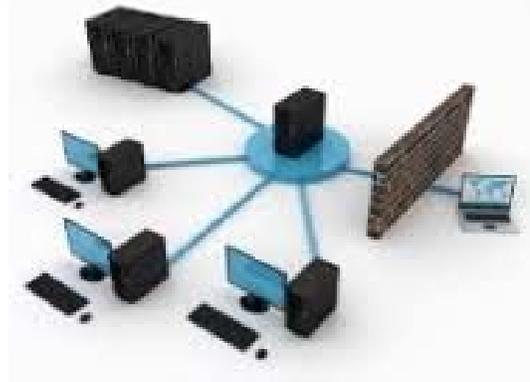# Technology Strategic Plan

Technology Strategic Plan

Oregon School Boards Association

2015 – 2017

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Executive Summary

The Oregon School Boards Association (OSBA) hired Talbot, Korvola & Warwick, LLP in conjunction with Assured Technology Solutions, to conduct an operational assessment of the association's technology and "create a well-documented strategic plan to guide the IT team over the next five years in planning, procuring, implementing and managing current and future technology investments and resources." The operational assessment has been delivered as a separate document. This document delivers the requested technology strategic plan. In recognition of the rapid pace of technology change, the plan was changed from a five-year plan to a three-year plan.

OSBA's technology operations are able to maintain a sufficient level of service to allow the association to meet its mission. However, several risk areas were identified that could compromise its ability to continue providing an adequate level of service in the future.

Highlights of the specific recommendations are listed below:

March – June 2015: Due to the need to immediately address outdated infrastructure and information security concerns, some recommendations from the operational assessment were scheduled to be completed during the drafting of this plan. The most significant activity is implementing a new file server with sufficient storage capacity and upgrading the operating system to a current version. A more complete backup solution with appropriate disaster recovery is also scheduled for completion by the end of June.

Other projects already scheduled for this budget cycle include: Implementing a case law management system for litigation services; redesigning the OSBA website; designing the updates to the School Personnel Online Tools (SPOT) applications.

Fiscal year 2015-2016: The recommendations for this fiscal year include updating the remaining infrastructure including switches, wireless equipment and remote access options. The update of the SPOT applications are expected to be completed in this fiscal year. A significant shift in the association's approach to bulk emails to members (list-serve for news clips, *School Leader News*, event marketing etc.) is also being recommended.

Fiscal year 2016-2017 Proposed Budget: The association's practices of updating equipment assigned to staff and association-wide productivity software continues for this fiscal year. In the 2015-16 fiscal year, technology staff are scheduled to develop a collaborative process for identifying and selecting new technology solutions to support the entire OSBA. This process is expected to yield specific projects for the 2016-2017 fiscal year. A budget of $175,000 is listed as a placeholder for those projects.

Introduction

Organization Mission:

The Oregon School Boards Association is *dedicated to improving student achievement through advocacy, leadership and service to locally elected, volunteer Oregon public school boards*. Its strategic directions focus on four areas:

- **Advocacy -** Harness the collective influence of Oregon's pre-K-14 school boards to promote excellence in student achievement, community engagement and public support. Sustain the strength and vitality of local education boards as the foundation of our democracy.
- **Leadership -** Provide and promote opportunities for pre-K-14 board members to gain world-class knowledge and collaborative skills that focus on improving student achievement.
- **Services -** Create outstanding professional services that are affordable, accessible and relevant for Oregon's pre-K-14 boards and education partners. Provide and promote services to school districts, public charter schools, education service districts and community colleges.
- **The Association -** Continually monitor and improve OSBA's structure, operations and services to meet the changing needs of members.

Organization Description:

OSBA was founded in 1946 to assist locally-elected volunteers fulfill their public education roles. The Association is governed by a member-elected board and serves K-12 public school boards, public charter school boards, education service district boards, community college boards and the State Board of Education. Its 40 staff provide legislative advocacy at state and federal levels, board leadership training, employee management assistance, board policy services, financial services and legal assistance.

