

# **ILS Z556 - SYSTEMS ANALYSIS AND DESIGN**

## **CHRISTEL HOUSE INTERNATIONAL**

Specification Document

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## 1 Executive Summary

Christel House International (CHI) is a non-profit organization headquartered in Indianapolis which provides funding and oversight to schools operating in 5 countries around the world (India, Jamaica, Mexico, South Africa, and the United States). The organization plans to grow in the coming years. The organization's current reporting system is as follows: At the beginning of their academic year, schools submit comprehensive business plans in pre-formatted word documents detailing their priorities and plans for the upcoming year. Throughout the year, they submit pre-formatted reports each month, and finally, a more comprehensive report at the end of the school year summarizing challenges and accomplishments.

CHI is seeking to expand, but it is currently facing some challenges. The current monitoring and oversight structure is time-consuming and prone to human error. As the schools operate on different yearly schedules, it is difficult to synchronize and optimize the reporting calendars. Report creation and review are also time-consuming. Interviews with client school representatives indicated that the creation of business plans can take up to 25 days, and there is ambiguity in following the instructions given in the report. Additionally, the data management is not as efficient as it could be. The student data warehouse project (data management plan) has encountered numerous roadblocks due to budget constraints, the COVID-19 pandemic etc., and there is concern that it will not be adequately integrated into daily practices. While the organization looks towards expansion, it is evident that the burden of reporting and oversight must be reduced, and the data management plan must be determined.

Although CHI is a non-profit organization driven by the mission to break the cycle of poverty through education, we suggest CHI align its reporting systems in a similar manner to a for-profit organization. This will allow the organization to achieve their mission more effectively. We propose transforming CHI through structural and technological changes, resulting in an information system based on four key factors: Data, Database, Process, and Information. In the end, the reporting system needs to be viewed through the lens of business intelligence (BI) so that it offers historical, current, and predictive views of the business environment.

It is crucial that CHI determine what data should be collected and create appropriate metadata that clarifies the exact definition and purpose of the collected information. This data can be used to create Key Performance Indicators (KPIs), which indicate how well a team is accomplishing specific goals and ultimately how well CHI mission is executed. CHI should develop KPIs that reflect its central goals and clarify responsibilities across departments. There should be a charter outlining each performance indicator in detail, including its use, underlying data sources, and target. The charter must be signed by all relevant stakeholders at CHI.

We recommend CHI reform its data collection strategy to make it more organized and efficient. Currently, CHI relies on Word and Excel documents to collect data from each Learning Center (LC). We recommend that CHI transition away from Excel as a data-collection tool, and instead utilize SharePoint Forms that connect directly to the SQL database. Through this process, all reporting entries will be pushed directly into the SQL Server database in a cost-efficient way. As

the ability to design SharePoint forms is in-house, designing and updating the reports can be a flexible process. By implementing our recommendation, all data will be centralized in one repository, as Student Information System (SIS) data is already being stored through automated pipelines and should be complete by June 2022.

Next, CHI should clarify the reporting process triggers, milestones and ownership. Although CHI leadership has set deadlines for when reports should be submitted, a clear trigger should also be in place for when the report preparation begins. This will allow CHI to provide input to the planning process without requiring school leadership to redo work which was completed before the two entities connect. The alignment and understanding of the steps in the reporting process will also help teams meet deadlines. In addition, report officers at CHI and LCs should be nominated. The reporting process spans multiple departments and currently lacks a clear owner to manage deadlines. Designating clear officer roles facilitates communication, builds accountability, and creates opportunities to connect across the network.

There should also be an immediate effort made to reduce the burden of writing and reviewing monthly reports. Rather than collect monthly reports, we propose collecting term reports twice a year. We made the following changes based on feedback, interviews with LC staff, and observations of their monthly reports -

- Move Challenges and Roadblocks to the end of the report
- Collect staffing changes at the end of term only
- Remove Teacher Attendance, Learning Walks / Teacher Observations (teacher's performance data will be reflected in the Teacher Assessment section)
- Remove the internal student performance table – develop a more efficient means to collect this information
- Aggregated mental health and other health services into one table
- Removed the parent sections from the report as they are not critical to mission achievement

Finally, data analysis and reporting problems can be solved using various BI tools such as Tableau, PowerBI, and Oracle. We performed a cost-benefit analysis on three BI tools to help determine which one is most suitable for CHI. ([Table 3](#)) According to our cost benefit analysis, PowerBI had the highest score, thus we recommend CHI to utilize PowerBI for reporting and data management.

CHI is a relatively small organization with a limited count of employees and budget. They must solve current problems and be ready for future challenges to succeed in implementing an expansion plan. Pursuing our recommendations, CHI will have success on both technological side and management side.

## **2 Description Of Current System**

The organization's current reporting system is as follows: At the beginning of their academic year, schools submit comprehensive business plans (Word documents) detailing their priorities and

plans for the upcoming year. Throughout the year, they submit shorter reports (Word documents) each month, and finally, a more comprehensive report (Excel and Word) at the end of the school year summarizing challenges and accomplishments. Historic data is currently stored in Excel documents or older annual reports. CHI staff have previously identified inefficiencies in this system and are currently developing a student data warehouse with a target completion date of June 2022, however, the integration for this system into existing reporting practices was still under development as of February 2022.

