SWOCA CIP Narrative
FY 27

1. **<u>Status and Progress*</u>**

<u>What is the status and progress of your continuous improvement plan for this past year? Briefly describe your goals, current status, and an overview of your ITC's efforts towards completion of your plan and activities.</u>

All Southwest Ohio Computer Association (SWOCA) team goals are developed by each team and submitted to our local Staff Leadership Team (SLT) for alignment and inclusion in the annual CIP update. The SLT was expanded during FY26 to include the new Director of AI Strategy and Innovation. The SLT is now comprised of Executive Director, Associate Director, CFO, CTO, and Director of AI Strategy and Innovation.

SWOCA maintains a CIP grid format, for ease of use and tracking. The CIP goals and updates are for only the five CORE service areas required of all ITCs, as defined by ODE. These service areas include Fiscal Services; Student Records Management; State-Mandated Reporting (EMIS); Library Automation; and Internet Access & Networking Services.

Although we complete the CIP for core services, SWOCA also has in place a broader, strategic plan, shared with the SWOCA Executive Committee, which guides organizational goals and is aligned with the CIP for core services.

<u>Summary of strategic plan</u>:

Our Vision	Ohio's Premier Technology Solutions Partner	
Our Mission	We provide trusted IT solutions for government and education	
Our Focus	<u>Communication</u>	We keep our internal and external Stakeholders informed
	<u>Accountability</u>	We keep our strategic plan front and center
	<u>Motivation</u>	We keep our stakeholders actively involved in our planning
	<u>Progress</u>	We report regularly on progress toward our goals

Our Core Values

We are guided in our decision-making by our core values

Integrity ***Innovation*** ***Empowerment*** ***Trusted*** ***Dependable*** ***Customer-Focused***

Strategic Priorities for 2024-2027

Staffing	Customer needs should drive staffing
Communications	Improve internal and external communications
District Training	Empower users to help themselves
Staff Training	Improve initial and on-going education of staff
Facility	Our facility should enhance operations and inspire creativity
Operations	All operations should reflect mission and core values
Business Development	Key to long-term success and viability

All goals on the CIP grid will show the status and progress of each of the five core service areas, as well as our efforts toward completion (see attachments). All SWOCA goals are developed by the individual support teams, not management. This keeps the progress and ownership of achieving the goals within each SWOCA team. Progress is reported annually to the SWOCA management team.

We continue to make steady progress in all our targeted areas/goals of the SWOCA strategic plan:

1. **Customer needs should drive staffing**

    - We have increased the number of K-12 school districts being served.
    - We have expanded our service offerings to the following agencies, outside of K-12:
        1. Mental Health Recovery Services - County Agency
        2. Townships
        3. Municipalities
        4. Purchasing Consortium

5. Board of Development Disabilities

- We have set a strategic goal of expanding into the nonK-12 market.
- We are actively recruiting school districts and nonK-12 agencies in Indiana and Kentucky.

With growth comes an increased workload for current staff. We have placed an emphasis on making sure that we continue to provide the high quality of service and support that current customers expect and deserve. However, we also need to recognize when the need to hire additional staff becomes necessary to continue such support. Operating in a difficult time finding qualified staff requires us to become creative in attracting and keeping people.

2. Improve internal and external communications

- SWOCA's current website was updated in FY22 and will undergo a major design update in FY27.
- Regular newsletters are sent by all software services departments to end users.
- Quarterly newsletters are scheduled to begin for all non-K12 clients and potential clients.
- SWOCA maintains a presence on social media via Facebook.
- In addition to site training, we continue to use Virtual meetings to deliver real-time and recorded training.
- Regular user group meetings with various stakeholder groups, including users of the Fiscal, Student, Library, EMIS, and Technical groups.
- Established internal district teams to meet with each customer.
- Google chats have been established for tech directors and student services. These are popular and used often.

During FY24, we developed a stipend position to serve as public relations coordinator. Responsibilities include keeping our social media current and working with staff on external communications. In addition, extra efforts have been made to provide information to all staff regarding projects and operations. Leadership meetings have been opened to all staff. Additional stipends include cybersecurity, human resources, customer satisfaction, and EMIS support.

3. Empower users to help themselves

- We train our customers to become independent users.
- We want our customers to have access to the same resources we use to support them.
- We want our customers to support each other.

Our training model is to provide our customers with the knowledge and skills they need to operate independently of SWOCA and to assist each other when called upon. We want all of our customers to be self-sufficient. Google chats are often used to address issues as a community.

