

# PLANNING TOOL: Assessing Value on Investment

COMPONENT	KEY SEGMENTS	KEY QUESTIONS	VALUE PERSPECTIVE
Return on Investment (ROI)	<ul style="list-style-type: none"> <li>a. Time Savings</li> <li>b. Money Savings</li> </ul>	<p>Does the school have to enter the same data multiple times?</p> <p>When data is corrected, how many places need to be touched?</p> <p>Does the school pay multiple licensing fees to different vendors?</p> <p>How expensive is setting up connections between multiple different products? Who will maintain the links?</p>	<p>Entering data once with no need to check multiple databases, will save time, money, and increase data integrity.</p> <p>One licensing fee cost v. multiple fees.</p> <p>Estimate cost/time of creating integration between multiple different products. What is the cost in time or support fees?</p>
Missional Proof	<ul style="list-style-type: none"> <li>a. Evidence</li> </ul>	<p>Can the school show that they are meeting the Goals set forth in the Mission?</p>	<p>Prospective and current parents want to "see" that the school is a success. Report/Charts/Graphs</p>
Data	<ul style="list-style-type: none"> <li>a. Accurate Data</li> <li>b. School Use</li> <li>c. Data Migration</li> </ul>	<p>Does the school believe their data is accurate?</p> <p>How much U.S. mail is returned from old addresses? How many emails bounce back?</p> <p>How does the school use its data? Dashboards? Cross-office reporting?</p> <p>Who will do the data migration of current data? Of legacy data?</p>	<p>Saves staff, students and parents time and aggravation. Decreases costs from inaccurate data, from cost of mailings returned, etc.</p> <p>Missional Proof, better understanding of where the school is being successful and where it needs to be improved.</p> <p>Understanding the options and being realistic about in-house talent will guide to selecting the correct implementation plan and ultimately lead to a successful change.</p>
Productivity	<ul style="list-style-type: none"> <li>a. Permissions</li> <li>b. Internal Use</li> <li>c. External Use</li> </ul>	<p>Can data owners update their own data or must all flow through a particular staff person?</p> <p>Is data from one office able to be viewed/used by another office?</p> <p>Do constituents consistently login and use the system?</p>	<p>Data owners can be responsible for their own data, saving time and input errors from data clerks. Parents own their data, etc.</p> <p>The appropriate sharing of data gives offices the ability to answer deeper and more meaningful questions.</p> <p>Better use by your constituents leads to happier constituents and reduces labor for internal staff.</p>
Security	<ul style="list-style-type: none"> <li>a. Location</li> <li>b. Responsibility</li> </ul>	<p>Is security handled on premises or by the vendor?</p> <p>Who is responsible for patches and updates to security between multiple different systems?</p>	<p>Having the data hosted off-site allows for better disaster recovery and a more secure environment. (Amazon hires a lot more security specialists than any one school.)</p> <p>In an integrated system, security updates are coordinated and released across all systems, removing this task from school staff.</p>

## Success Factors of a New School Management System

COMPONENT	KEY SEGMENTS	KEY QUESTIONS	VALUE PERSPECTIVE
Leadership	<p>a. Align Leadership</p> <p>b. Define Responsibility</p> <p>c. Determine Change Management Strategy</p>	<p>Does the leadership team -- especially the head of school, CFO, and CIO -- support this effort?</p> <p>Who will be in charge of the evaluation of options and ultimately the implementation?</p> <p>Is there regular communication with all constituents regarding the reason for and status of the change?</p>	<p>Leadership support leads to faster implementation and greater success</p> <p>Clear responsibility/accountability for each activity is required for successful implementation.</p> <p>Communicating with all constituents keeps everyone on the same page and eliminates assumptions about what is going on.</p>
Data Governance	<p>a. Data Mapping</p> <p>b. Data Standards</p> <p>c. Ownership</p>	<p>Does the school have a data map for core systems?</p> <p>Does school have a data standards document?</p> <p>Has the school identified primary and secondary ownership for maintaining data integrity?</p> <p>If the answer to any of the above is no, how will this be overcome?</p>	<p>Helps plan the implementation and makes sure data ends up in the correct spot in the new system.</p> <p>Improves data consistency when all are using the same format.</p> <p>Naming a key person gives them ownership to maintain the data system, which leads to higher value and trust in the data.</p>
Support and Professional Development	<p>a. Existing Resources</p> <p>b. Consultative Support</p> <p>c. Consistent Look and Operation of Digital Tools</p>	<p>Are just-in-time tools (manual, videos) available to help users who encounter problems or have questions?</p> <p>How does the vendor respond to questions or needs outside the original scope of the project?</p> <p>Has the school planned for sufficient training for initial use and for further development of skills in using administrative and learning products?</p>	<p>Oddities of multiple systems working together won't be covered in vendor-created videos or manuals. IT staff will need to create workaround explanations</p> <p>The right vendor will be able to support your flexibility with the solution to be more responsive to your mission.</p> <p>Learning an integrated system, while having complexity, is more time-efficient than learning multiple systems.</p>