



TOP 35 OPERATIONAL SCHOOL PROCESSES TO AUTOMATE:

eForms Masterclass

Capturing digital consents, signatures and acknowledgements



THURSDAY 30TH, 12PM BST

SEPTEMBER 2021



Today's Agenda

- Best practice digital school forms:
Top tips and core capabilities
- Live demonstration
- Q&A session

Parent Workflows



Automating parent-facing
Forms, processes and
communications

Staff Workflows



Automating staff forms,
processes, approvals and
policy management

eForms Masterclass



Capturing digital consents,
signatures and
acknowledgements

Health Workflows



Managing duty-of-care,
COVID-safe processes,
incidents and injury reporting

Paperless School Trips



Automating the entire
trip management
lifecycle

Student & Public Workflows



Engaging your whole school
community with digital forms &
process automation

Your Presenters



Lachlan James
Chief Marketing Officer, Operoo
ljames@operoo.com



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About Us



operoo

Our Mission

How we help schools & MATs

- Operoo empowers schools and MATs to use every minute and every pound possible on student education, rather than wasting resources on operational inefficiencies.





Use a template or
make any form



Add any
approval workflows



Automatically
distribute to
your audience



Responses received
within minutes



Trigger follow-up action
based on responses
received



Securely collect consent,
payment, medical info or any
other data required



Automated reminders
sent to stragglers



Track, analyze and
act on responses

Achieving Your Operational Goals



Faster and easier student pre-admissions and induction



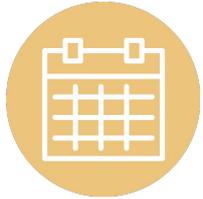
Digital school forms, consents and signatures



Up-to-date and accessible health & medical information



Digital payments and ordering



School trip and activities management



Staff requests, approvals and policy management



Streamlined communications, news & parent engagement



Manage and track incidents

TOP 35 OPERATIONAL WORKFLOWS DIGITISED BY SCHOOLS IN 2021





School Trip Management



Student Medical Cards



Injury & incident reporting



COVID-Safe Processes



School letters



IT help desk request man.



Pre-Admissions & induction



Consent Forms



Loan device reg. & man.



Bubble Scheduling



Risk Assessments



Daily Annmnt. & Messaging



Parent – Teacher Conf.



Ordering & Payments



Before and After School Club



Contactless Visitor Check-Ins



Request Mgmt.



Teacher Preference Sheets



Activity Management



SENCO Processes



Staff appraisals



Policy, Compliance, Onboarding



EAL Management



Survey distribution & collection



CPD Management



Event reg. & ticketing



Student Contracts

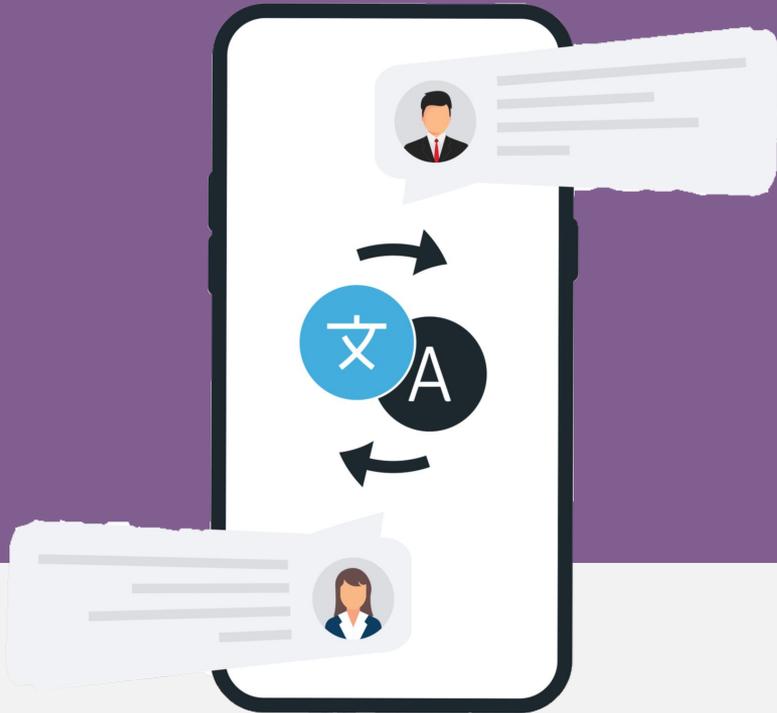
eForms Masterclass

7 Steps to Success



operoo

1. Any time, any device, in any language



- Cloud-based
- Mobile-ready
- Multi-language enabled

Embrace the cloud

- Give school stakeholders consistent access to the same up-to-date information



Top 8 Reasons to Embrace the Cloud

1

Minimise risk (it's simply safer)

Human error causes 90% of data breaches

2

Boost efficiency and save money

A MSP manages your system for you (troubleshooting, back-ups, patches)

3

Improve accessibility

24/7 access to the latest live data

4

Scalability

Easily manage fluctuations in demand

5

Iterative innovation

Get free updates and new features

6

Reduce hardware requirements

Save money and time on upkeep

7

Enhanced flexibility and reach

Parent engagement and student learning beyond the classroom

8

Better reliability

High up-time and availability

New Horizons Computer Learn Centers: <https://www.newhorizons.com/article/90-of-cyberattacks-traced-back-to-human-error-making-cybersecurity-a-workplace-culture>

The Educator Online (Australia): <https://www.theeducatoronline.com/k12/technology/e-learning/opinion-how-the-cloud-is-transforming-education/261628>

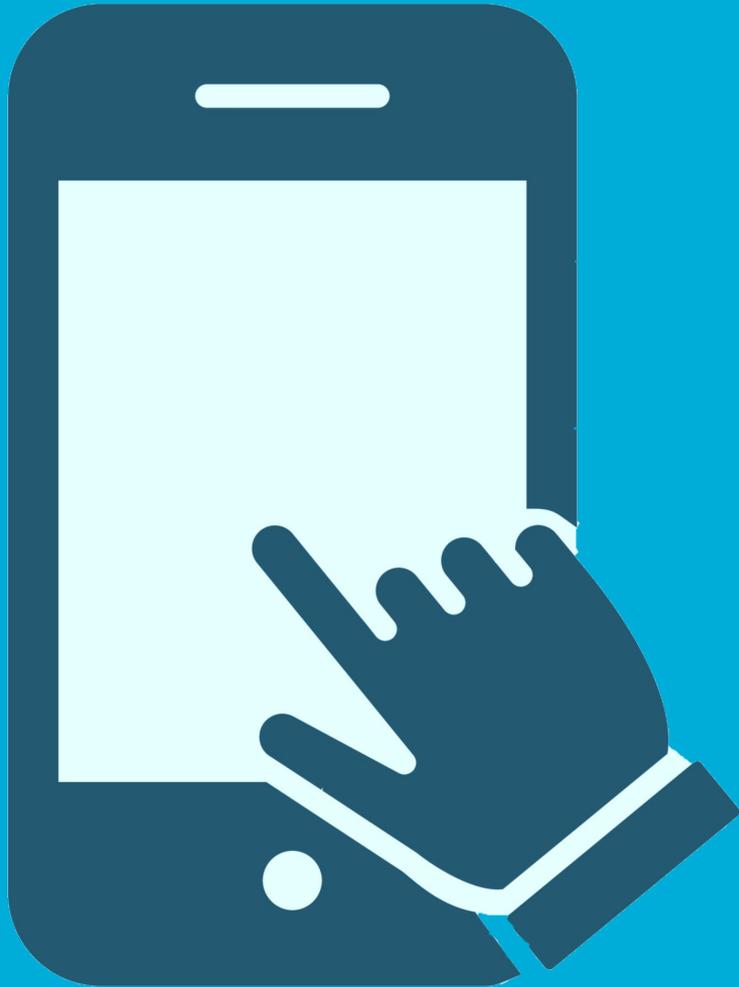
Cloud Academy: <https://cloudacademy.com/blog/surprising-ways-cloud-computing-is-changing-education/>