4. Improve initial and on-going education of staff

- We support professional development for all staff members.
- Two senior staff members attended the Women in Leadership seminar sponsored by BASA.
- Several members of our team attended and presented at the OECN United conference.
- Several staff members attended and presented at the Sandusky Braninstorm conference.
- During FY27, we will continue to use tuition reimbursement to include certification attainment and renewal.
- Several staff members have now completed the leadership training offered by CCL through the Management Council, and we will participate again in FY27.
- We have opened our successful SEAL training program to all SWOCA staff members and positions outside of EMIS. We successfully completed year 1 for a cohort of 15 members, and they will continue into year 2 for FY27.

We have improved the on-going education for our staff by providing short, weekly professional development sessions. We will continue to provide regular training to ensure that our staff is up to date on the latest technologies, software, and best practices. We will also continue to invest in leadership development programs to help our staff grow and advance their careers.

5. Our facility should enhance operations and inspire creativity

- A strategic planning process, completed in January of FY23, revealed that our facility was not viewed favorably by staff and considered uninspiring to the creative process.
- Several team meetings were conducted to gauge what was needed or missing from our facilities to better match the 21st century worker.
- A design team was employed to offer renovation ideas for our facility, and some of the renovations have been completed. Others are scheduled for FY25.

Although our facility is only 9 years old, the interior was boring and missing components that communicated to a “technology center” of the 21st century. Our workforce is becoming more diverse between veteran staff and new staff. As we hire more staff, our current facility does not meet the needs of a new generation of employees. We are taking steps to correct that and use our facility as a recruitment tool. So far, we have made numerous changes and improvements to our facility, including:

a. Lowered lighting in the main staff work area
b. Installation of sound-proof pod

c. Installation of project board
d. Renovation of back patio
e. Renovation of all three conference rooms
f. Installation of interactive artwork
g. Installation of additional storage space around workbench
h. Installation of massage chair and treadmill desk

6. <u>All operations should reflect mission and vision</u>

- As we grow and develop, every decision should reflect the mission, vision, and/or core values we have set for our organization.
- Mission, vision, and core values should be reflected in the discussions that we have, both internally and externally.
- Mission, vision, and core values should appear in our social media posts.

All our operations should reflect our mission and core values. We will review our operations regularly to ensure that they are aligned with our mission and values. We will also seek feedback from our customers to identify areas for improvement. We will use this feedback to make continuous improvements to our organization.

7. <u>Business development is the key to long-term success and viability</u>

- Keeping abreast of current technologies is key to providing the best service to customers.
- Expanding our services into the nonK-12 market is essential to growth.
- An intentional focus on business development needs to become a part of our operations.
- Exploration of new partnerships should open opportunities for SWOCA.
- We have developed a position for business development team lead.

Business development is key to our long-term success and viability. We will invest in business development programs that will help us identify new markets and opportunities. We will also build partnerships with other organizations to expand our reach and capabilities. We have currently focused on school districts and nonK-12 agencies in Indiana and Kentucky as future customers. In addition, we are planning to host an open house for local municipalities to learn about us and see our facility.

2. <u>What are the key areas of improvement you plan to address this coming year? Why were these key areas included? Were any needs identified in your ITC's results from the common customer satisfaction survey or your local survey? Provide an overview of the</u>

activities and professional development planned to address these key areas and describe what you hope to accomplish this year with those activities.

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.

#	Goals *	Initiated	Status **	Comments	Goal Status
2009.5.02	Commitment to increasing attendance at professional development opportunities (i.e., regional classes, meetings, State committees).	July 2008	Ongoing	Attendance and opportunities are both increasing. Using feedback from events to better target needs. Expanding training opportunities statewide where appropriate.	CEU forms, meeting agendas, and user feedback all show continued progress.
2009.5.03	Commitment to improving communication internally and externally.	July 2008	Ongoing	(i.e., implementing weekly team meetings; entering tickets for internal and external issues) Consider moving from newsletter to blog format to measure and manage actual readership, or customer portal in revised website	Completion of this goal can be measured by meeting agendas and Help Desk tickets, as well as internal staff feedback, and measuring increased readership of newsletters.
2013.5.02	Market and sell managed services	Aug 2012	Ongoing	Continued growth in non-traditional ITC customers building on earlier successes. Continue to expand service footprint to member districts.	The measured growth of services utilized is consistent.
2014.5.05	Improve integration with District / School Technical Teams	Aug 2013	Ongoing	Training opportunities and managed services growth.	We've confirmed increased inclusion into district technical decisions/discussions.

