



### INDUSTRY

- Public Sector Education

### PRODUCTS/SOLUTIONS

- BPA CRM & Project Management
- Microsoft SharePoint
- Microsoft Office 365
- Power BI

### THEMES

- Stakeholder Management
- Program/Event Management
- Donation Management

### SOLUTION SUMMARY

Fulton County Schools (FCS) is the fourth largest school system in Georgia with more than 14,000 full-and part-time employees, including more than 7,500 teachers and other certified personnel, who work in 106 schools and administrative and support buildings.

In order to track partnerships and activities between the local businesses, learning communities and schools, a large Excel workbook was maintained. This method made it difficult to quickly find which schools have a lack of partnerships, or which partner organizations attended which event/program. Because this workbook was maintained by a small segment of the Communications Department, no other departments could easily access the information, which led to redundancy and inefficiency.

With BPA CRM and the flexibility of BPA No-Code Solution Builder, FCS was able to build a very powerful system to manage relationships, donations, programs, and events. PowerBI helps to identify which schools do not have business partners, so that relationships between the schools and local partners can be quickly and easily established. Grant Management and Constituent Issue Tracking applications are currently under development in BPA CRM.

### CHALLENGE

The Excel Partner Relationship Tracker was managed by a small team of 5 people in the Communications Department. For every group of stakeholders, a separate Excel Tab was maintained (Schools, Community Partners, Faith Database, ...). For the partnerships, a column "Partners" was updated manually. It was very time consuming to make double entries. i.e. in the Schools section a column Faith Partners was maintained and in the Faith section a column "School Partnerships" gave the reverse information.

For every new event or program a new Excel Tab was added to the file. Partners attending the event were copied/pasted into the new tab. Putting together reports was painful and took a lot of time. There was no easy way to know which events a partner had attended or donated to over the course of their partnership.

All requests about schools and partnerships needed to be addressed and handled by the Community Relations team.

### SOLUTION STRATEGY

FCS had already moved to Office 365 and used SharePoint 2013 extensively over the past years. Therefore, SharePoint Online seemed to be the right platform to replace the Excel Partner Relationship Tracker.

With BPA CRM, FCS had a great starting point to track Stakeholder details and their related Contacts. A place to track activities and assign Contacts to Campaigns (Events/Programs) was developed next. The Opportunities section has been identified as a potential option to track donations.



# SUCCESS STORY

## ⊕ FULTON COUNTY SUCCESS STORY

BPA and the FCS developers spent most of the development time designing the many-to-many relationships between schools and partners. The goal was to extend the out of the box Detail Page of a School and see what partners are affiliated. When clicking on one of the partner's names the user should be redirected to the Partner Detail Page, where they can see what other schools this partner supports. At the same time the user wants to see in which events and programs someone from this partner has participated. If this partner has attended the Thanksgiving luncheon, by clicking on the event's name, the user can now immediately see what other partners participated.

Everything was built with SharePoint lists and views. Once the correct architecture was configured, BPA CRM user interface was extended with no code using BPA No Code Solution Builder. FCS did the SharePoint configuration internally. BPA helped in the conceptual phases and in some advanced BPA CRM configurations.

With the addition of PowerBI, a user can now open a map of Fulton County and see which schools have partnerships, with the geolocation bubbles displaying in different colors depending on the number of partnerships. The Donation Dashboard displays donations received, as well as those in process. A Campaign Dashboard shows the number of events held and how many attendees were at each event.

A Grant Submission Application is currently being built using Nintex Workflow and Nintex Forms. Once a Grant is funded, it will be added into BPA CRM and show up under the Schools by adding a new Tab "Grants". A new Menu entry will allow users to quickly find Grants and manage their expiration dates and follow up on the payment schedules. A Grant Dashboard will be built with PowerBI to illustrate the industries providing grants, funding over the life of the grant, and 5-year projections of grant funding.

## RESULTS

With BPA CRM and PowerBI, Fulton County Schools has been able to leverage their existing SharePoint Online infrastructure to create a Community Relationship Management system that meets the needs of the schools, the Community Relationship team, the partners, and ultimately the students who rely on the community partners to support their learning.

The flexible nature of the BPA product allows for the customization required to meet the district's unique needs.

Having key users access the system in a self-service mode saves a lot of time previously spent in manual reporting and communication. The cloud-based system eliminates redundancy, allows users who are not in the Communications Department to have visibility into the relationships, and permits wider access to partner contacts. Dashboards give insight into the overall community relationship landscape and promote better collaboration and communication. FCS is looking forward to further expansion of BPA CRM, and several new use cases are under consideration.

## ✓ WIN RESULTS

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