

Turning one high-stakes facilities question into long-term peace of mind

LARGE INDEPENDENT K-12 SCHOOL
(WESTERN U.S.)

THE CHALLENGE: “HOW DO YOU MANAGE YEARLY MAINTENANCE?”

When this large independent K-12 school’s operations lead left suddenly, the departure exposed just how much of the campus was being held together by institutional memory.

The operations and technology teams were left scrambling to cover the gap. Around the same time, a board member asked a question that cut straight to the heart of the issue:

“HOW DO YOU MANAGE YEARLY MAINTENANCE?”

The school was already using facility scheduling and work order software, but the real answer still depended on:

- People who “just knew” where things were.
- Spreadsheets and binders that were hard to keep current.
- Reports that went out of date as soon as construction finished or equipment was replaced.



A new Operations Director was stepping into the role with limited history on the campus. And this was not a small or simple environment:

- A multi-building, high-expectation independent school campus in a major metropolitan area.
- Dozens of acres and hundreds of thousands of square feet across early childhood, elementary, and secondary facilities.
- A mix of newer buildings and a century-old, multi-story structure where tracking infrastructure had always been challenging.

IN THAT CONTEXT, TECHNOLOGY AND FACILITIES LEADERS SAW A DEEPER PROBLEM THAN JUST ANSWERING ONE BOARD QUESTION. THEY NEEDED TO INVEST IN A FUTURE WHERE KNOWLEDGE WOULDN’T WALK OUT THE DOOR.

THE DECISION: INVESTING IN A LIVING SYSTEM, NOT ANOTHER REPORT

The leadership team made a deliberate investment: a full onsite asset survey across the entire campus, paired with interactive floor plan tools and deeper use of work orders.

This wasn't about getting a one-time facilities report to hand to the board. It was about building a living, visual system that would:

- Give the future Operations Director a solid foundation instead of a patchwork of files.
- Capture years of ad hoc decisions and upgrades into one coherent picture.
- Serve both operations and technology, so the entire infrastructure story lived in one place.

From day one, the project scope intentionally included technology assets, not just traditional facilities:

- Core network infrastructure (MDF/IDF rooms across the campus).
- Cameras, with plans to expand coverage.
- Cellular repeaters, internal and external speakers, and solar panels.

By framing the project as a shared asset for the next decade, not just a facilities clean-up, the school justified the investment as a way to protect its people, its campus, and its future leadership.

THE IMPLEMENTATION: QUIET WORK, BIG SHIFT

The professional services team scheduled the onsite survey to respect the school's rhythm:

- Work was scheduled while students were off campus (including a winter break period), so the team could move freely without disrupting classes.

- The team moved through mechanical rooms, boiler rooms, rooftops, IDF closets, older wings, and new construction, documenting everything as they went.

For tech and facilities leaders, it felt like a major project that barely felt like a project:

- Most days, staff could focus on their own work while the survey team quietly did theirs.
- There was no need to escort the team through crowded hallways or classrooms.
- Shortly after the onsite work wrapped, the school held a review session to learn how to navigate the new system instead of still "getting through" the survey.

From their perspective, a key part of the payoff was that the heavy lift didn't fall on internal staff, who were already stretched thin. [Recurring issues tied to instructional platforms](#)

WHAT THEY BUILT: A MAP OF THE CAMPUS FOR THE NEXT GENERATION

EVERY CRITICAL ASSET, ANCHORED IN PLACE

The asset survey covered far more than just HVAC and boilers. The school now has a unified view of:

- Life-safety equipment:
 - AEDs.
 - Fire extinguishers.
 - Boiler rooms and associated systems.
 - Gunshot-detection and similar safety technology that must be tested and documented.
- Mechanical and building systems:
 - AC units, with the ability to know exactly which unit serves a given room and when its filter was last changed.

- Technology-rich infrastructure:
 - Switches and network racks across multiple MDF/IDF locations.
 - Cameras, cellular repeaters, and speakers distributed across the campus.
 - Solar arrays and other infrastructure that sit at the crossroads of facilities, technology, and finance.

PREVIOUSLY, MANY OF THESE ASSETS WERE INVENTORIED SOMEWHERE, BUT NOT TIED TOGETHER:

- Older buildings had seen “a lot of cooks in the kitchen” over the years.
- Documentation lived in different formats and different people’s heads.

NOW:

- Every surveyed asset is pinned to an interactive floor plan.
- Staff can open a building and see exactly what’s in each room, closet, roof, and hallway, with photos and specs.
- Assets feed directly into work order software, so preventive maintenance schedules and tickets are grounded in the real, physical campus.

For a new Operations Director—and whoever comes after them—that’s not just convenience. It’s clarity and confidence on day one.

THE PAYOFF: PEACE OF MIND, DOCUMENTED

1. A PLAN FOR THE NEXT OPERATIONS DIRECTOR

Before the survey, a new Operations Director at a campus like this would likely face:

- Months of walking the buildings with veteran staff.
- A maze of undocumented choices and “temporary fixes.”
- Pressure from leadership without a clear map of what they were responsible for.

With a living asset system in place:

- The next Operations Director starts with a visual, data-rich understanding of the campus.
- The school isn’t gambling on whether key staff will still be there or will remember everything.
- Answers to questions like “How do you manage yearly maintenance?” are visible on screen, not buried in memory.

2. STRONGER CONFIDENCE AROUND RISK, INSURANCE, AND COMPLIANCE

The system also acts as a safety net:

- In the event of an audit, incident, or insurance question, the school can show:
 - Exactly where every AED, fire extinguisher, and critical device is located.
 - When life-safety systems were last tested or serviced.
 - A record of preventive work completed across buildings.

