

FY16 ITC Continuous Improvement Plan Narrative

Fiscal Services Goal Matrix – including accounting (cash basis with generally accepted accounting practice extensions), payroll/Personnel, and fixed asset accounting

<u># 1</u>	<u>Goals *</u>	<u>Initiated Date</u>	<u>Status **</u>	<u>Comments</u>	<u>Measure of Meeting Goal</u>
2009.1.01	Increase our awareness of our customers' needs and increase our own knowledge by seeking out training and attending all meetings provided to State ITC staff.	Aug-08	Ongoing	This is a goal that will never be removed from our CIP, as we will continue to seek the best possible training for ourselves, to better support and empower our end users	Completion of this goal will be measured by staff CEU forms and customer evaluations regarding the quality of training, service, and knowledge provided to our customers
2011.1.04	Increase communication with districts to determine if there are needs that may be met through our software packages or other existing services provided by our organization.	Jul-10	Ongoing	Through conversations with districts we assess the manner in which they currently use our software and make suggestions on products that may integrate to enhance existing software usage. Charter schools have been encouraged to use state software, but have not moved to state software, possibly because of the availability of the Flat File Editor program.	Completion of this goal will be measured by new contracts for services and/or software packages, as well as direct user feedback on annual customer satisfaction survey and department surveys

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# 1	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2013.1.02	Implement a Project Management workflow.	Jul-12	In progress	<p>The FAS team will implement a checklist to manage the implementation of software packages that are purchased by districts from third-party vendors or SWOCA. This will provide the FAS team with a guideline to verify that all steps of the implementation are completed.</p> <p>This goal will continue. New software packages have been introduced (PowWow & Munis)</p>	Completion of this goal will be measured by successful implementation of software packages as well as district user feedback on the annual customer satisfaction survey.
2014.1.02	Design and implement an end-of-life and migration plan for the current ARP (authorization request program)	Jul-13	In Progress	<ul style="list-style-type: none"> • Determine ARP end-of-life • Collaborate with other internal departments to scope out the specs for a new tool to replace the current ARP program • Survey peer ITCs for possible tools/solutions • Research outside vendors for possible tools/solutions • Research the viability of contracting with an outside vendor for a customized solution • Research the viability of developing an in-house solution 	Completion of this goal will be measured by the creation of a documented migration plan, which will include the research and findings from our achieved objectives.

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# 1	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2014.1.03	Increase district utilization of existing services, specifically OnBase and Kiosk.	Jul-13	Ongoing	<p>Increase utilization of OnBase and Kiosk by providing more detailed demonstrations of the software packages. Increase awareness of the applications by providing information in newsletters.</p> <p>This goal will continue until all districts are utilizing a paperless solution.</p>	Completion of this goal will be measured by new contracts for services and/or software packages, as well as direct user feedback on annual customer satisfaction survey and department surveys.
2015.1.01	Implement user group meetings for district payroll and accounts payable personnel.	Jul-14	Canceled-will be included as a part of an FY16 new goal.	Increase communication/knowledge between SWOCA and district payroll and accounts payable personnel by holding a quarterly meeting. The meetings will be for the purposes of discussing procedures, policies and specific topics related to payroll and budgetary processes, as well as best practices	Completion of this goal will be measured by scheduled user group sessions, agendas, attendance/evaluation sheets.
2015.1.02	Develop a new strategy for marketing fiscal training sessions.	Jul-14	Not started	Increase customer awareness of fiscal training sessions. Poll customers to determine what training sessions are needed, but not currently offered and create sessions to meet these needs. Revise current training sessions to increase customer participation.	Completion of this goal will be measured by scheduled training sessions, attendance records and evaluation sheets.

