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

#1	Goals *	Initiated Date	Status **	Comments	Measure of Meeting Goal
2014.1.02	Visit districts in person	2014	In Progress	In-person visits to help with fiscal services issues	Visit all interested districts during the fiscal year FY18 this process continues every year as needed
2014.1.04	Webinars	2014	Completed	Conduct at least one training using webinar software	Training conducted and recorded
2016.1.01	Transition to Fiscal Agent	2016	Completed	Migrated ACCESS to own fiscal agent	Fiscal Agent
2017.1.01	Implement Sungard eFinance for 6 pilot districts	2017	Completed	Implement 6 pilot districts and obtain eFP certification. Pilot districts were not happy with implementation and decided to withdraw (6/2017)	Districts implemented and certifications obtained FY17 districts withdrew from project.
2017.1.02	Conduct full network inventory	2017	In Progress	Full inventory and tagging of new network equipment.	Inventory completed, documentation maintained depreciation schedule created
2017.1.03	Project-based Accounting	2017	In Progress	Create project-based accounting to match expenses and revenues for various ACCESS projects	Plan created and presented to Assembly in May 2017 FY18 plan continues for presentation to Assembly May 2018
2018.1.01	Fiscal Training	2018	In Progress	Capture Fiscal Training using video capturing technology	Video offerings displayed on website for user reference
2018.1.02	Engage in Fiscal Redesign	2018	In Progress	Assist districts in vetting new fiscal redesign application working with MCOECN/SSDT to provide instances for testing, etc.	District satisfaction with testing and implementation.

2018.1.03	Participate in state wide user meetings	2018	Ongoing	OEDSA, OASBO, AOS, etc.	Agenda and participation documentation, certificates of attendance
2018.1.04	Conduct Roundtable Sessions and Fiscal Update Meetings	2018	Ongoing	Providing roundtable discussions for users	Agenda and participation sheets

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
2017.2.01	Illuminate Expansion	2017	In Progress	Continue working with ESCs and schools to expand the use of Illuminate in districts and schools	Illuminate usage increase in each school as measured on the "Usage Statistics Dashboard Report" FY18 continue to support schools utilizing application for EWS
2017.2.02	SIS Evaluation	2017	Not Started	Evaluate current SIS vendors and products	Evaluation complete recommendation made
2017.2.03	Training Expansion	2017	Not Started	Expand training offerings past PB Suite, to include SDC, Illuminate, Schoology, and Google.	Training calendar expanded.
2018.2.01	Participate in state wide and regional user meetings	2018	Ongoing	Attend OEDSA, ODE, etc workshops	Certificates of attendance
2018.2.02	Train on Harmony Reporting	2018	In Progress	Train users in the use of Harmony	Reports produced by users for their needs.
2018.2.03	Conduct open lab training sessions	2018	Ongoing	Assist users with StudentInformation	Attendance and participation.

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
2009.3.05	Conduct EMIS site visits	2008	Ongoing		Customer Satisfaction Survey
2017.3.01	Expand EMIS Trainings	2017	In Progress	SDC Training and EMIS101	Expanded offerings FY18 Engage in EMIS Alliance and assisting districts with training needs.
2018.3.01	Superintendent and Treasurer Training on EMIS	2018	Not Started	Focused training for administration on EMIS requirements and processes.	Attendance and participation.
2018.3.02	Record and post trainings when possible	2018	In Progress	Capture ODE and in-house training pertaining to EMIS	Training posted on webpage.

