



How Robert Fulton Elementary used digital Blue Cards and embraced process automation technology to eliminate manual tasks and focus resources on digital form workflows to drive strong school-wide participation -- even during a pandemic.

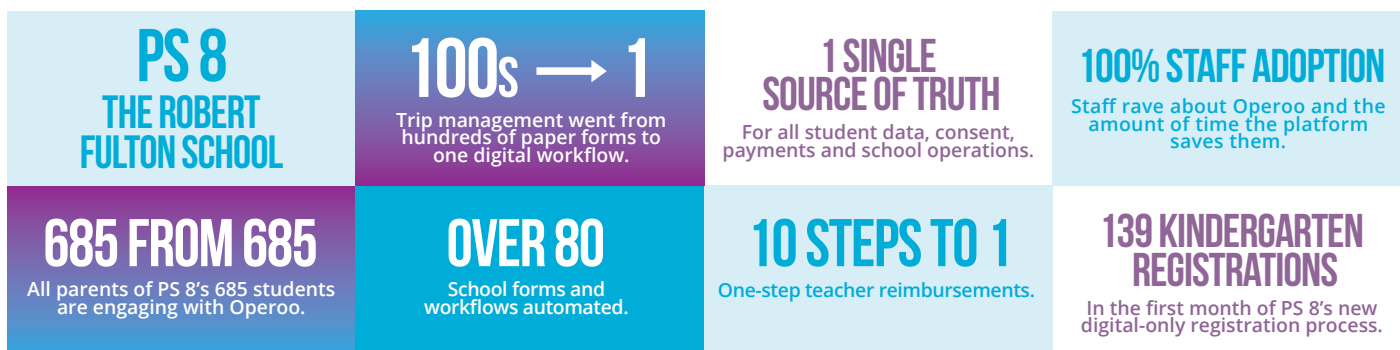
Robert Fulton PS 8 Elementary School **Digitizing Blue Cards, registration and onboarding**

Robert Fulton School: The Magnet School for Exploration, Research and Design -- otherwise known as Public School 8 -- is an elementary school based in Brooklyn, which operates as part of the New York City Department of Education (NYCDOE). At PS 8, 58 staff are responsible for educating 685 students spread from Kindergarten through to 5th Grade.

As the school grew, an increasing strain was placed on its people and manual, paper-based processes. Principal, Trish Peterson, knew that to keep pace with NYCDOE compliance requirements, its students safe and engaged, and its resources and staff focused on achieving educational outcomes, things had to change.

From that point, Peterson embarked on a journey to transform how the school completed operational processes and collected, verified and shared student data.

Summary of Results





The Challenge

The unreliable, repetitive nature of paper-based processes

Because every form and associated workflow was paper-based, Robert Fulton Elementary's processes were resource intensive, lacking consistency and reliability. That was especially unacceptable when it came to requests for, and collection of, critical and recurring information -- like student Blue Cards.

"Prior to Operoo, three copies of every student's Blue Card had to be completed at the beginning of each year," said Peterson. "One for the main office, another for the nurses office, and a third that stayed with the classroom teacher. This problem only multiplied when you consider that Blue Cards represent just one form type for student onboarding and registration.

“Our manual Blue Card system hindered PS 8's desire to be a green school; it was a poor use of time and money.”

More importantly still, Peterson said that the physical nature of Blue Card completion, collection and collation was extremely limiting.

"The compact amount of space dedicated to each section of the Blue Cards meant that we couldn't always read or fit-in all the required information," said Peterson. "This included difficulty reading emergency phone numbers. Beyond that, updating data collected at the beginning of the year was a difficult task because information had to be manually changed in three different versions of each Blue Card.

“As a result, there was potential for emergency contact information to become outdated fast -- a risk we were very keen to mitigate.”

"On top of that, the system was also vulnerable because it was possible that, in an emergency, someone might not have physically filed the Blue Card in its correct spot after previous use."

A paper-centric system also generally meant more work for both teachers and parents -- especially at the start of the school year.

"The beginning of each year always meant a bunch of consent forms going home to parents," said Peterson. "For Kindergarten students registering for the first time, NYCDOE requires 17 separate documents to be completed -- from Ethnic Race Identification and Parent Affidavit, through to ATS Admissions Form and the NYC New Kindergarten Admit Questionnaire. For registered or returning students, there's all the usual onboarding forms the school needs for the year ahead -- from Field Trip permission slips, Google Classroom usage agreements and Media Consent Forms, to Student Onboarding documents, Discipline, Cell Phone and Class Contracts."

Parents had to provide the same information again and again. The manual nature of form distribution and collection also meant a lack of uniformity: Teachers didn't always collect all the right information in the right way.