Market and Markets (Cloud Computing in Education Market): <https://www.marketsandmarkets.com/Market-Reports/cloud-computing-education-market-17863862.html>

Technavio (Global Cloud Computing Market in K - 12 Education Sector, 2018 - 2022):

<https://www.technavio.com/report/global-cloud-computing-market-in-k-12-education-sector-analysis-share-2018>

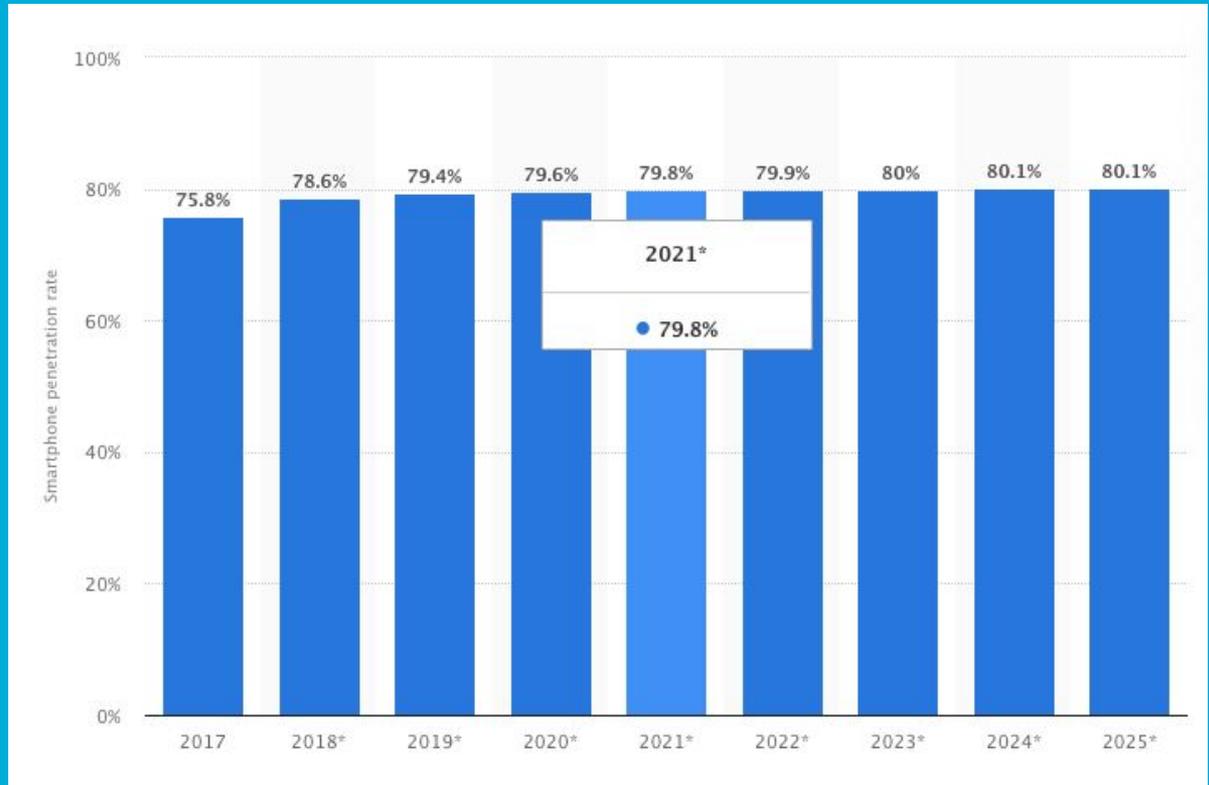
Extreme Networks: <https://www.extremenetworks.com/extreme-networks-blog/education-survey-identifies-the-increase-in-cloud-networking-and-key-trends-in-infrastructure-plans/>



Be mobile
ready and
device agnostic

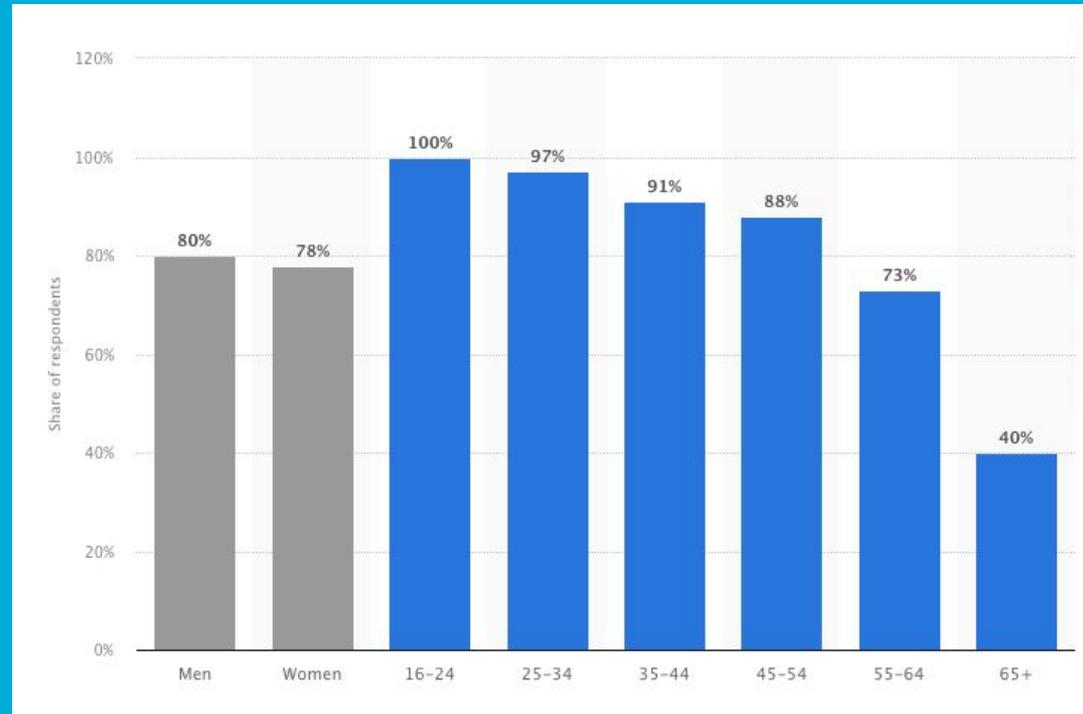
Smartphone penetration rate

→ Around 92% of the UK's total population use a smartphone (statistica.com)



