Tift County Schools digitized and simplified processes serving teachers across the district by adding Etrieve by Softdocs™.

"Etrieve in the cloud was still new to the K-12 community, but the ability to tie into our ERP sealed the deal. Integration between our ERP and ECM systems is fundamental to our long-term success."

KLINTON GUESS
CHIEF FINANCIAL OFFICER

KEY PLAYERS
- ▶ Senica Troutman, Administrative Assistant/Technology Advisor
- ▶ Klinton Guess, Chief Financial Officer

CHALLENGES
- ▶ Time-intensive processes and an outdated Financial and HR system
- ▶ Providing a consistent and easy-to-use experience while remaining agile and flexible

SOLUTIONS
- ▶ Etrieve by Softdocs
  - ▪ Etrieve Content™
  - ▪ Etrieve Forms™
  - ▪ Etrieve Flow™

TIFT COUNTY SCHOOLS

TIFTON, GEORGIA

Tift County Schools is a district comprised of 13 schools, serving approximately 8,000 students. The district prioritizes technology as a key consideration, with a mindset of deploying technology that best serves every student, teacher and administrators and a 1:1 Chromebook initiative for students.

It was at a conference for finance directors that Tift County Schools really became serious about pursuing an enterprise content management (ECM) system for the district.

The question "What cool, new technology are you using has the potential to be truly impactful districtwide?" opened their eyes to the topic of ECM.

And while the district did assess other available ECM solutions over the years, they quickly established a long-lasting relationship with Softdocs because of the ease of integration with their current enterprise resource planning (ERP) system.

The Decision to Deploy in the Cloud

In some cases, the K-12 industry is still in the early stages of adopting cloud technology, held up by uncertainty around whether it actually is a strategic choice for districts. But for Tift County Schools, it really was an easy decision to choose to implement the Softdocs Etrieve platform in the cloud.

"Etrieve in the cloud was still new to the K-12 community, but the ability to tie into our ERP sealed the deal. Integration between our ERP and ECM systems is fundamental to our long-term success," said Klinton Guess, CFO for Tift County Schools. Guess emphasized that in his experience cloud has proven to be a sound strategy, a perspective shared by many of those he works with.

"Cloud systems bolster our cybersecurity strategy. We benefit from the redundancy and additional resources available with the cloud. Deploying technology in the cloud is an economical and strategic decision for every district."

By choosing to deploy Etrieve in the cloud, should any issue arise Tift County Schools can turn to the Softdocs team standing by and ready to assist in any way.

Impact Across the District

A true enterprise system has the ability to impact business processes with document management, electronic forms and workflow in every nook and cranny of the district. With that understanding, a deeper dive into where and how Tift County Schools began with Etrieve is worth investigating.

In the Business Office, innovation began with a complete overhaul of the Accounts Payable/Purchasing system to digitize, automate and simplify the entire process of invoicing. In the world of K-12, it's not uncommon to have immediate purchases-requests that get approved immediately via workflow and then speedy delivery from Amazon or Staples. There's just no time to shuffle papers and wait for approval through manual processes.

This is a valuable example of how Etrieve delivers incredible gains when deployed within the business office. Purchase requests, invoicing and payments are all completed more quickly, saving the district real dollars.

Better Service for Every Teacher

Following the Business Office, the district looked to Human Resources. It's here that Tift County Schools improved a teacher-focused process around letters of intent. Now leveraging electronic forms and automated workflows, the district more quickly communicates with teachers to determine if they will be returning for the next school year.

It is fundamentally important to the district to determine early in the spring term how many teacher positions will need to be filled for the upcoming school year. The benefits of deploying ECM in this process aren't just increased efficiency, but a competitive advantage that allows the district to reach out to potential teaching candidates before other districts so they can hire the best talent.

Human Resources at Tift County Schools has also digitized the entire onboarding process for new teachers to the point that there are zero paper forms for a new employee. Everything about the new employee process and data collection is done within Etrieve, including gathering all demographic information. New employees are even able to complete the onboarding process through their mobile device, enjoying the same experience as employees completing the process on tablets or desktop computers.

The employee separation process is guided by the state of Georgia and because it is online, it is easily available to those who are no longer employed if it is necessary.

More examples include the personnel action form and leave request form that used to be paper-based and time-intensive. With the personnel action form, after data is entered via electronic form, it moves to payroll quickly and is processed with workflow. Leave requests move quickly to the Principal and can be approved via mobile device. The district has even devised a way to see all those requests that are awaiting principal approval, so processes do not stall.

Measuring the success of all this effort is simple. Every minute we spare a teacher doing administrative work that teacher can spend on a student. That's what education is all about.

Advice for Districts Implementing an ECM solution

First and foremost, you need a point person to lead the project. Someone who knows the processes of the district and is willing to dive deep into the product, really understand it and then use it to bridge gaps in processes districtwide. In the case of Tift County Schools, that person was Senica Troutman.

"Senica understands how things are being done across the district today and has a natural ability to identify where processes can be drastically improved by reconfiguring to work better for our students, their parents and our staff. She helps us drive ROI from Etrieve in some of our most important, teacher-serving processes," said Guess.

Tift County Schools also recommends weekly conference calls with the Softdocs team to assess progress and receive input on what is possible. While many districts understand finance and accounting very well, implementing new technology for process improvement can prove difficult. Change management is rarely simple. Balancing a strong technical mind and vision for what's possible with common sense of moving through change is essential.

Etrieve Provides Unexpected Benefits

In the middle of Tift County Schools' last audit, the power of this ECM solution to simplify very important and necessary reviews showcased the tremendous value of Etrieve. Accounts were set up for auditors to login directly to Etrieve and review the documents they needed to see. No more hand-retrieving documents, sharing with auditors and then returning those documents to all the right places. The audit moved faster and auditors were so impressed with the ease of the process they commented that they wished other districts had this functionality.

How much time did that save? Guess felt comfortable saying it saved at least half a day of their Comptroller's time. Those are the types of time savings they have to look for everywhere as efficiency gains ensure the wise spend of district funds.

And finally, there are times when districts get reorganized, programs are consolidated, or main offices change buildings. For Tift County Schools, these transitional periods have been easier with many of their documents digitized and stored electronically within Etrieve.

Troutman identified the most significant benefit of ECM being experienced by Tift County Schools as timeliness.

"We are serving staff and students faster, while providing timely answers to questions as a result of our efforts paired with this strong Etrieve solution."

Moving Forward with Etrieve Districtwide

Pleased with the successes they have realized and their close relationship with the Softdocs team, Tift County Schools has their eye on other key processes around the district to automate, including field trip requests, fundraiser requests, technology requests and maintenance requests. The possibilities are endless, and they look forward to leveraging this solution in countless ways in the coming years.