The IU team reviewed the report templates and interviewed current staff members to document a detailed sequence model for both the business plan creation and monthly report creation. A consolidated sequence model can be found in [Appendix](#). A key challenge is the relatively weakened accountability system that allows pending issues to remain unresolved and deadlines to be overlooked; in addition, report preparation is very labor-intensive at present, and submitted reports are often underused, especially in light of how much time it takes to prepare them. A more complete list of the challenges with the current reporting process can be found in [Appendix](#).

### 3 Recommendations For Improvement

CHI should align its reporting system similar to a for-profit to maximize its impact and create value for its stakeholders. The reporting system must be viewed through the lens of business intelligence (BI) so that it provides historical, current, and predictive views of the business environment and operations.

The solution is based on making structural and technological changes in CHI, creating a coherent management information system that is driven by four key factors:

*Figure 1: Management Information System Components*



#### 3.1 Data

CHI is currently working on creating a KPI schema to identify the purpose and need for all requested data points. This should be further expanded to a KPI charter which discusses each performance indicator in depth, including its use, underlying data sources, and "meet expectation" targets. All relevant stakeholders at CHI should sign this KPI charter to confirm understanding and agreement of the metric's collection. Using this approach, CHI will have a reference document to explain the metric, its data source, approving authority, and prevent the collection of any

unnecessary data. In the following section, we present a data collection plan that CHI can follow to create this KPI charter.

### 3.1.1 Data collection Plan

In this section, we outline the data collection plan that CHI can follow:

#### 1. Define What to Measure-

- **Measure** : Name of parameter or condition to be measured
- **Type of Measure** : X or Y attribute or discrete data, product, or process data
- **Operational Definition** : Clear definition of the measurement defined in such a way as to achieve repeatable results from multiple observers

#### 2. Define How to Measure-

- **Measurement or Test Method**: Visual inspection or automated test to be defined. Procedures for data collection are defined.
- **Data Tags Needed to Stratify the Data**: Data tags are defined for the measure. Such as: time, date, location, tester, line, vendor, buyer, operator, etc.
- **Data Collection Method**: Manual?, Spreadsheet? , Computer based? Etc.

#### 3. Who will do it-

- **Person(s) Assigned**: State who has the responsibility?

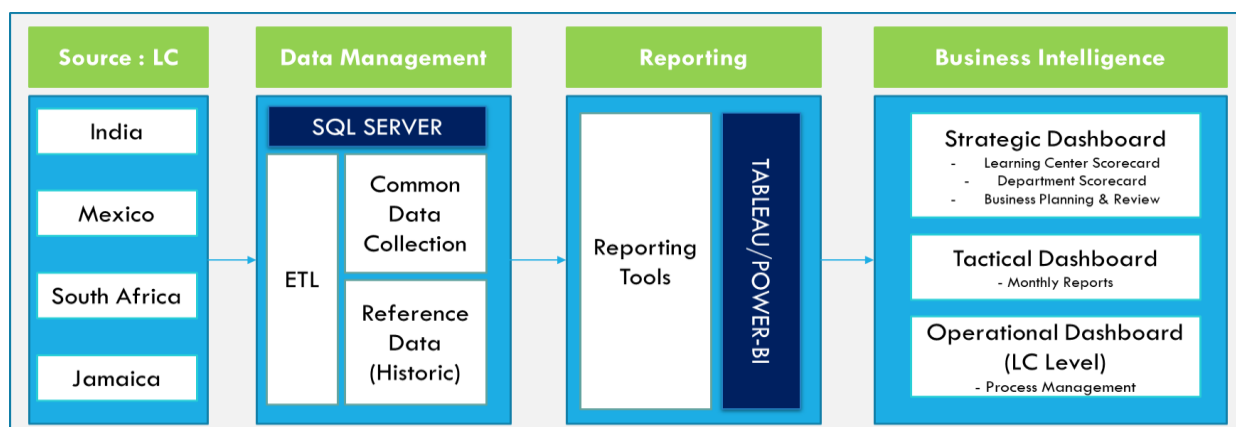
In addition, CHI can assess the performance of each data point through a **CUIKA** test. This would mean all data

1. Are **C**ollected - Data collection is **complete**
2. Are **U**seable with clearly defined targets and ability to determine trends
3. Have **I**ntegrity i.e.
  - a. Relevant: Reflects what needs to be measured
  - b. Objective: Uses unbiased methodology
  - c. Accurate: Numerically correct and not misleading
  - d. Representative: Reflect underlying population
4. Are **K**nown by the appropriate personnel
5. Lead to **A**ctions if results fall below target

KPI should be finalized only for data points that have passed the CUIKA test.

## 3.2 Database

We suggest that CHI builds a centralized database for all its data collection and management needs. CHI can implement an In-house reporting structure as show in the diagram below:

**Figure 2: Proposed In-House Reporting Structure (CHI)**

In the above structure, each Learning Center (LC) is treated as a business unit which generates information/data for consumption by different management levels at CHI. This data needs a central repository so that it may be shared, analyzed, or updated throughout the organization. Having all information in a central location allows for the data to be easily organized and secured. Since majority of CHI infrastructure such as existing SharePoint infrastructure is built on Microsoft products, using SQL Server as their database management tool will give them an added advantage in automating the ETL process. Building a centralized database with student data from the existing student information systems was already in process prior to this project's initiation, however, we recommend that this database be expected to cover all collected data, including from databases and documents initially outside the scope of the existing project.

Data transfer can be accomplished by removing all existing Excel-based reporting templates and redesigning them as SharePoint Forms that connect directly to the SQL database. Through this process, all reporting entries will be pushed directly into SQL Server database in a very cost-effective way. As the ability to design SharePoint forms is in-house, designing and updating report structure will also be a flexible process.