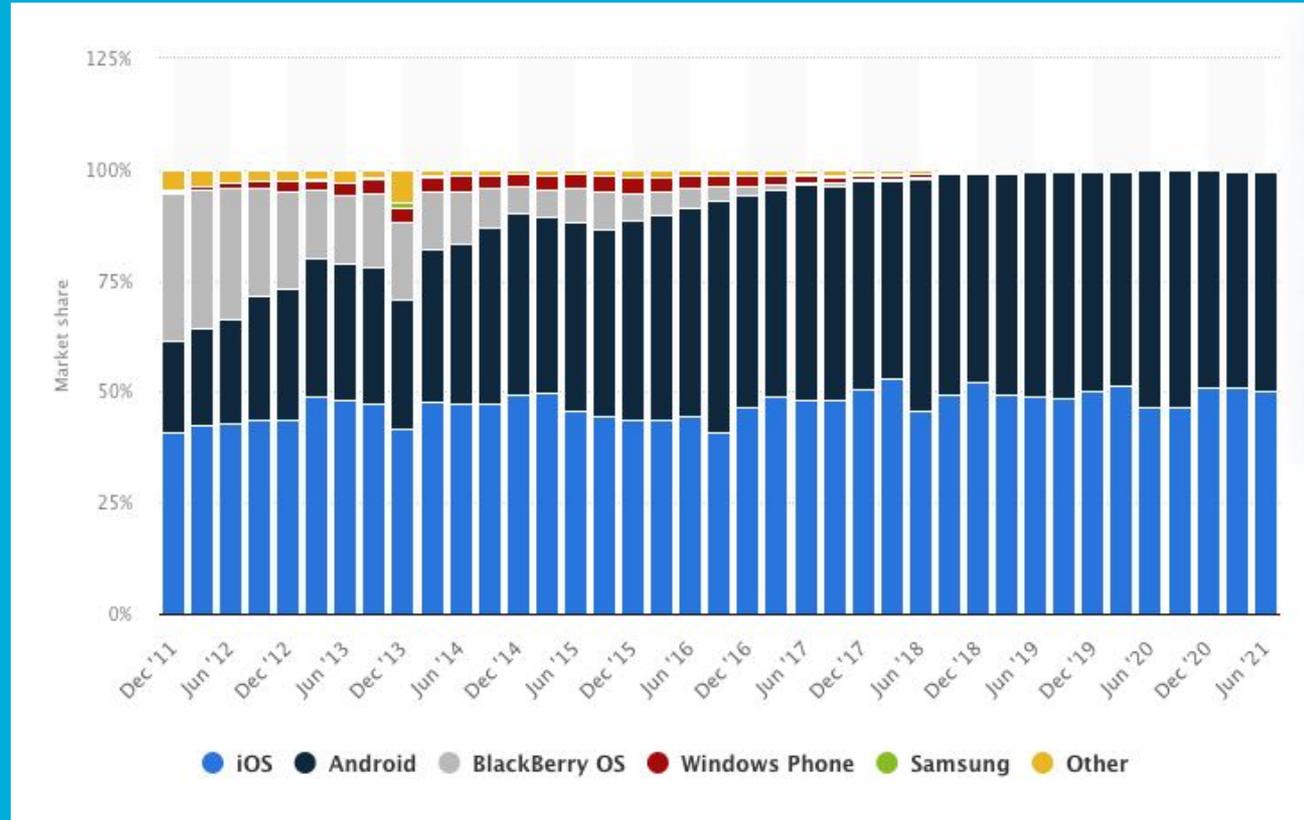
Smartphone penetration by age group

→ Adults with
School-aged children
Are among the
Heaviest smartphone
users in the UK
([statistica.com](https://www.statista.com))



Mobile operating system market share

→ Dec 2011 -
June 2021,
In the UK
(statistica.com)



Speak your audience's language with multi-lingual form distribution

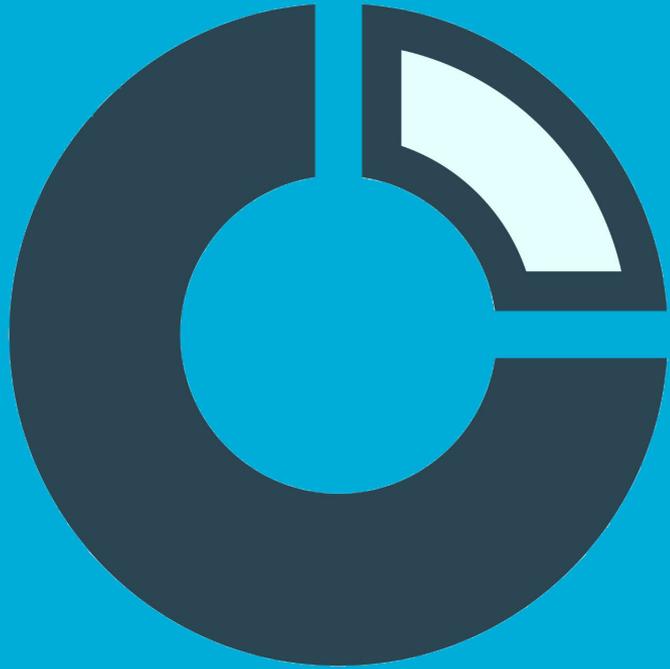


Languages other than English spoken at home 2021

→ Source: GOV.UK, explore-education-statistics.service.gov.uk

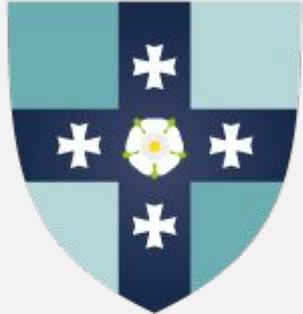
First language, number and percentage of pupils by school type, 2019/20 to 2020/21

		Known or believed to be English		Known or believed to be other than English		Language unclassified	
		2019/20	2020/21	2019/20	2020/21	2019/20	2020/21
State-funded nursery	Headcount	29,193	26,614	12,668	10,946	249	305
	Percent	69.3	70.3	30.1	28.9	0.6	0.8
State-funded primary	Headcount	3,702,159	3,673,420	1,002,387	975,238	10,226	11,606
	Percent	78.5	78.8	21.3	20.9	0.2	0.2
State-funded secondary	Headcount	2,808,162	2,872,392	584,565	601,238	16,550	19,877
	Percent	82.4	82.2	17.1	17.2	0.5	0.6
State-funded special school	Headcount	107,986	113,639	18,809	19,528	415	492
	Percent	84.9	85.0	14.8	14.6	0.3	0.4
Non-maintained special school	Headcount	3,374	3,472	400	428	13	24
	Percent	89.1	88.5	10.6	10.9	0.3	0.6



21% of primary
students come
from EAL families

Bootham School Case Study: Automating Trip Management



BOOTHAM
SCHOOL
AGES 3-18

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.

The Results

Safe students, happy teachers, engaged & informed parents

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.





“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.

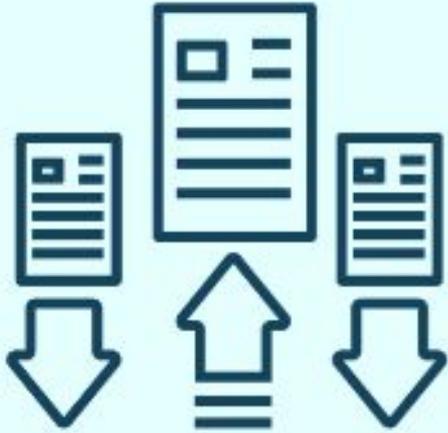
“Nobody’s chasing paper forms anymore. It’s taken really substantial volumes of repetitive work away from teachers and admin staff. It’s cut-down admin time for a trip by at least half. For example, my assistant Claire can now put increased effort into more valuable activities, such as helping me develop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

- **James Ratcliffe**
Assistant Head, Bootham School

2. Are Your Forms Fit for Purpose?

- Push, pull and recurring
- Forms for every audience and occasion
- Securely collect sensitive data



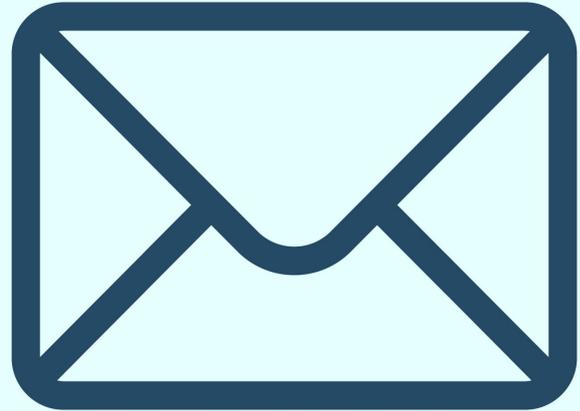


Self-service eForms

→ For continual,
anytime use

Push eForms

- Delivered to specific recipients, at a specific time, for a specific one-off purpose





A form type for any occasion

→ Fully customisable

Catering for multiple audiences and role types

- Parent users
- Staff admins and users
- Student users
- Public users



Facilitating multiple distribution / access methods



- Email
- SMS
- In-application (push and pull)
- Embedding in third-party platforms (eg: school website)

Enable consolidated
collection of multiple
data types





Securely collect sensitive data

- Digital signature and consent
- Verified medical data
- Integrated payments and ordering

Elizabeth College Case Study: Automating School Forms



How Elizabeth College automated the distribution and collection of forms across its school, reducing staff workload, safeguarding data security and increasing the reliability of student medical information – all while providing a seamless user experience for parents.

