

# ACCESS SITE REVIEW REPORT

PRODUCED ON BEHALF OF

THE OHIO DEPARTMENT OF EDUCATION

BY

THE MANAGEMENT COUNCIL

NOVEMBER 18-19, 2019

# ACCESS Site Review Report

*November 18-19, 2019*

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## OPENING REMARKS

The participation of the administration, staff, and members of the ITC is a critical part of conducting an ITC Site Review. For this reason, members of this review team commend the executive director, board of directors, administrative officers, staff, and clients of the Area Cooperative Computerized Educational Service System (ACCESS) for graciously responding to our assessment. The team appreciates contributions made by the ACCESS Executive Director for assistance in preparing for and participating in this site review.

Rules outlined in the Ohio Administrative Code section 3301-3-05 direct the Ohio Department of Education (ODE) to enable an accountability system to evaluate the delivery of core services by OECN ITCs. The site review process conducted by the Management Council on behalf of ODE is a component of this accountability system. However, the scope of the site review process does not rise to the level of a financial or performance audit, or legal review, and should not be construed as such. A site review encompasses a high-level examination of multiple aspects of an ITC, including state and federal compliance, administration, finance, the delivery of state-required core services, network and connectivity, IT service operations, participation in the statewide ITC network, and strategic initiatives of the ITC. Members of the review team used their collective experience to guide the observations and suggestions noted within this report.

The site review team is not charged with directing specific actions for an ITC to follow, nor would it be prudent for the review team to be permitted such latitude. The review team is on-site for a very short time and would not have to live with the consequences of any such directives. It is the function of the review team to provide information and suggest prioritizing alternatives, which may be considered by the owner-members in determining the future direction of the organization.

The following sections of this report are organized by the areas identified in the ITC operating standards. Each section notes the applicable standard, an evaluation of ACCESS efforts to meet the standard, and additional observations and recommendations from the review team.

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## 1. STATE AND FEDERAL COMPLIANCE

State and Federal Compliance Standards		Y/N
<b>1.1 Demonstrate compliance with ORC, OAC 3301-3, and CIP checklist items.</b>		Yes
Comments: ACCESS appears compliant with these standards.		
<b>1.2 Comply with CIP and other accountability requirements as determined by ODE.</b>		Yes
Comments: ACCESS appears compliant with these standards		
<b>1.3 Demonstrate compliance with FLSA work hour tracking as applicable.</b>		Yes
Comments: ACCESS appears complaint with the FLSA work-hour tracking standard		

ACCESS has demonstrated compliance with ITC requirements as noted in Ohio Administrative Code sections 3301-3-01 through 3301-3-07. The ITC is encouraged to continue these efforts. As such, ACCESS appears to meet ITC operating standards 1.1 and 1.2.

ACCESS is compliant with standards recommendation 1.3 and compliance with federal requirements under the Fair Labor Standards Act (FLSA) with one exception. ACCESS demonstrated a solid administrative approach to their implementation of FLSA requirements, including a process to track work hours for non-exempt employees, and FLSA exemption status is noted on all job descriptions. Although their FLSA tracking appears effective, ACCESS currently does not have specific policy guidelines for FLSA and is encouraged to develop and formally adopt such policies.

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## 2. ADMINISTRATIVE

Administrative Standards		Y/N
<b>2.1 Provide evidence of four executive/governing board meetings per year.</b>		Yes
Comments: ACCESS appears to exceed this standard.		
<b>2.2 Have and maintain board approved policies.</b>		Yes
Comments: The ACCESS policy manual was provided for this review.		
<b>2.2.1 Includes a policy prescribing a minimum carryover balance.</b>		No
Comments: ACCESS does not have a formal policy prescribing a minimum carryover balance, but their fiscal oversight committee has recommended an amount which exceeds this standard.		
<b>2.3 Maintain current job descriptions for every employee.</b>		Yes
Comments: Job descriptions were current and appear to be reviewed on a regular basis.		
<b>2.3.1 Job descriptions note FLSA status.</b>		Yes
Comments: FLSA status is noted for each position.		