The reporting layer can be built on top of this central repository using various business intelligence tools such as listed below:

- **Tableau**
  - ✓ Company: Salesforce
  - ✓ Price per viewer/creator: \$15/\$70 per Month
  - ✓ Environment: Desktop
  - ✓ User-Friendliness: High
  - ✓ Search Trends: High
- **Power BI**
  - ✓ Company: Microsoft
  - ✓ Price per viewer/creator: \$9.9/\$9.9-\$20 per Month
  - ✓ Environment: Desktop
  - ✓ User-Friendliness: High



- ✓ Search Trends: High
- ✓ \*CHI has easy access through Microsoft subscription
- **Oracle**
  - ✓ Company: Oracle Price per viewer/creator: \$40/\$40 per Month
  - ✓ Environment: Web/Desktop
  - ✓ User-Friendliness: Mid
  - ✓ Search Trends: Low

A cost benefit analysis of the tools is provided in [Section 4](#). Ultimately, we recommend that PowerBI be adopted by the organization.

### 3.3 Process

With regards to realigning and instilling a strategic point of view we make following suggestions to current operations (processes) at Christel House International:

- **Implement 5-year plans and simplify monthly reports:** A five-year strategic plan will allow for school leadership to plan further in advance, as well as follow through with projects over multiple years. A simplified annual business plan should be created to encourage annual progress towards the 5-year strategic plan, rather than emphasizing “new initiatives” every year. This will encourage more process stability and responsible resource management.

CHI collects monthly reports to stay current on school developments. To reduce the burden on schools, monthly reports should also be reduced substantially. As more data is available “on demand”, the organization should evaluate whether it could collect reports on a term basis rather than monthly.

- **Clarify process “trigger” and other milestones:** Although CHI leadership have set deadlines for when reports should be submitted, a clear trigger should also be in place for when the report preparation begins. This will allow CHI to provide input to the planning process without requiring school leadership to redo work. Alignment and understanding of the steps in the reporting process will also reduce frustration and help teams meet deadlines.
- **Appoint “Report Officers” at CHI and local schools:** The reporting process spans multiple departments and currently lacks a clear “owner” to manage deadlines. Establishing clearly defined roles facilitates communication, builds accountability, and provides opportunities to connect across the organization.

Table 1 summarizes the FTE allocations and responsibilities current roles can contribute towards the reporting function:

*Table 1: Reporting Function FTE Allocation*

Employee Title	Level	Report Responsibility	Reporting Function FTE Allocation
Report Officers	Mid-Level & Admin	Coordinate report process, ensure data quality follow through on questions and requests	15% - 25%, supports other administrative processes
Database Managers	Mid-Level	Maintain databases throughout the year, assist with additional requests and troubleshooting	15%, most responsibility not tied to pure reporting
Department Vice President	Leadership	Monitor reports and ensure compliance with business plans	10%, primarily strategic and operational discussions
CFO	C-suite	Oversee financial and HR departments, provide input to business plan	10%, primarily strategic and operational discussions
CEOs	C-suite	Oversee school functions, spearhead business plan creation, ensure plans are faithfully executed	10%, primarily strategic and operational discussions

### 3.4 Information

As discussed in [Section 3.1](#), CHI should align itself around a shared set of KPIs and common data. With an agreed KPI charter, updated database, and improved processes to support data collection, it is possible to create a system with easily accessible information that can drive strategic planning and decision making. However, one remaining challenge is that CHI is fragmented across different Learning Centers operating in very different contexts. We suggest building different dashboards that meet the needs of all learning centers and head office at CHI. These are discussed at length in the following section.

#### 3.4.1 Types of Dashboard/Reports

The report building process can begin once all the data has been set up in the database in a structured manner. The report creation process should consider the following classifications of reports for optimal utilization of information generated through collected data:

- **Strategic Dashboard:** Strategic dashboards, or scorecards, are designed to enable senior executives to execute strategy, manage performance, and drive new or optimal behaviors across the enterprise. They are primarily designed to facilitate monthly strategic review or operational planning sessions and help executives collaborate on ways to fix problems or exploit opportunities. These reports are for the top-level management who make strategic decisions at CHI. Few examples can be:

- a. Learning Center Scorecard
  - b. Department Scorecard
  - c. Business Planning & Review
- **Tactical Dashboard:** Tactical dashboards, on the other hand, are designed to help mid-level or departmental managers optimize the performance of the people and processes under their supervision. These dashboards collect summary and detailed data on a daily or weekly basis, largely from operational systems, so managers and their analysts can identify problems and devise fixes to ensure they achieve their short- and long-term objectives. These reports can help mid-level management at CHI who manage the day-to-day operations and need continuous flow of KPIs to monitor performance and take corrective actions. For example, Monthly Reports on Operational performance.

In addition, during the interviews, we discussed how Learning Centers can utilize past performance data such as budgets, salaries, etc., to create Business plans or other reports. There is currently no central repository through which learning centers can extract prior performance of KPIs or view the performance of other learning centers. This can be resolved through the tactical dashboard which can provide historical trends of cost, budgets, and other information as needed by Learning centers. This dashboard can be a vital tool for Learning centers to adopt a strategic view of their operations and better plan their goals

- **Operational Dashboard (LC Level):** The operational dashboards enable front-line workers to monitor and control core processes on an intraday basis. These dashboards are populated with detailed data from operational systems and comprise driver KPIs and operational metrics, many of which drive higher-level KPIs as discussed earlier. For example, Class-to-class attendance per day, staff attendance, Teacher-student ratio, Exam outcomes etc.