The Results

“The feedback has been amazing”

4 APPS, 1 LOGIN

Single Sign On across Elizabeth College's four parent platforms.

100% STAFF ADOPTION

Staff rave about Operoo and the amount of time saved.

1 SOURCE OF TRUTH

For all student medical data and emergency contacts.

97% PARENT ADOPTION

Feedback from parents has been overwhelmingly positive.

NO MORE DATA MATCHING

Returned forms are automatically attached to each student profile.

1 PLATFORM, MANY USER TYPES

Operoo customises access for different staff members.

100% GDPR COMPLIANT

Operoo helps Elizabeth College meet GDPR compliance with ease.

1 FORM, MANY DATA TYPES

Include payment, consent, medical data and attachment requests in one workflow.

100% MOBILE ACCESS

Anytime access to student medical info - even when offline.

1-CLICK TRACKING

Elizabeth College distribute forms and track responses with one-click.





“We can now build and distribute any form type in minutes, automatically associate submitted data to each student profile, and reduce the load on parents and staff by requesting information once and having it universally accessible to authorised users all-year-round. Operoo can do it all.”

- **Joe Langlois**
IT Manager, Elizabeth College

3. Programmatically Segment your audience





Tailor your
message to
your audience

TABLE 2

Individualization, not technological capacity, matters most for whether parents, teachers, and school leaders use and value a communication system

Percentage of each group indicating that they used the system and the average value rating of each system

Communication system	Parents		Teachers			School leaders		Statistically significant group differences
	Value	Percentage who use each system	Value	Percentage who use each system	Percentage whose school uses each system	Value	Percentage whose school uses each system	
Parent-teacher conferences	4.49	68.2%	4.35	77.8%	76.8%	4.55	65.0%	■
Paper notifications	4.00	54.6%	3.69	57.8%	66.3%	4.05	46.6%	■
Websites	3.97	54.0%	3.84	39.1%	76.4%	4.17	61.8%	◆
Personalized calls or emails	4.43	53.9%	4.51	74.9%	62.3%	4.53	49.3%	N/A
Emails or listservs	4.09	53.3%	3.96	55.4%	60.6%	4.23	59.1%	◆
Automatic text messages	4.09	35.1%	3.80	20.5%	43.7%	4.26	49.3%	■
Web-based platform with personalized student/class information	4.22	32.5%	3.99	33.2%	46.5%	4.32	40.9%	■
Robocalls	3.45	32.4%	3.43	6.0%	52.3%	3.66	33.8%	N/A
Social media (e.g., Twitter, Facebook)	3.66	23.5%	3.46	16.5%	46.1%	3.94	37.7%	◆
Other	4.27	2.4%	5.00	3.6%	1.0%	4.14	1.7%	N/A
Average number of systems used	4.1		3.8		5.3	4.5		★

- Teachers different from others
- ◆ School leaders different from others
- ◆ School leaders and teachers different
- ★ All groups different

Notes: Survey respondents rated the communication systems on a scale of 1 to 5, with 1 meaning "Not at all valuable"; 2 meaning "Slightly valuable"; 3 meaning "Somewhat valuable"; 4 meaning "Mostly valuable"; and 5 meaning "Extremely valuable." Most responses for the "Other" communication systems category cited Class Dojo or other phone apps. Statistically significant group differences are displayed for value ratings and average number of systems used only.

Source: Original CAP analysis. See Appendix for the full methodology in Meg Benner and Abby Quirk, "One Size Does Not Fit All: Analyzing Different Approaches to Family-School Communication" (Washington: Center for American Progress, 2020), available at <https://www.americanprogress.org/?p=479902>.



“With Operoo, the need for a huge amount of continuous manual effort disappeared. Returned forms are automatically attached to each individual student profile and grouped by year level, class, activity, medical condition or any chosen data attribute. That’s the massive difference for us.”

- **Joe Langlois**
IT Manager, Elizabeth College

4. Integrated requests and approval processes

- Ensure recurring internal forms, from sick leave to PD submissions, are managed systematically and efficiently





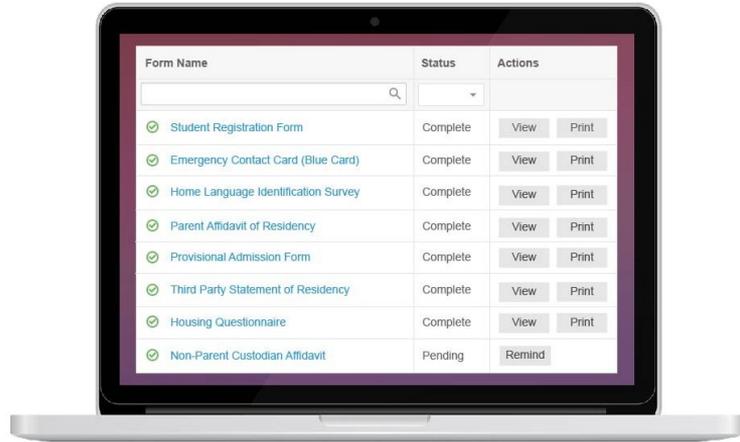
“The first rule of any technology used in a business is that automation applied to an efficient operation will magnify the efficiency. The second is that automation applied to an inefficient operation will magnify the inefficiency.”

- Bill Gates, Founder of Microsoft

5. Data Management

→ Collection, collation, tracking, reporting and analysis





Digital Filing Cabinet

→ A single source of truth for all form data

Felpham College Case Study: Automating Trip Management



How Felpham College digitised and automated school trip management to escape a paperwork avalanche, give staff their time back, keep students safe and engage its parent community.

The Results

Safe students, happy teachers, engaged & informed parents

5000 → 0

From grappling with over 5,000 paper consent forms each year to zero.

100 TRIPS AUTOMATED

Felpham College digitally manages 100+ trips per year with Operoo.

1 SOURCE OF TRUTH

For all student medical data and emergency contact information.

NO MORE CHASING PARENTS

Automated reminders mean parental requests are return on-time; without any manual follow-up.

100% GDPR COMPLIANT

Operoo helps Felpham College meet GDPR compliance with ease.

24/7 MOBILE ACCESS

Anytime access to student medical information from any device -- even when offline.

100% PARENT ADOPTION

Parents love the speed and convenience of Operoo.

ACCIDENT IN AUSTRIA

When a bus accident and a break-down delayed arrival home, Operoo saved the day.