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# 2	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2016.1.01	Redesign the training documentation page on our website.	Jul-15	Not Started	Redesign the training documentation page on the fiscal accounting supports services page. It is too difficult for users to find the documentation they need. Investigate design options and reorganize according to processes.	Completion of this goal will be measured by user comments.
2016.1.02	Create new training sessions and develop a strategy to increase marketing of fiscal training sessions.	Jul-15	Not Started	Create training sessions on topics that have not been included in training sessions in the past (Fiscweb, OnBase, etc.). Revise current training sessions to meet the needs of users and to increase user participation. Develop a plan to increase awareness of fiscal training sessions.	Completion of this goal will be measured by scheduled training sessions, increased user attendance at sessions and evaluation sheets.
2016.1.03	Develop a training plan for new fiscal team members.	Jul-15	Not Started	Create a detailed training plan with a flexible schedule to assist a new FAS team member with acclimating themselves with the position. This plan will have goals to allow the new member to master tasks. The plan should be flexible to accommodate different learning styles.	Completion of this goal will be measured by the ease in which the new team member can follow the plan, as well as staff evaluations.

Notes

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Student Records Management Goal Matrix – including provisions for student scheduling, grade reporting, attendance tracking, and tracking of special education needs:

# 2	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2009.2.01	Attend training offered by DASL State Support (DASL Retreat, OEDSA, Web Conferences, etc.) and/or other ITC providers; attend any and all Progress Book training and relevant conferences or meetings	July, 2008	Ongoing	Represented at all sessions offered	Completion of this goal will be measured by the CEU credits/PD records of each Staff member.
2009.2.02	Provide districts a weekly DASL and Progress Book update, which includes DASL and Progress Book release information, timely application information, and upcoming training opportunities	July, 2008	Ongoing	Staff is committed to providing consistent, timely, and accurate communications to our customers	Completion of this goal will be measured by the number of updates actually sent to users' distribution lists.
2009.2.06	Explore professional development opportunities to develop better time management, training, and other related skills	August, 2008	Ongoing	We are still researching quality and affordable professional development opportunities; this will continue.	Completion of this goal will be measured by the CEU forms of individual staff members, which will list related and relevant training; it will also be measured by direct and documented staff feedback

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# 2	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2011.2.02	Provide software options to our districts, that complement our core software applications, i.e. Master Schedule Builder, IEP Anywhere, etc.	July, 2010	Ongoing	Several new districts are now using IEP Anywhere and the MSB. Additionally, we are now also hosting the Master Schedule Builder for other ITCs' districts. We continue to pursue apps that are beneficial to our customer needs.	Completion of this goal will be measured by the software applications that are available and integrated with our core software applications
2011.2.04	Offer group opportunities for user collaboration and sharing of best practices among districts	October, 2010	Ongoing	DASL Futures meeting. DASL User Group Meetings	Completion of this goal will be measured by the schedule of training events
2013.2.2	Provide our districts with a Student Services 'expo' to demo all student applications that SWOCA offers.	August, 2012	Canceled	Not completed. We have provided demos to our districts but have not had one big expo for all student services offerings. Need to work with Administrative staff to complete.	Completion of this goal will be measured by the schedule of training events calendar.
2014.2.02	Become proficient with the Report Builder program in GradeBook (GB) and StudentInformation (SI). Provide custom reports to our districts via this tool.	October, 2013	Ongoing	We were trained in June, 2014 and have since created several reports for our districts to use. At this time the tool is not available for the districts to use to create their own reports.	Completion of this goal will be measured by reviewing USD tickets and direct user feedback, as well as production of custom reports.
2014.2.03	Document Student Services Procedures	August, 2013	On-going	Several procedures have been documented. We will continue to document other processes as we complete them.	Completion of this goal will be measured by documentation provided
2015.2.01	Provide individualized on-site training to districts for changes in software applications (SI Discipline, IEP Anywhere, GradeBook, etc.).	August, 2014	Ongoing		Completion of this goal will be measured by the schedule of events. Value of training will be determined through evaluations and tickets.

