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ACSI Ontario Board/Administrators' Conference
February 5th, 2011

Information Integration For School Business Offices



Start Time: 11:35 am ET

Duration: 60 minutes

Presentation: 45 minutes

Q&A: 15 minutes

PRESENTED BY:

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PARTNER



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Definitions

“Information integration (also called information fusion, deduplication and referential integrity) is the merging of information from **disparate sources** with differing conceptual, contextual and typographical representations. -- Wikipedia, 2011

“Data integration involves **combining data** residing in **different sources** and providing **users** with a **unified view** of these data. Data integration appears with increasing frequency as the volume and the need to share existing data explodes.”

-- Wikipedia, 2011

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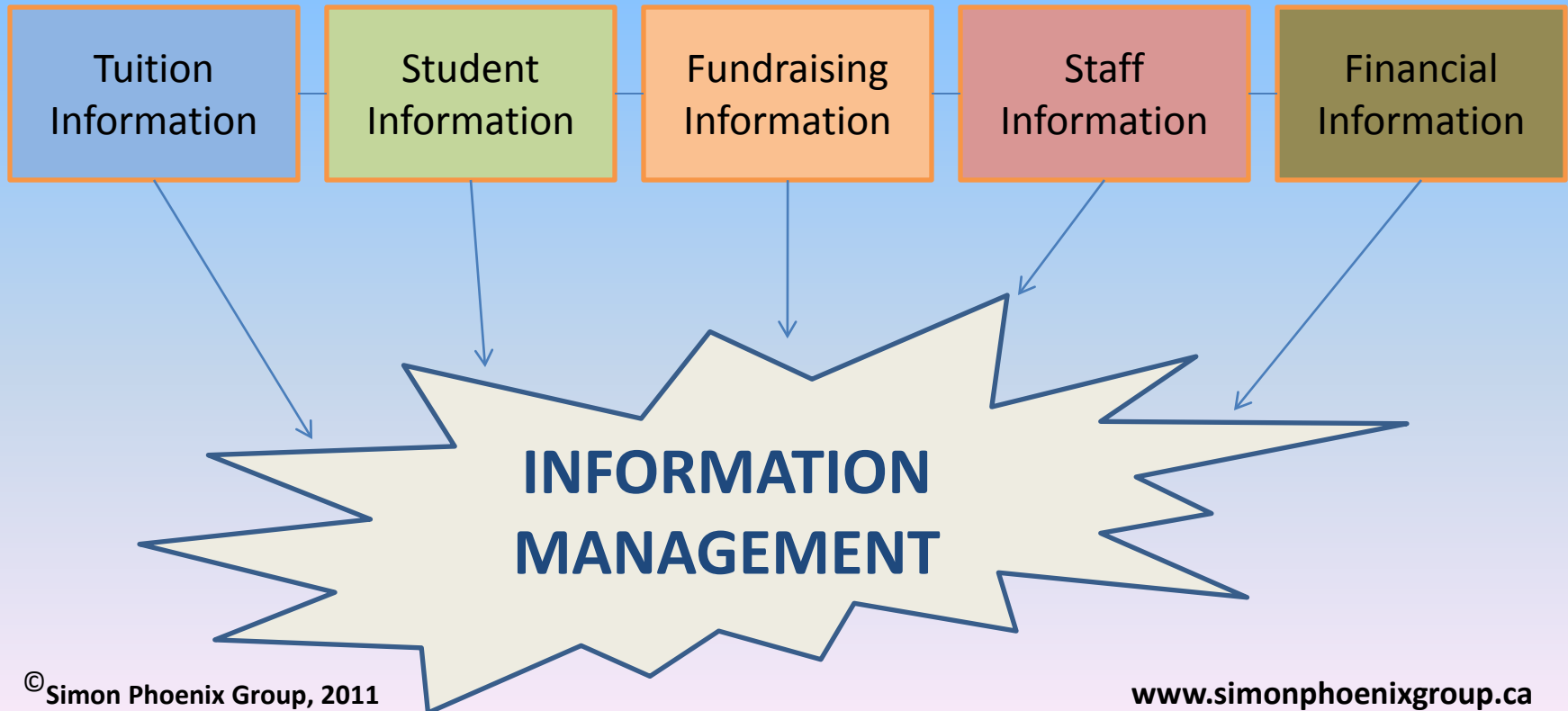
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INFORMATION TYPES