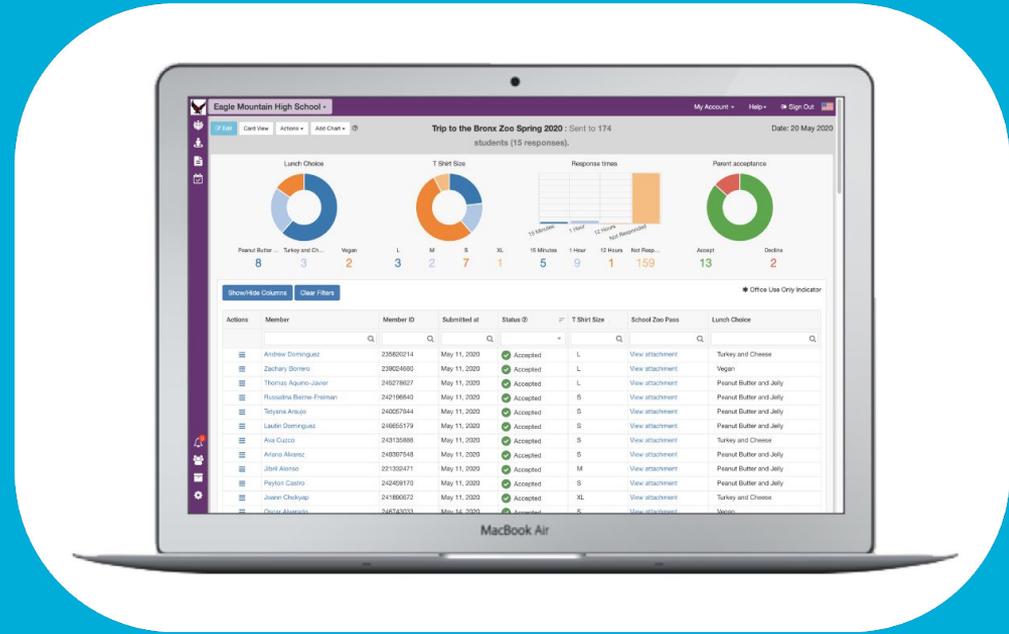


“Before Operoo, everything was recorded on paper. This had several undesired consequences: Not only did we have no ability to re-use information gathered, and so asked for the same information every time we held a school trip or activity, we were also unable to store it securely in one accessible place. Now, all authorised parents and staff can access the same universal source of truth, from one digital platform, anywhere, anytime, from any device -- even when offline.”

- **Phil Rayner**
School Business Manager,
Felpham Community College

Reporting and Analytics

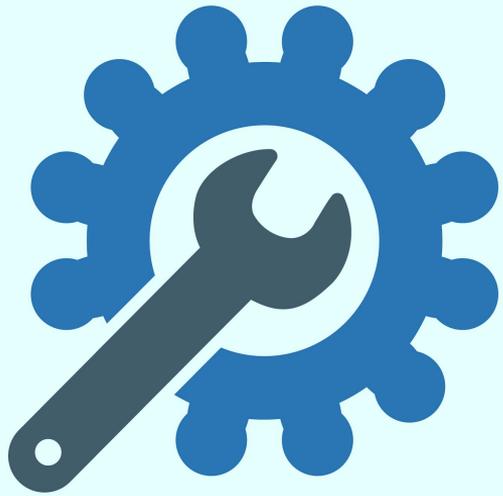
→ Search, sort, filter, chart, analyse and act on your form data





“Distributing, tracking and analysing responses became one-click functions with Operoo, while automated reminders now chase parents for us.”

- Joe Langlois
IT Manager, Elizabeth College



Data integration to
underpin reliable
tracking, analytics
and visibility

Allerton High Case Study:

Digitising and Automating Pre-Admissions



How Allerton High School digitally transformed the way it manages pre-admissions, streamlining the entire process, automatically inducting new students once admitted, and instantly syn data back into its Management Information System, SIMS.



“The Operoo - SIMS integration is an all-round game changer for processing pre-admissions data. It automatically pulls across all dietary and medical data captured during pre-admissions and syncs it with the student record in SIMS upon acceptance. Not only does this save time, it reduces risk by ensuring we have a single trustworthy version of the truth for managing emergency situations.”

- Gary Loughrey
Data Manager and EVC Coordinator,
Allerton High School

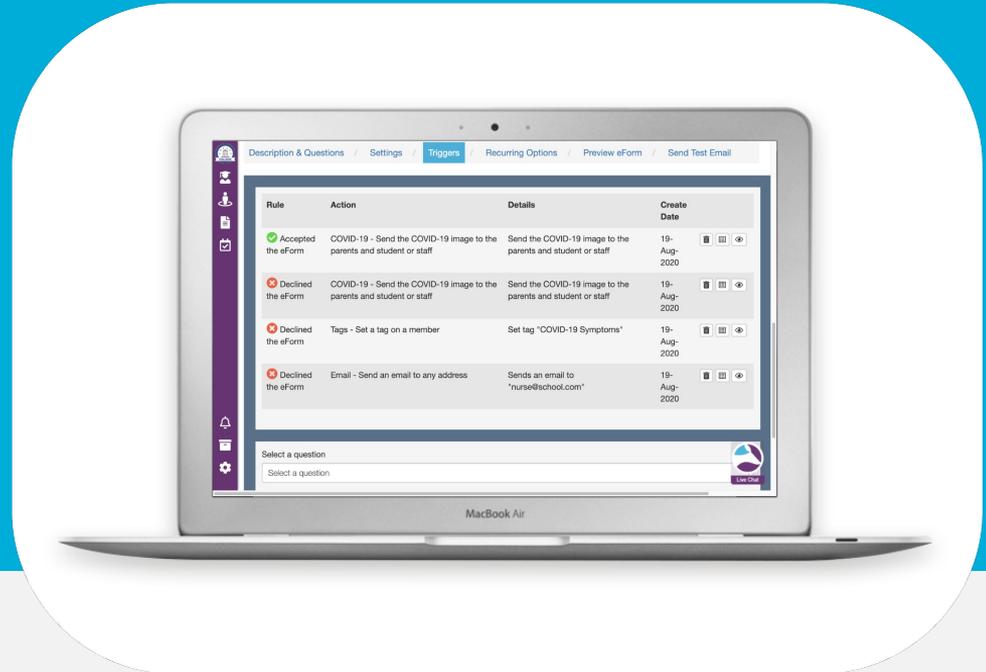
6. Programmatically respond to dates and data

- Automated Reminders,
Dynamic / Smart eForms,
Triggers Actions



Trigger Actions

→ Automatically trigger follow-up communications based on timeframes or responses received.

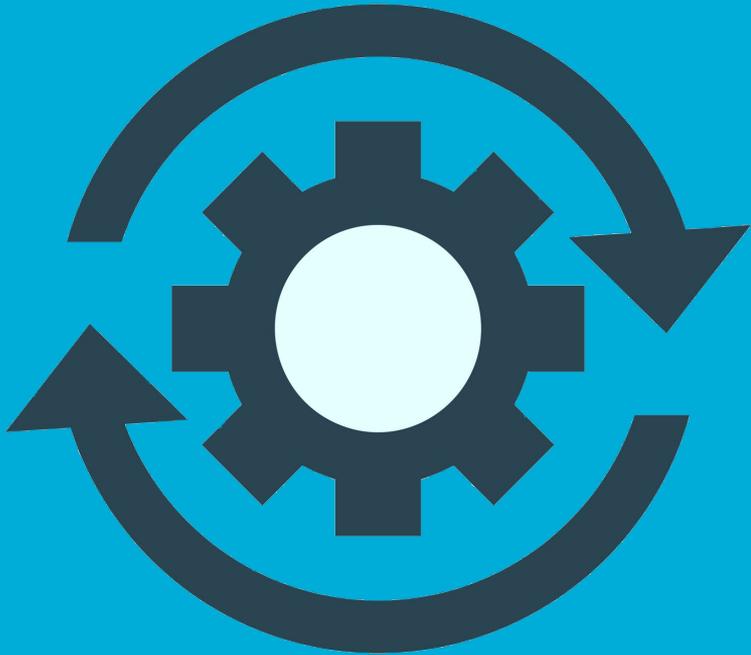




“We’ve saved hundreds of hours, thousands of pounds and a lot of heartache. I am so happy and amazed with our pre-admissions process now. We have completely removed all paper from the new starters parents experience. We send out all forms digitally.

