

CASE STUDY

How Operoo Helped Improve Efficiency and Boost Fundraising



for the School of Arts & Sciences Charter Network

TYPE: Charter

GRADES: K-8

STUDENTS: 800

LOCATION: Leon County, FL

Connecting staff and parents in a streamlined and impactful fashion over a two-location charter school network in Florida's Leon County is of paramount importance to the School of Arts and Sciences (SAS).

Known for its innovative practices, SAS adopted a new digitized process for operationalizing staff-parent communications and facilitating student activities at the schools—all of which enhanced connection, collaboration and community both virtually during the pandemic and in-person once faculty and students returned full time.

The Challenge:

Understanding operational obstacles from both sides of the equation

The School of Arts and Sciences’ Finance Manager Karen Burns understands the frustrations of confusing, time-consuming manual school processes as both a school administrator and a parent.

As a parent with four children who attended SAS over the years, Burns felt overwhelmed by the sheer volume of paperwork. “The repetitive and manual nature of these school processes, particularly at the start of a new academic year, seemed ridiculous,” said Burns. “I remember thinking to myself, **‘There must be an easier way to share and submit information to the school.’**”

Then, in her role as a school administrator, Burns suffered the effects of a flawed and outdated system. “Tracking paper forms, and the associated manual workflows, is time-consuming and inefficient.”

A collage of various school forms. The forms include: 1. 'THIRD PARTY STATEMENT OF RESIDENCY' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 2. 'PARENT AFFIDAVIT OF RESIDENCY' from the Department of Education, Chancery's Regulation A-101, Page 1 of 2. 3. 'PROVISIONAL ADMISSION FORM' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 4. 'NON-PARENT CUSTODIAN AFFIDAVIT' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 5. 'PARENT AFFIDAVIT' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 6. 'THIRD PARTY STATEMENT OF RESIDENCY' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 7. 'PARENT AFFIDAVIT OF RESIDENCY' from the Department of Education, Chancery's Regulation A-101, Page 1 of 2. 8. 'PROVISIONAL ADMISSION FORM' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 9. 'NON-PARENT CUSTODIAN AFFIDAVIT' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1. 10. 'PARENT AFFIDAVIT' from the Department of Education, Chancery's Regulation A-101, Page 1 of 1.

Expanding and extending capabilities and collaboration

When SAS opened its second charter school in 2015, increased demand plagued its already overburdened operational practices.

“I quickly realized that, as our own two-school district, there was a real need to revamp our paper-based and people-reliant operational processes,” said Burns.

Burns sought out and implemented a number of work-arounds and tools, including Google Forms and Script, which had varying degrees of success. Ultimately these tools came up short or were quickly outgrown.

Burns’ search led her to Operoo in January 2020. “We knew we wanted to digitize our forms, workflows and processes across our two schools, but it was difficult to find a platform that could meet the breadth of our mission,” said Burns.

“When we began discussions with Operoo, we soon realized that it was the only solution that could both fit within our budget and manage everything we needed it to—from digital multi-language school forms to staff approvals, student registration and onboarding, field trip management, integrated payments processing, student medical data capture and verification—and more.”