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Administrative Standards, Continued		Y/N
<b>2.4 ITC has and follows locally defined employee evaluation process which is:</b>		Yes
<b>2.4.1 Conducted at least annually</b>		
<b>2.4.2 For all employees</b>		
<b>2.4.3 In writing (each employee evaluation is documented)</b>		
<b>2.4.4 Encourages professional growth</b>		
<b>2.4.5 With a review of the process at least every five years</b>		
Comments: ACCESS appears to meet this standard.		
<b>2.5 Have and maintain succession plans for key employees and positions.</b>		Yes
Comments: ACCESS appears to meet this standard		
<b>2.6 Review governance documents at least every five years.</b>		No
Comments: The last review of their governance document appears to be from 2007.		

The ACCESS Executive Director is commended for the attention to detail regarding the ITC operating standards covering general ITC administration. The majority of administrative standards were met, and administrative documentation provided for this site review was extensive. ACCESS provided evidence of regular board meetings which exceed the standard of four per year. The board members are commended for consistent attendance and participation at governing board meetings. ACCESS provided copies of job descriptions for all positions. With review dates spanning from 2016 to 2018 the ACCESS job descriptions appear to be current, and FLSA exemption status is noted for each position. ACCESS provided a succession plan for key positions and appears to have sufficient cross-training to ensure customer needs are met if a vacancy should occur.

An effective evaluation process presents an opportunity to discuss each employee's growth with an eye towards the needs and goals of the ITC. ACCESS has an annual employee evaluation process for all

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## 2. ADMINISTRATIVE, CONTINUED

employees and the ACCESS Executive Director. Feedback from employees was mixed. Some employees felt the process satisfactorily included constructive advice, supported individual goals, and encouraged professional growth while other employees suggested those elements could be more meaningful. ACCESS is encouraged to strengthen their existing process to enhance the benefit for all employees and the ITC.

ACCESS provided a copy of their policy manual for this review. ACCESS does not have a written policy prescribing a minimum carryover balance, but the carryover balance recommended by their fiscal oversight committee exceeds the 20% standard prescribed in operating standard 3.3 (per section 3 below). The ACCESS policy manual was derived from policies of their former fiscal agent, and FLSA policies were not present in the original set when it was adopted by ACCESS. The ACCESS administration is working to correct this unintentional oversight. Other than this need to adopt formal policies, ACCESS appears to have a good process in place for managing FLSA requirements and tracking non-exempt work hours.

Operating standard 2.6 recommends that governance documents be reviewed at least once every five years. The ACCESS agreement and bylaws have not been revised since 2008. Although the review team found no specific concerns, ACCESS is advised to review their governance document to ensure it remains up to date and complies with Ohio Administrative Code requirements for information technology centers (3301-3-01 through 3301-3-07).

ACCESS is commended for instilling a positive culture among employees, who specifically noted effective communications with ITC leadership, a healthy and productive working environment, and the overall positive culture of the organization. No concerns were voiced by employees regarding compensation or workload. In the past year ACCESS acquired and relocated their offices to a new building. The new location provides a modern and efficient work environment with ample meeting and training space for customers.

While there is no formal work-from-home policy in place, employees indicated that there is an ad hoc practice in place. Based on customer feedback it appears that some work-from-home activity is already occurring for after-hours support. ACCESS may wish to review the work-at-home policies of other ITCs and consider formalizing this opportunity on a trial basis at the same time that it adopts required FLSA policies.

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## 3. FINANCIALS

Financial Standards	Y/N
<b>3.1 Provide a board-approved three-year financial forecast with assumptions– current year plus two years of future forecast.</b>	Yes
Comments: A financial forecast with assumptions was provided.	
<b>3.2 Demonstrates current cash receivables/fee collection activity.</b>	Yes
Comments: The ACCESS fiscal officer indicated fees collection is current and generally presents no concern.	
<b>3.3 Maintains a cash balance (general fund plus undesignated/unencumbered reserve funds) of at least 20% of current general fund annual budget.</b>	Yes
Comments: ACCESS appears to meet this standard.	