“Operoo saves us loads of time, as the system triggers next steps in the workflow, subsequent communications, and does the chasing for us.”

- Gary Loughrey
Data Manager and EVC Coordinator,
Allerton High School



Consistency on
which you can rely.
Transparency that
everyone will trust.



Reallocate time
and resources.

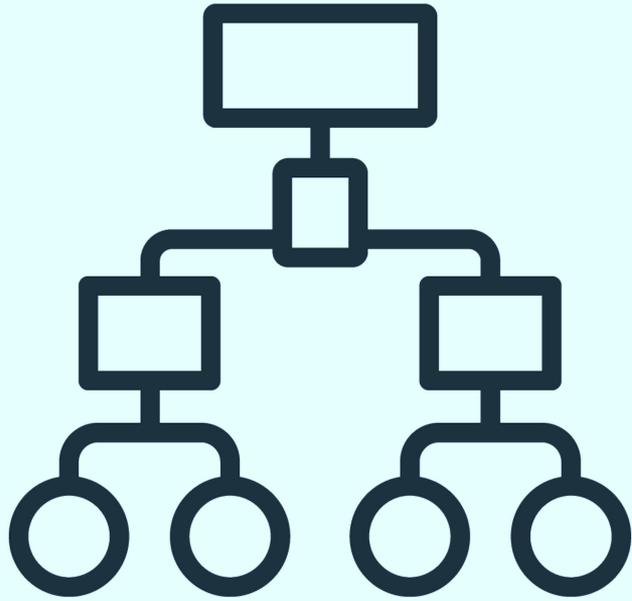
Achieve more
sophisticated
outcomes





“The biggest thing is that chasing forms is now a thing of the past. Now, we just select the cadence with which they want automated reminders to go out, and parents keep receiving subsequent requests until missing information is submitted.”