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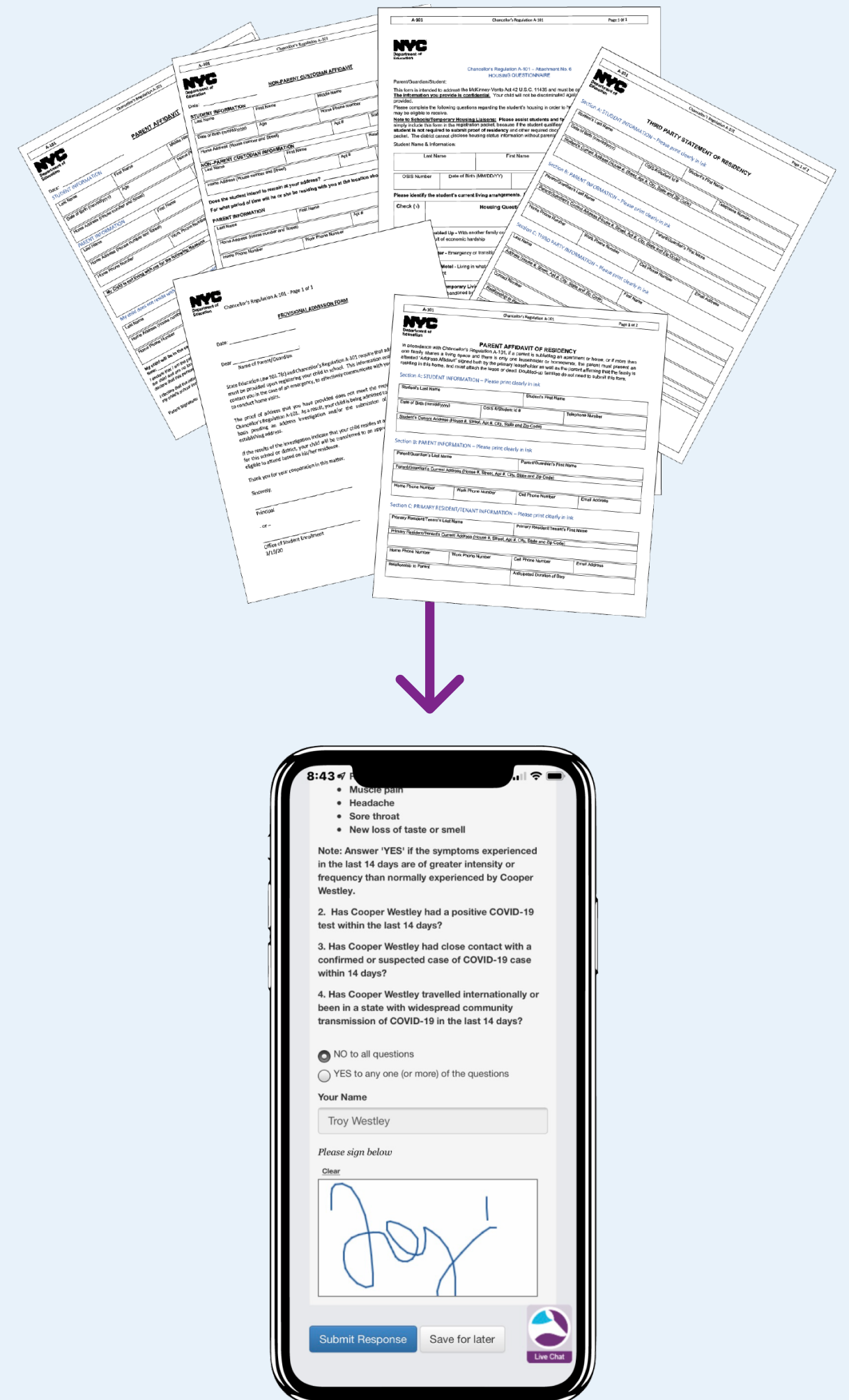
KAREN BURNS, FINANCE MANAGER, THE SCHOOL OF ARTS AND SCIENCES

The Solution: Streamlining operational processes

SAS's digitization mission began as a quest to reduce the need to manually manage ad-hoc physical payments and collect verified online signatures from parents. But, as Burns and her colleagues started to realize what was possible, the charter network's process automation agenda became far more expansive.

“Today, we’ve used Operoo as the backbone to automate many of our major financial-, request- and consent-based processes for parents and staff across both schools,” said Burns.

“While eliminating the reliance on people and paper for completing recurring tasks and workflows has delivered significant efficiency gains in itself, there’s no way I would have even survived the last year of the pandemic if not for Operoo.”



15 → 0

**DECREASED START-OF-YEAR
STUDENT ENROLLMENT PAPER
FORMS FROM 15 TO 0**



Now that we know what's possible, there's no way we're going back to how things used to be, even after the pandemic is firmly behind us. Our digital way of operating is definitely the new normal.