*Table 2: Summary of Types of Dashboards*

	STRATEGIC	TACTICAL	OPERATIONAL
Focus	Execute strategy	Optimize process	Control operations
Use	Management	Analysis	Monitoring
Users	Executives	Managers	Staff
Scope	Enterprise	Departmental	Operational
Metrics	Outcome KPIs	Outcome and driver KPIs	Driver KPIs
Data	Summary	Detailed/summary	Detailed
Sources	Manual, external	Manual/core systems	Core systems
Refresh cycle	Monthly/quarterly	Daily/weekly	Intraday

	STRATEGIC	TACTICAL	OPERATIONAL
"Looks like a..."	Scorecard	Portal	Dashboard

In an aligned organization, KPIs cascade from higher levels to lower levels of the organization and from strategic dashboards to tactical and operational dashboards.

### 3.4.2 KPI Management Review

We also suggest MNMI analysis , a methodical approach towards reviewing each KPI. For data reported monthly or month-to-date, we will have 3 data points over a period of 12 weeks. Definitions below-

1. **Meeting (M)** – Out of the 3 months rolling data being considered, at least 2 data points meet the said target, i.e., 2 or more data points are shown green.
2. **Not Meeting:** - Out of the 3 months rolling data being considered, if all 3 data points are red, it becomes a “not meeting” metric. These are further classified as “Improving” or “Not Improving”
  - a. **Not Meeting but Improving (NMI)** - A KPI is considered “improving” if the most recent data points are closer to the goal number than the older data points. This indicates that there may have been a “shock” to the system, but the proper strategies are in place to correct for this shock.
  - b. **Not Meeting, Not Improving (NMNI)** - If the more recent data points are the same or worse than the older data points, the KPI is considered “Not Improving.” Additional interventions may be necessary to correct the issue.
3. **Data Insufficient (DI)** – If there are less than 3 data points collected over the given time frame.

## 4 Justification Of The Recommended Solutions

The Business Intelligence driven approach has many advantages:

- **Database Adoption** – An effective database is shaped by the goals of the organization, with a large percentage of the data being metrics. The queries and reports generated by a database directly feed into the decision-making process of a business, enabling it to make informed decisions
  1. **Prepare for Expansion** – A database will help CHI overcome the hurdle of data complexity as it grows in size with expanding operation of existing learning centers

2. **Reduce the Reporting Burden** – CHI will be able to avoid data redundancy and save time of its staff in entering information which is repeatedly required. This will also improve data accuracy and provide one source of “truth” for the organization, instead of multiple versions of spreadsheet with different variations of same information
  3. **Increased Capacity for Goal-Driven Strategy** – The level of synchronization required between business plan reporting and monthly reporting is not optimal at present as reports published monthly do not provide a way to track whether KPIs are contributing to achieving the business plan's objectives. Through the database, we can connect the business plan goals with monthly KPI's and track them accordingly. In addition, it will make it easier to connect data from different learning centers to create an organization-wide strategy for best use of CHI resources.
  4. **Increased Flexibility and Search Capability** – A database adds a very powerful search capability. If a new metric needs to be devised from existing data or additional information is needed, then CHI staff can quickly retrieve it from the database instead of collecting it from multiple spreadsheets. In addition, with minimal effort, the same report can be generated multiple times with different variations or time periods.
- **Process** – The reporting process is a cost function for any organization. Our suggestion to allocate fixed FTE to reporting function will allow CHI to assign a dollar value to its reporting function and calculate cost associated with its reporting. Total FTE hours spent on the reporting process multiplied by per hour cost will provide a close estimate of the dollar value spent on reporting. This will allow CHI to compare the value of each report against its cost. Additionally, as a result of resources being charged with reviewing and responding to various reports, collective ownership of the reporting function will be fostered as well as a more collaborative hierarchy.

## 4.1 Project Cost

Both the technological and process changes suggested by us are low-cost initiatives. We estimate the new system will cost CHI approximately \$5,600 per year to operate. \$3,600 per year will be spent on PowerBI licenses (estimating 30 licenses at \$120 per year). The everyday operation of the central database can be covered through a Microsoft Azure grant, while approximately \$2,000 per year should be budgeted for the maintenance and development of the central warehouse, (estimating 20 hours of development support at \$100 per hour.) The initial development of the centralized database is not included here, because this work is already contracted and underway. Thus, our recommendations are focused on how to get the best-possible value from this investment.

For a \$5,600 annual investment, significant staff time is saved across all Learning Centers, and reporting work can be transferred to mid-level management and administrators, rather than top-paid executive leadership. The time saved and value added from shifting report processes will be well worth this annual investment. This investment will prove even more cost-effective as CHI expands operations and manages more schools.

## 4.2 Cost Benefit Analysis

In order to determine which business intelligence tool is most suitable for CHI, a cost-benefit analysis was conducted. The criteria were "Ease of Use", "Brand Power", and "Search Trends". Ease of Use was given the highest weight because not all CHI employees are tech-savvy, and there is a reluctance to hire more staff to manage these tools. Next, Brand Power (as determined by Forbes' rankings) contributes to ensuring that technical issues can be resolved through free online forums, company documentation, and readily available customer service. Google search trends were used to gauge market interest in the tools with the assumption that tools that are searched more frequently will be more popular and, therefore, better.