For the purpose of this site review, the review team focused on fiscal policy, revenue and expenditure trends, risks, and stability. ACCESS financial data and projections were reviewed to determine financial trends and to identify potential risks and threats to the ITC's financial stability, as well as recognize good business practices. However, the scope of this review does not extend to that of a full financial or performance audit (*as noted in the Opening Remarks section*).

Recently initiated ITC operating standards suggest a best practice of maintaining a carryover cash balance of at least 20% of the ITC operating budget (*see operating standard 3.3 above*). While ACCESS has no formal carryover policy, ACCESS has demonstrated fiscal year-end carryover balance sufficient to meet this standard. ACCESS recently established a fiscal oversight committee to review the finances of the ITC and recommend fees necessary to remain fiscally sound. The committee recommended an increase in fees sufficient to build a carryover balance of one million dollars over the next two years; this recommendation was approved by the general assembly of ACCESS customers. ITC leadership and customers of ACCESS are commended for taking actions to keep the ITC fiscally sound. ACCESS might consider adopting their carryover practice as formal policy.



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## 3. FINANCIALS, CONTINUED

ITC operating standards suggest a best practice of maintaining a board-approved three-year financial forecast with assumptions that cover the current year plus two years future forecasts (*see operating standard 3.1 above*). A strong forecast can be a valuable management tool, and ACCESS provided a financial forecast with assumptions for this review. ACCESS board and administration are commended for being proactively transparent regarding the fiscal operations of the ITC.

No concerns were expressed by the ACCESS Treasurer regarding receivables; fees collection appears to be current as recommended by operating standard 3.2.

Within the scope and limits of this review, ACCESS appears to demonstrate strong financial management practices and has a healthy fiscal status.

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## 4. SERVICE OPERATIONS FOR CORE SERVICES

Core Service Standards	Y/N
<b>4.1 Use of a service desk system to track requests and incidents.</b>	Yes
Comments: ACCESS uses a service desk tool to track incoming client requests.	
<b>4.2 Publish a service level agreement (SLA) for each service and maintain reporting to measure against this SLA.</b>	Yes
Comments: SLAs were provided for all core service areas.	
<b>4.3 Demonstrate adequate staffing, cross-training, or 3<sup>rd</sup> party service agreements in each core service area sufficient to meet or exceed local SLA policy.</b>	Yes
Comments: ACCESS appears to meet this standard.	

Feedback from customers involved in this site visit were universally positive, with focus group participants suggesting there has been a noticeable improvement in customer satisfaction since the current director assumed the executive director role in 2017. ACCESS staff noted a positive work environment and camaraderie. The ACCESS Executive Director is commended for growing the customer-focused culture at ACCESS.

ACCESS is recognized as providing exceptional customer service and satisfaction as noted by feedback shared from the customer focus group participants across all service areas. Customers expressed sincere appreciation for ACCESS staff, noting they often go “above and beyond” in attending to their clients’ needs. Customers noted appreciation for receiving responses to questions outside of working hours. Customers also felt answers to questions which ACCESS provides are accurate and ACCESS is willing to provide a thorough understanding of the solution. Customers expressed a true feeling of community when working with the ACCESS staff and other districts they serve. ACCESS freely offers the use of their new building space for districts to utilize for meetings and other activities they have going on. The support team at ACCESS are well regarded, and there appears to be adequate cross-training to meet customer expectations.

