How a UK boarding school digitised and automated its paper-based trip management processes, and consolidated its manual systems of medical record keeping, to improve student safety and focus on what matters most.
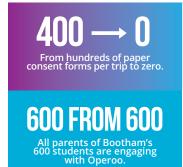
Bootham School, York

Digitising trip management & keeping students safe

Founded in 1823, Bootham School is based in the UK city of York and operates on the values of the Society of Friends. The school embodies the Quaker Ethos of caring community, peaceful resolution of conflict, and opportunity to serve others.

Botham offers full boarding school (seven nights) and weekly boarding school (four nights) to its co-curricular cohort aged between three and 18. Split across a Junior School Campus (ages 3 - 11) and Senior School Campus (ages 11 - 18), Bootham School is attended by 600 pupils.

As part of its mission to provide a well-rounded educational experience that extends beyond the classroom, Bootham conducts a large number of local, national and international school trips for its boarders. Every trip requires up-to-date medical information and parental consent for each participating student. And, as Assistant Head James Ratcliffe explains, maintaining that heavy schedule was beginning to take a toll on parents and staff alike.

Summary of Results

400 → 0 From hundreds of paper consent forms per trip to zero.	**AT LEAST 50%** Efficiency saving on trip planning resources needed.	**1 SINGLE SOURCE OF TRUTH** For all student medical data and emergency contacts.	**100% STAFF ADOPTION** Staff rave about Operoo and the amount of time the platform saves them.
600 FROM 600 All parents of Bootham's 600 students are engaging with Operoo.	**24-HOURS** Most trip consent forms signed and returned within a day.	**100% MOBILE ACCESS** Anytime access to student medical -- even when offline.	**103 LANGUAGES** Families can receive updates and forms in their home language.

The Challenge

Until recently, the school's requests for information, parental permission and student medical data were all paper-based processes.

"We manually drafted, distributed and collected paper forms for every field trip the school conducted," said James.

"Parents were sick and tired of completing the same information and forms over and over again. Some kids go on 12 trips a year, which meant filling in the same thing literally every month."

"Additionally, staff were spending far too long on these recurring operational tasks. Our paper-based nature of record keeping also meant that student medical information and emergency contacts were physically stored in a central file, which staff couldn't actually access when required."

James said things finally came to a head when organising the senior school summer trip of 2019.

"We had over 1000 paper consent forms to manage," said James. "These physical forms had to be sorted into 25 different piles, all of which then had to be photocopied three times -- one copy for the school, one for the trip organiser, and another for each student's emergency contact," said James. "It was a ridiculous way to work; especially when you consider the logistics involved as a boarding school. Parents can't exactly just drop-off paperwork as they chaperone their child to school in the morning."

James was also concerned about the potential for privacy issues arising from the school's paper-based methods of operating.

"Organising large multi-week school trips abroad, to places like the US, quickly becomes a logistical nightmare," said James. "But more than that, these manual processes also left us unnecessarily vulnerable to privacy breaches. How can you guarantee that paper-based forms are always stored securely and only ever viewed by authorised parties? It's not trackable.

"This also meant that we had no easy way of showing parents or staff which information the school did and did not have at any point in time. So it was a bit of a data nightmare too."

Bootham School used a number of disparate approaches, including notifying parents of upcoming requests for information via email through its Management Information System, iSAMS; mailing paper forms to and from families for completion; then capturing submitted information in spreadsheets.

"None of these systems were connected, which simply meant more work and additional security risks," said James.

"We really needed a single, central digital repository for all our student medical data and trip-related forms; accessible to authorised staff and carers anywhere, anytime."

The Solution

To reduce recurring trip-related workload for parents and staff -- as well as securely and efficiently receive, store and share student medical information -- Bootham School assessed a number of service providers.

"Integration with iSAMS was critical, in order to ensure we could build and maintain that single source of truth for student data that we were craving," said James. "Operoo, working alongside specialist integration partner Wonde, was able to meet that criteria."

Having ticked the non-negotiable iSAMS integration box, James said there were a number of additional Operoo capabilities he knew would help Bootham School streamline its management of trips.

"The flexibility of Operoo's Form Builder stood out to me immediately," said James.

"We can start with a best practice template out-of-the-box, add-in our own modifications to suit existing processes, then quickly distribute to parents where they can respond straight from their mobile device of choice.

Aside from the ability to create and send custom digital forms fast, James said he was confident Operoo's built-in automations would directly address issues regarding staff workload.

"Not only does Operoo's automated reminder function follow-up with non-respondent parents on our behalf -- until the requested information is submitted," said James. "It also records an auditable trail of communications."

Additionally, the ability to message parents directly from Operoo -- via SMS, email or push notification -- was important.

"Previously, we had to rely on kids texting parents on the school's behalf," said James. "Controlling this channel of communication is a big step forward -- particularly given the recent introduction of a student mobile phone ban. As imperfect as it was, that workaround simply wasn't available to us anymore."

Catering for a range of international students, James also saw an opportunity to improve Bootham School's ability to communicate with families who speak English as an additional language.