2019.5.01	Expand Technical Training options for members	Aug 2018	Ongoing	Districts vary in their internal technical abilities to deploy and manage technology.	Measured increase in technical training opportunities and attendance.
2020.5.03	Extend Visibility into Network and Systems environments	July 2019	In Progress	Increased dependence on hosted applications, and their increasing infrastructure needs requires better monitoring and management tools to detect and more quickly resolve performance Issues.	Decreased response time to performance issues, reduction in measured performance impacting events.
2020.5.04	Enhance ITC and member Cybersecurity posture	July 2019	In Process	Evolving threat landscape requires proactive detection and prevention of Security Incidents. Transitioned from traditional SIEM into a fully operational CyberLock SOC platform, providing real-time detection, correlation, and automated response across all member districts.	Measurable reduction in MTTD and MTTR, with an increasing percentage of incidents handled through automated playbooks for the ITC and members.
2021.5.01	Evaluate and expand consortia purchasing opportunities	July 2020	Ongoing	Evolving customer needs open possible savings opportunities in areas previously not served by SWOCA.	Additional Products and services have been available to our members. Expanded relationships with distribution partners and key manufacturers.
2022.5.02	Expand security policy more deeply into organization by getting full, documented compliance with P1 and P2 NIST 800-53 control families.	April 2020	Complete	More in-depth compliance with 800-53 standards will help strengthen the cybersecurity resilience of the organization. P1 and P2 Controls have been met. P3 Controls are mostly met. This is now an ongoing process	Documentation of compliance with P3 control families, with SPP. This goal has been re-stated as 2027.05.05.

2023.5.03	Expanded Member visibility to real time Security threats	February 2021	Ongoing	Delivered tenant-aware dashboards providing real-time threat visibility across network, endpoint, and identity layers. Unified telemetry enables actionable intelligence rather than isolated alerts.	Realtime threat intelligence deployed and visible to members, increased district engagement and visibility.
2023.5.04	Expanded Member Security Audits	March 2023	Complete	To further support 2022.05.02, expand annual security audits to include affirmative confirmation from account managers and sponsors within the member.	Annual evidence of audit report and written confirmation from members of all accounts and access policies are valid, and all identified vulnerabilities have been reviewed and addressed.
2024.05.01	Streamline Customer and Staff Onboarding	January 2023	Ongoing	To better support our members, we need to streamline the following: 1: New ITC Staff 2: New Customers 3: New Staff at Locations	Documented processes for each of the three, with an annual review of effectiveness.
2024.05.03	Expand SWOCA DR Site with “Warm” standby operations to speed Recovery time for critical applications	April 2023	In Process	The current DR site has limited capacity for being a Warm Standby site. This should be leveraged for key applications.	Key applications available at DR Site with short term failover (less than 4 hours).
2025.05.01	Streamlining Identity and Access Management (IAM)	October 2023	In Process	MFA options for current core products are insufficient to protect PII. Implement centralized identity control integrating to support Zero Trust	Deploy a centralized identity and access management (IAM) solution with MFA for key applications, leveraging SSO wherever possible.

				principles, MFA, and device-aware access policies.	
2025.05.02	Conduct a comprehensive review of third-party vendor security controls.	January 2024	In Process	To better comply with NIST Policies, third party vendor agreements need to be reviewed for compliance.	Assess security controls of all third-party vendors and address identified gaps within six months.
2025.05.03	CRM and Business Development Process Automation	February 2024	In Process	Ensure data needed by SWOCA Staff is readily accessible, streamline product procurement, product delivery, and operational efficiency.	Improved business development efficiency and automation of data flow.
2026.05.01	Evaluate and Implement Per-Device Network Access Control	October 2024	In Process	In support of 2022.05.01, assess and implement, where feasible, centralized Network Access Control and ZTNA solutions are needed to enforce device-level authentication on wired and wireless networks.	Improved endpoint visibility with SIEM, ZTNA remote access, role-based segmentation, and better support of NIST 800-53
2026.05.02	Evaluate and implement additional DDOS Controls	November 2024	Not started	Evaluate DDOS options for secondary carriers, and revisit OARnet protections for any additional integration with our current solutions	Reduced impact, faster dictation, and recovery time from various DDOS attacks.
2026.05.03	Revise and improve customer metrics and Dashboard Status	January 2025	Not started	Ensure customer facing portals present a total picture of network status and health, circuit history and saturation alerts, security posture.	Faster customer awareness of issues, centralized reporting across all services.