- Gary Loughrey
Data Manager and EVC Coordinator,
Allerton High School



7. Think about workflows, not individual forms

applet

IF

IF

IF room temperature drops below 17 °C

IF I leave home

IF humidity changes

T

THIS

T

THEN

THEN

THEN

THEN

T

THAT

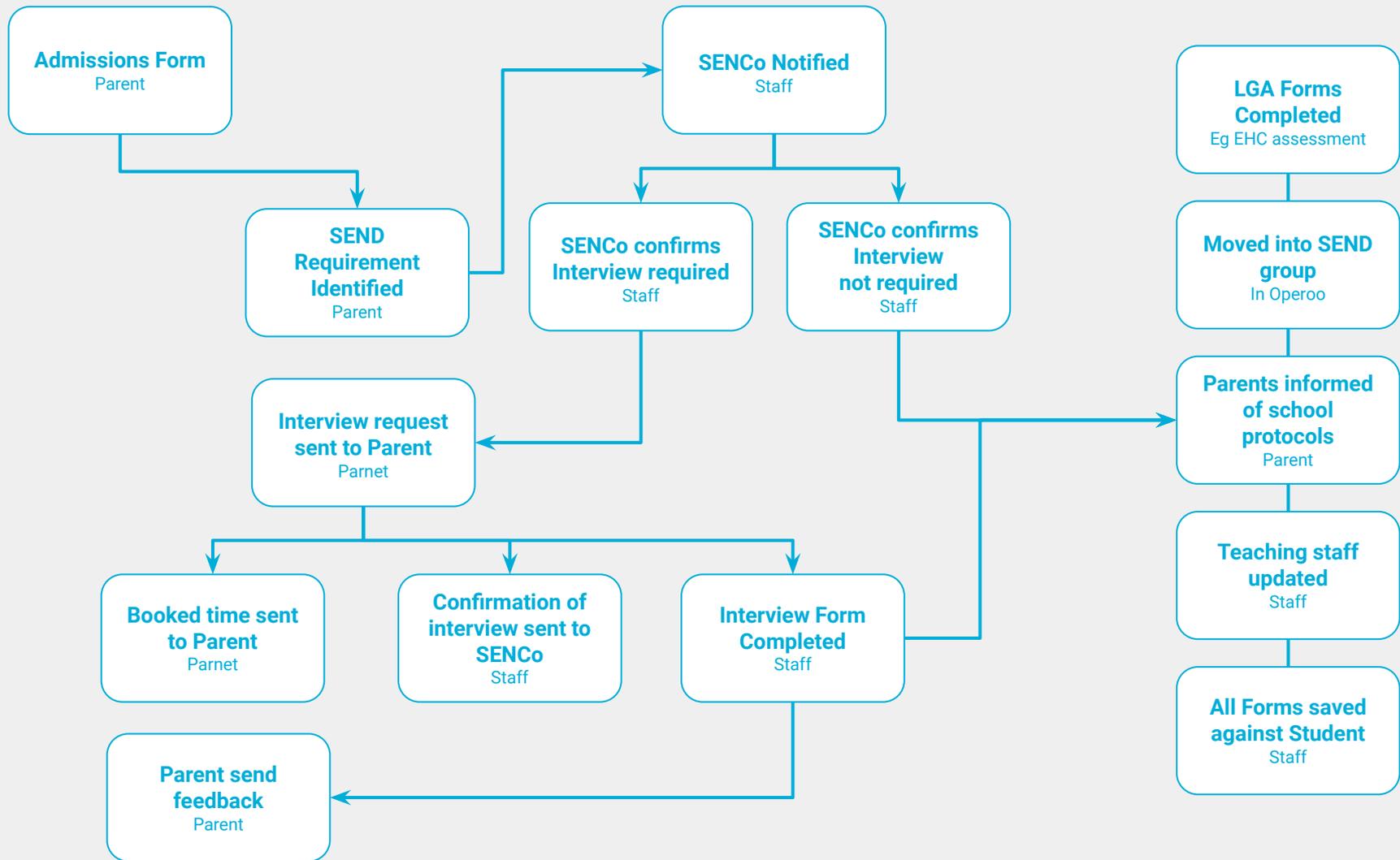
send me a message or e-mail

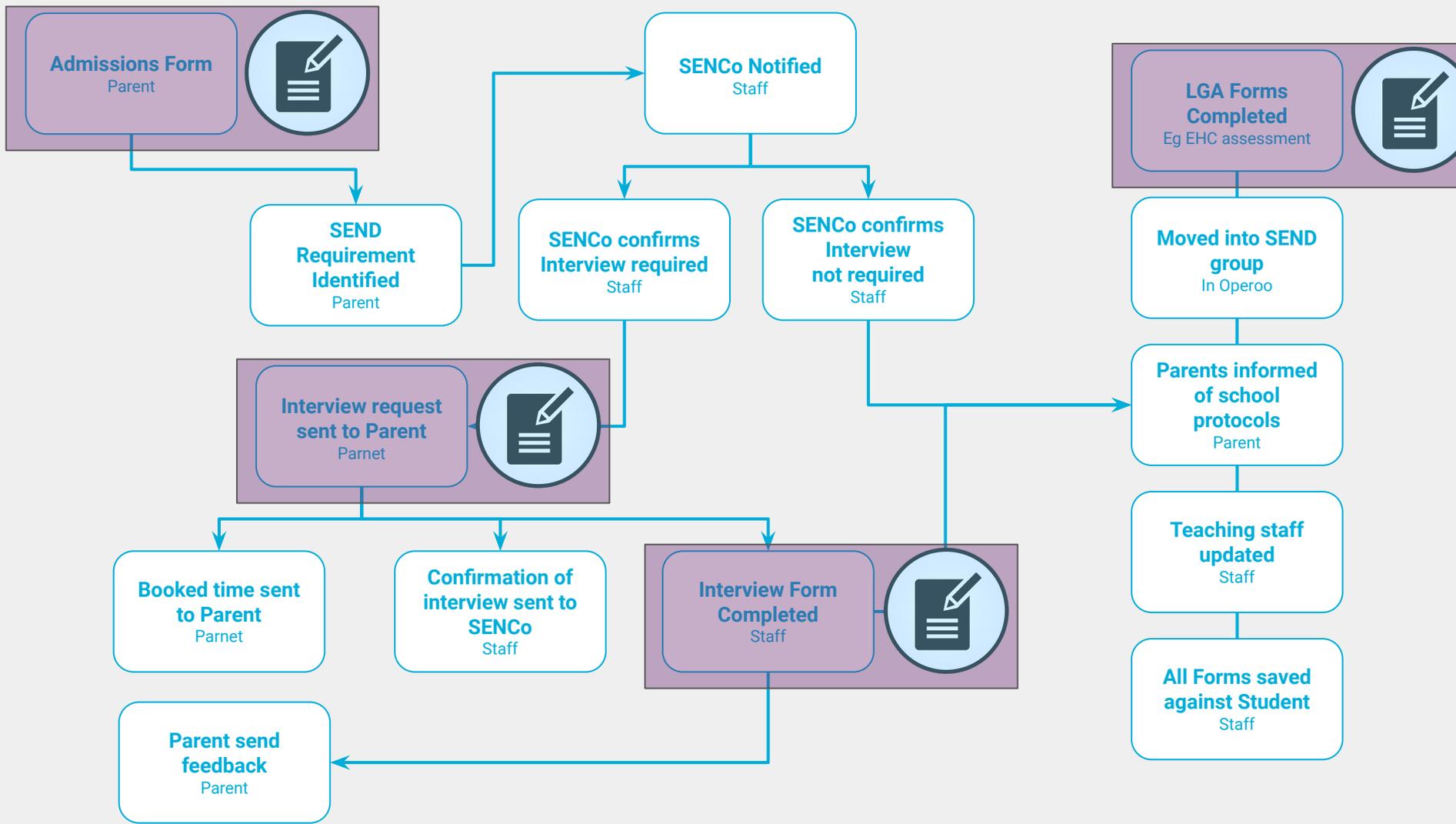
switch my Hue lights off

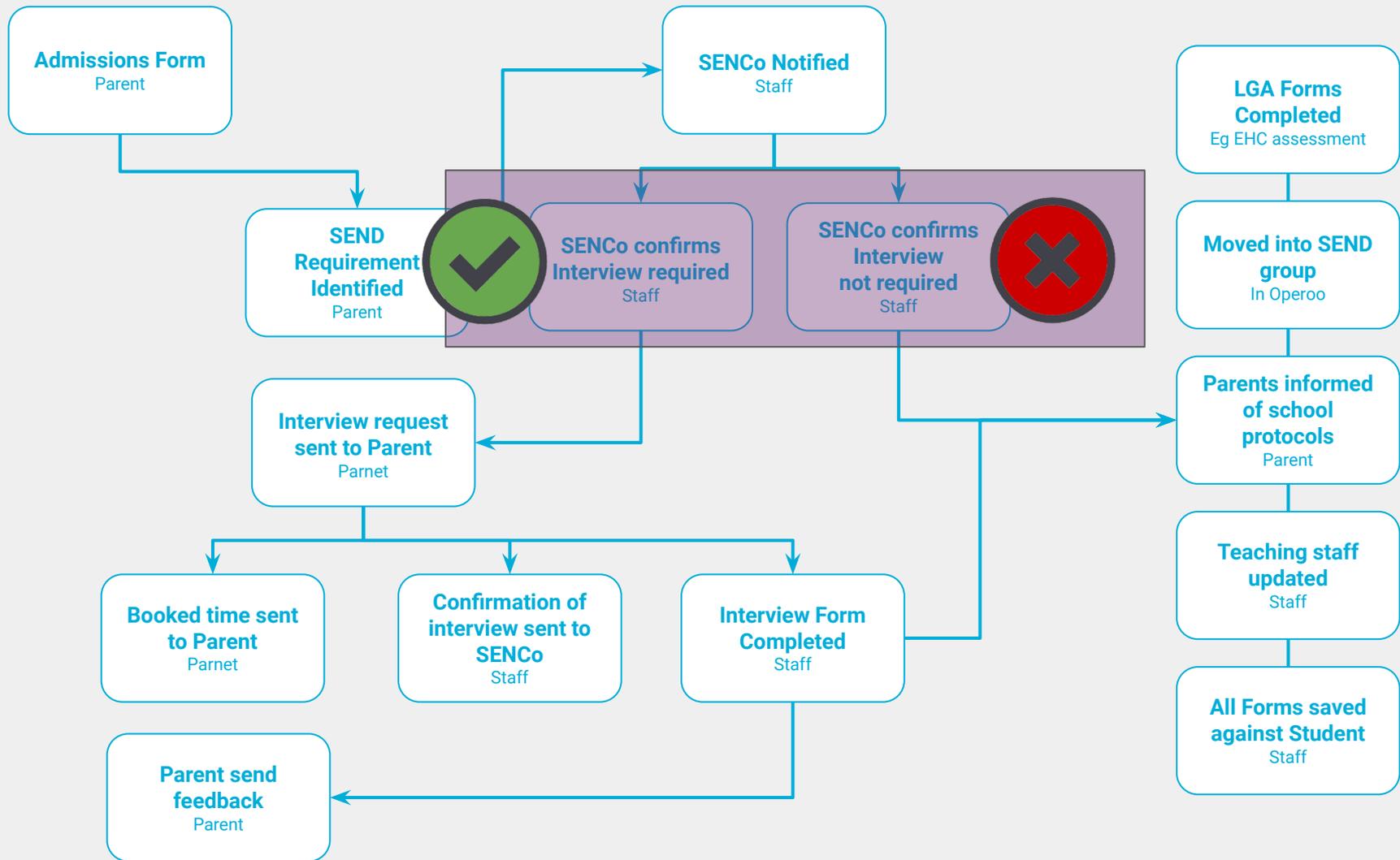
lock to a Google spreadsheet

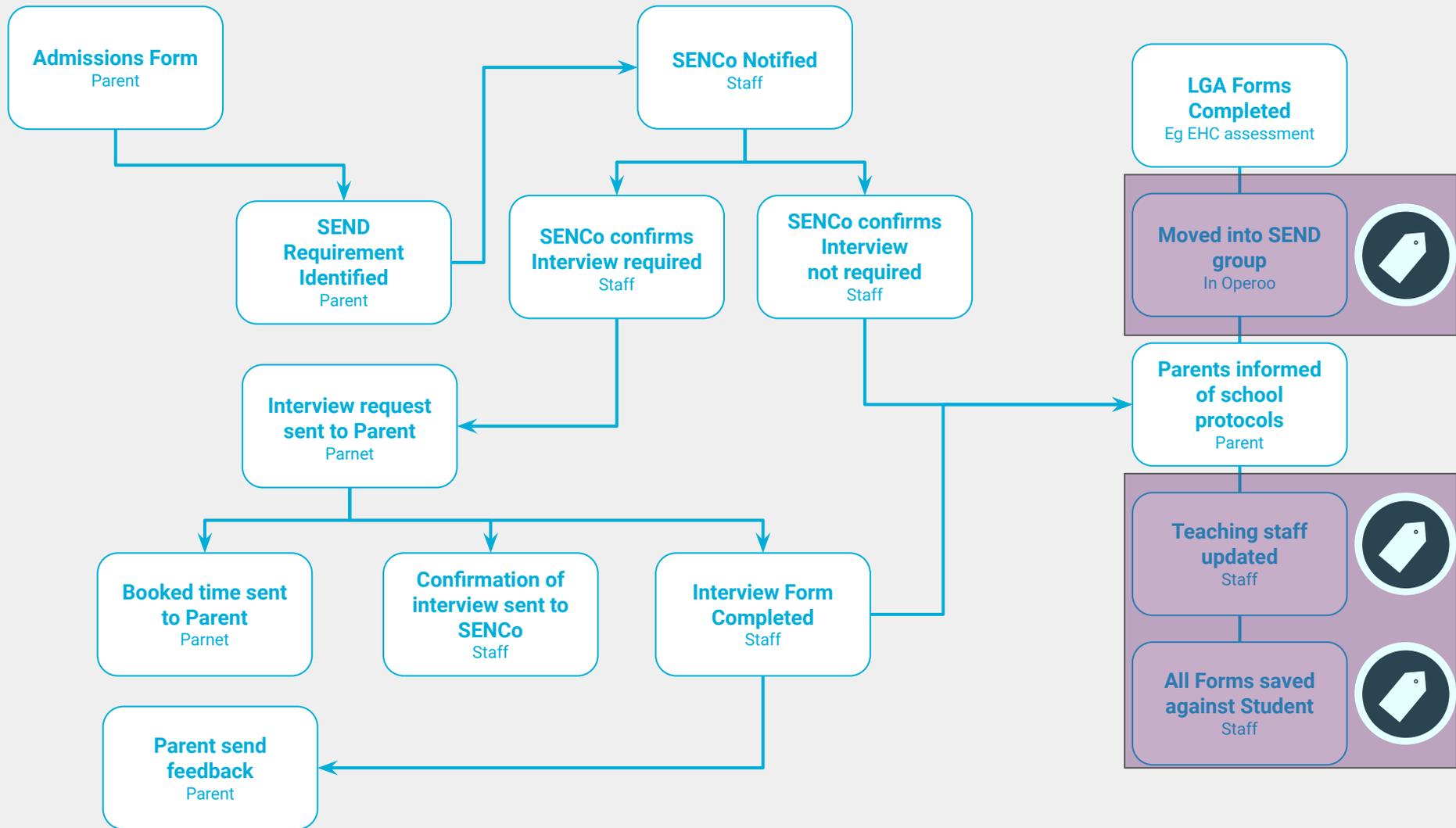
trigger

action









The Results

Bishopsgate School Case Study



80 STAFF USE CASES

Automated through Operoo:
From staff onboarding to
leave requests.

NO MANUAL CHASING

Of staff for missing forms,
information, acknowledgements
or consents.

380 OF 380

"All our parents are onboard
with Operoo and love it."

100% AUTOMATION

Of all staff processes, requests,
forms and workflows.

12-HOURS

For all parents to return
signed digital consent forms
for remote learning.

100% STAFF ADOPTION

Staff rave about Operoo and
the amount of time the
platform saves them.

SIMS INTEGRATION

Means medical, emergency, dietary
and other data is synced and
updated in the student record.

1 SOURCE OF TRUTH