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## 4. SERVICE OPERATIONS FOR CORE SERVICES, CONTINUED

Customers can contact ACCESS using the service desk system, email, or by telephone. Focus group participants noted multiple examples of excellent customer service. They appreciated the quick response typically experienced when contacting the ACCESS staff for assistance. They spoke highly of ACCESS' use of the Zendesk help desk, describing how ACCESS provides ample status updates via this tool. The frequency and timeliness of these service request updates enable customers to better manage their time and keep others in their district informed. ACCESS provides detailed screen shots for solutions and reviews with the client on the phone to make sure the solutions is clearly understood. Clients find these details exceptionally helpful, especially when sharing the solution with others in their district. Customers said ACCESS support is always friendly and "personalized." ACCESS has stepped in to provide one-on-one training for Payroll, EMIS, and other needs when unanticipated district personnel concerns have arisen. ACCESS staff follow up on tickets and after training events to validate client satisfaction with the services provided. Customers expressed comfort knowing their thoughts and opinions matter. ACCESS is very timely on their communication whenever maintenance or updates are going to happen to any system.

EMIS customers participating in the focus group sessions expressed that ACCESS' training for student information and EMIS are timely and very relevant to their job requirements. EMIS customers suggested ACCESS has done an outstanding job keeping current with and communicating EMIS changes. ACCESS makes sure districts have all training material resources they need especially when they can't participate in training sessions in person. Although ACCESS is willing to schedule one-on-one training when requested, the EMIS focus group would like to see expanded interactive training webinars. ACCESS might consider investing in Zoom videoconference licensing available via the statewide purchase opportunity. It was further suggested that scheduling additional open lab times throughout the school year would allow customers to work face-to-face with ACCESS staff and enable district-to-district conversations to deal with cross reference errors as they are encountered. The ITC might also investigate opportunities to offer shared personnel supporting EMIS in client districts and offer additional EMIS Secure Data Center training opportunities for principals.

EMIS focus group participants noted that online registration software has been a source of frustration. They have been dealing with issues that have ensued from the software product selections their districts have made. They suggested ACCESS could take the lead in helping their customers research a choice that will not only work with the student information software but work better overall. This group also voiced the desire to be consulted as stakeholders in the decision-making process to ensure their unique needs are met by whatever software is selected.

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## 4. SERVICE OPERATIONS FOR CORE SERVICES, CONTINUED

In general customers expressed satisfaction with the quantity and scheduling of user meetings held in all service areas throughout the year. The users of student/EMIS meet monthly, technical customers meets quarterly, and fiscal staff in December and June. Fiscal focus group participants were complementary regarding the support they have received during the fiscal software transition, suggesting it may be an opportune time to resume roundtable meetings, especially for redesign clients.

Focus group participants expressed some concern that ACCESS staff might become overextended. This feeling appeared to derive from the small size of the ACCESS staff and the occasional need for after-hours and weekend support. District Superintendents participating in the focus group session articulated a greater interest in service than in minimizing fees. The superintendents acknowledged a willingness to pay additional funds for support beyond that included in the base SLAs, such as additional support provided to districts during gaps in coverage for district level fiscal, EMIS, or student information system services. These superintendents emphasized reliability and service as desirable attributes, and it was noted that they supported the concept of sharing inn redundant centralized technical services such as shared ProgressBook hosting so the staff could focus on customer services. One comment noted lament over the flawed and ultimately abandoned self-implementation of eFinancePLUS at ACCESS a couple years ago.

ACCESS is moving their INFOhio/Library specialist to new responsibilities, creating a potential gap in the ITC's ability to support this service. ITC leadership is considering outsourcing to fill this need by contracting for the services of the INFOhio state support team. This type of arrangement has been successful at other ITCs; ACCESS is encouraged to proceed with this direction.

Fiscal customers expressed confusion regarding availability of extended or after-hours support as questions arise during calendar and fiscal-year-end processing; ACCESS customers would benefit if ACCESS would clarify communications regarding support availability during these key fiscal processing periods. Clients also suggested the ITC might investigate additional shared personnel services to assist clients who are new or inexperienced in the legacy software system until it is their time to convert to the new platform.

ACCESS publishes a quarterly newsletter covering information on all core service areas; clients find this very informative and helpful to know more about the activities and services of the ITC.