				Current notifications rely on SMTP to Text messages. Which has been deprecated by the carriers and is no longer reliable.	
2026.05.04	Enhance Alerting and Telemetry gathering	January 2025	In Process	Integrate more granular security and performance alerting into the Security Stack for proactive incident handling and historical reporting.	Improved overall Security posture for SWOCA and members.
2027.05.01	Expand Security Footprint at DR Site	April 2026	Not Started	Expanded DR capabilities to include CyberLock security stack, ensuring continuity of monitoring, logging, and response during failover scenarios.	Security visibility and logging are maintained during DR tests, with validated failover of critical security services within the target RTO.
2027.05.02	Ensure members are able to comply with HB96	September 2025	In Process	HB96 requires all Local Government entities to adopt a Cybersecurity Framework. Establish multiple support avenues to assist with this critical compliance issue.	Member compliance with HB96, as confirmed by Auditor of state.
2027.05.03	Enhance Multi-Tenancy in Security Fabric	April 2026	In process	Tenant-aware security architecture across all CyberLock services.	Improved client level security event detection, notification, and response

2027.05.04	Evaluate and implement Threat Hunting Program	April 2026	Not started	Establish structured threat hunting practices leveraging CyberLock data platform to identify emerging threats before impact.	Documented threat hunts, identified risks mitigated proactively, and improved overall security posture.
2027.05.05	Ensure security practice meets policy with annual review of targeted NIST 800-53 control families on a 3-year cycle	April 2020	Ongoing	More in-depth compliance with 800-53 standards will help strengthen the cybersecurity resilience of the organization.	Annual review of a section of artifacts and control families

General items that don't belong in section 05

	Improve customer access to documentation, orders, and contracts	April 2026	Not started	Expand or supplement CRM portal to allow customers direct access to signed agreements, orders, projects, etc.	Customer access to key documents and records on demand.
	Expand Helpdesk offerings across all department by leveraging central knowledge base and possible AI integration	March 2026	Not started	Supplement our helpdesk staff with AI empowered tools to streamline support and service requests wherever possible	Reduced workload on support departments without a degradation in service quality.

	Evaluate internal processes for possible automation and streamlining	Sept 2025	In process	Many of our business processes require manual intervention and duplicate data entry between systems.	Reduced workload on internal departments, faster service delivery.

Notes

* Goals that are complete can be removed from next year's CIP

** Status should be – not started, in progress, ongoing, cancelled, or complete

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

#	Goals *	Initiated	Status **	Comments	Goal Status
2017.1.01	Increase our awareness of our customers' needs and increase our own knowledge by seeking training and attending all meetings provided to State ITC staff.	Aug 2017	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. This goal also aligns with our strategic plan and	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.
2018.1.01	Focus on customer service to enhance the user experience.	Sept 2017	Ongoing	Use the strategic plan as a guide to improve our customer service. Team members will attend customer service training and assist each other in communicating	Completion of this goal will be measured by the annual survey results and satisfied customers. We should constantly strive to provide quality customer service and exceed customer expectations.

2019.01.02	Create short Zoom videos of common processes in State Software applications (USAS, USPS).	August 2018	Ongoing	Create short videos (15 minutes or less) of common procedures to provide supplements to the training documentation	Completion of this goal will be measured by the number of videos created and posted on our website. Some videos have been completed and posted. Update: Videos are sent on a monthly basis (Fiscal 15 on the 15th)
2019.01.03	Create a mentor program to help new users in their first year.	August 2018	Completed	This program would guide new users through the software as well as assistance with reporting requirements and tools to balance payroll.	Completion of this goal will be measured by documentation of scheduled calls with the new user. 2026: A group of experienced payroll users has been established to help mentor new users.
2024.01.01	Create new procedures for training SWOCA Fiscal Staff.	May 2023	In Progress	Design a better method of onboarding new SWOCA Fiscal staff members. Create checklists of processes in each software application and track progress. Create detailed step-by-step instructions for all applications. Create a spreadsheet of applications and descriptions.	Completion of this goal will be measured by the documentation and completed checklists.

2024.01.03	Create a catalog of standard responses to tickets.	July 2023	Ongoing	Create a catalog of items we can use as standard responses to helpdesk tickets for recurring items (for example, creating new users or quarterly submissions of ODJFS files).	Completion of this goal will be measured by the creation of the catalog (excel spreadsheet or other type of document).
2025.01.01	Create consistent communication with districts.	July 2024	In Progress	Create a new email message to send communications to fiscal software users. One email notice for urgent messages and one for information. This will not change our	Completion of this goal will be standardized messages that are sent to fiscal users.
2025.01.02	Standardize fiscal documentation.	July 2024	Completed	Make all FAS documentation consistent (same format, headers, footers). Update all documentation on the website. Label all documents on the website consistently.	Completion of this goal will be measured by updated documents on our website.