This isn’t just operational neatness—it’s evidence that the district is doing what it says it’s doing to keep students, staff, and visitors safe.

3. A DAILY WORKING TOOL, NOT A SHELF DOCUMENT

Crucially, the asset survey did not end with a binder. It unlocked the value of tools the school already owned:

Work Orders moved from “installed” to truly in use:

- The maintenance team now carries tablets in rugged cases, closing tickets in the field.
- Tickets link to specific assets, building a long-term maintenance history automatically.

Facility Schedules feeds both operations and technology:

- When an event is scheduled (for example, a school-wide ceremony), separate tickets go to ops and tech.
- Each team sees their requirements clearly, without stepping on each other’s toes.

Day to day, this means less guesswork and fewer surprises. Over years, it means the campus tells a cohesive story about how it’s being cared for.

WHY THIS MATTERS FOR K-12 TECH AND FACILITIES TEAMS

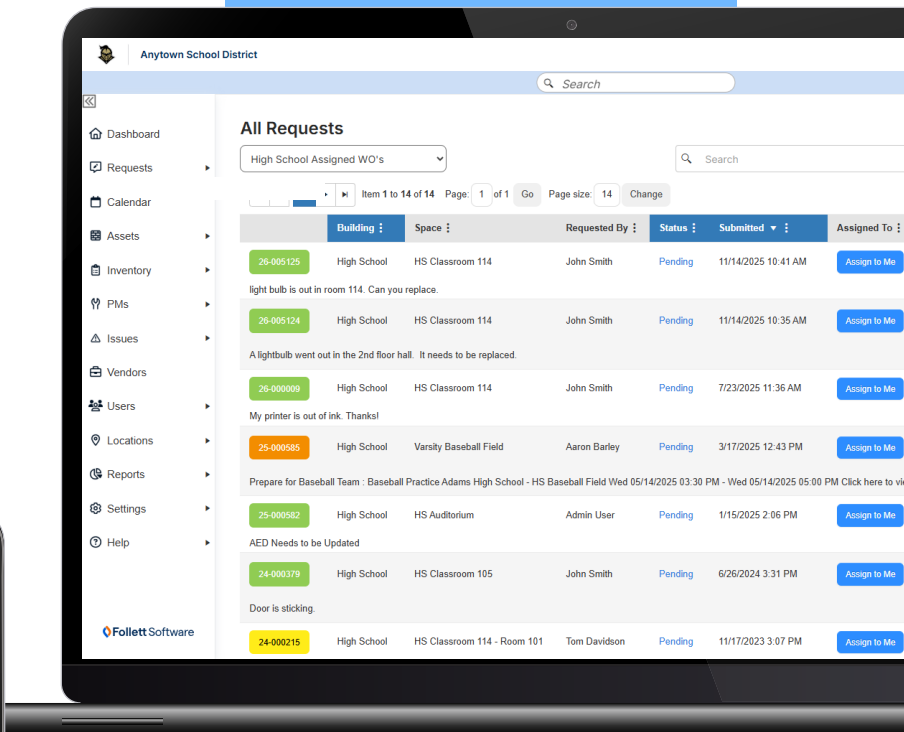
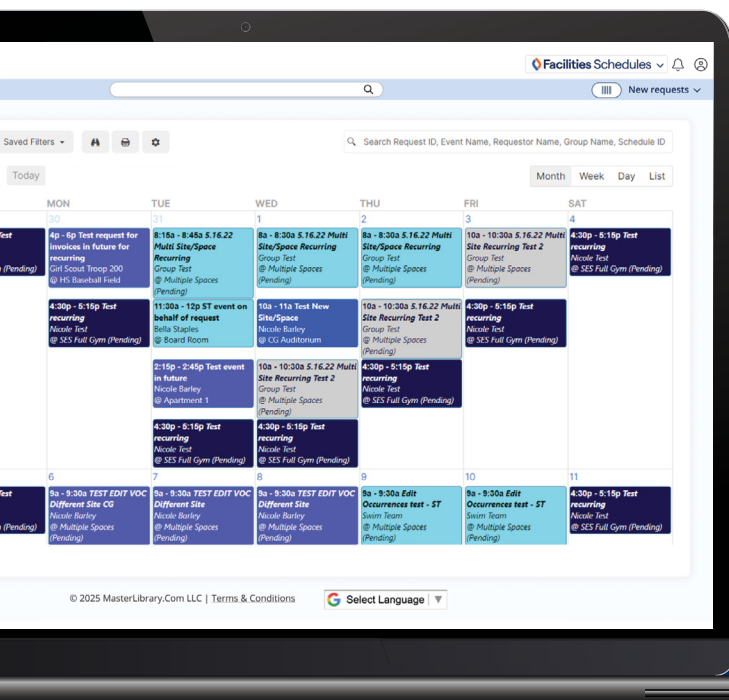
For K-12 tech and facilities leaders facing similar challenges, this anonymous case highlights a pattern many recognize:

- A sudden leadership change exposes how much depends on unwritten knowledge.
- Well-intentioned spreadsheets, binders, and reports can't keep up with continuous projects and replacements.
- New leaders need more than a hand-off meeting—they need a living system that shows what they're responsible for.

Investing in an asset survey plus interactive drawings and integrated work orders is ultimately an investment in:

- Succession planning (for operations, facilities, and technology).
- Risk and compliance readiness.
- Daily efficiency for teams already stretched thin.

IT'S HOW ONE LARGE
INDEPENDENT SCHOOL
MOVED FROM "WE
THINK WE KNOW" TO
"WE CAN SHOW YOU,
RIGHT HERE."



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