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# 2	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2015.2.02	Provide instruction and support to district staff in the use of modules in the software applications that can automate processes in the district (Graduation Verification, Special Education Transfer, etc.)	August, 2014	In-Progress		Completion of this goal will be measured by the schedule of events and the number of districts implementing these modules.
2015.2.03	Provide our districts with collaborative training and instruction. Design a new series of training that ties together the Student, Gradebook and when applicable EMIS and/or Special Education applications and how they interact with one another.	September, 2014	Not Started		Completion of this goal will be measured by the schedule of events. Value of the training will be determined through evaluations and helpdesk tickets.
2015.2.04	Roll-out the new Cherwell helpdesk system to our Student Services customers	October-December, 2014	Not Started		Completion of this goal will be measured by the phase out of the USD ticketing system and documented use of the new Cherwell
2016.2.01	Conduct regular (3 times a year) User Group Meetings for the ProgressBook Suite of products. This will provide our member districts with updates on enhancements and defect fixes for the entire suite of products as well as an avenue to provide feedback to us.	October, 2015	Not Started		Completion of this goal will be measured by the schedule of events and evaluation forms.
2016.2.02	Implement Family Groups in all StudentInformation/GradeBook districts to prepare for the ParentAccess change coming in 16/17 school year.	August, 2015	In progress		Completion of this goal will be measured by the schedule of events and tracking which districts have implemented this process.

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# 2	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2016.2.03	Provide alternative training opportunities for district staff. This includes short webcasts that can be viewed at the customer's leisure, interactive and recorded webinars, face to face group meetings, and district specific training sessions. Our goal is to provide a variety of options for all district/building staff to take advantage of the training we offer.	September, 2015	Not Started		Completion of this goal will be measured by the schedule of events, posted webcasts, and posted webinar recordings.
2016.2.04	Provide training and support for our districts for VirtualClassroom and DataMap.	September, 2015	Not Started		Completion of this goal will be measured by the schedule of events, helpdesk tickets, and direct feedback from our customers.
2016.2.05	Become proficient with the new Report Builder reports in the ProgressBook Suite.	October, 2015	Not Started		Completion of this goal will be measured by the quantity of custom reports available to our customers.

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State-Mandated Data Reporting Goal Matrix – including access to the appropriate department and software applications (EMIS):

# 3	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2010.3.02	Research professional development opportunities for us as trainers to develop improved methods of training	August, 2008	Completed		Completion of this goal will be measured by staff CEU forms, as well as direct, documented feedback of staff as to the quality and relevance of the training; actual implementation of the acquired skills will be assessed and documented in employee evaluations
2014.3.01	Collaborate with ODE to revise EMIS Training to target the new budget bill.	August 2013	Completed		Completion of this will be measured by the schedule of events. Value of training will be determined through event evaluations.
2014.3.03	To provide assistance to districts on the Teacher Student Data Linkage project.	August 2013	Completed		Value of training will be determined through event evaluations and through tickets in USD.
2014.3.04	Document procedures for EMIS	August 2013	Completed		Completion of this goal will be measured by documentation posted on the SWOCA server.
2015.3.01	Provide individualized district training on changes to EMIS reporting.	August 2014	Completed		Completion of this will be measured by the schedule of events. Value of training will be determined through USD tickets.

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# 3	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2015.3.02	Create a new series of trainings to further educate EMIS Coordinators on the basics of EMIS data to enhance their knowledge base and expertise.	August 2014	Completed	Goal is now complete. Events have been scheduled on training calendar and presentation materials have been created and distributed. Evaluations have been sent and received from by the participants.	Completion of this goal will be measured by training documentation. Value of training will be determined through event evaluations.
2015.3.03	Create and design new training geared specifically for the FY15 EMIS funding and reporting changes.	August 2014	Completed	Goal is now complete. Training presentations and materials have been updated. Evaluations were sent and received by the participants.	Completion of this goal will be measured by the training documentation. Value of training will be determined through event evaluations.
2016.3.01	Committed to making users feel confident with the reporting window changes and their ability to accomplish reporting requirements within timelines.	August 2015			Completion of this goal will be measured by the training agenda and documentation. Value of training will be determined through training evaluations, helpdesk tickets and surveys.
2016.3.02	To provide assistance with new EMIS Applications in the ODDEX Secure Data Center system.	August 2015			Completion of this goal will be measured by the training agenda and documentation. Value of training will be determined through training evaluations, helpdesk tickets and surveys.