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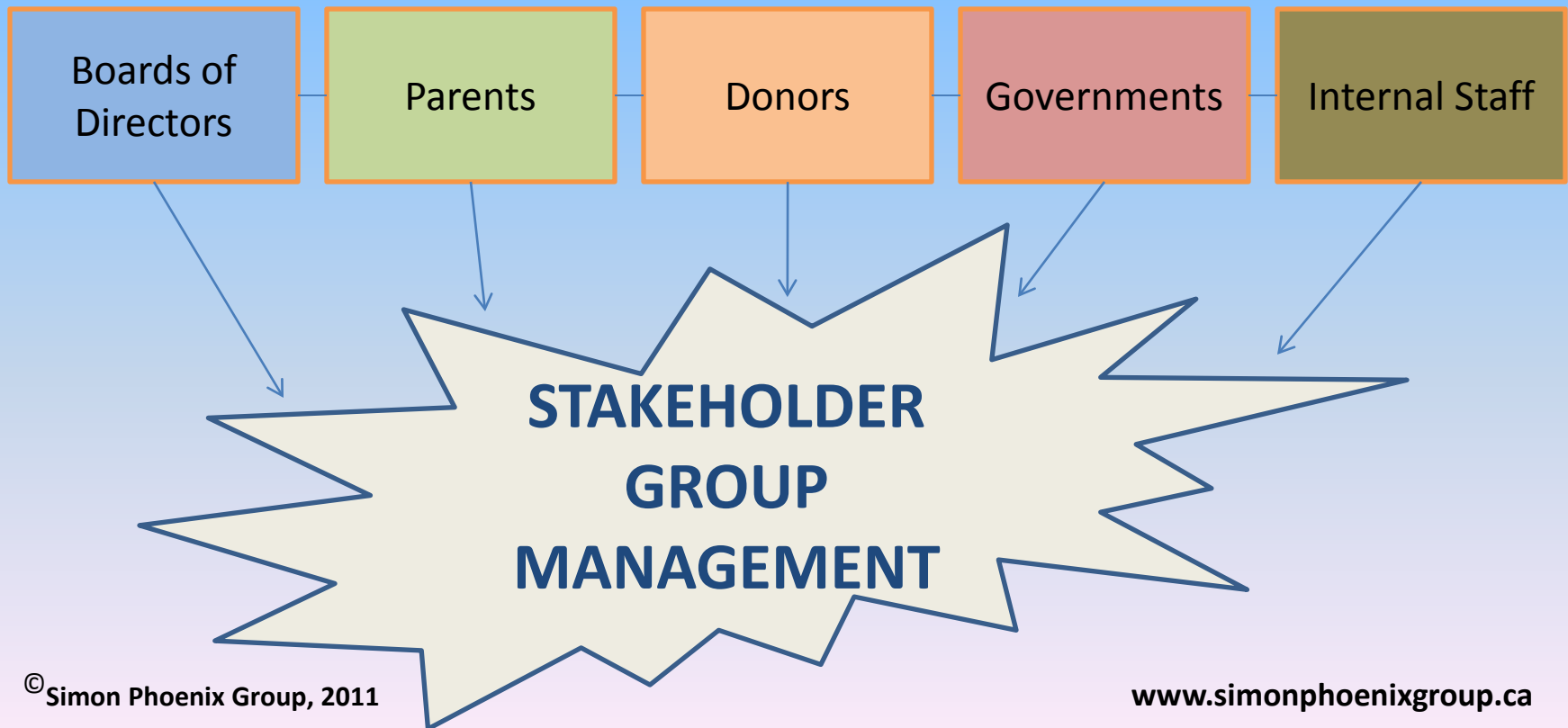
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STAKEHOLDER GROUPS



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INFORMATION COMPONENT

Tuition
Information

- Financial Reporting (Boards, CRA)
- A/R Management
- Tax Receipt Production



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INFORMATION COMPONENT

Student
Information

- Board Reporting
- Government Reporting (OnSIS)
- Student and Parent Communication (Newsletters, Emergency, etc.)
- Medical Data (Allergies, etc.)
- Student Management (Class Lists, Report Cards, etc.)



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INFORMATION COMPONENT

Fundraising
Information

- Board Reporting
- CRA Reporting
- Donor Reporting
- Donor Contact Management
- Tax Receipt Production

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INFORMATION COMPONENT

Staff
Information

- Board Reporting
- OnSIS, Ministry of Labour, CRA Reporting
- Staff Management (Salaries, Substitute Teacher Usage, etc.)
- Union Reporting
- Budget Analysis



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INFORMATION COMPONENT

Financial
Information

- Financial Management (Cash flow, A/R, A/P, Student Tuition Management, What-if-Analysis, Student Pop Projections, etc.)
- CRA and Audit Reporting
- Board Reporting
- Budget Analysis

