



How the SAS charter school network in Florida’s Leon County automated its routine and recurring financial, request and permission-based workflows, reducing administrative demand on parents and save staff, while enabling it to operate efficiently and remotely during the pandemic.

The School of Arts and Sciences

Based in Tallahassee, Florida, The School of Arts and Sciences (SAS) Charter School was established in 1999. It was founded by educators and parents with a shared dream: The desire to create a school in Leon County that combined ‘industry best practices and learning-by-doing’.

Today, SAS offers two tuition-free schools that consistently rank among the highest achieving in Leon County, and in the top 10 percent of schools in the state, based on the Florida School Rankings. The SAS on Thomasville Road campus serves kindergarten through eighth grade. SAS at The Centre serves kindergarten through eighth grade.

When Finance Manager, Karen Burns, transitioned from teaching physical education and dance to an administrative role in 2015, SAS expanded operations by opening a second school — its SAS at The Centre campus. Burns realized the two-school charter network would soon outgrow many of its existing operational processes; especially its finance-related and permission-based workflows. Read on to discover Burns’ and the schools’ process automation journey.

Summary of Results

<p>A NEW NORMAL</p> <p>“Now that we know what’s possible, there’s no way we’re going back, even after COVID. Our digital way of operating is definitely the new normal.”</p>	<p>1 CENTRAL PLACE</p> <p>SAS systemized and standardized its operational processes, forms and data collection across both schools in one place.</p>	<p>ANYTIME ACCESS TO MEDICAL DATA</p> <p>“Supervising staff members access student medical and emergency information via their cell phones.”</p>	<p>15 - 0</p> <p>Start-of-year student enrollments went from involving 15 paper forms to zero.</p>	<p>FLORIDA TESTING SCHEDULE</p> <p>“Without Operoo, I’m not sure how we would have managed this process. With it, we set-up a process in 10-minutes and started receiving responses in five.”</p>
<p>NO MANUAL CHASING</p> <p>“The system does the chasing for us until everything we need is submitted — from payments to form completions, permissions or medical data.”</p>	<p>FAST AND FLEXIBLE</p> <p>“During the pandemic, things changed at a moment’s notice. Operoo automated the digital flow of information between the school and its families remotely, safely and quickly.”</p>	<p>BETTER RESPONSE RATES</p> <p>“When we distribute a form, request or piece of communication now, recipients can instantly view and respond to it on their device of choice.”</p>	<p>50% INCREASE</p> <p>By automating its Program Enhancement Contribution workflow, SAS increased parent contributions from \$40,000 per year to \$60,000 in two months.</p>	<p>CONTACTLESS DEVICE LOAN SCHEME</p> <p>“Without Operoo, attempting to do something like this would have been absolute chaos. We’re so happy with Operoo and our process automation journey to date.”</p>



The Challenge

Understanding operational obstacles from both sides of the fence

In 2008, The School of Arts and Sciences (SAS) Finance Manager, Karen Burns, adopted four children.

"My husband and I already had two kids, then made the decision to adopt four children in need," explained Burns.

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As a first-time mom at the school, I had 15 pieces of identical paperwork for each of my new school aged kids.

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"The repetitive and manual nature of these school processes, particularly at the start of a new academic year, seemed ridiculous. I remember thinking to myself; 'there must be an easier way to share and submit information to the school!'"

When Karen started working as a teacher in 2010 at SAS on Thomasville, she gained insight into the impacts that these inefficient processes had on the school too.

"When you make people complete stacks of paper forms, you're constantly fighting what feels like a losing battle," said Burns. "Handwritten documents are ridiculous. The more you require people to complete — parents or staff, the less legible the writing becomes, and the more you find yourself having to chase people for missing information or entire forms.

"Then, what happens if the format or fields in physical forms need to change? All the existing records are wrong, new forms need to be designed, and information needs to be requested and collected all over again. Tracking paper forms, and the associated manual workflows, is equally time-consuming and inefficient."

In 2015, Burns moved from a teaching position to a financial role as part of the SAS administration team. In that same year, SAS also opened a second school (SAS at The Centre), placing increased demand on its existing 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.

"And, for the first time, I was in a position where I could truly enact that change. I wanted to take all our routine and recurring financial, request and permission-based workflows online to both reduce administrative demand on parents and save staff from having to manually create, distribute, collect and collate information over and over again.