"The avalanche of paperwork often resulted in imperfect tracking and incomplete data collection at an individual teacher level, which meant imperfect recording keeping at the school level," said Peterson. "The way that information was requested and collected was also inconsistent. Teachers would sign-off on our school and staff regulations at the start of each year, which included acknowledging the required format of school forms such as permission slips. However, these guidelines often weren't followed as precisely as they should have been.

"In fact, in my conversations with our teachers, some admitted that they were unfamiliar with the Chancellor's regulations and requirements for form types. They didn't know there was a standardized format to follow. At that point, it became clear we needed a way to automate this process in order to remove potential for human error."



The Solution

Embracing automation: Consistent processes and complete data

Peterson said that digitizing the distribution of forms and collection of data -- via Operoo's School Platform -- enabled PS 8 to easily establish a single source of truth for reliable, up-to-date student information for the first time.

"With Operoo, we know that the right forms are being sent directly to parents," said Peterson. "We also know that the right information is requested of all parents, responses are tracked, and returned data is made universally accessible to authorized staff -- at any moment, through any device."

"Now, there's no traveling back to my office at the school to find student information and parent contact details at 7:30pm. I have everything I need at my fingertips. It would be so hard to go back to how things were before Operoo."

In fact, Peterson said that PS 8's Parent Coordinator, Eileen Carrier, had been using Operoo to correct and update student data in other NYCDOE systems.

"We use Operoo as our primary source of data and truth for student information, school operations and anything the NYCDOE mandates -- from parent consent through to Proof of Immunization," said Peterson. "It's so easy for staff to update data as things change. And, because Operoo is forward-facing, even parents can directly update student information, with relevant staff immediately notified of those changes. With Operoo, we know we always have the best student information on hand."

Automating these recurring processes was also critical for reducing staff workload -- particularly during student registration and onboarding.

"Not only can we automatically adhere to the Chancellor's and NYCDOE regulations regarding form types and data collection requirements, Operoo does all the distribution and chasing for us until everything is signed and returned," said Peterson. "It eliminates

wasted time, paper and human error, while delivering better and faster response rates.

"Parents are more engaged, student participation is up, and our staff can concentrate on delivering a better school experience rather than inefficient admin tasks."

Peterson added that it wasn't just the automation of student registration and onboarding processes at the start of the school year where Operoo came to the fore. Operoo also helps PS 8 facilitate ongoing processes and communications to keep staff and parents informed throughout the year.

"The ability to quickly send messages to parents, and then copy staff, has been amazing," said Peterson. "For example, we had to suddenly implement a suite of new COVID-19 protocols relating to school drop-off and pick-up."

"For the safety of students and staff, we needed to stop parents and grandparents from walking around the school building and dropping children at the school in large clusters. Shortly after, we needed to fully close the school and ensure updates were received and understood by both our families and staff."

"With Operoo, we were able to rapidly distribute new COVID-19-specific updates, forms and remote learning processes. We even distributed feedback and internet access surveys through Operoo to establish which families required which levels of support to effectively participate in virtual schooling."

"The system made it easy to create different groups of stakeholders, ensure consistent information was distributed to those groups at the same time, attain sign-off regarding new operating policies, track responses and automatically chase stragglers."

"To be able to keep our school community connected, informed and accountable as COVID-19 developed was invaluable."

1 SINGLE SOURCE OF TRUTH

For all student data, consent, payments and school operations.

100% STAFF ADOPTION

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

OVER 80

School forms and workflows automated.



The Results

Consolidating school processes:

Blue Cards, parent consent, payments, school trips and more

Peterson said that while Operoo had quickly lightened the load on staff, dramatically streamlining many of its school processes in one place, none of that would have mattered without parent uptake of the system.

"Parent buy-in was absolutely critical to Operoo's success," said Peterson. "No matter how beneficial school staff found it, that view needed to be shared by parents -- and it is.

"At the beginning of the 2019 - 2020 school year, we distributed digital Blue Cards via Operoo. This doubled as both the first workflow we automated with Operoo, as well as the method we used to introduce the platform to our parent community. We now have all 685 students onboard.

"Parents love being able to respond to any request for information, or sign any type of consent, straight from their phones. And, teachers love having everything they need in the palm of their hand."

Whilst both parents and teachers have emphasized the reduced workload and enhanced reliability of the data captured through the school's digital forms and workflows, Peterson said it was a couple of emergency situations that really highlighted the benefits of ditching paper-based school processes.

"At the start of this school year, right after we started with Operoo, we had a missing student," explained Peterson. "I was on the phone to the police and immediately pulled-up that student's profile, alongside their picture and Blue Card and emergency contact information, so that I could share pertinent details then and there.