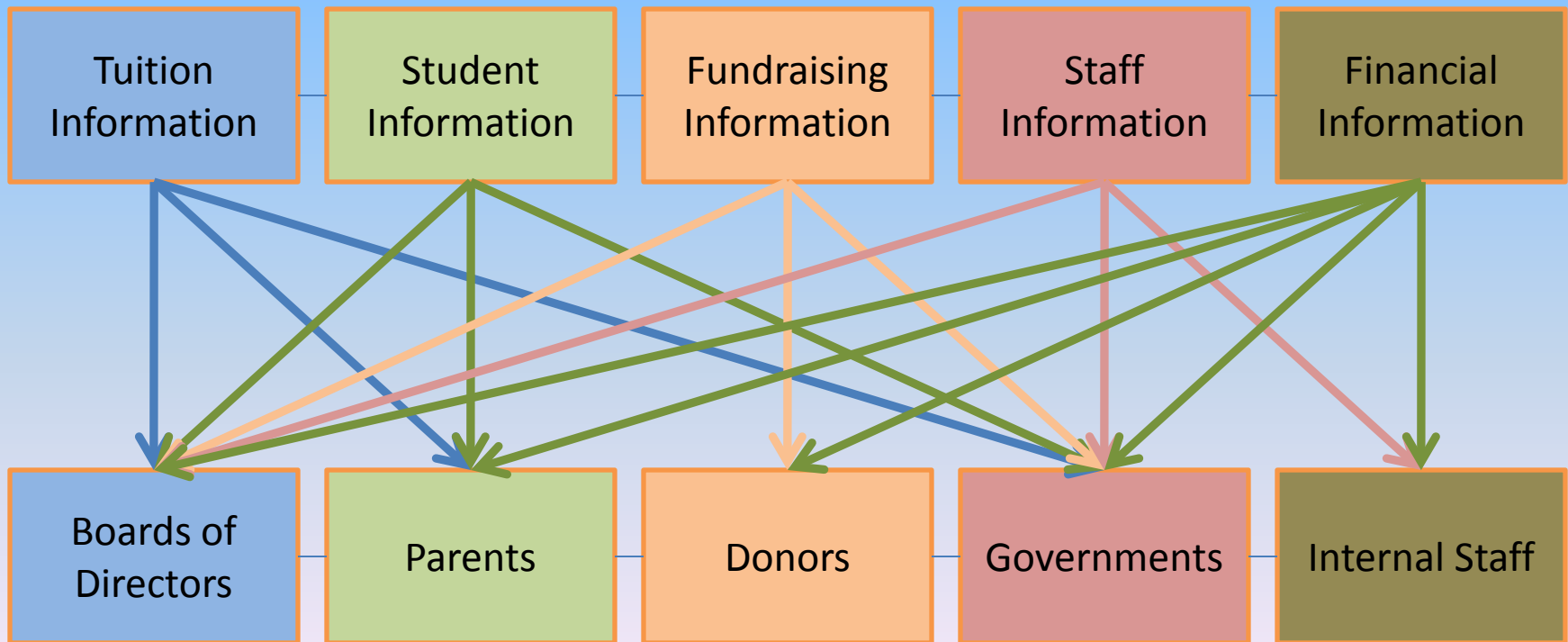
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INFORMATION – STAKEHOLDER RELATIONSHIPS





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INFORMATION – STAKEHOLDER RELATIONSHIPS

Current State

- Multiple methodologies (computer-based and paper-based) employed for information management, using a multiplicity of tools (spreadsheets, databases, text documents, email client contacts)
- Maintaining version control over tools can be problematic
- Transferring data between tools can be straightforward (Microsoft Office[®]), or require more detailed knowledge (transferring financial transactional information into other applications)
- Reporting quality and frequency can vary depending on staff and/or tool capabilities
- Additional consulting and/or staff time costs associated with current state data management



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INFORMATION – STAKEHOLDER RELATIONSHIPS Future State

- Minimization of reliance on paper-based systems
- Clearly defined and understood business office information management requirements (core processes versus “nice to have”)
- Above requirements treated on a “holistic” rather than “individualistic” basis
- Clearly defined and understood organizational staff and technical capabilities
- Alignment of information management requirements with “best-of-class” applications
- Selection criteria to determine “best-of-class” should be based on the following:



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INFORMATION – STAKEHOLDER RELATIONSHIPS

“Best-of-Class” Application Selection Criteria

- Ability to maximize number of business processes managed
- Ability to adapt to existing business processes
- Cost (initial and maintenance)
- Ease of use
- Customizable
- Ability to easily share and manipulate data within existing organizational framework



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ADVANTAGES

- Minimize number of applications in use
- Maximize efficiency of staff
- Cost minimization
- Better understanding of your own business
- Better able to share, manipulate, and analyze data
- Faster and more flexible reporting capabilities



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PITFALLS

- Lack of strategic planning
- Incomplete or inaccurate assessment of business information management needs
- Assuming the most expensive information management application is the one best suited for your needs
- Trying to change everything at once (ie backend systems, website, business processes, etc.)

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QUESTIONS?