2026.01.01	Create Fiscal Google Chat Rooms.	July 2025	Completed	Create Google chat rooms for payroll staff and accounts payable/budgetary staff based on feedback received at district site visits.	Completion of this goal will be measured by the number of individuals that participate in the chat.
2026.01.02	Standardize State Software Accounts	August 2025	In Progress	Review accounts in USAS/USPS/EIS and Inventory. Add titles for users so that fiscal staff can easily see positions. This will assist FAS with account turnover at districts.	Completion of this goal will be measured by the updated accounts in State Software applications.
2026.01.03	IPDP Migration	August 2025	Completed	Migrate from KIOSK/IPDP to new State Software IPDP application for districts that will continue to use this service.	Completion of this goal will be measured by the successful migrations of districts.
2027.01.01	IPDP Implementation for New Districts	April 2026	In Progress	Implement IPDP software for districts that were not using Kiosk for this purpose. This project started in April 2026, so districts are ready for teachers	Completion of this goal will be measured by the successful implementation of the two districts that want to use IPDP for the first time.

				to come back in August 2026.	

Notes

* Goals that are complete can be removed from next year's CIP

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

#	Goals *	Initiated	Status **	Comments	Goal Status
2024.2.01	Create a GradeBook session syllabus to provide districts to assist them with knowing what training SWOCA offers and how it applies to their position.	July 2023	Complete	The syllabus has been started, new webinars and agendas are being created and added.	Completion of this goal will be measured by the GradeBook software syllabus document being created.
2024.2.03	Provide connection training to districts to bridge the gap between SI and EMIS, SI and GradeBook, SI and SameGoal.	May 2023	Complete	5 Connection Trainings were done this year; more are being created.	Completion of this goal will be measured by the 'connection' training offered to our districts and the feedback received from our districts.

2025.2.01	Design and implement a comprehensive training module titled 'The Places You Can Go' for EMIS Apprentice/SIS Boot Camp, integrating interactive learning activities, assessments, and certification criteria, aimed at equipping participants with essential skills and knowledge to navigate diverse pathways.	June 2024	In Progress	Working on defining the needs of the SIS Boot Camp to determine feasibility. We need to re-evaluate both short- and long-term goals of the EMIS Apprentice idea.	Completion of this goal will be measured by the framework document that outlines the plan.
2025.2.02	Provide SameGoal training for districts on tasks in SameGoal.	July 2024	In Progress	Training schedule in April/May 2026	Completion of this goal will be measured by the SameGoal training offered to our districts and the feedback received from them.
2025.2.03	Work with the TSS team to implement/convert either Passport or SSO functionality into the PB Suite	June 2024	In Progress	Working with Frontline and Fortinet teams to iron out the details of the process. Plan for implementation in [illegible]	Completion of this goal will be measured by the account transition to one of these options.
2026.2.01	Learn how to upload MARC records in INFOhio to assist with timely and accurate records loads for member districts	May 2025	Cancelled	Amy can process these tasks in a timely manner without assistance from the Student Team.	Completion of this goal will be measured by our ability to load the records in a timely manner, ultimately resulting in improved customer feedback on the process.
2026.2.02	Revise the current webinar recording process to improve user accessibility by incorporating task-based bookmarks	August 2025	Complete	All webinars for the 25/26 school year will be broken down into instructional segments, creating clear and descriptive bookmarks for each topic, allowing users to quickly locate and view the needed content.	Measured by the revision and outcome of updated webinars on Google Drive.
2026.2.03	Revise the current SI Syllabus to include the correct webinar links from Google Drive	April 2025	Complete	Webinars and links have been updated to the current syllabus.	Replace the recording links and update the SI Syllabus to point to the recorded webinars posted on the Student Google Drive. Once complete, the syllabus will also be posted to the Student Google Drive.

2026.2.04	Create a Student Services Contacts/Links Page	May 2025	Not started	This will be a page for users to find out how and who to contact at SWOCA for specific questions as well as where to find related tools and documentation.	Completion of this goal will be measured by the page being created, saved to Google Drive, SI Home Page, and shared with the SWOCA News Distribution List.
2026.2.05	Provide district Superintendents with a listing of SI Security Administrators for verification	July 2025	In Progress	Working on getting these ready to send these out. Plan to complete by mid-May.	Completion of this goal will be measured by signed/returned approval by each district superintendent verifying the correct staff have the ability to create/modify/delete accounts and access to the PB Suite of products.
2027.2.01	Re-organize Google Drive for simplification	April 2026	Not Started		Completion of this goal will be measured by the Drive being re-organized and easier to navigate.
2027.2.02	Utilize the Help Desk to evaluate trends/needs and create training based on the data.	April 2026	Not Started	Using AI/Chat GPT to pull and organize trending data.	Measured by more creative training and documentation.
2027.2.03	Evaluate Canva for Student Newsletters and Training Updates	May 2026	Not Started		Measured by using Canva for new newsletter and Training Update formats.