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# 3	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2016.3.03	Gain an increase knowledge of the new EMIS reporting and how it relates to curriculum, testing, accountability and school finance.	August 2015			Completion of this goal will be measured by attending state meetings and collaboration with state agencies. Value of goal is the ability to offer confident support to users via helpdesk tickets, and trainings.
2016.3.03	Help districts understand the importance of data integrity and how to become proactive in reviewing EMIS data.	August 2015			Completion of this goal will be measured by the training agenda and documentation. Value of training will be determined through helpdesk tickets and surveys.
2016.3.04	Committed to helping community schools become more aware of EMIS reporting timelines and changes specifically related to community schools.	August 2015			Completion of this goal will be measured by the scheduled events. Value of training will be determined through meeting evaluations and surveys.

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Library Automation Goal Matrix – curricular resources and educational technology services to support academic content standards and effective instruction:

# 4	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2009.4.04	Attend training offered by INFOhio Tech Services and/or other ITC providers	August, 2008	Ongoing		Completion of this goal will be measured by the accumulated CEU credits for staff attendees
2009.4.06	Present sessions on new INFOhio Electronic Resources and SchoolRooms at upcoming conferences: • SOITA • Local curriculum committee • ITC INFOhio User Group • Others as available	August, 2008	Ongoing		Completion of this goal will be measured by the agendas listing a SWOCA staff member as a presenter and user feedback
2010.4.01	Introduce new services that can be offered • Textbook Management • Cataloging services	August 2009	In progress	<ul style="list-style-type: none"> • Developed and distributed flyer for textbook management. • Working with a school district for Textbook Management • Working with Donna to create new cataloging service for districts. • New school library automated with INFOhio in May 2012 • New school library automated with INFOhio August 2013 • New district has been added to Textbook Management Services 	Completion of this goal will be measured by number of districts who subscribe to these services.

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# 4	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2011.4.03	Develop new training modules and expand the offerings to include other audiences beyond library staff. Examples include: • Web 2.0 Tools/21st Century Tools • Skills to Help Students Transition to College • Copyright in the Digital Age • Curriculum Ties to INFOhio Resources and other web resources • Evaluating Web Resources	September 2010	Completed	Offered a Blended learning workshop on Digital Citizenship Presented 9 training sessions on using the INFOhio Electronic databases to non-INFOhio school districts.	Completion of this goal will be measured by the actual implementation of the training modules, schedule of events, and class evaluation forms
2011.4.04	Develop new training modules for Sirsi districts on topics not previously covered. Expand offerings to help non-certified library staff. Possible topics: • Weeding the Library • Cataloging for Non-Catalogers	September 2010	Completed	Offered 5 training sessions for non-certified staff on Cataloging, Inventory and Reports	Completion of this goal will be measured by the actual implementation of the training modules, schedule of events, and class evaluation forms
2012.4.02	Offer training opportunities for teachers that demonstrate INFOhio resources and Web 2.0 tools and how they relate to the curriculum standards. Create a repository of lesson plans that teachers create incorporating the tools that were demonstrated in training and make them available for use by other teachers.	September 2011	Completed	Offered Hands-on training to teachers in several districts to explore INFOhio resources and create resources for teaching and research	Completion of this goal will be measured by the actual implementation of the training modules; schedule of events; and class evaluation forms and the lesson plans that are collected
2013.4.01	Develop new training modules to support districts in the implementation of Common Core Standards using INFOhio resources	August 2013	Ongoing		Completion of this goal will be measured by the actual implementation of the training modules, schedule of events, and class evaluation forms