The constraints were "Subscription Cost", "Ease of Training", and "System Restrictions". Because CHI is a non-profit organization and does not have a large technology budget, subscription costs had the highest weight. Training ease is also crucial to CHI staff's adoption of the tool, but since BI tools are generally easy to learn, this was given a lower weight. Systems Restrictions refers to the tools' ability to run on multiple devices and operating systems. Due to CHI's almost exclusive reliance on Windows desktops, it was given a lower weight.

Among the three BIs, PowerBI had the highest score, thus we recommend CHI to utilize PowerBI for reporting and data analysis.

*Table 3: Cost Benefit Analysis of Reporting Tools*

Criteria	Weight	PowerBI		Tableau		Oracle	
		Raw Rating	Extended Score	Raw Rating	Extended Score	Raw Rating	Extended Score
Ease of Use	15	4	60	3	45	4	60
Brand Power	10	5	50	3	30	4	40
Search Trend	10	5	50	4	40	1	10
<b>Constraints</b>							
Subscription Cost	20	5	100	4	80	2	40
Ease of Training	5	4	20	3	15	3	15
System Restriction	5	2	10	4	20	5	25
<b>Total</b>			<b>290</b>		<b>230</b>		<b>190</b>

## 5 Implementation Schedule For New System

CHI should implement a two-year plan to achieve the recommendations we mentioned, such as developing a KPI schema, launching the data warehouse, and simplifying monthly reports. By using a 2-year-plan, school leadership can plan further in advance, and also follow through with projects over a longer period of time. We state two objectives CHI should aim for: reducing the burden of report creation and review and establishing a data management plan and training schedule. Here's the mission statement and implementation timeline we've developed to accomplish these two objectives.

### 5.1 Objectives

- Reduce the burden of creating and reviewing reports
- Set up Data Management Plan and Training Schedule

### 5.2 Mission Statement

**Table 4 : Mission Statement**

Deliverable	Description
Create KPI Schema	KPI agreed upon by all members
Simplify Reports	Monthly report length, format, submission routine
Launch Data Warehouse	Using SQL Server for data management and security
Build KPI Management Dashboard	Set up PowerBI for visualizing and tracking KPI's
Train Employees	Train employees at CHIs and LCs on how to use PowerBI
Draft 5-Year Strategic Plan	Based on the progress and feedbacks construct 5-year plan

### 5.3 2-Year Plan Implementation Schedule

**Table 5: Implementation Plan**

Mission	Duration (Months)	2022		2023				2024	
		07-09	10-12	01-03	04-06	07-09	10-12	01-03	04-06
Create KPI Schema	3								
Simplify Reports	3								
Launch Data Warehouse	3								

Mission	Duration (Months)	2022		2023				2024	
		07-09	10-12	01-03	04-06	07-09	10-12	01-03	04-06
Build KPI Management	6								
Train Employees	9								
Draft 5-Year Strategic Plan	6								

Based on the progress of our recommendations and feedbacks of the two years, CHI should draft 5-year strategic plan.

## 6 Conclusion

As Christel House International seeks to expand current operations, the need to refine and automate current reporting practices will become ever more pressing. The IU team recommends that Christel House acts now to bolster their reporting capabilities, so when the organization is ready to expand, they will have a fully mature system aligned with current for-profit business intelligence standards. These recommendations fall into two buckets: technological, by expanding the current data infrastructure to support a centralized data warehouse and automated report creation, and procedural, to adjust the manual report templates, timelines, and roles. Although the first bucket – technology – will undoubtedly garner more support and excitement, the second bucket – processes – is also crucial to affect meaningful, long-lasting change throughout the organization.

At the beginning of the project initiation, the recommendations in this report may feel daunting. Effecting meaningful change in an organization requires the coordination of multiple staff members operating on different time-zones and annual academic calendars and balancing other responsibilities and priorities. Invariably, there will be complications with defining key KPIs, and roadblocks as staff members adapt to the new tools and processes. However, by choosing to pursue these recommendations, CHI will enable every stage of the reporting process – Data -> Database -> Reporting Process -> Information – to reach new levels of efficiency and usefulness.

*There is only one thing stronger than all the armies of the world: and that is an idea whose time has come.*