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Real-time communication and connection

Parents, staff and students need to be able to participate in processes and access information from anywhere, anytime and from any device. Plus, the nature of the pandemic meant that last-minute changes were regular and required a level of flexibility and timeliness, which were not possible with face-to-face interactions.

“Everything had to be done online, and we needed a new form type, permission capture and workflow process for all of it—all of which needed to be digitally managed,” said Burns.

“For example, we had to obtain parental permission from students with learning disabilities to participate in online classes. We also used Operoo to administer our testing schedule and survey to all students.”

“Without Operoo, I'm not sure how we would have managed this process but, with it, **we set-up what we needed in 10 minutes** and started receiving responses in five minutes,” said Burns. “Now that we know what's possible, there's no way we're going back to how things used to be, even after the pandemic is firmly behind us. Our digital way of operating is definitely the new normal.”

Streamlined processes empower faculty & parents

With that confidence, Burns went about digitizing the two-school charter network's routine paper processes and forms, including Staff Payroll Forms, Leave Requests and Requests for Supply Donation Funds.

Parent-facing examples include Beginning of Year Family Surveys, Medication Permission Forms, Program Enhancement Contribution Processes, Free and Reduced Lunch Forms, Extended Day Program Registration and Invoicing.

Digitized Commitment Forms help administrators gauge enrollment numbers and plan for the upcoming school year. And, with Operoo's Stripe integration for digital payments, transactions and refunds are easier for school administrators to manage.

From a feature perspective, Burns identified a number of key factors that made the digital version of these forms, workflows and processes more efficient and easier to manage.

“Operoo's Trigger Actions are life changing,” said Burns. “They allow us to define a series of automated actions—such as instantly sending eForms, communications or adding members to certain groups—based on data received or time-based thresholds. We can eliminate all the subsequent things that need to happen in any of our operational workflows—like chasing missing or incomplete information, distributing subsequent forms and documentation, beginning new request or approval processes and more.”

Additionally, Burns pinpointed mobile accessibility as critical to simplifying swift information dissemination and collection. “When we distribute a form or request a piece of communication now, we know that all recipients can instantly view and respond to it on their device of choice. Not only is it a big benefit to be able to push information to staff and families on their cell phones, authorized users can also proactively look-up data, documents and details. This is particularly useful for accessing student medical information, which means staff can act quickly and accurately in an emergency situation.”

The Results:

Investment in infrastructure leads to greater efficiency

When it comes to results, there is one key outcome that Burns and the SAS team are particularly proud to share. “One of the initiatives we run to raise additional funds for SAS schools is what we call Program Enhancement Contribution—donations to improve the quality and breadth of experiences we can offer students,” said Burns. “Before Operoo, this was a completely manual, protracted process that required constant management, countless follow-ups and hands-on reconciliation to log and track donations, which were received in various formats, for each family.”

The SAS network would typically raise approximately \$20,000 per school during these drives, often employing an additional resource to help oversee the cumbersome process.

“When we automated the Program Enhancement Contribution process through Operoo, we turned the whole scenario on its head,” shared Burns. “We digitized every component, streamlining each into one seamless workflow—from distributing the initial request to issuing automated follow-ups, accepting payments and tracking contributions. Better still, we used Trigger Actions for programmatically managed payment options.”

“Not only were we able to repurpose a huge number of staff hours previously spent on managing the process and chasing donations, the added flexibility saw us collect more than \$60,000 in the first two months of the new automated campaign model.”