Notes

* Goals that are complete can be removed from next year's CIP

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EMIS Goal Matrix – including access to the appropriate department and software applications:

#	Goals *	Initiated	Status **	Comments	Goal Status
2025.3.01	Design and implement a comprehensive training module titled 'The Places You Can Go' for EMIS Apprentice/SIS Boot Camp, integrating interactive learning activities, assessments, and certification criteria, aimed at equipping participants with essential skills and knowledge to navigate diverse pathways.	June 2024	In Progress	Started an outline with training modules/suggestions.	Completion of this goal will be measured by the framework document that outlines the plan. Plan placed on hold, waiting for further guidance.
2025.3.02	Revitalize EMIS training initiatives for our districts by modernizing and diversifying delivery methods to better suit their needs and preferences. Enhance accessibility and engagement through updated delivery options, ensuring comprehensive coverage and effective knowledge transfer.	May 2024	Ongoing	Increased training through in-person, webinars, zoom sessions, open labs, and recorded sessions. All training documentation and recordings are posted to the google drive for easy access Incorporated SI/EMIS connection training, EMIS + Payroll, EMIS + Treasurers, round table sessions with Career Tech districts to help	Completion of goal will be measured by agendas from various trainings and posted documentation, i.e. EMIS Round Tables, New EMIS Coordinator training, Focused sessions (CTE, Preschool, etc.), Checklist trainings, etc. 3/12/26- We believe these goals are currently being met. We strive to continually provide the training and incorporate ideas our districts provide. We update, revise, and schedule our training at the beginning of each school year.

				bridge the reporting gap.	
2026.3.01	Google Drive – update documentation, start inserting training tracks in our recorded sessions, and begin recording our EMIS Alliance.	April 2025	Ongoing	Organizing the EMIS Google Drive for better usability, creating short training resources (e.g., macros and VLOOKUP), and launching a monitored Google Chat group for EMIS Coordinators to collaborate and get support.	Completion of this goal will be measured by items added and organized throughout the upcoming year. We believe our goals are being met. Our Google Chat has been a great success, and we believe it has helped minimize some less complex HelpDesk Tickets.
2026.3.02	Organize EMIS team concentrations	April 2025	Complete	Now that we have 3 members on our team, we are working to identify our individual strengths and interests to enhance the training and response time in answering tickets.	COMPLETED-We have found our strengths in our EMIS team, and we have successfully distributed responsibilities for monthly events, trainings, etc. We share and troubleshoot HelpDesk tickets together when necessary. Kimberly has become a welcome member of our EMIS team.
2027.3.01	Quarterly eMap in person training with round table session afterwards.	July 2026	Initiating for the FY27 school year	Districts requested roundtable discussions during training, so the EMIS team plans to add quarterly roundtable sessions following eMap training, where EMIS Coordinators can	We will initiate this for FY27 with a goal of our first-round table session to be October 2026.

				share topics and best practices.	

#	Goals *	Initiated	Status **	Comments	Goal Status
2027.3.02	EMIS Alliance Training webinars and in person sessions	March 2026	Beginning immediately	Encouraging more engagement in EMIS Alliance webinars by pausing recordings during "Quick Check" discussions and planning to record in-person sessions to avoid duplicating training recordings.	We will begin this immediately with our upcoming EMIS Alliance training in March. We will evaluate its success based on the participation of our audience. This will also allow us to index the training session into categories.
2027.3.03	New EMIS Coordinator trainings	September 2026	Initiating FY27	Planning quarterly best practice sessions led by experienced EMIS Coordinators to share skills like Pivot Tables, Google Docs, and tips to support newer coordinators.	This will be put in place for the upcoming school year. We will evaluate this based on the comments from the New EMIS Coordinators, and by the number of seasoned EMIS Coordinators that would like to participate in this.