**-Victor Hugo**



## 7 Appendix

Figure 3: Report Creation Flow Model

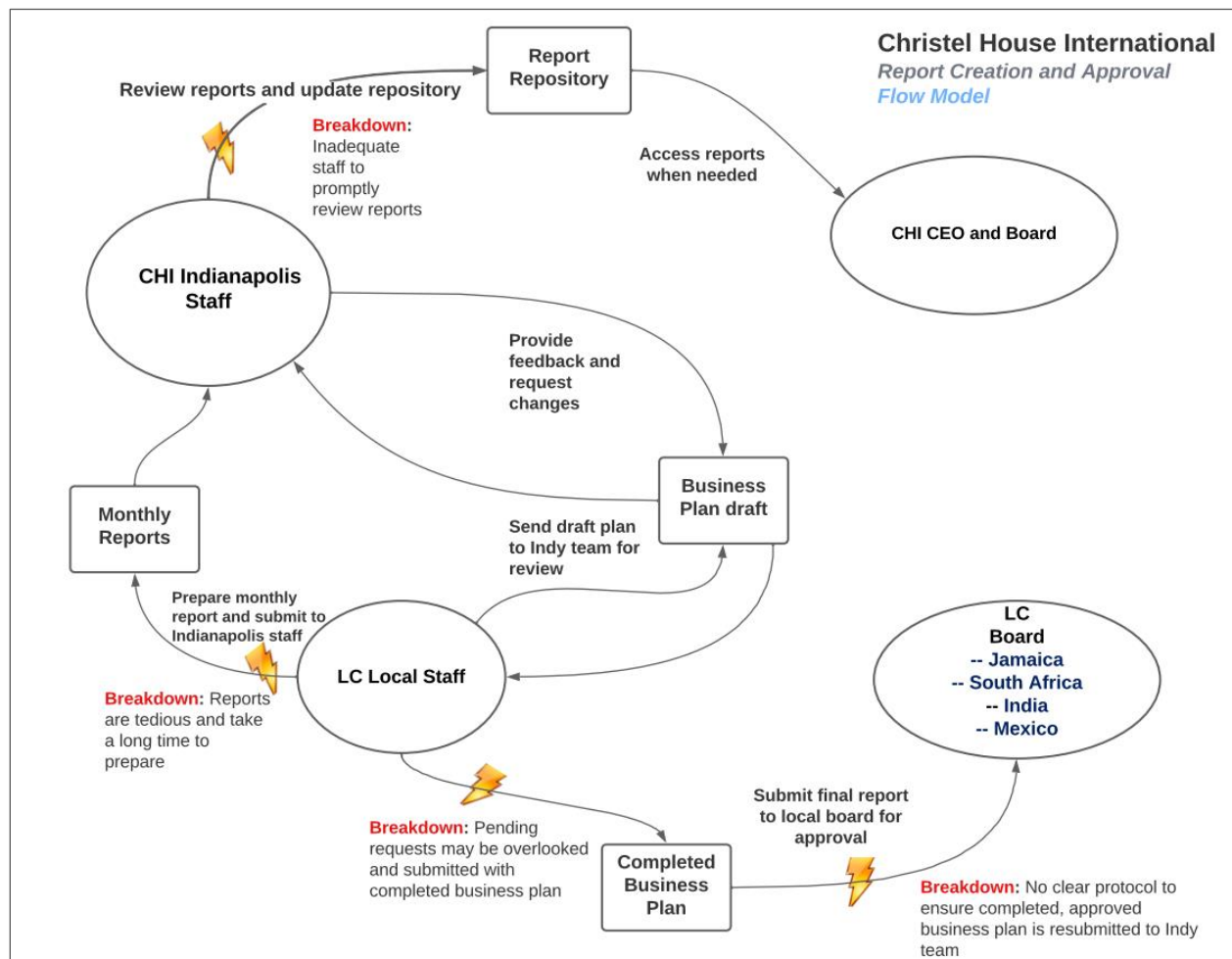


Figure 4: Reporting Process Affinity Model