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# 4	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2013.4.02	Develop a Marketing plan for new INFOhio Tools – Online Literacy Course Go, Ask, Act, Achieve IMatrix Book Flix Points of View Literature Online Literary Reference Center	September 2013	Ongoing	Promoted resources through newsletters and email announcements Visited school districts to present workshops on all the resources	Completion of this goal will be measured by the actual implementation of the training modules, schedule of events, and class evaluation forms
2014.4.01	Expand the I-Coach program by offering more training sessions -offer training to staff at schools that automated with INFOhio in 2012-2013 Visit more districts and offer on-site training to staff	October 2013	Ongoing	Completed 18 I-Coach training sessions at SWOCA and on site at schools. Sessions were focused on K-5, Gr 6-8 and Gr 9-12 resources.	Completion of this goal will be measured by the actual implementation of the training modules, schedule of events, and class evaluation forms
2014.4.02	Promote INFOhio Electronic Resources to non-INFOhio schools	September 2013	Completed	Offered workshops/training sessions on INFOhio Electronic Resources at 8 non-INFOhio schools	Completion of this goal will be measured by the number of new districts that have requested district username and password to access the resources
2014.4.03	Implement Mitinet services for eight INFOhio districts (39 schools) to enhance their MARC records with Lexiles and Reading Program Information	August 2013	Completed	Completed conversion of MARC records with Mitinet updates for 54 schools.	Completion of this goal will be measured by the number of new requests to export and reload MARC records

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<u># 4</u>	<u>Goals *</u>	<u>Initiated Date</u>	<u>Status **</u>	<u>Comments</u>	<u>Measure of Meeting Goal</u>
2014.4.04	Provide support to INFOhio districts in cataloging and accessing eBooks and Audiobooks as they transition from traditional materials to electronic resources	August 2013	In Progress	Created specific item groups and categories for cataloging eBooks and Audiobooks. Loaded customized MARC records and vendor loads into the district databases.	Completion of this goal will be measured by the number of vendor loads customized for districts.
2015.4.01	Promote INFOhio's new website and all the new tools and features for educators, library staff and students	September 2014	Canceled		Completion of this goal will be measured by the actual implementation of the training modules, schedule of events, and class evaluation forms
2015.4.02	Provide support and training to non-certified library staff on using Library automation software (SIRSI/WorkFlows) effectively	September 2014	Ongoing		Completion of this goal will be measured by the actual implementation of the training modules and schedule of events

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Internet Access and Networking Services Goal Matrix – including email and the support of data exchange within the Information Technology Center’s user entities and across different Information Technology Centers and their user entities:

# 5	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2009.5.02	Commitment to increasing our attendance at professional development opportunities (i.e. regional classes, meetings, State committees)	July, 2008	Ongoing	Attendance and opportunities both increasing. Using feedback from events to better target needs.	Completion of this goal can be measured by CEU forms, meeting agendas, and user feedback on surveys with regard to service and knowledge of staff
2009.5.03	Commitment to improving communication internally and externally (i.e. implementing weekly team meetings; entering USD tickets for internal and external issues)	July, 2008	Ongoing	Consider moving from Newsletter to blog format to measure and manage actual readership.	Completion of this goal can be measured by meeting agendas and through CA-USD tickets, as well as internal staff feedback
2010.5.02	Develop and implement Disaster Recovery plan	July 09	In Progress	Hot site selection in process.	Production of a tested, physical plan
2010.5.05	Phase out legacy systems and equipment	July 09	Completed	Last Remaining system is VMS, which is expected to be virtualized	Measured by the reduction of legacy equipment
2013.5.01	Develop Data Retention Policy	July 2012	In Progress		Completion of an adopted policy

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# 5	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2013.5.02	Market and Sell Managed Services	August 1, 2012	Ongoing	Growth in non-traditional ITC customers and additional services to member districts.	Measured by the # of face-to-face meetings; creation of marketing materials and growth in adoption of promoted services, as well as actual signed contracts for services
2014.5.03	Develop and implement Bandwidth conservation and monitoring tools at the district level	Aug 2013	Completed	Combination of cache, monitoring, and bandwidth management in place.	Measured by the purchase of monitoring tools and creation of a conservation plan document
2014.5.04	Implement High Availability model for Key Applications	Aug 2013	Cancelled	Limitations in place due to vendor design. DR plan (2010.5.02) will add to availability options. Working with vendors to overcome limitations where possible.	Measured by a documented plan
2014.5.05	Improve integration with District / School Technical Teams	Aug 2013	Ongoing	Training opportunities and managed services growth. Needs discovered for Systems support similar to Network Services, and Technical Strategist functions. See Goals 2016.05.02 and 2016.05.03.	Documented improvements and outcomes
2015.5.01	Revise service offerings for ERATE 2.0	July 2014	In Progress	eRate 2.0 "Internal Broadband Connections" opens opportunity for SWOCAGold and SWOCASilver, as well as Infrastructure as a Service in NET and SYS functions. (See goal 2016.05.02)..	