"Allowing parents to receive forms in their own language really evens the playing field for our international families," said James. "Our Mandarin speaking parents are very happy."

But it wasn't just product features that set Operoo apart. For James, it was also the potential for a fresh openness and willingness to work collaboratively with Bootham School as a true technology partner.

"We liked the fact that Operoo was a newer player in the UK school market," said James. "We thought they might be easier to deal with and more responsive to our needs. And, as it turns out, we were right."

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The Results

The success of school software can often be measured best by feedback from key users. This is a truism that certainly applies to the Bootham School - Operoo partnership.

"Staff simply love it," said James. "I'm pleasantly surprised by the way Operoo has been adopted. Many of our staff have worked at the school for over 30 years and can be sceptical of new systems. I'm impressed that we've won them over."

"It's simply a very intuitive system that makes it easy to do exactly what we want to do," summarised Bootham School Deputy Head, Martyn Beer.

"Parents have got onboard really quickly too -- and much faster than expected," added James. "Parents are really happy with the enhanced level of communication Operoo enables the school to deliver, as well as the reduced administrative workload on their end. Our Chinese parents are particularly happy with the multi-language capabilities. In fact, we've had translators assess forms we've converted to Chinese who've been impressed with the results."

Above all else, James said that Operoo had "saved Bootham School a ridiculously large amount of time" when organising and running school trips.

"The contrast between how we operate now and our old paper-based system is astounding," said James.

" Today, we can digitally distribute a trip consent form in Operoo and have the majority signed and returned within 24-hours. Previously, that sort of response rate was simply unheard of and unachievable. "

"On a personal level, because I'm also the Educational Visits Coordinator, it's incredibly valuable to be able to log into Operoo and have a clear overview of everything that's going on -- whether it be school trips or medical records.

"There's no paper trail to grapple with, or people stuffing forms into my pigeon hole; just the insights I need."

The efficiency gains that paperless school trip management delivers Bootham School also gives staff time to concentrate on "more important things".

"Nobody's chasing paper forms anymore," said James. "It's taken really substantial volumes of repetitive work away from teachers and admin staff. It's cut-down admin time for a trip by at least half. For example, my assistant Claire can now put increased effort into more valuable activities, such as helping me develop better risk assessments for school trips."

When it comes to accessing medical and emergency information on-the-go, James said that Operoo was a "game changer".

"Whether you're in the middle of a school trip on another continent, or just walking through the school grounds, you've now got all the verified medical data you need in the palm of your hand -- straight from the Operoo mobile app," said James. "Not only can we be confident it's the latest data available, staff can be confident that it's always accessible via any device -- even when offline.

" In the past, if there was an emergency, staff needed to call the office to have someone relay the right information. We've come light years since then. "

James used to take a big bag of paper consent forms on every trip he managed. This hassle, as well as the related inefficiency and risk, has all disappeared.

"A normal trip pack would have 60 to 70 sheets of paper in it, which was then photocopied four times," said James. "We'd have one version and a back-up with us on the trip; one copy back at the school office; and another with each student's emergency contact.

"And, that's just the final trip pack. On top of that there's all the permission slips and other information about the trip distributed during the planning phase. Aside from greatly enhanced accessibility and security, Operoo is saving us around 400 sheets of paper per trip."

In fact, James experienced first-hand just how valuable immediate, streamlined access to reliable medical records can be.

"A student actually had an accident and split their head open whilst on a recent residential trip I was supervising," said James. "It was 11pm at night and nothing was open -- certainly not the school. I can't overstate what a relief it was to be able to reach into my pocket, flick open the Operoo app, and instantly find the students medical history, list of medications and emergency contacts I needed to act."

Another measure of success for school software implementations is the willingness of the school involved to extend usage beyond the original brief.

"We originally purchased Operoo to address a very specific need regarding school trips -- which it's done admirably," said James. "We're now using it to digitise other school processes, such as the selection of extra-curricular activities for the Junior School. It's also been invaluable with regards to getting information about the children of key workers to the right staff members during the Coronavirus lockdown.

"With school only open to children of key workers during this period, we used Operoo to find out which students needed to attend and when, collect lunch choices, and provide their medical details to staff who may not normally work with them."

Similarly, the use of Operoo as the school's source of truth for medical data has also been extended.

"Easy access to the latest medical information isn't just important for school trips," said James. "We now use Operoo as our 'go to' data repository for general boarding operations, which includes medical and emergency information for both students and staff. Additionally, the school's health centre now uses Operoo too."

When asked how he would describe his experience working with Operoo, James was absolute.

"In terms of customer service, Operoo is one of the best companies we've worked with," said James. "Amanda, Our Customer Success Manager, is brilliant. She replies to our questions within hours and requests are met within days.

"In stark contrast to other software companies I've worked with, new feature requests are also met with genuinity and enthusiasm. For example, we asked if staff could be given the ability to print their own summaries of school trips organised in Operoo. And, within a week, that feature had been built and set live within the product.

"That's amazing responsiveness. I don't know many other companies that would do that for their customers."

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