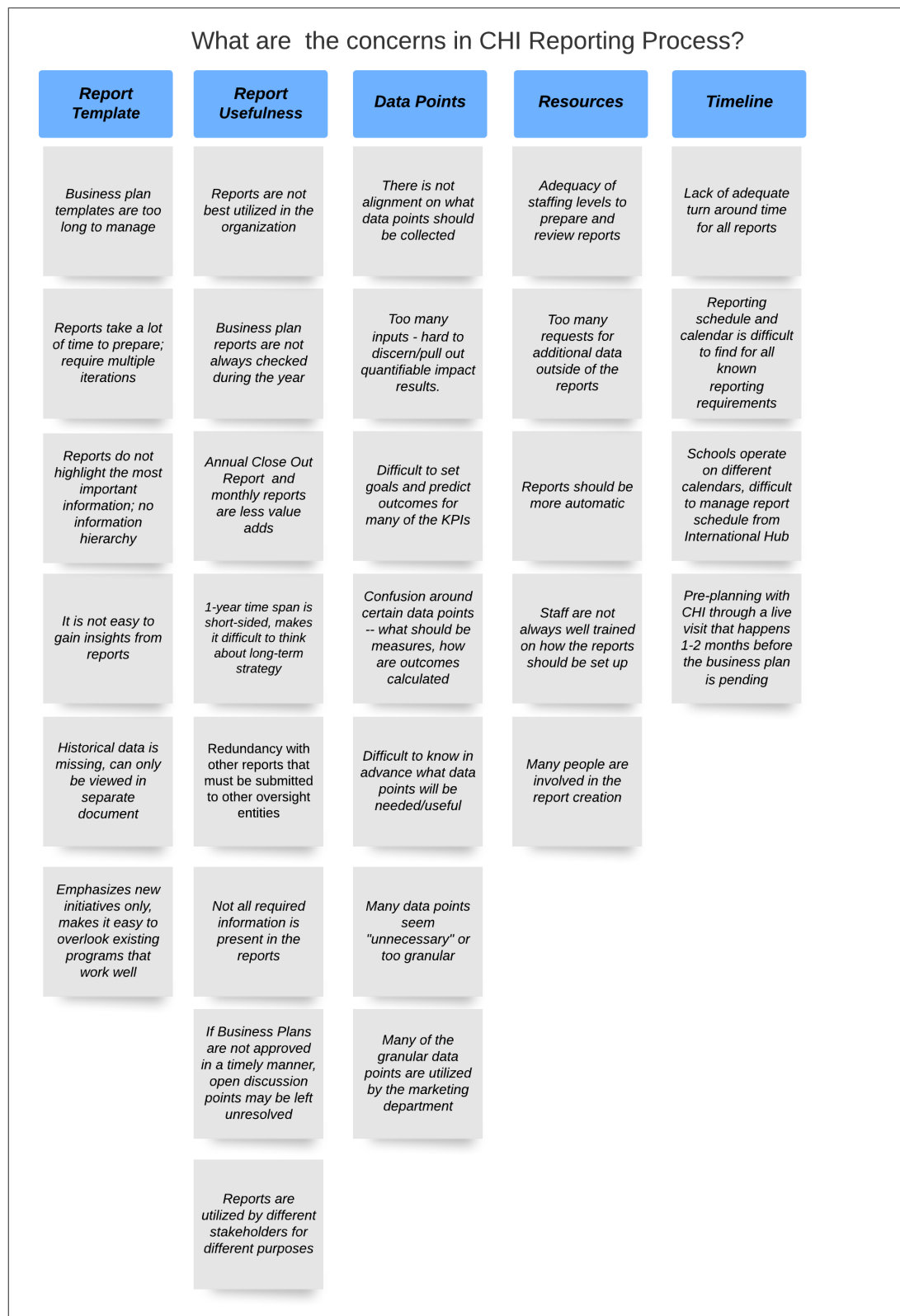


Figure 5: Business Plan Sequence Model

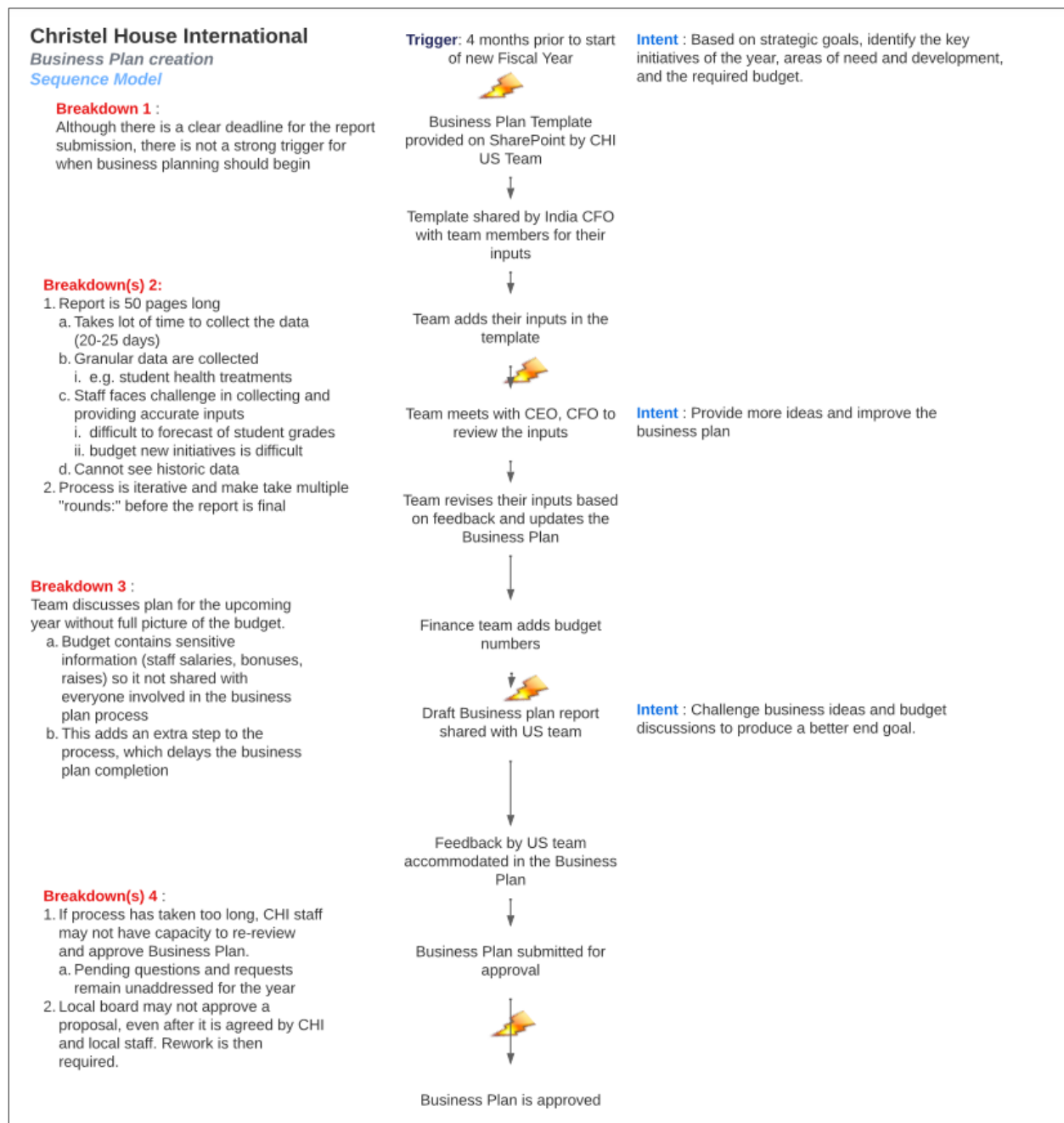
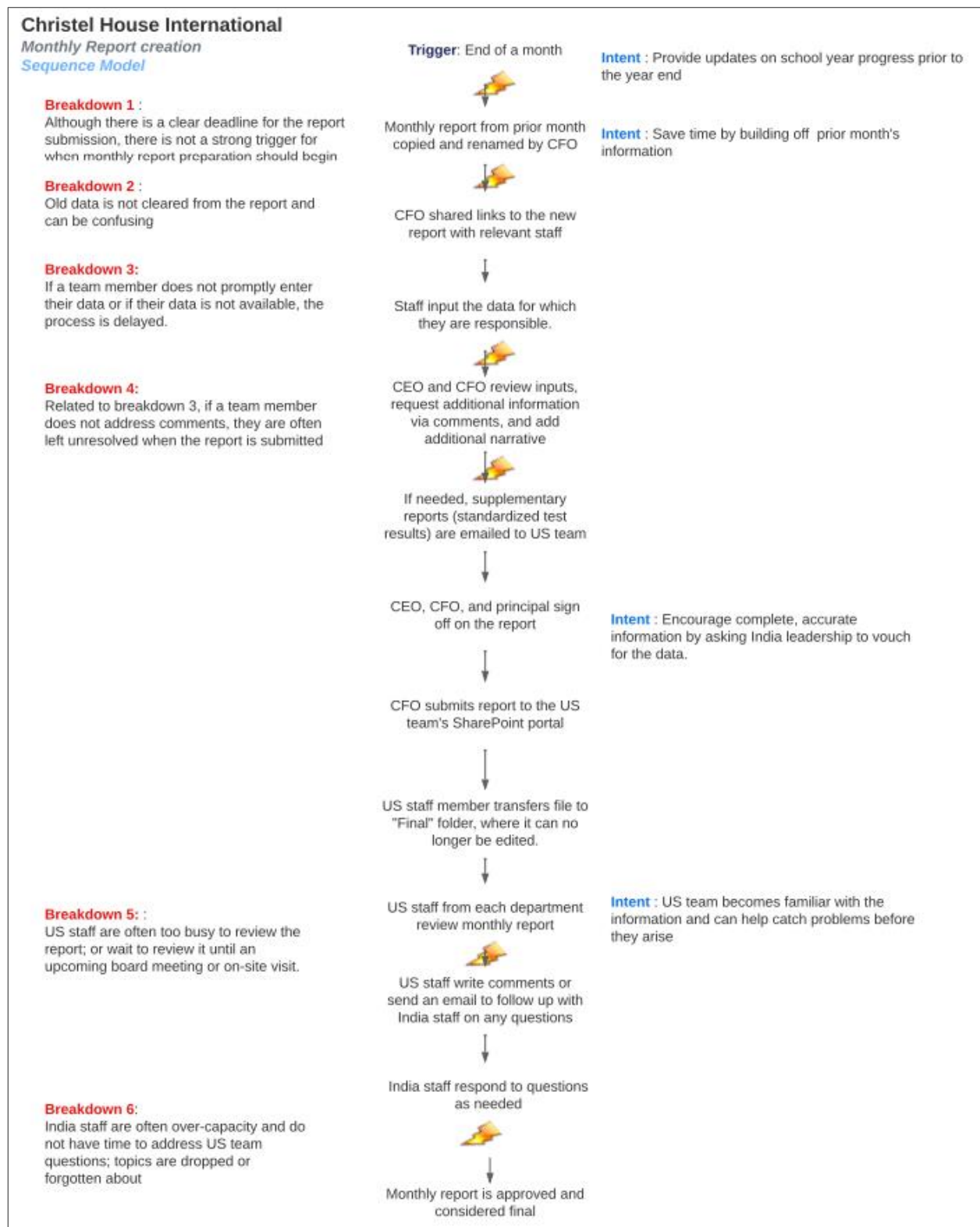