OSBA Technology Team:

Name	Title
Michael Robison	Director of Operations and Finance
Kathy Knock	Management Information Specialist
Eric Mousel	Webmaster
Andrew Norval	Part-time IT Specialist

OSBA Technology Strategic Directions

The OSBA strategic technology direction articulates the path for ensuring the association technology program supports OSBA programs and departments in the delivery of services and information to members through cost-effective, innovative, reliable and secure technology.

The following principles represent the framework for achieving the association's technology goals:

Accountable – Establish and maintain a process for implementing technology initiatives and taking responsibility for outcomes.

Collaborative – Involve stakeholders early to build cooperative relationships and common understanding of issues to ensure proposed solutions achieve shared objectives.
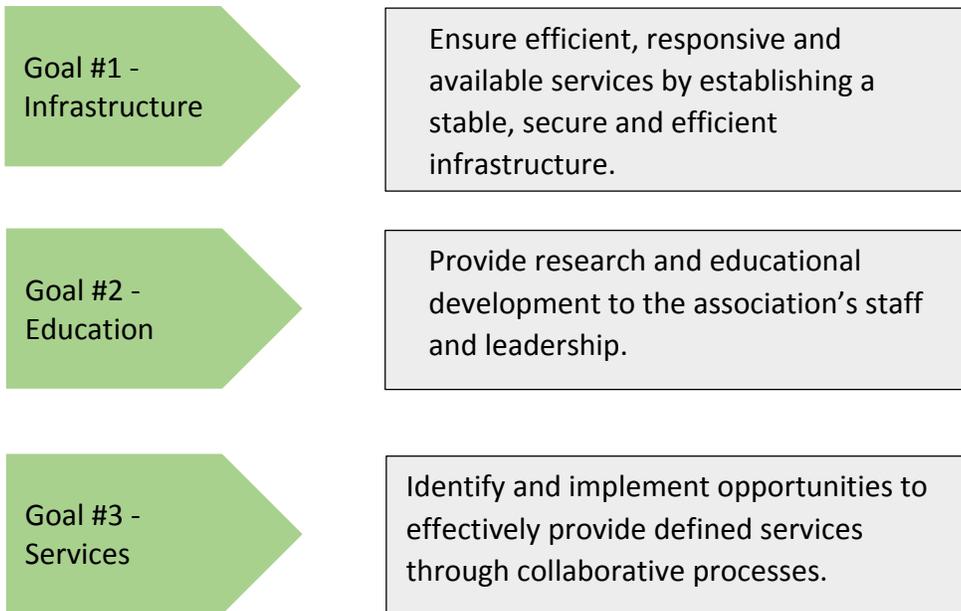
Service driven – Pursue solutions with a clear business case and ensure that proposed solutions provide a measurable value to solve an identified problem.

The specific strategic directions include:

Direction	Description
Technology environment	Maintain and improve the technology infrastructure available to the association including hardware, software, web services and applications.
Technology use	Establish and promote a collaborative technology environment that is responsive and proactive to external and internal needs.
Elected officials support	Support our non-partisan, locally-elected members across the state to effectively engage in public awareness campaigns and legislative lobbying.

OSBA Technology Goals

OSBA's business strategy consists of multiple components and identifies common themes where technology can assist in meeting organizational goals. OSBA's technology goals focus on improving existing services and creating new possibilities through a variety of technologies.

Goal #1 - Infrastructure	Ensure efficient, responsive and available services by establishing a stable, secure and efficient infrastructure.
Goal #2 - Education	Provide research and educational development to the association's staff and leadership.
Goal #3 - Services	Identify and implement opportunities to effectively provide defined services through collaborative processes.

Key External Trends

A number of key trends will potentially impact OSBA's technology efforts over the next five years:

Economic – A significant portion of OSBA's revenue comes from interest on investments. While these returns are currently doing well, they are a volatile source of income and a sudden downturn in the financial markets could significantly impact OSBA's ability to maintain or move forward with its technology goals.

