

## Narrative Summary:

1. Explain the process that is used within your organization to identify changing customer needs and develop organizational goals to advance your organization as a service provider.
- The operational goals to address the changing requirements of the core services of the Informational Technology Center (ITC) are determined by the organization's customers as a derivative of the high-level of standards established by our Board of Directors. Additionally, these board members represent the ITC, which represent the owners, the consortium districts. The operational goals are implemented under the direction of our Chief Executive Officer, Mike Carder, whom provides continual leadership, recommendations, direction, and support to implement the processes as set forth by the Board of Directors.
  - The executive staff of our organization, Chief Financial Officer, Scott Armstrong; Chief Operations Officer, Ray Funk; and Director of Support Services, John Shank, enhance the identification process through various communication techniques such as Social Networking, Twitter, Facebook, electronic mail, video conferencing, Basecamp (project management tool), verbally with our staff and our consortium districts, to ensure that the organization is continually meeting the needs of it's users.
  - In addition to the standard communication tools identified in the previous bulleted point of this document, TRECA utilizes CA-UniCenter as well as the Web Help Desk applications to support our customers. The combination of these tools provide the organization with a unique opportunity to provide a quality of support for the five core services as well as value-add services that meet and exceeds the expectations of the users.
  - The TRECA Board of Directors, official representatives of our districts, the owners of TRECA, develop the goals for the organization. Our CEO ensures that the directives and goals provided by the board are implemented successfully. In addition, the goals are further enhanced by the continual involvement of our executive staff, ensuring that our goals are met to the satisfaction of our user community. Our organizational goals are constantly changing as we identify issues through the daily monitoring of CA-UniCenter and our internal help desk application. As we strive for excellence, as a provider of instructional and informational services, the use of the help desk ticketing systems provides the detail analysis to aggressively develop resolutions prior to systematic network/system infrastructure/distributive applications service failures. Ultimately, the organizational goals are focused on the delivery of all services to our districts, and supporting the educational initiatives of the districts.

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2. How do you plan for the ongoing and future financial and staffing needs of your organization to maintain its position as a viable service provider?
  - Our Organization realizes the financial challenges facing our districts and the potential reduction of state support to the ITC as well as to our K-12 community; therefore, our CEO is always encouraging the executive team to search for funding initiatives and fixed cost reduction measures to assist our districts and our organization. Therefore, the following 16 services and saving initiatives have been implemented to create revenue streams and/or reduce costs of operation; thereby, helping to sustain the organization, maintain current staff, and increase staffing to meet our districts requirements from a service provider.
- 1) Technical Support Personnel contracts for districts. These technicians can support multiple districts and become a resource for the district as well as our organization.
- 2) Software Professional Development contracts for desktop applications, FileMaker Database Development, Web Site development, Web Site Maintenance, etc.
- 3) System/Network Infrastructure project management for the medical community in Marion and the surrounding counties.
- 4) Microsoft Exchange hosting and management for districts.
- 5) System/Network/Management support contracts for database management and project management.
- 6) Ohio School Facility Commission (OSFC) project technology support contracts. We work with the districts and architects to ensure that the building projects meet the technology requirements of the district.
- 7) District Technology Coordinator contracts.
- 8) Application Service Provider contracts.
- 9) Negotiating volume discounts for the consortium by promoting group purchasing.
- 10) EMIS Coordinator Contracts; whereby we provide personnel for EMIS Data Entry/Processing to districts.
- 11) 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.