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<u># 5</u>	<u>Goals *</u>	<u>Initiated Date</u>	<u>Status **</u>	<u>Comments</u>	<u>Measure of Meeting Goal</u>
2015.5.02	Develop lower cost VoIP offerings	Aug 2014	In Progress	Potential VoIP ERATE eligibility changes and competitive forces require more aggressive cost structures. Evaluate current partner relationships.	
2015.05.03	Consolidate District Wireless Solutions into hosted services	July 2014	In progress	4 districts added to MWS Service, each with cost savings. Additional opportunities remain.	Reduction in overall wireless management/maintenance costs to the districts.
2015.05.04	Consolidate and add redundancy to Voice services	Jan 2013	In Progress	Add failover voice services for district hosted services, consolidate traditional voice circuits.	Reduction of overall telephone expense.
2016.05.01	Develop plan for meeting new state Internet Standards and bandwidth growth.		In Progress	1 GB per 1,000 students per ODE Standard is goal for 2017. = 110 GB	
2016.05.02	Building on successful hosted virtual server model, Develop and offer additional systems IAAS, support, and monitoring models.		In Progress	Two districts already interested in new service offerings as pilots.	Successful Pilot programs and deployment to additional districts.
2016.05.03	Develop and offer Technology Strategist Function.		Not Started	Districts need assistance in integrating Technology plans with curriculum goals.	Successful Pilot programs and deployment to additional districts beyond pilot.
2016.05.04	Explore opportunities for Co-Location Data Center service	Aug 2015	In Progress	This fall, SWOCA will be is a Tier 4 Data center with 20 gb+ of connectivity upstream, and a geographical diverse hot site, potential value to co-location clients.	

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Narrative:

1. What is the status and progress of your continuous improvement plan for this past year?

(See attached goals grid)

The status of the FY15 SWOCA CIP plan is updated, showing all progress made on existing goals. New goals have been added to existing for FY16. Work will continue toward accomplishing and modifying goals to best serve our districts and other customers.

The process for continuous improvement planning at SWOCA is an ongoing, involving all staff members (internal stakeholders), resulting in integrated goal setting, inclusive of individual staff development plans, department goals, and organizational goals, as well as customer (external stakeholders) survey/evaluation data and other feedback.

The methodology for SWOCA's Continuous Improvement Planning includes:

- Staff/internal stakeholders have participated in a SWOT analysis of the organization
 - As a staff, we analyze and document the strengths, weaknesses, opportunities and threats of the organization. This process involves candid discussion and self-reflection to determine weaknesses and strengths and how we build upon both for organizational improvements.

We also use this analysis to plan for our changing market and environment, examining new opportunities and threats, to keep us in front of technology and services, as an effort to lead our districts to current technologies, as well as greater efficiencies, through the use of technology.
 - Customers (external stakeholders) are surveyed annually, as well as at each training session and user group meeting. In FY15 our software support departments hosted 445 training sessions/opportunities at SWOCA.
 - The information from all Stakeholders is merged and used to formulate a plan for future services and improvement, as well as expansion of existing services.

The instruments used to gather data and feedback are both formal and informal. For formal surveying, we utilize Survey Monkey and electronic class evaluation forms. For informal data gathering, we use information collected through emails, helpdesk tickets, and notes from user group meetings, as well as feedback/notes from face-to-face meetings.

Each January, all departments are responsible for a mid-year update on the progress made toward goals.

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2. What are the key areas of improvement you plan to address this coming year? Provide an overview of the activities and professional development planned to address these key areas and describe what you hope to accomplish this year with those activities.