"Ms Carrier [PS 8's Parent Coordinator] was also able to share the child's Operoo Profile with other relevant staff members so that all the right people had the right information at the right time.

"Operoo's ability to help resolve the situation dominated conversation at our first PTA meeting of the year -- our parents were just as impressed as we were."

Two weeks later, a different child was rushed to hospital due to an allergic reaction.

"The teacher in charge immediately jumped into the ambulance, without hesitation, because they knew they could easily access all the student's medical details and emergency contacts straight from the Operoo mobile app," said Peterson. "In this scenario, Operoo was a complete game changer.

"There was no delay or mad scramble searching for -- or even making -- paper copies of Blue Cards and other required information during the actual emergency. We could fully focus on the student's needs."

While digital Blue Cards remains a significant use case for PS 8, Peterson said that Operoo's real power was its ability to streamline and consolidate many processes, or complicated multi-step processes, into one fully-digital workflow.

"Planning our 5th Grade trip used to mean hundreds of pieces of paper," said Peterson.

"Now, we can capture what we need in one digital form -- from parental consent and medical information, to payments and required t-shirt sizes."



The ability to integrate a variety of payment mechanisms into the one form type was particularly important to avoid confusion and arduous volumes of additional paperwork.

"Parents have always wanted to pay via credit card when submitting consent for trips and activities," said Peterson. "But, we couldn't support that need. Instead, parents found a bunch of different workarounds that inevitably caused confusion and compliance issues. Parents would pay at the office, and we'd then have to associate that payment to the right child, activity and separately submitted consent forms. Alternatively, we'd scrounge around the bottom of kids' backpacks for cash their parents had given them. And, if we actually found that money, we'd then lock it in the school safe and manually connect it to the right activity and consent form."

"Operoo is a lifesaver and eliminates an incredible amount of back-and-forth. As soon as parents submit online consent, we know that we've received secure electronic payment too. And, if we get last-minute permission and payment, we can let those kids board the bus with confidence."

PS 8 staff have also directly benefited from the overhauled payments capabilities.

"Teacher reimbursements used to be a nightmare," said Peterson. "It was something like a 10-step process. Now, it's one step with Operoo."

100s → 1

Trip management went from hundreds of paper forms to one digital workflow.

The Surprise

Online-only Kindergarten registration and student onboarding

Whilst using Operoo to streamline forms and workflows related to Blue Cards, parent consent, payments and school trips was always on the agenda, it was another unexpected use case that really dug PS 8 out of a sizable potential hole.

"When COVID-19 initially struck, and then schools closed, we were able to lean on Operoo to keep the lines of communication open and to facilitate virtual operation," said Peterson. "But then the NYCDOE changed its policy regarding student registration, which presented an entirely new challenge."

"Previously, children had to be physically seen in order to be registered for the new school year. The DOE then mandated that, due to the Coronavirus Crisis, schools had to establish 100 percent digital methods of registration, which meet all the same information requirements and compliance standards. I can honestly say that Operoo was a lifesaver here -- I'm not sure what we would have done without it."

Using Operoo and its best practice templates, PS 8 was able to seamlessly replicate, distribute and collect mandated forms digitally and automatically map them back to NYCDOE issued PDFs for record keeping -- from Proof of Age Forms and Home Language Identification Surveys, to Proof of Residency and Emergency Contact Cards.

685 FROM 685

All parents of PS 8's 685 students are engaging with forms and requests for info sent via Operoo.

10 STEPS TO 1

One-step teacher reimbursements in Operoo.



“ We’re doing Kindergarten registration completely remotely using Operoo, which is amazing,” said Peterson. ”

“Operoo delivers all forms straight to the cell phones of incoming parents, which they can complete, sign and return with ease in any language and from any device. From an administrative perspective, it’s also given the school the ability to track exactly what has and hasn’t been returned for each prospective student.

“In fact it’s all going so well, we have a waitlist for our Kindergarten program. And, we are able to move forward with registrations with no meetings or home visits, and no paper or photocopies. After this, it’s hard to see us going back to the old way of doing things.”

“I had some great feedback from a parent who was registering their second child for Kindergarten,” said Carrier. “They emailed me to say that completing Operoo’s digital forms was a huge improvement over sitting for an hour in a school office, child in tow, to fill out the same forms in ink.”

Buoyed by their experience, PS 8 is also now using Operoo to fully digitize its onboarding processes for returning students for the new school year.

“Parents and staff rave about Operoo,” said Peterson. “From the moment we signed-on, the Operoo team has been so responsive to our needs. It’s easy to use -- and I’m definitely not the most tech-savvy person. And, everytime we have a question, we’ve had an immediate reply. Everything has been amazing.”

139 KINDERGARTEN REGISTRATIONS

In the first month after setting-up PS 8’s new digital-only registration process.

