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Nagendra Roy, Senior Director IT,
Aptude



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Major school district aces project and budget management with Microsoft Project Online and Visio

"We realized that we could build a tool based on Project Online that would align with our project management model and take us even further. That's how our PMO evolved to the point where it is today."

Tim Dunn, Director of IT Program Management,
Fulton County Schools



Fulton County Schools (FCS) in Atlanta, Georgia, is one of the state's biggest school districts. The FCS Project Management Office (PMO) supports the district's high educational standards by ensuring equally high-quality project management for peak administrative performance. Envisioning a solution to provide easy portfolio visibility and reporting, the department teamed with consulting firm Aptude, creatively blending Microsoft apps to realize that vision. Saving a week per month of PMO time alone, FCS is now at the head of the class.

It may not be obvious at first blush, but project management is as important to a large school district as it is to a business. For Fulton County Schools (FCS), technology is a game changer. Today's students learn in technology-rich classrooms—and administering the technology budget and resources needed to serve those thousands of children requires superb management.

To optimize its resources and best serve the 95,000 students of Fulton County, administration created a project management office (PMO) to ensure that everything from construction projections to technology rollouts runs smoothly. The district had never had the granular view into this activity that it wanted for decision making and budget management. Now that it has teamed with a local Microsoft partner firm to create its envisioned solution, the district is saving time and money. The big winners? The children of Fulton County.

Supporting education with a better business infrastructure

Fulton County Schools brought a program manager on board in 2009 to optimize operational outcomes through excellent project management. Six years later, the district expanded the single role to a program management office. Upon accepting the Director of IT Program Management role, mechanical engineer Tim Dunn began to build a team to implement the technologies and solutions the district needed.

Now the Director of IT Program Management, he heads a staff of 25. Dunn also thinks of himself as the custodian and guardian of “the penny”—the 1 percent sales tax approved by the voters of Fulton County for school infrastructure costs, particularly technology improvements. “We’re charged with working with our peers in academics, finance, and other departments to honor our

commitment to the taxpayers who approved this referendum,” he says. That means stretching his small team to cover a large project load. Without clear insight into the FCS project portfolio, planning was difficult and Dunn worried about staff overload.

The PMO team of project managers and analysts is responsible for five types of projects: network infrastructure, enterprise applications, capital improvements, IT security, operational hardware, and instructional technologies to roll out technology to the classrooms. Dunn's overarching goal: implementing a methodology to optimize the efforts of his small team. “We knew that we needed to mature the organization from a project-management perspective so that we were doing things in a systematic, uniform way, regardless of the type of project,” he says. That’s when he decided to approach Nagendra Roy, Senior Director of IT at consulting firm Aptude. Already embedded at the district, the firm had earned Dunn’s respect. “They had the bandwidth and the expertise to help us develop our project-management model,” he says. “We focused on our people first—training needs, how we assigned work to them—and then on process. But to standardize our processes, we needed the right tool.” That’s when the partnership between Dunn and Aptude began.

Teaming with the right partner

Dunn identified three top requirements: schedule management, budget management, and a secure repository for project artifacts. He’d researched the options carefully, delving into Gartner’s Magic Quadrants and exploring the marketplace in depth. “The turning point came when we chose Microsoft Office 365 and migrated everything to the cloud,” recounts Dunn. “And when I saw Microsoft Project Online at a partner

conference, I knew that this tool could help me with my top three wish-list items.” Dunn is glad he hired Roy’s team to help implement the solution. “Having Nagendra’s subject matter expertise and Aptude’s technology capabilities available saved me a tremendous amount of time and money,” he says. “And after a few conversations, we realized that we could build a tool based on Project Online that would line up with our project management model and take us even further. That’s how our PMO evolved to the point where it is today.”

“Using Office 365 apps, we worked together on a strategy to take people, process, and technology forward so that we could cover all dimensions of the need—content management, visualization, project management, and portfolio management.”