Consumer – An age disparity gap exists between OSBA's staff and its members. Based on OSBA's membership surveys from 2004-2012, the age of OSBA's members is increasing as shown below:

	18-34	35-54	55-64	65+
2004	2%	61%	27%	10%
2008	4%	53%	29%	13%
2012	1%	43%	39%	17%

The average age for the current OSBA staff is 47 years old. OSBA is increasingly facing a younger, more tech-savvy workforce and an aging membership. These two groups represent generations with different exposures and expectations regarding technology which is likely to pose a significant challenge for the association in evaluating proposed solutions.

Political and regulatory – Since OSBA members are subject to a significant number of regulations imposed by outside agencies, the association faces the challenge of keeping up-to-date with those regulations and their impacts on members. Legislative changes could impose requirements and timelines which would necessitate a reordering of the association's technology plans.

Technological – The exponential advancement of technology makes predicting its future more of an art than a fact-based process. As a result, technology planning must be an iterative process which is constantly evolving to meet business needs. A small group of in-house staff is likely to have difficulty implementing emerging technologies while maintaining existing systems. Balancing the pace of change with the need to control fixed costs will present a significant challenge to the association.

Operational Analysis

Current State of Technology:

A comprehensive operational analysis of OSBA's technology environment was conducted in the fall of 2014. The assessment found OSBA has been able to maintain a level of service allowing the organization to meet its mission and goals. However, it also revealed areas of risk including:

- Facility and information security;
- Outdated infrastructure;
- End-of-life software;
- Technology staff expertise;
- Technology staff workload;
- General staff training.

The first two items are the most serious concerns and should be addressed as soon as possible. End-of-life software is a security issue which must be resolved in the next the 18 months. However, upgrading these applications also provides an opportunity to examine new technologies. OSBA will need to develop an implementation plan which allows for this assessment.

Process Improvements:

Addressing system security (based on current design), the aging of devices currently in use, and staffing issues will help to mitigate the risks associated with the technology environment.

Proposed Expenditures

Total 2014-15 March thru June Capital Assets Expenditures - $277,800
Total 2015-16 Capital Assets, Hardware, Software and Consulting Expenditures - $312,500
Total 2016-17 Capital Assets, Hardware, Software and Consulting Expenditures - $228,000

Measures of Success

As part of improving technology operations, OSBA technology staff will work with department staff in the 2015-2016 service year to set target levels for the following measurements.

Goal: Ensure the availability of existing Processing Capabilities

Infrastructure Incidents

Evaluate the number of non-desktop problems that affect more than a single user and resolution time. Includes hardware and system software. Requires a consistent definition for severity.

1. Total Infrastructure Incidents (by infrastructure type excluding desktop incidents)	Track infrastructure incidents by infrastructure type (network, server, etc.). Exclude desktop problems that only affect a single user.
2. Infrastructure Incident Resolution	Incidents resolved with SLA / Total Incidents. Track by severity.
3. Mean time to resolve (by severity)	Track the mean time to resolve by incident severity

Infrastructure Availability

Evaluate the availability of non-desktop infrastructure during peak business hours

4. % Downtime	% Infrastructure downtime (by type) during peak and non-peak business hours. Exclude scheduled downtime.

Goal: Timely Response to Business Requests for New Features of Services

5. Total Active Requests by Type	
6. Total Backlog Requests by Type	
7. Total Completed Requests	

Goal: Successful Implementation of System Changes

8. Planned Application Changes	
9. Emergency Application Changes	
10. Enhancement Change Success Rate	

Goal: Customer Satisfaction

Based on Customer Surveys

11. Infrastructure Availability/Reliability	Perception of the availability and reliability of the infrastructure
12. Operations Support	Satisfaction levels relating to Operations Support
13. Applications Support	Satisfaction levels relating to the support provided by applications support relating to problem resolution, consultation, and work requests such as enhancements.