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
2018.4.01	Participate in state wide and regional user meetings	2018	Ongoing	INFOhio and related meetings.	Certificates of attendance
2018.4.02	Conduit district workshops and meetings to disseminate information.	2018	Ongoing	District User meetings	Attendance and participation

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 Date	Status **	Comments	Measure of Meeting Goal
2015.5.01	Investigate and Select an Identity Management Solution	2015	Completed	ADManager Selected	IdM system installed Summer 2015
2017.5.01	Develop Maintenance and Replacement Plan for Fiber	2017	Not Started	20-Year Maintenance and Replacement Plan	Plan created and presented to Assembly in May 2017 FY18 revise plan presentation for May 2018
2018.5.01	Evaluate new Internet Filter Application	2018	Not Started	Evaluate new products on market	Network Advisory Committee selects new product line for implementation
2018.5.02	Conduct Technical Meeting & Training	2018	Not Started	Provide resources for customers	Agenda and Attendance Sheets
2018.5.03	Promote Cybersecurity	2018	In Progress	In conjunction with MCOECN, promote Cybersecurity awareness	Participation in training

Narrative Summary:

Required Questions:

1.   **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 toward completion of your plan and activities.**

    FY17 was met with staff transitions and pilot projects causing some goals to be delayed.

    - Network Services - A fiber replacement plan is in development stages as well as inventory tagging and recording of network equipment.
    - Student Services – Illuminate implementation, expansion, and training continues. StudentInformation continues to be supported and trained on.
    - EMIS – Districts continue to be updated on EMIS changes and their impact.
    - Fiscal Services – Transition to ACCESS Fiscal Agent is now complete. SunGard eFinance Project has been put on-hold as all pilot districts withdrew from project. New projects will be looked at in the future.

2. **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 surrey? 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 following are key areas to focus on for FY18. These areas were not derived from our customer satisfaction survey, but from internal planning and general customer communicated needs.

    - Network Services – Continue Fiber Maintenance and Replacement planning as well as inventory new network equipment. Conduct meetings and training for technical customer population, including training in cybersecurity. Begin evaluating new filter products for implementation at end of current provider contract.

    - Student Services – Expansion of Illuminate DnA in areas of interest to our customers and continue to support Early Warning System grant participants. Expand use of Software Answers' products as well as continue supporting any ancillary products that require tie-in. Continue training and workshop

offerings. Assist new employees with understanding StudentInformation processes.

- EMIS – Remain involved with EMIS Alliance. Provide districts with information pertaining to the need for "teamwork" within districts across many departments for proper reporting. Assist new employees assigned to EMIS in districts with better understanding guidelines and processes.

- Fiscal Services – Engage in the Fiscal Redesign offering for our customers; inventory network equipment; create project-based accounting structure; continue roundtable discussions and training in new fiscal procedures. Assist new personnel in USAS/USPS.

- Library Services – Continue hosting meetings to disseminate INFOhio information to local library entities and support day-to-day operational needs. Attend state-wide meetings in preparation of implementing new resources, etc.

3. **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 plan?**

ACCESS conducts a customer satisfaction survey each spring. The results of that survey are shared with the Advisory Committees, and the committees meet to determine the goals for the coming year. These goals are then written into the CIP, and form the basis for individual staff goals for inclusion into their Annual Development Plan.

Further, ACCESS sends customer satisfaction surveys following the closure of each help desk ticket. These results are reviewed daily, and any negative comment is addressed via a direct phone call from the Executive Director.

ACCESS uses our Advisory Committees to discuss upcoming projects and uses the outcomes from those discussions to form the performance objectives for the ACCESS staff. These objectives then form the basis for this CIP.

No changes have been made to our survey and data gathering this past year.

4. **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?**

    ACCESS continues to collaborate with many different ITCs for a variety of services.

    NEOMIN – Assisted with DASL/PB Go-Live by answering tickets and knowledge transfer. Assist with training across areas as needed.

    NOACSC – ACCESS contracts with NOACSC for the hosting and support of our DASL/PB environment; we pay for the Ohio Alerts system as provided by NOACSC; and contract for use of NOACSC's *Harmony* report application. We were also one of the original INFOhio Shared Server participants.

    LACA – We contract with LACA for their RAM product.

    OMERESA – ACCESS has partnered with OMERESA to provide Internet filtering services to two of their districts.