HIGHER RESPONSE RATES

with device-agnostic communications



50% INCREASE IN CONTRIBUTIONS

using an automated Program Enhancement Contribution workflow



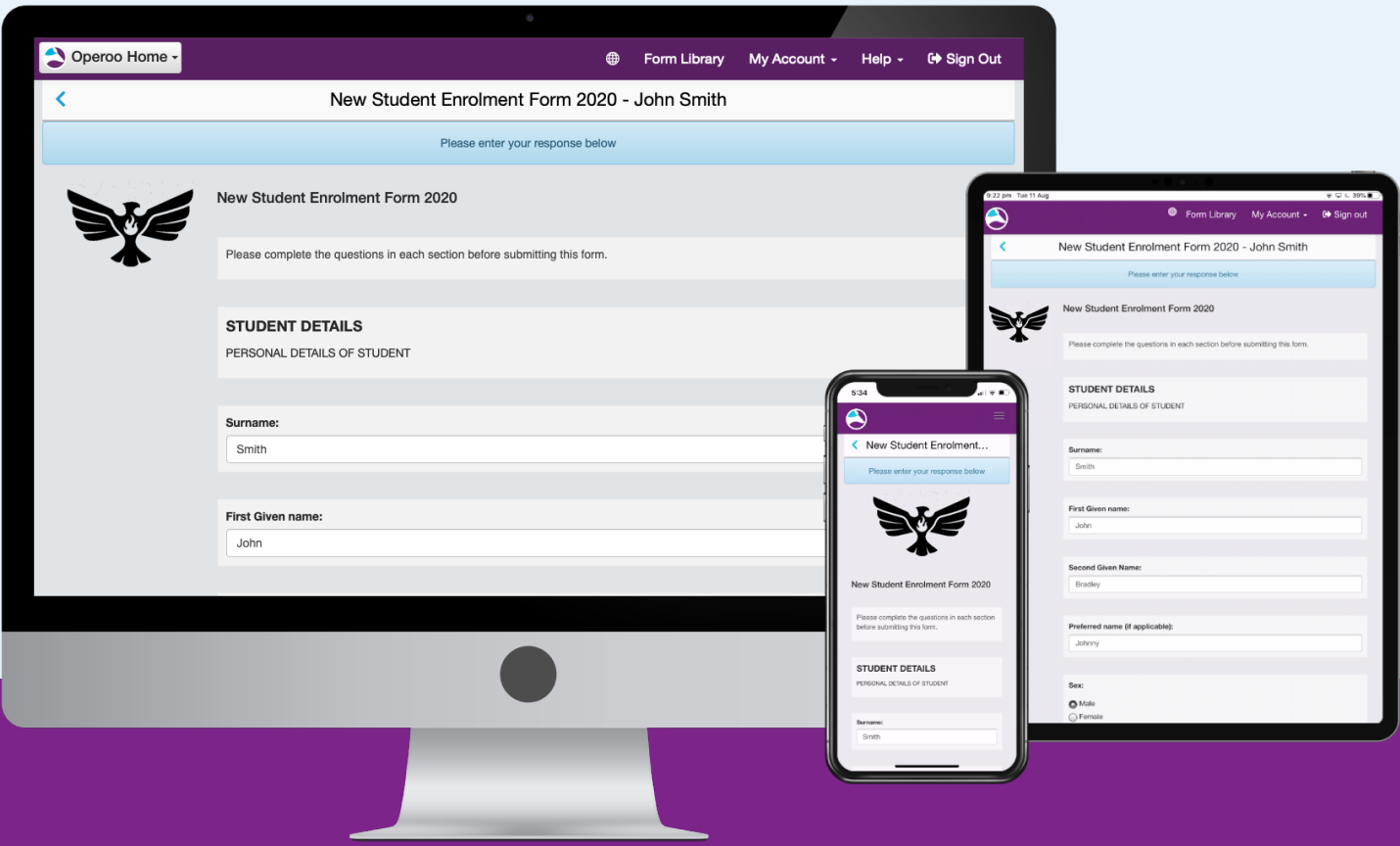
0 PAPER FORMS

eliminated 15 start-of-year student enrollment paper forms

A new normal

By taking the initiative to introduce a powerful digitization system that streamlined operations and better aligned administrators, faculty and parents, the School of Arts and Sciences was able to supercharge imperative initiatives such as student admissions, fundraising efforts and HR requirements.

Freeing school staff and parents from time-consuming and confusing manual data entry has skyrocketed levels of family participation throughout the SAS community, leaving everyone excited, engaged and...relieved!



Schedule a meeting to learn more about our easy-to-complete digital, customizable multi-language school forms and workflows.

LET'S TALK