"Because we'd opened another campus location, all of a sudden we had an additional school-worth of teachers collecting cash and coins, handwritten start-of-year documents from new families such as Student Clinic Cards [Emergency and Medical Information Forms], as well as conducting lots of field trips and different activities. It was crazy, borderline unmanageable, and most definitely unsustainable. The challenge was going to outgrow me if I didn't change something. We needed strategies to reduce the amount of work for both teaching and operational staff."

Burns sought-out and implemented a number of work-arounds and tools, which had varying degrees of success, but ultimately came-up short or were outgrown.

"Our first attempt at digitization saw us adopt Google Forms for collecting signatures," said Burns. "I was able to collaborate with a parent at the school to develop a script that automatically transferred data collected via Google Forms into a PDF. However, we still had the issue of reliably verifying parent signatures collected through this method. So, we'd then print those PDFs, and send them to the classroom for parents to sign to verify that all the information captured was accurate and to give consent for students to participate in activities as required.

"So, after all that, we were still using paper and relying on manual actions to close-the-loop in those workflows. It was better than before, because the information collected was legible and more easily collated, but it definitely wasn't perfect. We still relied on workarounds to capture reliable signatures and consents."



The next stop on Burns' and SAS' digitization journey saw them adopt a standalone digital payments system, called Script.

"Initially, Script was great," said Burns. "We were able to accept ad-hoc payments from parents completely online. For example, we could hold events like pizza parties for the middle school and request and collect payments digitally. Parents were really buying into the online nature of the process.

"But, we were outgrowing the system. We wanted to be able to do more complex things, connect digital payments collection with other requests for information, and have a consistent automated process rolled-out across all operational activities for both schools. When the company told us they were no longer offering the school payment platform, that clinched it. We had to move on."

Burns' search led her to Operoo, which she started assessing 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.

" We didn't need another Student Information System; we needed a digital operations platform. "

"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.

"At first I couldn't believe the breadth of what was possible. Our assessment and initial roll-out of Operoo also happened pre-pandemic. So, at the time, I had no idea how much we'd come to rely on the platform and the automated processes we've been able to create."

The Solution

One place for all operational processes

SAS' 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, combined with the onset of COVID-19, 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. "Whilst 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 this pandemic if not for Operoo. We've all been working and learning remotely; so how else could we have managed our operations!?"

" Not only was there a need for parents, staff and students to participate in processes and access information from anywhere, anytime and from any device, the nature of the pandemic meant that last-minute changes were regular and required a level of flexibility and promptness, which was not possible with face-to-face interactions. "

"Over the last year, there's been many operational changes at a moment's notice," said Burns.

" Operoo gave us a platform to communicate, manage and automate the digital flow of information between the school and its families remotely, safely and quickly. "

On top of the challenges associated with remote dissemination of information and frequent change, Burns explained that all the new methods of



operating, linked to the shift to online schooling, also required additional parental permission. “Everything had to be done online this year, 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. Other examples include our general Permission to Zoom Form, which we had to distribute to all parents, and Digital Student Device Lending Agreements to support at-home learning. We also used Operoo to administer our testing schedule and survey to all students.”

An Emergency Order was issued by the Florida Department of Education requiring all students in grades three and up to complete the annual standardized testing on campus. Bringing the students learning in Digital Academy to site, while continuing to host the Site Based learners, while also keeping these groups separate on campus, required careful planning. SAS arranged this by using Operoo to disseminate the Florida Testing Schedule Choices for Digital Students survey. The survey helped determine when students would be available to participate in state testing, and also helped the school communicate COVID safety protocols as well as testing policies and procedures.

“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.”

And, with that mentality, Burns went about digitizing a raft of the two-school charter network’s routine paper processes and forms too.

“In terms of payments processing, there’s a lot that we’ve put into place,” said Burns. “Some of the standout forms and associated workflows we’ve digitized include Staff Payroll Forms and Requests for Supply Donation Funds.

Significant parent-facing examples include our Program Enhancement Contribution processes, Free and Reduced Lunch Forms, and Extended Day Program Registration and Invoicing. And, with Operoo’s Stripe integration facilitating those digital payments, transactions and refunds are so much easier to manage.

“Beyond finance use cases, we’re now submitting and tracking all Staff Leave Requests digitally. For parents, we’ve digitized our Beginning of Year Family Surveys, Medication Permission Forms for students, and Commitment Forms that help us gauge enrollment numbers and plan for the next school year.”