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## 5. NETWORK AND CONNECTIVITY

Network and Connectivity Standards	Y/N
<b>5.1 Maintains an ISP bandwidth capacity which meets or exceeds the rate prescribed in the FCC E-Rate Modernization Order of 2014 – currently specified as a minimum of 100Kb/student.</b>	Yes
Comments: ACCESS exceeds this standard via their private fiber network.	
<b>5.2 Document a minimum 51% K12 bandwidth purchased from the designated K12 Network ISP provider.</b>	Yes
Comments: ACCESS meets this standard.	
<b>5.3 Actively monitors ITC-to-building (or district demarcation) connectivity availability.</b>	Yes
Comments: ACCESS meets this standard using PTRG, Cisco Prime, and other logging solutions.	

ACCESS owns their own private fiber network to their districts. ACCESS has strategic partnership established to assist in the maintenance of the fiber network and utilize its capabilities beyond the K-12 customers served by the ITC. The private fiber network allows ACCESS to provide sufficient bandwidth for the stakeholders to meet the per-student allocation mandate. They utilize the designated K12 Network ISP provider for more than half of their bandwidth, therefore are in compliance with the 51% bandwidth purchase requirement. They have a secondary internet bandwidth provider and use BGP for failover and routing. The private fiber network is a valuable asset for the ACCESS and its member schools.

ACCESS has monitoring in place to assure all connections are up. When an alert is received, they take the necessary steps to restore services or notify the districts. Districts and other entities utilizing ACCESS's network services expressed appreciation for the way that staff work with them on scheduled outages or when unexpected outages take place, even when that occurs off-hours. A number of examples were provided where ACCESS went above the normal working hours to assist with a critical issue.

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## 5. NETWORK AND CONNECTIVITY, CONTINUED

ACCESS provides a variety of technical services for its stakeholders including wireless, voice over internet protocol (VoIP), voicemail, backup storage, and hosted virtual server. Focus group participants expressed satisfaction with each of the services that they utilized from ACCESS. The customers indicated good service and response time for changes in and assistance with each of the services.

Overall, the district technical staff appreciated the timeliness of ACCESS's response to their requests even if they did not always like the answer or the issue was not yet resolved because it required additional research or action from a third party.

District technical staff indicated that ACCESS has provided technical consultation and assistance on district network and server items that ACCESS has expertise in. When talking with both clients and ACCESS technical staff, personal contact and personal connections were mentioned as key components of the relationship. It was very apparent that both groups looked at their working relationship as a partnership; A lot like friends helping each other out. This is indicative of the strength of network services offered by the ITC.

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## 6.IT OPERATIONS

IT Operation Standards		Y/N
<b>6.1 Actively participates in the OECN Security Working Group</b>		Yes
Comments: SWG participation as well as weekly review with Management Council consultant Art Provost.		
<b>6.2 Has adopted and implemented security best practices and policies as recommended by the OECN Security Working Group</b>		Yes
Comments: Board policy adoption August 2019.		
<b>6.3 Maintain detailed documentation of technical infrastructure, including a list of mission critical assets as needed to provide core services. Assets include but not limited to server, storage, networking, and contractual agreements for offsite (i.e. cloud or contracted with another entity).</b>		Yes
Comments: Documentation provided for this review.		
<b>6.4 Demonstrate maintenance agreements for items on mission critical list.</b>		Yes
Comments: Documentation provided for this review.		
<b>6.5 Demonstrate current, tested, disaster recovery/business continuity plan which includes an emergency contact list, with a copy stored offsite.</b>		Yes
Comments: Updated August 2019.		

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## 6.IT OPERATIONS, CONTINUED

IT Operation Standards	Y/N
<b>6.6 Actively monitors system availability.</b>	Yes
Comments: Using PRTG monitoring for system availability.	

ACCESS utilizes a co-location data center service for the network core equipment and server resources. The review team met with the ACCESS technical staff and toured both the current and a future data center (transition planned to take place by summer 2020). Both centers are physically secured and sufficiently controlled with all of the features expected in a modern data center including 24x7 personnel, monitoring, security, redundant power and cooling, fire suppression, and multiple location options to support the hardware necessary to drive the network and support the service offerings. There appears to be adequate monitoring by PRTG of infrastructure hardware hosting customer-facing applications.