Figure 6: Monthly Report Sequence Model



*Table 6: Consolidated Sequence Model*

Activity	Intent	Abstracted Steps	Breakdowns
<b>Business Plan creation</b>	Based on strategic goals, identify the key initiatives of the year, areas of need and development, and the required budget.	<ol style="list-style-type: none"> <li>1. India's CFO downloads the templates and shares it with the team</li> <li>2. Team members add the inputs for which they are responsible</li> <li>3. Inputs are reviewed and revised, often an iterative process</li> <li>4. Budget numbers are added for review by higher leadership only</li> <li>5. Plan is reviewed by US team, further iteration may occur</li> <li>6. Plan is submitted to the Board and approved</li> </ol>	<ol style="list-style-type: none"> <li>1. Weak trigger to begin process</li> <li>2. Report is very long and difficult to complete</li> <li>3. Sensitive financial data add extra steps and time to the process</li> <li>4. If process takes too long, US team may not have the capacity to fully review and approve the plan. Items may remain pending even after approval</li> </ol>
<b>Monthly Report Creation</b>	Provide updates on school year progress prior to the year end	<ol style="list-style-type: none"> <li>1. India's CFO creates the template and shares it with the team.</li> <li>2. Team members add the inputs for which they are responsible</li> <li>3. Data are reviewed by India's team and submitted to US team</li> <li>4. US team reviews and offers feedback</li> <li>5. India team addresses the feedback and monthly report is approved and considered final</li> </ol>	<ol style="list-style-type: none"> <li>1. Weak trigger to begin process</li> <li>2. If a staff member is slow to input data or respond to comments, the process is delayed</li> <li>3. Reports are often not promptly reviewed by US time, due to staff capacity</li> <li>4. Issues arising from monthly reports are not always addressed promptly</li> </ol>