

Jeffco

Certified  
PartnerCertified Agiloft  
System Integrator

## Lessons learned: Automation in Colorado schools delivers 100% ROI

### Business Overview

Jefferson County School District (Jeffco) is Colorado's second largest district—serving more than 86,000 students. With over 150 schools from kindergarten through high school, Jeffco provides public education for Denver's rapidly growing suburbs and surrounding areas.

Jeffco is regarded as a progressive leader in its approach to technology and education and have plans to invest \$200M in its fiber optics infrastructure to support its tech objectives.

### Challenges

As a pioneer of applied technology in the classroom, Jeffco faces the challenge of all early adopters: it must create the processes to support its progress. Four years ago, Jeffco had a structure in place to review all the apps, tools, and software that teachers and other staff members requested. If HR wanted to implement a new healthcare plan vendor or a teacher wanted a curriculum tool, the Information Security team needed to conduct a data security assessment. Jeffco's Senior Information Security (IS) Analyst Quintana Patterson and her team would then need

to communicate the approval decision with Purchasing and the requester.

"Requests would come into the Purchasing team, but InfoSec wouldn't know about it, or InfoSec would know about a request but Purchasing wouldn't," Quintana said. "We didn't have a definitive way of talking through things. We had emails and an Excel spreadsheet that would track vendor names and details, but vendors weren't added, and teams were too busy to check it. There were so many obstacles and it was inefficient."

"In terms of return-on-investment, I'd estimate about 100%, due to the volume of requests. With 100 to 150 new requests each school year—that's excluding renewals and RFPs—the efficiency with Agiloft is profound."

— Quintana Patterson, Jeffco Senior Information Security Analyst Manager

The teams at Jeffco realized that they needed a process to manage their technology requests and keep all the parties connected. Without a solution on the market designed to address their need, they worked with their ERP team to create a



### Industry

- Education

### Challenges

- Disconnect between Purchasing, Information Security, and staff
- Lack of oversight for new technologies in use within the school district
- No out-of-box solution on the market could automate the process
- Attempts to build-out workflows in internal system failed

### Agiloft Benefits

- Customized solution captures current process and future evolutions
- Agiloft's flexible licensing allows for participation from 5,000 plus teachers and staff
- Delivered estimated 100% return on investment
- Phased implementation enables new functionality to keep pace with changing needs
- Came in under budget by 10% through 3 implementation phases

workflow using an internal system. “That turned out to be another pain point in the process,” Quintana said. “It didn’t provide the functionality we were looking for.”

The school district found itself with mounting inefficiencies while the demand for new software tools continued to increase.

## The Search

Once it became clear that the first attempt at a workflow had failed, Quintana began a search for the right solution. She had come across Agiloft before but assumed its strong performance as a CLM system prohibited it from meeting the unique needs of education information security. Still, Quintana remained intrigued by the flexibility of Agiloft and the possibilities it might allow.

“I had a discussion with the sales rep and he said he could develop a workflow for our process,” Quintana said. “We explained what we were looking for and they created an Agiloft demo.”

The demo included a critical security requirement for Jeffco’s process. District departments and teachers often request tools and applications that require sensitive student or faculty data. These applications needed a heightened review process because information like birthdate and gender could end up in the hands of a vendor. The demo captured this functionality, automating the steps by which a new software, and relevant contracts, received the necessary scrutiny.

Next, Quintana began working with Agiloft Platinum Partner Spectrum Mobility and Agiloft Project Manager Misha Berkowitz to design the right Agiloft platform for Jeffco’s business process.

“Through discussions and business analysis, we helped them choose the best design for their needs,” Spectrum Mobility CEO Aytan Leibowitz said. “Since the user answered primarily yes or no questions, it was well suited to Agiloft’s survey solution. Users can click a few buttons and then the results get tallied up into an automated risk matrix and the workflow moves forward.”

Every year the security questions change so Aytan and

his team developed the solution to capture the changes within a few minutes rather than requiring a rebuild. With Agiloft’s no-code platform, it is easy to enhance and make additions after deployment.

“The team at Spectrum Mobility is amazing, I adore them,” Quintana said. “I know what I want but I don’t always know how to tell you what I want. When I couldn’t articulate the functionality, they came up with ideas and suggestions on how they could customize the workflow. They know the system so well; they can see the forward vision.”

“I’d want others in education to know that Agiloft is a tool that you can use for any process or tracking; and the security practices meet the standard regulations and recommendations for data security,”

— Quintana Patterson

## The Project

“I wasn’t convinced that it was going to work,” Quintana said. “We have three teams involved in the process and one of the largest districts in Colorado. How were we going to get all the necessary information into Agiloft? But they did it.”

By integrating with Active Directory and utilizing Agiloft’s flexible licensing, more than 5,000 users, including all of Jeffco’s teachers, have access to the system. The IS and Purchasing teams manage the staff’s requests; but all users are able to look-up previously approved software and track the progress of outstanding requests. If someone needs a tool that IS has reviewed before, they can view the decision and the reasoning behind it.

“As the business changes, the software supporting it should change too,” Aytan said. “We’re doing another phase of changes now for Jeffco. They have annual renewals for their software requests and every year they need to check if the application still meets their

standards. So, we're building new functionality around renewal checks."

Aytan and Misha continue to work together to add new features to the school district's Agiloft solution, including a recent expansion for user visibility. A teacher can now follow the progress of another's request. If they are interested in the same software for their students, they can get regular updates as the request moves forward. In this way, efficiencies are recognized both at the operational level and in the classroom.

### Solution Benefits

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Beyond the benefits of the request process, Quintana and her team are making more strategic decisions. Agiloft's reporting captures data and provides a perspective on trends within the district. It also reinforces security by tracking the reasons for rejecting certain software requests.

"I'd want others in education to know that Agiloft is a tool that you can use for any process or tracking; and the security practices meet the standard regulations and recommendations for data security," Quintana said. "I spoke at Agiloft's Summit in October 2019 because I think our case is different than most in the way that we are using the solution and expanding on it."

Jeffco completed its third implementation phase with Agiloft back in October 2019 and each phase they've come in under budget by 10%. With cost savings and a substantial ROI, Jeffco is well positioned to achieve their goals of leveraging technology to the benefit of all students.

### Let Us Show You

What Agiloft has done for Jeffco, it can do for you. Let us show you how. In a few hours, we can set up a custom proof of concept featuring your toughest business process. Give us a call to schedule a time.

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