Nagendra Roy, Senior Director IT, Aptude

One of the issues Dunn faced was managing capacity for his small team. Not only was it difficult to maintain clear insight into the portfolio and prioritize projects, but tracking his staff’s accomplishments—and reporting them to executives—was cumbersome and time-consuming. By the same token, without accurate, up-to-date information about current workloads, prioritizing and planning those projects and estimating timelines for upcoming initiatives was more difficult than it should have been. Dunn knew that a tool that could provide insight into PMO capacity would benefit the entire organization. He and Roy formed a vision for an overarching PMO solution built on Project Online. Building a solution as sophisticated as the one they planned from the ground up could be daunting. But Dunn and Roy saw opportunity in the varied, yet connected tools in Office 365.

Building the Navigator solution: Greater than the sum of its parts

With its Office 365 subscription, FCS already had access to advanced, off-the-shelf building blocks to create a solution that ticked every box on Dunn's wish list. "We've always been a SharePoint shop," says Dunn. "And part of the beauty of Office 365 is that it is largely built on the SharePoint environment in the cloud." FCS is beginning its transformation from on-premises to cloud based computing. Dunn believes that creating a cloud-ready tool sets a strategic foundation. He looks forward to the FCS migration to SharePoint Online in 2020. "Our tool is ready for our eventual full cloud adoption. When we get to that stage, we'll have even greater functionality and more features," he adds.

"This is much more than a simple automated process. We're saving a week of time while producing a better project portfolio report—consistent, succinct, and very readable. And my team enjoys using it."

Tim Dunn, Director of IT Program Management, Fulton County Schools

Integrating the applications and developing the solution was a journey, says Roy. "Using Office 365 apps, we worked together on a strategy to take people, process, and technology forward so that we could cover all dimensions of the need—content management, visualization, project management, and portfolio management," he adds. His team created a tool called "Navigator" based on Project Online for project management and SharePoint for content management and collaboration.

To give project teams and stakeholders a fast, easy view of individual projects and the FCS project portfolio, the Navigator

development team blended Microsoft Visio into the solution. The team uses Visio with SharePoint and Microsoft Flow to create a graphical picture of project status. Adding Microsoft Teams gives FCS project managers a further edge when initiating projects. With project teams frequently composed from assorted departments, kick-starting collaboration is key to project success. Upon project approval in Project Online, the tool automatically creates a project team with the project name and embeds a dashboard directly into Teams. New team members don't have to go to Project Online to learn about their project assignments; they click on a link in Teams and the project dashboard appears.

The FCS PMO stays ahead of the project trajectory, surveying stakeholders and incorporating inquiries via Microsoft Flow, which also streams data into Power BI. Project managers monitor projects using Microsoft Visio not only to create visual maps of everything from organization charts to processes, but also to compare progress at regular intervals and perform gap analysis for district-wide projects. The icing on the cake for Dunn was the seamless integration of Power BI with Project Online. "I knew our data team were Power BI experts," he says. "But I had no idea of how well it interoperates with Project Online. That opens a lot of possibilities."

Visualizing complex data for better decisions

If information is the lifeblood of a PMO, then Power BI is the heartrate monitor. In an increasingly data-driven society, information flows faster from more sources. To stay productive, FCS staff need real-time data to provide senior management with the most current information for proactive decisions—and action.

The FCS team augments the timeline views available in Project, using Visio to develop a range of charts tailored to FCS

needs and deliver high value to multiple audiences—from Project Managers and project teams to executives. PMO leadership uses a program-level timelines chart for quick updates, while project managers and stakeholders drill into a given project using tailored project timeline charts and end-to-end project roadmap charts from Visio. The teams see both summary and detailed step-by-step views of their owned and participating processes and services; and that data from Visio integrates with Microsoft Flow and Power BI for automated workflows that further enhance PMO governance and productivity.

