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Mark Ames 10/10/08 12:49 PM

Comment:

- 1) **The process that is used within TRECA to identify changing customer needs and develop organizational goals to advance TRECA as a service provider.**
 - a. The process to identify our changing customer requirements first is a direct derivative of the high-level of standards established by our Board of Directors, which represents our consortium districts, for our Instructional Technology Center owned and operated on behalf of our districts.
 - b. In addition of the standards established by the TRECA Board of Directors, our process to meet the needs of our customers is directed by the board through our Chief Executive Officer, Mike Carder, whom provides continual leadership, recommendations, direction, and support to implement the changes that meet the delivery of educational resources/services to our districts.
 - c. The executive staff of our organization, Chief Financial Officer, Scott Armstrong, Director of Business Operations, Gary Koons, and Director of Operations John Shank, enhance the identification process by working with our staff and our consortium districts to ensure that the organization is continually meeting the needs of our customers. They accomplish this process through meetings, on-line surveys, direct contact, phone calls, electronic communication, and video conferencing.
 - d. In addition to the processes identified in sub sections 1a -1c, TRECA utilizes CA-UniCenter to identify areas where our districts need additional resources, training, or assistance as the result of changes in a district's personnel infrastructure. Therefore, when we identify a large volume of tickets that address a similar problem, such as student information system, EMIS, fiscal operations, or library automation we develop a process to address those issues, whether it be with on-site visits, training, documentation, or personnel to meet the specific requirements of the district.
 - e. TRECA several years ago in order to meet the demands of our customers and to provide quality services we implemented a help desk to detail technical concerns that were not meant with CA-UniCenter. This internal ticketing system has provided our districts with on-line technical details that assist our users to meet their daily operational requirements and also provides a mechanism to support our districts more efficiently.

- f. The processes identified in items 1a – 1e provide the foundation for our organizational goals that are listed in the following sub-section:
 - a. Our organizational Goals are first derived from our Board of Directors that represents our districts, which represents our owners.
 - b. Our organizational goals, derived from the Board of Directors, are supported and directed by our CEO that ensures that these directives provided by the board are implemented successfully.
 - c. Our organizational goals are further enhanced by the continual involvement of our executive staff to ensure that our staff is meeting the requirements and daily challenges of our districts.
 - d. Our organizational goals are constantly changing as we identify issues through the daily utilization of CA-UniCenter. Data Support staff monitor the tickets and reports to identify areas of concern and processes that need to be implemented to provide the service/support required by our districts.
 - e. Our organizational goals are also derived through the utilization of our internal help desk ticketing system that provides details on infrastructure configurations for our districts and our system/network specialist. The internal help desk system help our organization identify system/network areas of concern and proactively develop resolutions prior to systematic failures.
 - f. Ultimately, Our organizational goals are always focused on the delivery of services to our customers with the most important customer being the students we serve within our consortium. We regard their existence at the highest level and “always” base our decision making process on how does a specific process effect the educational objectives of our most important commodity the students, “The Leaders of Tomorrow”.

2) How does TRECA plan for the ongoing and future financial and staffing needs to maintain our position as a viable service provider?

- a. Our Organization realizes the financial challenges facing our districts that our represented by our Board of Directors; thus, our CEO is always encouraging the executive team and staff to search for funding initiatives to assist our districts and our organization.

- b. The following sub-section 2b1 – 2bxi lists the funding streams we have implemented for fiscal year 2010:
- i. Technical Support Personnel contracts for districts. These technicians can support multiple districts and become a resource for the district as well as our organization.
 - ii. Software Professional Development contracts for desktop applications, FileMaker Database Development, Web Site development, Web Site Maintenance, etc.
 - iii. System/Network Infrastructure project management for the medical community in Marion and the surrounding counties.
 - iv. Microsoft Exchange hosting and management for districts.
 - v. System/Network/Management support contracts for database management and project management.
 - vi. OSFC project technology support contracts. We work the districts and the architects to ensure that the new buildings meet the technology requirements of the district.
 - vii. District Technology Coordinator contracts.
 - viii. Application Service Provider contracts.
 - ix. Negotiating volume discounts for the consortium by promoting group purchasing.
 - x. EMIS Coordinator Contracts whereby we provide personnel for EMIS to districts.
 - xi. Treasurer Support Contracts whereby we fulfill the treasurer's position during the absence of that position. We provide interviewing services, recommendations, and complete fiscal management.
 - xii. Additional service contracts will be added as required to meet the challenges of our districts.
- c. Our entrepreneurial process provides our organization the ability to appropriately staff our organization with the skill sets to meet the requirements of our districts. We understand in order to be a viable service provider that we will continually have to search for additional revenue sources in order to effectively and efficiently support our consortium of districts.