As security has become a critical concern for both ITC and district operations, it's noted that ACCESS has begun considering security polices aligned with the National Institutes of Standards and Technology (NIST) and making investments to support this goal. ACCESS technical staff are regularly participating in the OECN security working group and joining in bi-weekly calls with the Management Council security consultant. Adopting each policy will take time and resources; ACCESS understands security is a vital issue for all ITCs requiring consistent attention and awareness.

ACCESS maintains documentation on their technical infrastructure including diagrams of the fiber network they own and maintain. They also have a good network intrusion response plan that covers measures for themselves and districts. Their disaster recovery plan is reviewed and tested regularly to assure business continuity is sustainable.

The ACCESS technical team are proud to be working for ACCESS. They have a good working relationship within their department, with their leadership team, and with stakeholders. They are looking forward to the pending addition to their team to enhance their ability to cross train each responsibility area. They have enough flexibility and control of their environment to rely on each other when something unexpected arises. The ACCESS staff puts in time after hours to help clients. They feel their relationships are personal and they want to help; There are no indications this extra effort is being abused.



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## 6.IT OPERATIONS, CONTINUED

Technical staff are evaluated annually, most recently completed within the last 4 months. They felt compensation is fair and aligned with Technology Coordinators within their region.

ACCESS technical staff visit clients when problems arise. Much has been learned about client infrastructure on these visits. The ITC technical staff suggested clients might benefit by expanding ITC services to incorporate additional local area network (LAN) services, possibly including Active Directory and server management. It was noted this expansion might be hindered by the availability of resources needed to provide an appropriate quality of service. This suggestion is worthy of additional study.

It was also suggested that expanding available staff in the technical area could improve opportunities to expand their technical skills and increase their value to the ITC. Additional staff resources might also allow them to specialize their technical focus and collaborate more with their counterparts at other ITCs. Alternatively, outsourcing some technical functions to hosted applications (e.g. ProgressBook and/or Redesign) would relieve some of the pressure on present technical staff. They would value more time to focus on project planning and cross training so they can be forward thinking and proactive in supporting client needs.

In summary, ACCESS' network and technical operations are efficient, cost conscious, and provide good value to the districts they serve.

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## 7. DATA COLLECTION AND GENERAL PARTICIPATION

Data Collection and General Participation Standards		Y/N
<b>7.1 Actively participates in data collection and sharing which will inform and improve the performance of the OECN and its members, including common customer satisfaction, staffing and compensation, and fees surveys.</b>		Yes
Comments: ACCESS is a strong participant in OECN data collection and program advisory groups.		

ACCESS is commended for their involvement in OECN activities and projects. The executive director participates on the Board of the Management Council and demonstrates regular attendance at ITC Director meetings. ACCESS staff are involved in several advisory boards for state-level programs.

ACCESS has participated in the common customer satisfaction survey, fees information collection, and the staffing survey. Participation in data collection, attending meetings, and active involvement in working groups benefits ACCESS as an organization and as part of the larger ITC network.

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## STRATEGIC INITIATIVES

Strategic Initiatives Standard	Y/N
<b>8.1 Provide a strategic plan or other documentation to describe the aspirational vision of the ITC.</b>	Yes
Comment: A strategic plan was provided.	

A copy of the “ACCESS Vision and Strategy” document was provided for this review. Although brief, the document described high-level goals and a strategic direction for the ITC, and ACCESS is commended for working with their board, district leadership, and clients to create this instrument.

It would prove beneficial for ACCESS to include more detail in its strategic plan, including timelines, milestones, measurable outcomes, resource commitments, and firm completion expectations for the goals expressed in the plan.