Operoo provides a true workflow management platform for schools and districts. 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. “Trigger Actions allow us to define a series of automated actions — such as instantly sending communications, eForms or adding members to certain groups — based on specific data received or time-based thresholds. We can now eliminate all the subsequent things that need to happen in any of our operational workflows: From chasing missing or incomplete information, distributing subsequent forms and documentation, beginning new request or approval processes and more.

“In the same vein, Automated Reminders mean that we almost never have to chase parents or staff for missing information. The system does the chasing for us until everything we need is submitted — from payments to form completions, permissions or medical data.”

Additionally, Burns pinpointed mobile accessibility as critical to facilitating swift information dissemination and collection.

“When we distribute a form, request or piece of communication now, we know that all recipients can instantly view and respond to it on their device



of choice,” said Burns. “For us and our school community, that’s huge. Today, people live on their phones, which is demonstrated by the superior response rates we now enjoy.

“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 regarding other users. This is particularly useful for accessing student medical information, which means staff can act quickly and accurately in an emergency situation. For example, our Before and After School Programs Coordinator organizes all of her student groups through Operoo, giving supervising staff members access to student medical and emergency information via their cell phones.”

1 CENTRAL PLACE

SAS systemized and standardized its operational processes, forms and data collection across both schools in one place.

NO MANUAL CHASING

“The system does the chasing for us until everything we need is submitted — from payments to form completions, permissions or medical data.”

BETTER RESPONSE RATES

“When we distribute a form, request or piece of communication now, recipients can instantly view and respond to it on their device of choice.”

The Results

High response rates, low touch

When it comes to results, there’s a couple of outcomes that Burns and the SAS team are particularly proud to share.

“One of the key initiatives we run to raise additional funds for SAS schools is what we call Program Enhancement Contribution,” said Burns. “Essentially, we ask parents to make a donation to improve the quality and breadth of experiences we can offer students. This is a process that I manage.

“Previously, I’d have to set-up a big spreadsheet containing all the kids and parents. This was a completely manual, protracted process that required constant management, countless follow-ups and manual reconciliation to lodge and track donations — received in various formats — against each family. Typically, we’d raise about \$20,000 per school, though we’d sometimes have to employ an additional resource to help oversee the process.

“*When we automated the Program Enhancement Contribution process through Operoo, we turned the whole scenario on its head.*”

“We digitized every component, streamlining them into one seamless workflow — from distributing the initial request, issuing automated follow-ups, accepting payments, tracking contributions.

“Better still, we were able to use Trigger Actions to set-up programmatically managed payment options. When donating, parents could select which payment plan they wanted — between four and ten installments — and they’d automatically receive monthly payment requests until all installments in their chosen plan were submitted.

“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 over \$60,000 in the first two months of the new automated campaign model.



That's significantly more than we've ever collected. What makes that result even more astonishing is that it was done in a pandemic year, when 40 percent of students weren't even on-campus."

The second "really big win" came when digitizing the network's Student Device Lending Agreement. This was a critical process that needed to be conducted quickly, efficiently and accurately in order to enable families to engage with remote learning throughout the pandemic.

"After digitally surveying parents about their ability to access technology during remote learning, we discovered that many of our students needed to borrow Chromebooks and other materials. To meet this need, we created a digital device lending agreement, approval process and registration in Operoo."

When parents submitted that form, the school then created an internal approval workflow, which was automatically triggered when parents requested to loan a Chromebook. The Office Manager and then the Assistant Principal approved requests, as part of the automated approval workflow, before devices were distributed to families. When devices were approved for distribution, device ID numbers were automatically assigned to each student, creating a Registration Log that the school could track and manage. But the smartest part of the process related to how SAS managed contact-free device distribution.

"After their loan request had been approved, parents automatically received a confirmation email, which also contained pick-up instructions," said Burns. "So they'd simply drive to the school, call the office upon arrival, and sit in the car loop. We'd then verify their loan request and signature while they were on the phone and hand them their device in real-time. This process allowed us to keep our families engaged in learning, manage our resources, and significantly reduce the chance of exposure during the height of the pandemic.

"Without Operoo, attempting to do something like this would have been absolute chaos. We're so happy with Operoo and our process automation journey to date."

A NEW NORMAL

"Now that we know what's possible, there's no way we're going back, even after COVID. Our digital way of operating is definitely the new normal."

15-0

Start-of-year student enrollments went from involving 15 paper forms to zero.

50% INCREASE

By automating its Program Enhancement Contribution workflow, SAS increased parent contributions from \$40,000 per year to \$60,000 in two months.