3) **CA-USD Questions: (The following questions must addressed in the narrative.)**

a. **How does TRECA use the data derived from the help desk to assist TRECA in making management decisions?**

- i. The year-end help desk summary report provides and indication of the volume of assistance that our staff provides to our customers.
- ii. The data is a catalyst for review with our Chief Executive Office and Board of Directors as it relates to staff increases, reduction, or realignment of personnel resources.
- iii. CA-USD provides the data to our staff that indicate areas that we need to develop professional development opportunities and or enhance existing user training opportunities
- iv. The data provides a global view of the areas that impact our consortium districts and issues that prevent them (the consortium districts) from functioning their education entities effectively and or efficiently. Furthermore, the CA-USD assists our Chief Executive Officer, Board of Directors, and staff to construct our Instructional Technology Centers Business Model to provide the resources to the consortium that supports the district's operational requirements.

b. **What is the relevance and correlation between data reports from CA-USD and the measurement and development of TRECA's goals?**

- i. The relevance of the data that comprises the CA-USD reports is pertinent in the procedures that our Chief Executive Officer and Board of Director uses to determine whether our Instructional Technology Center is meeting the goals of our customers. However, it is equally important to understand that the CA-USD data is only a small portion of what the Tri-Rivers Educational Computer Association analyzes to determine whether the organization is meeting it's goals.
- ii. The development of the organization's goals can be attributed to the CA-USD data, because in many cases it triggers alerts about core services and or products that may be jeopardizing the effectiveness and efficiency of the services and or products we distribute. Thus, a product or core service professional development goal/goals may be developed to address high volume of CA-USD requests. Although, equally important to goal/goals being created, a high volume of CA-USD requests may also indicate short comings with a software product and or core service that the organization is attempting to deliver.

- iii. Additionally, a product/process/service that has a low volume of CA-USD requests may equally prompt an in depth research as well. The Instructional Technology Center will need to determine whether the product/process/service is being used, not used, and why. The research may indicate that the product/process/service is high functional or not functional; thus, could these services be eliminated from the organizations list of products. Thus, a cost effectiveness “goal” may be created to reduce an offering that has a low volume of requests, thereby saving the ITC and consortium valuable fiscal resources
- iv. There tends to be a direct correlation between the CA-USD data and how we as an organization develop our Best Business Practices and the goals of our organization. We do not rely solely on the CA-USD results, because we understand that there may be extenuating circumstances with services and application delivery that skew the CA-USD results. However, the data does direct our executives’ attention to areas of concern that without CA-USD results may be overlooked.

c. How is TRECA beginning to utilize CA-USD TO measure SLA compliance with services provided to your schools?

- i. We are beginning to develop Service Level Agreements (SLA) templates for the services and application distribution that we provide our consortium districts. Previously, it was the goal of the Instructional Technology Center to provide the most efficient and effective service, application support and core services as economically as possible. Thus, this goal has “not” and will not change; however, what is changing is that our districts, our owners, rely on our services more than in the past as indicated by the increase volume of CA-USD request. Additionally, due to the financial limitations of our districts, we must continue to provide our services economically; therefore, the SLA will take into consideration that the Instructional Technology Center must be a “value add” to our districts. Additionally, We correlate the volume CA-USD requests, the average duration time that the request requires, to our efficiency and operational costs. The organization is continually analyzing this data to develop Service Level Agreements that will clearly detail our services and present to our consortium why we are a value add benefit to their educational initiatives.
- ii. Although, organizationally we understand as we develop the service level agreements they are “only” a benchmark. We realize that in all situations we must go beyond the indicators in the SLA to provide the service that our owners require. Furthermore, the CA-USD results will continue to monitor the changing technological environment; thus, in the future the ITC will be required to modify

our Service Level Agreements to meet the demands of our educational customers.