Notes

* Goals that are complete can be removed from next year's CIP

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<u>Library Automation Goal Matrix</u> – We will enhance SWOCA's organizational development and effectiveness by providing timely, relevant communication and will diversify SWOCA's service portfolio by offering synchronous and asynchronous training to support current and new services available via the SirsiDynix and Enterprise Library Services Platforms (LSP)

#	Goals *	Initiated	Status **	Comments	Goal Status
2024.4.01	Send bi-monthly newsletters to library staff and library volunteers.	August 2022	Complete	Delivered 26 Smore newsletters during the 24-25 school year. Delivered 13 group communications during 25-26 school year.	24-25 Goal met: 26 newsletters/10 months = 2.6 per month. Clicks & Sources: 2712 email 18 Website 7 Smore 5 Direct Interactions: 110 Buttons 178 Attachments 222 Links Average Time Reading: 18 Minutes 25/26 Goal not met: group communications were not delivered bi-monthly. The

					average was 1.4 (13/9).
2024.4.02	2024.4.02 Lead Bi-Annual INFOhio User Group Meetings INFOhio Fall User Group Meeting SWOCA MEET Counting as INFOhio User Group Meeting #2	August 2022	Complete	I was disappointed that only one person registered for my fall 2024 meeting at SWOCA. Glenda and I discussed additional options to drive increased attendance Most library staff are aides and rarely get release time, as they provide coverage for art, music, gym, and extra duties.	24-25 Goal not met: INFOhio Fall User Group Meeting Canceled. SWOCA MEET attendance = 10 25/26 Goal Met: INFOhio User group meeting held. SWOCA Meet attendance = 17 (both sections)

2024.4.03	Attend training retreats, workshops, and webinars offered by INFOhio or other state and national library-focused organizations to better support all SWOCA clients in implementing the SirsiDynix LSP and INFOhio.	August 2022	Complete	Attended the OELMA and OECN conferences this year.	Completion of this goal will be measured by evidence of a Certificate of Attendance or a meeting agenda if a certificate is not provided. 25/26 Goal Met: Attended OECN, OETC, ETLA
2024.4.04	Offer New Librarian Orientation, an introduction to effective school library management for library staff or volunteers.	August 2022	Complete		Completion of this goal will be measured by documentation of training modules, scheduled training sessions, and evaluation forms. 25/26 Goal Met: Completed 12 "New Library Orientation" training opportunities.

2024.4.05	Offer new online training sessions Via Zoom (webinar or blended) and asynchronous options for clients who cannot leave their building during the school day.	August 2022	Complete	Current: · Report Favorites · New Librarian Orientation · Introduction to Cataloging · Introduction to Library Reports · Completing Your First Inventory · End of Year Tasks · Cataloging Strategies for Genrefication and Dewey Lite	Completion of this goal will be measured by evidence of scheduled training sessions, increased user attendance at sessions, and evaluations. Goal Met: Completed 72 training sessions (in person) so that library staff would not have to leave their building.

2026.4.01	Diversified Training Portfolio: Develop a series of "Interactive Training Handbooks" using NotebookLM for the library platforms. These will serve as 24/7 virtual trainers.	December 2025	In progress	Virtual Trainers along with slide decks leave staff with reference materials for immediate support is unavailable.	The “Library Services Handbook” notebook is complete (presented at OECN United). Piloted notes with specific media aides at Hamilton and will continue through 26-27 SY to create additional trainers that are targeted for each district.

2026.4.02	Revitalize the INFOhio User Group Experience: Transition the INFOhio User Group meetings into a high-engagement, interactive format (utilizing networking icebreakers and live AI tool demos) to drive attendance among aides and staff with limited release time.	August 2025	In progress	Schedule these sessions and market them earlier and to a wider audience to get better attendance.	The first group meeting was utilized to introduce myself to being a new staff member. There were 3 staff members that attended. The SWOCA Meet conference was the second meeting and we had 17. There was great feedback in person and one of my media staff emailed Glenda directly with positive messaging about the day. Moving into 26-27, we are thinking of adjusting times to all day as it is easier to get subs for all day vs a few hours.
2026.4.03	State-Level Knowledge Sharing: Advocate for SWOCA's innovation by submitting and presenting sessions at major conferences focusing on library, AI integration, and digital creation tools.	August 2025	In progress	Look into additional conference options related to library moving forward.	Presented at the following conferences: • **OETC:** Combating Burnout with Technology & Mentorship, OETC Olympics - Global Village with Google Earth & MergeCube • **OECN United:** Transforming (Library) Training with AI: Building an Interactive Guide Using NotebookLM • **Brainstorm:** Help! I'm a Director, but They Treat Me Like the HelpDesk

2026.4.04	**TILO Collaborative Exchange:** Facilitate regular regional meetings designed as a collaborative forum	October 2025	Ongoing	Held a new track at SWOCA meet for Instructional Technology Integration	SWTILO Meetings • October 2025: COSN AI Maturity Tool • November 2025: All Things Google • March 2026: Google Admin Console Workshop

	for district technology leaders to share current initiatives, challenges, and "boots-on-the-ground" updates from their respective districts.				
2027.4.01	New Librarian High-Touch Onboarding: Conduct in-person site visits for 100% of newly hired library media specialists in SWOCA member districts within their first 90 days.	August 2026	Not Started		