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## SUMMARY OF RECOMMENDATIONS

1. State and Federal Compliance
  - a. Adopt formal FLSA policy per item 2-a below.
2. Administrative
  - a. Formally adopt FLSA policies aligned to your existing FLSA practice and include policies and procedures in the employee handbook.
  - b. Consider adding a carryover balance policy per item 3-a below.
  - c. Research FLSA implications of offering the cell phone stipend to non-exempt staff.
  - d. Assure all staff have access to professional development; Encourage staff to partake in professional development opportunities which may strengthen skills in their areas of responsibility.
  - e. Strengthen the evaluation process to increase value for all employees.
  - f. Explore staff resources needed when considering new service opportunities for EMIS, fiscal, and technical.
3. Financials
  - a. Consider formalizing a policy regarding a carryover balance of at least 20% of operational expenditures.
4. Service Operations for Core Service
  - a. Consider Zoom-based online training for districts and purchase Zoom licensing for all key district contacts.
  - b. Continue plans to transition to a shared-service model for INFOhio/Library support by contracting for service with the INFOhio state support team.
  - c. Recent hosting of state resource meetings has been welcomed; continue to offer to host regional meetings for STRS, SERS, and other state resources.
  - d. Resume holding fiscal roundtable meetings for fiscal redesign clients.
  - e. Considers scheduling additional open lab opportunities for EMIS and fiscal clients.
  - f. Broaden the cross-section of client stakeholders when vetting product selections.
  - g. Clarify communications regarding extended calendar and fiscal-year-end support availability.
  - h. Investigate shared personnel opportunities to assist clients who may be unfamiliar with classic until they can transition to the new fiscal software.
  - i. Participate in hosted operations used by other ITCs for key applications such as ProgressBook and Redesign, freeing up staff to provide more customer-facing services
5. Network Connectivity
  - a. Continue to offer excellent customer support and networking capacity to client districts.
6. IT Operations
  - a. Consider expanding network service offerings to support client LAN needs; Investigate benefits of additional staff resources to support technical services.

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## SUMMARY OF RECOMMENDATIONS, CONTINUED

7. Data Collection and ITC Participation
  - a. Continue participating in statewide data collection and collaborative efforts.
8. Strategic Initiatives
  - a. Expand on the foundation of the strategic planning document; Consider adding specific outcomes, timelines, completion targets, and RACI elements to the plan.

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## CLOSING REMARKS

We appreciate the welcoming environment we encountered at ACCESS. The facility was open and set for our meeting needs. Everyone was cordial, and a healthy number of client sites showed up for the sessions, giving us a strong basis of feedback from which to draw our conclusions. Greater participation is always welcomed in site reviews, to add reliability to the feedback.

ACCESS has a healthy balance that is set to grow based on recent Board action, good technology resources, an outstanding private fiber network with ample bandwidth capabilities, admired leadership, and dedicated support staff who are highly competent at solving core service and other client issues. The culture at ACCESS has a strong customer service focus that has continued to grow under new leadership. While the staff headcount is small, cross-training and the dedication to customer service are meeting client needs. ACCESS is open to working with other ITCs, supporting a systemic view of ITC services across the state. This collaborative culture makes all of the ITCs stronger, and is to be commended.

ACCESS will continue to face some of the same challenges faced at all ITCs – technologies are changing quickly, more services and expertise are sought by schools, and the marketplace expands with new providers constantly. Determining which services to offer, which to host, which to purchase as services, and how to best serve the needs of the client districts is causing all ITCs to look at their delivery model; by embracing collaboration, ACCESS is in a good position to be able to provide the best array of services to the schools.

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## APPENDIX A – LIST OF REVIEW TEAM MEMBERS

### **The following individuals participated in the ACCESS site review**

- Geoff Andrews, Chief Executive Officer, Management Council, Review Chair
- Andrew Tompkins, Director of Member Services, Management Council, Review Coordinator
- Theresa Fredericka, INFOhio Director, Management Council
- Paul Craft, CEO, META Solutions
- Laurie Hille, Executive Director, NOECA
- Eric Schumm, Network Services, NOACSC