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- 12) Additional service contracts will be added as required to meet the challenges of our districts.
  - 13) Virtual Instruction opportunities for districts that include credit recovery options, singleton courses, and the ability to deliver blended instructional environments which provide traditional educational options for students as well as on-line instruction.
  - 14) Redesign of wide area network infrastructure to lower monthly fixed connectivity expenditures to our districts and organization.
  - 15) Implemented Shared Services process for OpenVMS Support, Connectivity, server hosting, Voice over Internet Protocol (VoIP) services, and long haul wide area network connectivity solutions with the Northwest Ohio Computer Association (NWOCA) in order to sustain operational expenditures.
  - 16) Developing Shared Service strategic network connectivity solutions with Oarnet to in order to decrease Wide Area Network (WAN) costs.
- As we plan for the future needs of our organization, the ITC's leadership has employed additional professional staff to meet our owners/district objectives. Additionally, in fiscal year 2010 the organization began hosting and supporting an additional student information system (SIS), Pearson's PowerSchool product suite, at the request of our consortium districts. In fiscal year 2012, all of our districts are converting to PowerSchool; therefore, in order to sustain cost for our districts, we are actively negotiating with another SIS product to promote competition. This type of negotiating represents the vision of TRECA to be entrepreneurial and support our users desires for effective and efficient services.
  - Our entrepreneurial processes provide revenue streams and the development of Shared Services initiatives provide the revenue to appropriately staff the organization with the skill sets to meet the requirements of our districts. We understand, in order to be a viable service provider in the PK-12 educational environment, we are required to search for additional revenue sources, and reduce costs in order to continue to provide high quality services at the lowest possible price. Therefore, as the service requirements change for our customers, as indicative of the information provided in the electronic communication and monitoring tools, our organization is adjusting staffing requirements to meet these needs accordingly. Therefore, additional staff with new skill sets and current employees are and will be receiving training to meet the changing landscape of our users.
  - Additionally, as state and federal budgets are reduced and or eliminated, our organization will continue to strive for methods to reduce the financial burden to our member districts by increasing the organization's revenue capacity from

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other sources and/or reduce operational expenditures. Furthermore, it is the ultimate goal of our organization's leadership, at a point in the future, to be able to provide the five core services free of charge to our member districts.

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3. Helpdesk Questions: (The following questions must be addressed in the narrative.)
  - i. How did you use the data derived from the helpdesk to assist you in making management decisions?
    - TRECA uses the data derived from CA-UniCenter (CA-USD) and our internal Help Desk Application to support and assist the organization with management decisions. For example, the year-end help desk summary report, from CA-USD, is indicative of the volume of assistance that our staff provides to our customers.
    - The Help Desk Applications data are also the catalyst from which our Chief Executive Officer and Board of Directors are able to perform an analysis on the effectiveness of our staff's professional ability and the hardware functionality to support our distributed applications such as <sup>1</sup>Accounting, <sup>2</sup>Payroll, <sup>3</sup>Pupil Scheduling, <sup>4</sup>Attendance Reporting, and <sup>5</sup>Grade Reporting, which comprise the five state subsidized core services. This information is critical as well to our human resource department as they evaluate staffing requirements in order to meet the organization's service level agreements with our districts.
  - ii. What is the relevance and correlation between data reports from the helpdesk and the measurement and development of your organization's goals?
    - We have discovered that there is a direct correlation between our help desk application report data and how the organization develops our best business practices for the goals of our organization. We do not rely solely on these results, because we understand that there may be extenuating circumstances with services and application delivery that skew the help desk application results. However, the data does direct our executives' and staff attention to areas of concern that without these support application results may have been overlooked.

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iii. How is your organization utilizing helpdesk data to measure SLA compliance with services provided to schools by your organization?

- As we focus our daily operation attention to the information provided by the help desk applications, we are formalizing the organization's Service Level Agreements (SLA) templates for services and application distribution. Previously, it was the goal of the Instructional Technology Center to provide the most efficient and effective service, application support and core services, economically as possible. This goal has "not" and will not change; however, what is changing is that our districts rely on our services more than in the past as indicated by the increase volume of help desk application requests that are not related to the five "core" services. Therefore, the challenge is continuing to increase the services we offer, while maintaining current costs structures to our districts as indicated in our SLA.
- The help desk application information is strategic in our SLA development and our reliance on this data will be vital as we expand our services to meet our owner's requirements.
- Priority value of help tickets and due dates are monitored weekly by the Director of Support Services, John Shank to ensure that assistance is provided efficiently to our districts.
- All support for each department is scheduled according to the Priority of Help Desk Ticket in order to ensure that our organization's customers receive the support expected as defined by the organization's SLA.
- Districts are encouraged to submit help desk to initiate efficient support from our organization and to develop a repository of support resolutions for future reference.