




Microsoft Fabric supports 1st Planner with real-time decision making for public sector transformation



Highlights

AI-enabled Microsoft Fabric with Power BI is deployed for evidence-based planning so local authorities, Diocese and Multi Academy Trusts can make faster decisions on all aspects of mainstream and high needs education provision.

1st Planner is transforming the way education providers access, manage and act on data to improve the outcomes of mainstream and high needs pupils, without overspending on both capital and revenue budgets.

Huge static PDF reports that were manually generated are dramatically reduced by enabling customers to uncover insights with visuals on interactive dashboards.

About the organisation

1st Planner is a small organisation that specialises in population planning, school estate efficiency and funding identification.

It supports education providers in identifying and creating school places for mainstream and SEND (Special Educational Needs and Disabilities) pupils, without overspending on capital and revenue budgets. 1st Planner forecasts future populations whilst identifying capacity within existing estates and identifying funding sources to achieve the needs and objectives of education providers.

The Challenge

Mainstream pupil place planning and school estate sufficiency is generally a robust process by local authorities. But the complexities of increasing demand coupled with a lack of a defined approach means planning places for individuals with SEND is not always so systematic.

As specialists in planning populations and combining projections with asset requirements, 1st Planner maps huge amounts of data. From pupil numbers and buildings provision to tracking

trends, it calculates SEND supply and demand for its three main client types: local authorities, dioceses and multi-academy trusts.

Until recently, the firm was bringing data together and performing analyses using various software packages, including Excel, Sketch Up, AutoCAD, QGIS, Google Earth Pro, Adobe and



PowerPoint. The process was time-consuming and with a large influx of work, 1st Planner could not carry out numerous projects at the same time to meet demand, because the volume of work to undertake each commission was so considerable.

Rob Tozer, Managing Director, 1st Planner, says **“We had initially engaged a software provider to build a bespoke data system, but ultimately, it did not meet our needs. At the same**

time, we were upskilling our novice data development staff to take on complex data projects themselves and really needed to give these staff the right technology to more easily access, manage and act on data.”

With data integration, modern tools, visualisations and easy-to-use dashboards, 1st Planner could not only increase the volume of projects it takes on but empower its clients to uncover insights for themselves.

Working with Xpedition

“Xpedition has really helped us increase efficiencies and save time in our workloads and will enable us to scale the business as we automate our processes. Our education providers will now get faster data analysis and reports in very accessible formats to support their strategic planning.”

Rob Tozer, Managing Director, 1st Planner



Solution

To help staff and customers access data faster, 1st Planner now uses Microsoft Fabric to deliver a unified data platform, giving its team the tools they need to reduce data integration efforts backed up by governance and security. Power BI provides the easy-to-use dashboards so staff and customers can visualise data and interact with reports from the Fabric workloads.

It selected Xpedition initially to administer its Fabric licences. Wanting to train its staff up quickly and efficiently, 1st Planner then tapped into Xpedition's how to guidance and training expertise to help staff become autonomous with the technology rather than having to rely on a third party.

The introduction of Microsoft Fabric allows 1st Planner to take advantage of AI-enabled technology to help identify pupil places and improve efficiencies in education provision much faster. Manual reports that used to be over 500 pages long can now be presented on a dashboard using visualisations, graphs and charts. This key data can be deployed directly by local authorities, dioceses and multi-academy trusts for decision-making.

Rob explains, **“We are already working with two local authorities who are using the Power BI dashboards to access their own provisioning data and seeing reports presented in such a visual, useable way is ground-breaking for them. The new system is also saving us so much time. Without the**

need to intensively number crunch, as a team we can focus on adding more value elsewhere in the business.”

“Microsoft Fabric with Power BI will allow us to increase the volume of projects we can do. Previously we

were working manually while using Excel and numerous other software packages. Fabric bridges this gap, so everyone is accessing data using a single platform,” highlights Rob.

Benefits

Faster decision-making

With relevant data available in one place, customers can benchmark against other local authorities in numerous different ways to make faster, key decisions about pupil planning and estate provision.

Confidence in evidence-based data

Because the system provides an audit trail of all the raw data that comes from many different sources, it gives customers the knowledge the decisions made are based on evidence.

Impactful and visual reports

Staff and customers can visualise data and utilise the various charts and graphs with the user-friendly dashboards presented in Power BI.



Scalability of business

This modern Microsoft Fabric platform means 1st Planner can give local authorities, diocese and multi academy trusts the tools to access their data, make decisions and implement development plans more quickly, enabling the company to expand other work streams and opportunities in other sectors.

To learn more about Xpedition visit: xpedition.co.uk
Or contact us on +44 (0)20 7121 4705

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