

Montana Office of Public Instruction



The Company

The Montana Office of Public Instruction (OPI) oversees the School Nutrition Programs unit that administers school-based child nutrition programs throughout Montana on behalf of the U.S. Department of Agriculture (USDA).

The Need

In order to deliver on its mission to ensure schools provide nutritious meals and promote healthy lifestyles through collaborative education and training, and administration of the USDA School Nutrition Programs, OPI needed an efficient method to track student eligibility for the programs. Previously, spreadsheets were used to manually identify students in the district who were enrolled in state assistance programs that qualified for the School Nutrition Programs. The process was time consuming, labor intensive and prone to error.

In addition, OPI was under new federal requirements for its direct certification rate. Direct certification is a critical tool to improve access, increase accuracy, and reduce paperwork in the school nutrition programs by simplifying the certification process. OPI needed a system that would provide access to data quickly and more efficiently.

The Solution

OPI determined that a CRM solution that could analyze data from multiple sources would be the best fit for their organization. OPI was introduced to Aspect at the recommendation of Microsoft, and after an extensive search process OPI selected Aspect's Professional Services (APS) to deploy Microsoft Dynamics CRM. The decision ultimately came down to Microsoft Dynamics CRM collaboration tools and the ability for a custom data search.

Aspect and OPI built the Direct Certification Application (DCA) on Microsoft Dynamics CRM for OPI to make it easier for its schools to enroll children in the School Nutrition Programs by matching students in the assistance programs with students in each school district. Before implementing CRM, OPI conducted a manual method of matching state data sources (matching students to eligible children in Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance for Needy Families (TANF). The last manual matching process OPI performed in November 2012 found 42,423 eligible children from SNAP/TANF resulting in 26,815 matches (63%). Current Production DCA matches found 45,071 eligible SNAP/TANF children resulting in 39,835 matches (88%). In addition, staff paperwork has been reduced, and OPI has quicker access to data for reports and federal requirements.

To ensure that errors in the database, misspelled names or wrong addresses, do not interfere with a student qualifying for meals, Aspect, OPI and InRule, a provider of business rule technology for the Microsoft platform, worked together to build a custom application that enhances matches by flagging near matches to the users.

OPI continues to seek ways to improve the matching process, identify unaccounted for children, and add additional eligible sources.

"We've been especially pleased working with Aspect on the Microsoft Dynamics CRM deployment. Their knowledge and expertise ensured a smooth installation and guided us as we learned the solution," said James Geitzen, IT Services Division Administrator, Montana Office of Public Instruction. "Of all the vendors we considered, Aspect was the only one that could truly help us reach our goals to meet the federal requirements, and ensure that students in our state receive access to proper nutrition."

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