

Information Management software

Miami-Dade County Public Schools

Overview

■ Challenges

150 administrative support locations manage budgets and strategic planning using separate Excel spreadsheets. 300 reports were manually being consolidated every time budgets needed to be closed.

■ Why IBM?

Used IBM Cognos 8 Planning for budgeting and strategic planning processes in real time. Gained insight into resource requirements and future business potential. End users liked the solution flexibility and user friendly interface. The new solution brought cost efficiency to both the district's construction and business practices.

■ Solution

- IBM Cognos 8 Planning
- Cognos Professional Services,
- Cognos Education, & Support

■ Benefits

- End User satisfaction
- Increased data integrity and single view of data
- Increased access to data required
- Improved responsiveness and efficiency
- Accelerated initiatives on the superintendent's strategic agenda



Miami-Dade County Public Schools (M-DCPS) is the fourth-largest school district in the U.S. With an annual budget of \$6.1 billion, the school system has approximately 350,000 students, 50,000 employees, 367 schools and 150 school administrative support sites. The M-DCPS is committed to providing educational excellence for all by providing the highest quality education so that students are empowered to lead productive and fulfilling lives as responsible citizens. In support of its vision, the M-DCPS pursues the highest standards in academic achievement and organizational performance.

“We were thrilled with Cognos Professional Services. From start to finish, we received excellent customer service. During the designing, building, and testing of our IBM Cognos 8 Planning solution, Cognos Professional Services was always there for us.”

*~ Eugenia Sanchez de Fuentes,
Executive Director, Budget,
Miami-Dade County Public Schools*

To help build a better foundation for higher performance across the district, the M-DCPS decided to deploy an enterprise planning solution for its 150 school administrative support sites. The M-DCPS selected IBM Cognos 8 Planning to enable it to integrate its budgeting and strategic planning processes in real time, gaining immediate insight into resource requirements and future business potential.

Challenges faced

Each of the district's 150 administrative support locations managed its budgets and strategic planning using separate Microsoft Excel spreadsheets. Not only was it difficult for users to gain a quick understanding of how these two processes related, but as a result of this piecemeal procedure, 300 reports were being generated every time budgets needed to be closed. In addition, each report needed to be manually consolidated, a time-intensive task.

"We needed more flexibility when it came to budgeting and strategic planning. We wanted a solution that could combine the two processes and would be easy for end-users," explains Eugenia Sanchez de Fuentes, Executive Director, Budget, Miami-Dade County Public Schools. "Our previous structure also made it very difficult to track and keep a proper audit trail."

The M-DCPS was looking for a flexible enterprise planning solution that could combine its budgeting and strategic planning processes. The organization also needed a solution that could be rapidly deployed and was easy to use.

Strategy followed

When M-DCPS was considering solutions, the IBM Cognos solution was at the top of its list. The district had recently standardized on IBM® Cognos® 8 BI, and was impressed by its scorecarding capabilities and the strong results achieved since the implementation. After a rigorous evaluation of enterprise planning solutions by the district's Information Technology Services (ITS), M-DCPS decided to move forward with IBM Cognos 8 Planning.

To ensure a smooth and rapid deployment, M-DCPS called on IBM Cognos Professional Services. "We had an aggressive schedule—about six months to get up and running. It was amazing what was accomplished by Cognos Professional Services so quickly and so well," states Worthy Fuentes, Budget Supervisor, Miami-Dade County Public Schools.

In addition to its technical expertise, IBM Cognos Professional Services provided M-DCPS with extensive knowledge transfer. "There was constant communication every step of

the way," states Fuentes. "Augmenting its one-on-one dialogues, Cognos Professional Services provided the district with detailed documentation on how its solution was built, best practices, and troubleshooting tips."

The M-DCPS was also pleased with project management expertise it received from IBM Cognos services. "We were thrilled with Cognos Professional Services," stresses Sanchez de Fuentes. "From start to finish, we received excellent customer service. During the designing, building, and testing of our IBM Cognos 8 Planning solution, Cognos Professional Services was always there for us."