The key areas addressed by SWOCA in FY16 include:

- Business development
- Strategic planning and partnerships
- Quality of services

Overview of activities and professional development planned to address key areas are as follows:

- Our staff and stakeholders will work with consultants to complete a strategic planning process and plan document for SWOCA. This will require professional development meetings, as well as reading required materials and small group work.
- Training in quality customer service will also be provided to all staff.

Describe what we hope to accomplish this year with these activities:

The goal of working with consultants, stakeholders, and staff to accomplish strategic planning is to establish a clear direction for services and partnerships, over the next three to five years, in an effort to meet and exceed the needs and desires of our customers, in the most efficient manner possible.

3. How do you obtain input from customers, governing board, and staff in identifying the key areas identified in question #2?

Input is sought and gained through dialog, face to face meetings, surveys, and other direct feedback. Our customers are surveyed annually (the FY15 survey is included) to obtain their level of satisfaction with services provided, as well as staff, training, and future service offerings.

Through monthly and other meetings during the year with Superintendents and Treasurers, serving on the SWOCA Board, we are able to hear directly from district leadership as to needs, desires, and quality of services. Services at SWOCA are driven entirely by customer demand.

4. How does collaboration with other entities contribute to your ITC's continuous improvement?

Collaboration with other entities provides our organization with challenges, as well as opportunities for innovation, expansion of services, and often the achievement of greater efficiencies, all of which contribute to the goals of SWOCA's continuous improvement plan.

(See list of collaborative efforts below of SWOCA working with other entities)

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Examples of collaborative and shared services efforts:

Collaboration with other entities, to share costs is core to SWOCA's values. Our philosophy remains, when it makes sense and dollars may be saved, we will look at sharing services for the benefit of our customer districts.

SWOCA has/is participating in shared services, as follows:

- i. **Currently contracting with a partner ITC for INFOhio support for member districts.**
- ii. **Local Government Innovation Fund Grant collaborative with SWOCA, HCCA, MDECA, and WOCO.**

Together, we wrote a \$70,000 grant to conduct a feasibility study.

- iii. **OnBase Document Management Software; shared service with LNOCA**

SWOCA and LNOCA partnered on purchasing the OnBase Document Management Software system. Purchase price and ongoing costs are equally shared by the two ITCs. We offer this service to our districts for under \$4,000 (total) annually, while other ITCs are charging in excess of \$5.00 per adm, annually.

- iv. **Helpdesk Collaborative; hosted by TCCSA**

SWOCA participates in the Cherwell Helpdesk collaborative, hosted by TCCSA.

- v. **HR KIOSK Collaborative; hosted by NCOCC**

SWOCA participates in the OECN HR KIOSK collaborative, hosted by NCOCC.

- vi. **AESOP Substitute Collaborative with Butler County and Warren County ESCs**

Butler and Warren County ESCs and SWOCA formed a consortium to provide centralized payroll services for substitute teachers in each county, using a single instance of the AESOP software. Districts desiring participation may contract directly with the ESC. The ESCs hire all of the subs directly; all payroll/HR issues are managed by the ESCs and not by the districts. SWOCA programmed a software enhancement to extract the payroll information from AESOP and automatically upload the data into the payroll software for time and attendance needs.

- vii. **Interagency Shared Service Network Grant/Leadership Council**

Two goals of grant/study:

FY16 ITC Continuous Improvement Plan Narrative

- I. Design, implement, and evaluate a shared service approach to help school districts in the region to align their models for educator evaluation with State guidelines.
- II. Study the feasibility of creating a regional shared transportation management center, using one routing program.

Participants included: Montgomery County ESC; Butler County ESC; Hamilton County ESC; Clermont ESC; SWOCA ITC; HCCA ITC; MDECA ITC

Summary statement:

SWOCA has dedicated staff who take pride in the organization and have embraced the Continuous Improvement planning process. Our staff continues to research ways to improve both individual and organizational performance. Our goal is to exceed the expectations of our customer districts through proactive leadership, provisioning districts with quality services and support before the need occurs. Our success is demonstrated in the data collected on our annual customer satisfaction survey; the results of which are shared with our Governing Board, staff, and customers.