Notes

* Goals that are complete can be removed from next year's CIP

** Status should be – not started, in progress, ongoing, cancelled, or complete.

- **How do you obtain input from customers, governing board, and staff in identifying the key areas identified in question #2? Did you do anything new or different in developing your new plan?**

  We obtain input from all stakeholders via face-to-face meetings, an annual survey, as well as specific surveys related to projects, applications, and training

  - Every 5 years the SWOCA ITC is required to undergo a peer site review. A review team visits SWOCA and meets with SWOCA stakeholders/staff over a two-day period. A full written report of stakeholder feedback is provided to ODE, the SWOCA Executive Director, and the SWOCA Executive Committee. The data from the site review is used to assess and improve services for all stakeholders. SWOCA's last site review was in December 2024.

- Another practice at SWOCA is for our staff to send, at the end of all training sessions, an electronic evaluation form to all training attendees. These completed evaluation forms help us to make immediate improvements to any indicated or perceived weaknesses. Our goal is always to evaluate the quality of training and relevance of the event to job responsibilities.

- We have implemented internal teams that meet with our customers throughout the year to gather feedback.

In FY26, SWOCA hosted numerous training sessions for our members. We have seen an increase in demand for face-to-face training.

All SWOCA customer surveys are read by the department team members and administrative staff, to assess any improvements needed. Action will be taken by staff if improvements are indicated, and changes are considered positive for all SWOCA staff/stakeholders.

Superintendents, treasurers, and district tech coordinators serve on the SWOCA Executive, Products and Services, and Finance Committees. As a result, we can hear directly from district leadership as to the needs, desires and quality of services provided to our members. Our members have been supportive of our efforts toward improvement and do provide us with constructive input. We evaluate all input received for any improvements that are needed.

Internally, the Staff Leadership Team (SLT) meets each Thursday. Members each contribute to developing the agenda. Discussions range from planning, services, and operations to updates on projects and other initiatives. Team members are responsible for keeping their teams informed related to the outcomes of these meetings and needed changes. This meeting is open to all staff.

Additionally, we have staff meetings weekly, every Wednesday. All SWOCA staff are required to attend meetings, and the team leads report for each department. These meetings are for discussion of any real or perceived problems/issues, needs, or updates. These meetings have proven to be a great vehicle for keeping our staff informed and being in front of any issues facing our districts or those internal to our staff. We also provide short professional development sessions during this time.

In fiscal year 2024, we implemented district site visits for internal teams. Our entire staff was divided into small groups. Each team was assigned 4-6 districts to visit and meet with district leadership regarding their relationships and experiences with SWOCA. These meetings have been valuable in improving and maintaining relationships with our members. In addition, it has provided more ownership of SWOCA to our employees.

- **Highlight examples of new or recent collaboration with other entities, or new products or services where collaboration could be valuable. Do you anticipate these efforts will directly contribute to your ITC's service improvement? If so, explain.**

- Collaboration efforts include our partnership with the OECN and MCOECN, which includes the following joint efforts:
    - Standardized pricing of services
    - Support relationships
    - Shared services
    - The exploration of fiber and/or other projects, where there are mutual interests, and projects are predicated upon positive outcomes for all stakeholders

- Broadband projects/partnerships
    - Partnering with local municipalities to plan for and build fiber infrastructure (project management and oversight included)
    - Partnering with local townships to plan for and build fiber infrastructure, leveraging available funding

- BAO (Broadband Access Ohio)
    - Working in partnership with entities across the State to enhance fiber infrastructure and partnering on existing infrastructure, when there is an opportunity

- Ohio Education Job Site (SchoolSpring)
    - This is a partnership with the MCOECN/ODE to provide a "jobs board" to all ITCs and their districts

- RiskSource/Seminars
    - This partnership allows SWOCA to partner with our insurance carrier to bring education and additional risk management capabilities to our member districts

- WOCO
    - This partnership provides software support and training for our five eFinance school districts

- Fortinet
    - This partnership has been critical to the success of our SWOCA CyberLock project.

- HCC
    - This partnership provides software support and training for a few of our districts.

- SchoolStream/Innovation Center for AI Automation (ICAA)

- This partnership provides AI in Automation support to SWOCA and our districts.

Any collaboration with another entity, to improve the quality of services or to share expenses or other, is core to SWOCA’s business values. SWOCA’s goal is to be on the path of continuous improvement and expansion of services and cost-sharing, to better support the stakeholders we serve.

SWOCA’s goal and expectation are always that the services we share/provide meet the standard of quality SWOCA demands for its’ stakeholders.