For Dunn, the obstacles to sharing capacity data about his team with executives is a fading memory. The PMO leadership, project managers, and executives can now see projects from a matrix of vantage points, whether from a budget perspective, goal progress, or risks and issues. With Visio, all phases of the project are clearly represented in a convenient graphical format. "It shows a glimpse of the full portfolio of all of the works that are in progress, large and small, so that as we discuss priorities and capacity, or if the district considers new initiatives, we have the information we need," says Dunn. FCS uses the flexible Visio charts to empower its stakeholders, who can edit the charts/views tailored for them. "And when we realized that Visio works seamlessly with Power BI, we began to integrate our Executive, Portfolio, Program, and Project Manager Dashboards with the corresponding Visio charts that we already have in place, in order to create a dynamic, automated, futuristic, and productive integrated solution," he adds.

Spreading the word: Project management to lift every department

The PMO's toughest customer is the mission-critical one: academics. Dunn deeply respects their expertise. "There are decades of experience in education per person,

especially at the central office level," he says. "They're experts in the science of learning. But they hadn't encountered project management, technical IT, or business. They shouldn't need to, of course. But they are now seeing how they can use project management to implement the things that are important to them." Project managers and project team members use reports, workflows, and dashboards related to academic projects under PMO management to seamlessly execute planned activities and data-driven decisions. It's also given a crucial window into school performance for academic stakeholders, like district principals.

At the central office level, it's all about staff productivity. With state-of-the-art technology at their fingertips, they're able to get more done, increasing support for the teaching staff. When non-PMO staff join project teams, better capacity planning means less disruption to their regular work.

Accelerating learning with technology

Dunn is clear that nothing will ever replace "good old-fashioned teaching and learning." He is adamant that the best technology in the classroom is still the teacher. "But teaching staff can use technology to enhance and ultimately improve the learning process," he says. "We like to consider ourselves the 'behind-the-curtains folks.' The district has an overarching strategy and vision for how student outcomes should unfold. We are the solution providers."

His team sits at the nexus of every part of the school system, working closely with academics, instruction, finance, talent, and operations to ensure that the technologies provided enhance learning. All middle and secondary students have district-provided devices. Class sets of student devices are standard in FCS elementary schools. Ensuring that those devices and networks are safe and secure is vital to the district, and the FCS PMO stays on top of security projects with the project insights it has achieved.

Saving time, achieving excellence

Like the FCS project managers, Dunn and his assistant once dreaded monthly project and portfolio status reports. Project managers updated status spreadsheets that were combined and reviewed for quality. The differing writing styles of the 15 contributors meant days of reviewing and rewriting to produce a high-quality report. Now, as project managers enter their updates, the Navigator tool combines them automatically to produce that monthly portfolio report, which is also available in real time on the project dashboard. "This is much more than a simple automated process," says Dunn. "We're saving a week of time while producing a better project portfolio report—consistent, succinct, and very readable. And my team enjoys using it."

The team also appreciates the organization that the tool brings to their professional lives. The Navigator tool opens a window

into the capacity for team members and can be overlaid with the work schedules of non-dedicated team members from other departments so that commitments and expectations don't clash. With a view into each project and how it might impact other projects, the PMO is set for continuing achievement.

Fulton County Schools CIO Serena Sacks is impressed with the progress made by Dunn's team. Recognized by the Georgia CIO Leadership Association as the 2017 CIO of the Year for her accomplishments in information technology, Sacks has long advocated for PMO advancement and more recently, the Navigator project. "Our forward-looking PMO has combined Microsoft apps to create a project management solution that we use for visibility into every project in our portfolio. That translates into an educational advantage for the children of Fulton County," she says. That support inspires the rest of the organization to reach for the same benefits. "With her as champion of this approach at the executive level, other groups are seeing the benefit of our work and are asking for our help to manage projects," says Dunn. "It's intangibles like this that show us that the rubber is really hitting the road, because at the end of the day, we're here to support teaching and learning. Having our academic colleagues on board and making good things happen for them is what we're all about."

Software

- Microsoft Office 365
- Microsoft Flow
- Microsoft Project Online
- Microsoft SharePoint Online
- Microsoft Teams
- Microsoft Visio
- Microsoft Power BI

Overview

Customer: Fulton County Schools

Customer Website: www.fultonschools.org

Partner: [Aptude](#)

Products and Services: [Microsoft Project Online](#)

Country or Region: United States

Industry: Primary and Secondary Education

Employee Size: 14,000 employees