With the goal of accelerating end-user adoption, the district partnered with IBM Cognos Education for on-site training of its 150 users. "The end-users got incredible support from Cognos Education," comments Sanchez de Fuentes. "The trainers made sure we felt comfortable using our new solution, and had an amazing knowledge of Cognos which they conveyed very well."

During its rollout, the M-DCPS also had the opportunity to work with IBM Cognos Support. As well as using the IBM Cognos Knowledgebase, M-DCPS often relied on phone support. "Cognos Support would always take the time to understand our issue, research it, and

then quickly call us back with the best possible solution. Cognos Support always nipped the problem in the bud," praises Fuentes.

Another integral component to the project's success has been the ongoing support Sanchez de Fuentes and Fuentes received internally. In addition to the executive sponsorship from Ofelia San Pedro, Deputy Superintendent, Business Operations, it received constant assistance from Kevin Davis and Carol Hsiao from ITS.

Benefits realized

"We are thrilled with Cognos. At the beginning, end-users worried that the budgeting and strategic planning processes would be a nightmare like last year. When they started working with IBM Cognos 8 Planning, we were showered with praise. In addition to finding the new process painless, our end-users were impressed by the solution's flexibility and user-friendliness," explains Fuentes.

With IBM Cognos 8 Planning, operational budgets from the M-DCPS can now be tied to strategic initiatives and the detailed activities that support those initiatives. By integrating these processes, end-users can now easily access a complete, consistent, and real-time view of their information, enabling them to make better decisions in a more timely manner. The transparency obtained through IBM Cognos 8 Planning also makes it easier to keep an audit trail.

With its new solution, the District's administrative support staff have helped to drive the strategic agenda. With IBM Cognos 8 Planning, end-users have completed milestones in eliminating low-performing schools, increasing academic achievement for all students, and bringing cost-efficiency to the district's construction and business practices.

Another key benefit of IBM Cognos 8 Planning has been its ease of use. "Many of our employees are not finance people. They are curriculum people. IBM Cognos 8 Planning made it a lot easier for them to get information the way they needed it," explains Sanchez de Fuentes. "Our end-users also love the Microsoft Excel feature in IBM Cognos 8 Planning because of their familiarity with the interface. This capability helped with the transition to the new solution."

Additionally, the solution's ability to provide pre-populated information gives users more guidance and saves them time. Equally important, the solution makes it easier for the Budget Department to manage the overall process. "With IBM Cognos 8 Planning, we are able to give end-users a target, see if they are over the target, and conduct deeper analysis to provide the Deputies with updates at a much faster pace," says Fuentes. "Users also get immediate feedback by seeing the direct effect of their entries, relative to their target. Plus, the dollar values are shown for the initiatives now."

Furthermore, the Budgeting Department has increased the integrity of the data and overall efficiency. “Last year, it was a lot of manual labor to get the numbers right. We plugged in data by hand, report after report,” notes Fuentes. “And every time you manipulate data, there is a chance you’ll make mistakes,” adds Sanchez de Fuentes. “This year, with IBM Cognos 8 Planning, we were able to receive a file from ITS, upload it, and have the updated information the next day.”

Sanchez de Fuentes sums up the district’s IBM Cognos experience, “IBM Cognos 8 Planning has made the budgeting and strategic planning process a hundred times better than it was before. This has made 150 sites very happy.”

About Cognos, an IBM company

Cognos, an IBM company, is the world leader in business intelligence and performance management solutions. It provides world-class enterprise planning and BI software and services to help companies plan, understand and manage financial and operational performance. Cognos was acquired by IBM in January 2008*. For more information, visit **<http://www.ibm.com/software/data/>** and **<http://www.cognos.com>**.

**As a result of the acquisition, product names have now changed to reference IBM at the beginning of the software or service.*



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