For distributing, collecting and
monitoring all staff form responses,
requests and process completions.

"TRANSFORMATIVE"

Change in staff response rates
and submission timeframes for all
policies and processes.

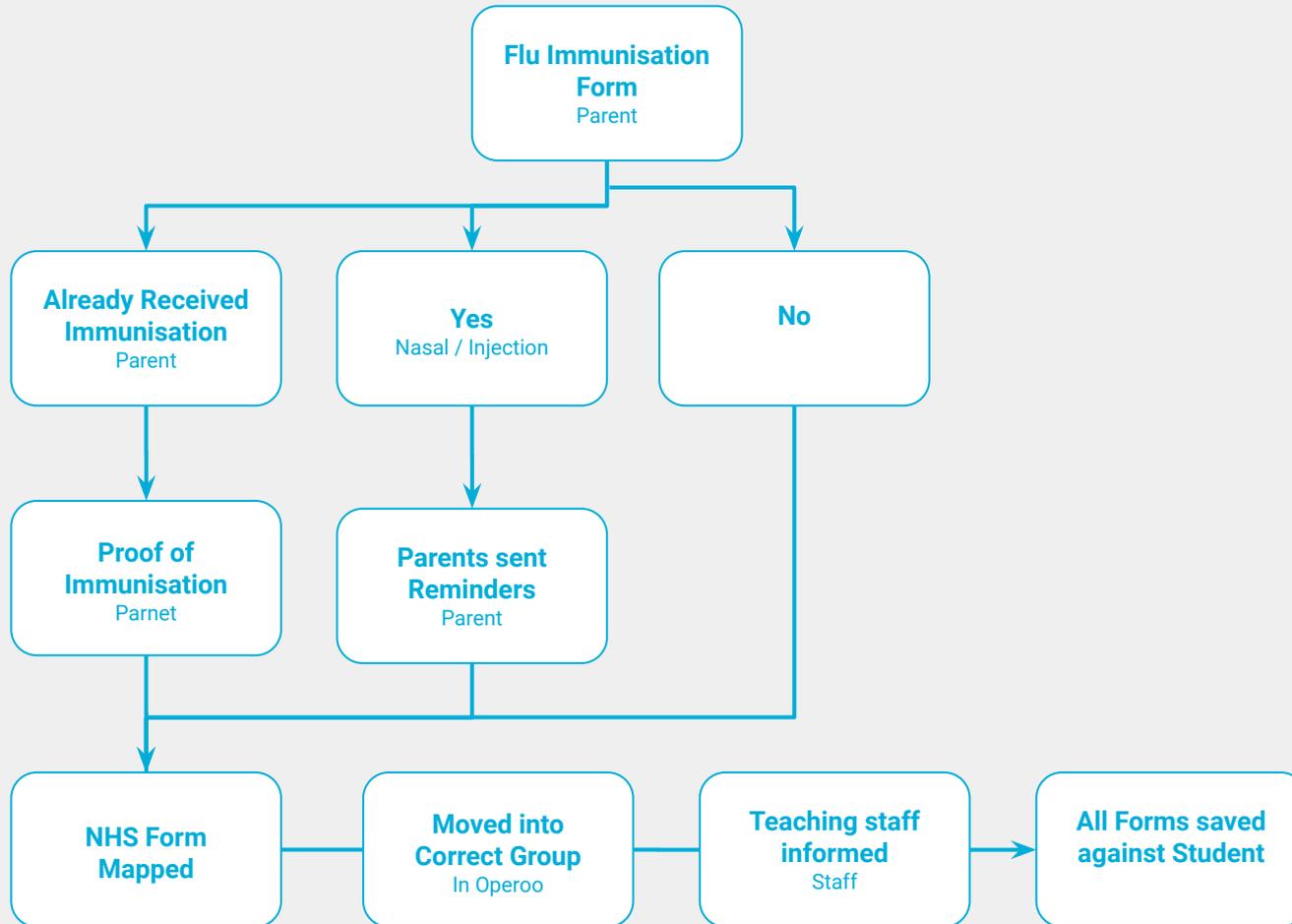
28 TRIGGER ACTIONS

Fully automated in one
COVID-safe workflow, keeping
the school safe and compliant.

Demonstration

→ Building a Process in Operoo





Q&A Session



Questions?

We're here to answer them!

www.operoo.com/contact-sales

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Staff Workflows



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Managing duty-of-care,
COVID-safe processes,
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Paperless School Trips



Automating the entire
trip management
lifecycle

Student & Public Workflows



Engaging your whole school
community with digital forms &
process automation

You may also be interested in...



Thanks For Your Time

And for the incredible work you're doing

Next steps:

- 1 We'll send you the webinar recording
- 2 We'll follow-up with a copy of the presentation slides and guide
- 3 And, if you'd like to know how Operoo can help you, simply ask:
www.operoo.com/contact-sales