

Creating a Roadmap for Modernizing Operations with SharePoint and Power Platform

The Oakland Museum Women's Board (OMWB) has been supporting the Oakland Museum of California (OMCA) for more than 60 years. This non-profit organization raises funds for the Museum by conducting one of the largest rummage sales in the country, www.whiteelephantsale.org. The volunteer-based workforce consists of board members who support committees that manage the sale, the building, and the sale volunteers. More than 1000 volunteers contribute their time to collect, organize, price, and display donated items for the sale which is usually held in the Spring of each year.

The OMWB warehouse is over 94,000 square feet and sells anything you can think of, from small household items and clothing to entire households of furniture. The event draws thousands of shoppers each year and has raised millions of dollars for the Museum in six-plus decades.

THE CHALLENGE

An amazing group of women have accomplished remarkable things year after year, with grit, determination, and a passion for supporting the Museum. Over the years, the OMWB has managed its annual White Elephant Sale using loads of paper, email, and a Microsoft Access database. The Board started dreaming of its digital transformation to not only improve operations in the short term, but also to archive documents, histories, and photos so they are accessible digitally to relevant members. Board Members and Volunteers have grown up in a digital world, and paper processes have become arduous and costly.

In early 2021, Kathryn Autin, OMWB member and Co-Chair of a committee on information systems, was looking for help to bring the organization into the digital

SUCCESS METRICS

1. Collaboration needs defined and prioritized
2. Education in Microsoft 365 collaboration tools and best uses conducted
3. Multi-phase implementation roadmap delivered
4. Phase 1 scope and budget delivered

INDUSTRY

Non-Profit

PLATFORMS AND SOLUTIONS

- Microsoft 365 – SharePoint Online
- Microsoft Power Platform
- Microsoft Teams
- Microsoft OneDrive
- Microsoft Forms
- Microsoft Lists

"We were excited in every meeting with Compass365 because we all knew how much value the changes they suggested are going to bring to the day to day work of our wonderful volunteers."

Kathryn Autin, Board Member,
Oakland Museum Women's Board

ABOUT COMPASS365

Compass365, a Microsoft Gold Partner, combines our years of SharePoint and Microsoft 365 expertise with proven methods to improve the way companies work, operate, and confidently get the value from their Microsoft investments.

age. Kathryn and team reached out to Compass365 with a laundry list of needs, including SharePoint sites for the board members and volunteers, migrating the last five years' of documents into an online repository and a vision for automating a variety of manual processes. The OMWB needed guidance on where and how to start. To address this need, OMWB selected Compass365 to lead a Workplace Collaboration Assessment and Roadmap Planning engagement.

THE INVESTIGATION

The Assessment and Roadmap Planning engagement consisted of a series of workshops with Ingrid Camill and Jill Stelter from Compass365 and representatives from the OMWB. As a Sr. Solutions Architect and Director of Compass365, Ingrid's deep technical expertise of the Microsoft 365 platform capabilities combined with Jill's focus on governance, training, and user adoption, provided the Women's Board with a holistic view of the efforts necessary to successfully enable workplace collaboration.

During the workshops, Compass365 and OMWB discussed how the organization works, improvements needed, and the Microsoft 365 platform. Compass365 considered priority of needs, readiness, and potential challenges.

All agreed that this digital transformation will take time and that user adoption and enablement of their internal resources will be key to long term success.

THE SOLUTION

Based on the investigation, Compass365 developed a roadmap with recommendations and shared it with the Women's Board. Together, they determined that the best next step is to have Compass365 build the Committee and Volunteer Hub sites to include the following features: general information, global navigation,

news/announcements, shared document storage, calendar, how-to guides, and FAQs.

Compass365 and the Women's Board will collaborate to build the OMWB committee and sale department sites to ensure the Women's Board is trained and enabled to confidently support the digital platform.

With a clear scope, timeline, and budget estimates, Kathryn and the OMWB have a path forward and will be able to build the digital platform with continued support from Compass365. This engagement outlined the foundational steps the Women's Board will be taking to evolve from a paper and email culture to a digitally enabled organization in an estimated eight weeks.

COLLABORATION AND MODERNIZATION

With the successful completion of the 2022 White Elephant Sale, the OMWB and Compass365 are about to embark on the first phase of their digital transformation. We will check back in after implementation of phase one.

The OMWB's Roadmap for Workplace Collaboration in Microsoft 365 serves as a guide to improving the day-to-day efficiency and effectiveness of hundreds of Board Members, Committee Members and Volunteers, enabling them to do what they do best – support the Oakland Museum of California!

"The word I would use about Compass365 is patience. They listened to our story and crafted a solution to fit our user base who will be adopting completely new ways of working."

Kathryn Autin, Board Member,
Oakland Museum Women's Board