

## 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. These board members represent the ITC owners, the consortium districts. The operational goals to address the core services, are implemented under the direction of our Chief Executive Officer, Mike Carder, whom provides continual leadership, recommendations, direction, and support to implement these goals as set forth by the Board of Directors.
  - The executive staff of our organization, Chief Financial Officer, Scott Armstrong; Director of Business Operations, Ray Funk; and Director of Operations, John Shank, enhance the identification process through various communication techniques such as Social Networking, including Twitter, Facebook, electronic mail, video conferencing, and verbally with our staff and our consortium districts, the owners, 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 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 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 failures. Ultimately, the organizational goals are focused on the delivery of 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 to assist our districts and our organization. Therefore, the following 13 services have been implemented to create revenue streams for our 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) 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 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.
- 12) Additional service contracts will be added as required to meet the challenges of our districts.

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- 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.
- 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. An Ohio licensed treasurer with over 20 years of experience utilizing the State Software Development Team's, Ohio auditor approved/endorsed fiscal software and additional student services support staff have been employed to provide efficient support for the distributed student information system applications. Additionally, in fiscal year 2010 the organization began hosting and supporting an additional student information system, Pearson's PowerSchool product suite, at the request of our consortium districts. The added student information system further demonstrates the vision of TRECA to be entrepreneurial and support our users desires for service options.
  - Our entrepreneurial processes provide revenue streams 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, 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 communication and monitoring tools, staffing requirements will need to adjust accordingly. Therefore, additional staff with new skill sets or current employees will be trained to meet the changing needs 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 other sources. 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 and 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 missed.

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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 new challenge we are addressing is how do we continue to increase the services we offer and support the organization provides in an SLA, maintaining current costs structures to our districts.
  - 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.