## Budget

Rittman Exempted Village (045591) - Wayne County - 2015 - Straight A Fund - Rev 0 - Straight A Fund - Application Number (261)

### U.S.A.S. Fund #:
[Plus/Minus Sheet (opens new window)]

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**Adjusted Allocation** 0.00

**Remaining** -187,790.00
### A) APPLICANT INFORMATION - General Information

#### 1. Project Title:
4 Districts Innovative Shared Services for Business Process Management

#### 2. Executive summary: Please limit your responses to no more than three sentences.

Four public school districts in Wayne County, Ohio, Rittman Exempted Village, Orrville City, Green Local, and Southeast Local, representing 5,181 students, will create an innovative shared services (ISS) agreement by combining fiscal services functions, under one Chief Financial Officer (Treasurer), to provide efficient, cost effective services through the creation of one "Business Process Management" model. The model will streamline fiscal operations procedures and routine processes in order to create economic efficiencies and ultimately provide funding for additional resources for educational programs in the four districts. The overall goals of the Business Process Management (BPM) model are: 1) align information, system and service quality of fiscal services between all four districts; 2) reduce replication of work; 3) strengthen the expertise and improve functional knowledge of staff to further develop them in their current role, or prepare them for a more advanced position; 4) eliminate paper processes and create more efficient means of communication and access to information by implementing innovative web-based technologies and electronic work flow procedures; 5) increase transparency in government; and 6) create a greater utilization of resources in the classrooms of all four districts.

*This is an ultra-concise description of the overall project. It should not include anything other than a brief description of the project and the goals it hopes to achieve.*

#### 3. Total Students Impacted:

5,181

*This is the number of students that will be directly impacted by implementation of the project. This does not include students that may be impacted if the project is replicated or scaled up in the future.*

#### 4. Please indicate which of the following grade levels will be impacted:

- [ ] Pre-K Special Education
- [ ] Kindergarten
- [ ] 1
- [ ] 2
- [ ] 3
- [ ] 4
- [ ] 5
- [ ] 6
- [ ] 7
- [ ] 8
- [ ] 9
- [ ] 10
- [ ] 11
- [ ] 12

#### 5. Lead applicant primary contact: - Provide the following information:

- **First Name, last Name of contact for lead applicant**
  - Brett Lanz OR Mark A. Dickerhoof

- **Organizational name of lead applicant**
  - Rittman Exempted Village School District / Orrville-Rittman-Southeast Compact

- **Address of lead applicant**
  - 100 Saurer Street, Rittman, OH

- **Phone Number of lead applicant**
  - 330-927-7150

- **Email Address of lead applicant**
  - rlt_lanz@tccsa.net OR roc_mardick@tccsa.net

#### 6. Are you submitting your application as a consortium? - Select one checkbox below

- [ ] Yes
- [ ] No

If you are applying as consortium, please list all consortium members by name on the "Consortium Member" page by clicking on the link below. If an educational service center is applying as the lead applicant for a consortium, the first consortium member entered must be a client district of the educational service center.
B) PROJECT DESCRIPTION - Overall description of project and alignment with goals

8. Describe the innovative project: - Provide the following information

The response should provide a clear and concise description of the project and its major components. Later questions will address specific outcomes and the measures of success.

The current state or problem to be solved; and

Ohio Auditor Dave Yost makes the following statement on the website www.SkinnyOhio.org: "Ohio's fiscal reality demands - and its citizens deserve - clean, accountable and efficient government". This same reality is true for public school districts. Local taxpayers demand efficient operations while at the same time schools must provide for adequate and equitable educations for students. Therefore, how do small suburban and rural school districts create efficiencies in operations with limited resources without negatively affecting classrooms? The four districts face looming budget deficits: Green Local will experience deficit spending in FY (Fiscal Year) 2014, and a negative cash balance in FY 2018; Rittman Exempted Village Schools is currently experiencing deficit spending and will have a negative cash balance by FY2016; Southeast Local will experience deficit spending in FY2016 and a negative cash balance in FY 2018 and Orrville City Schools will incur deficit spending in 2016 and a significantly lower cash reserve by FY 2018 (Evidence: Ohio Department of Education: Five Year Forecast - Traditional Districts; http://education.ohio.gov/). Each partner district in this grant is looking for opportunities to reduce cost of operations without harming education programs. According to the Auditor of State "Shared Services have been used by Ohio governments for many years to take advantage of opportunities to lower costs and enjoy economies of scale by joining together in contractual and other service arrangements. The opportunity to provide combined, cost-effective services is limited only by imagination and determination". Therefore, the four districts have identified a unique innovative opportunity to create a business process management model by combining the fiscal services departments of all four districts to streamline operations under one Chief Financial Officer (Treasurer) and work more efficiently without compromising the level of customer service.

The proposed innovation and how it relates to solving the problem or improving on the current state.

The 4 Districts ISS Model will establish a unique partnership among four school districts in Wayne County, Ohio to offer innovative fiscal support to the partnering school districts through a shared services agreement and the establishment of a Business Process Management model. The first and foremost critical component of the project will be the alignment of fiscal staff under one Chief Financial Officer (Treasurer) and a single shared services agreement between all four districts. Currently, three of the four districts (Rittman, Orrville and Green) have a shared services agreement for the employment of the school treasurer between all three districts. The treasurer serves each board of education and fulfills the duties and responsibilities of Chief Financial Officer for all three districts. A fourth district, Southeast Local, will employ the same Treasurer/CFD and the shared services agreement will be expanded to all four districts. Initially a savings will be realized with reduction of the Treasurer position at Southeast Local. It is anticipated that within two years, the ISS Model will be able to reduce the equivalent of an additional part time staff member. This savings in human capital will allow the districts to operate more efficiently by directing the savings towards classroom expenditures. The Treasurer will establish a business process management system by aligning the staff by tasks related to information, system and services provided. Many of the functions of the fiscal services department are routine and cyclical in nature. Each member of the fiscal staff will take on different roles and responsibilities serving all four districts in their job function. This will create a unique team of experts and allow for the second goal to be reached - that of reducing replication of work. In two separate articles, governments of both the United States - "Creating a 21st Century Government: Enhancing Productivity and Achieving Cost Savings by Reducing Fragmentation, Duplication and Overlap", April 8, 2014, and the United Kingdom - "Creating an Exceptional Civil Service - Less Bureaucratic and More Skilled, Digital and Unified" November 1, 2013, have cited shared services as a way to reduce back office costs and generate savings for taxpayers. (http://www.whitehouse.gov/sites/default/files/omb/reports/fact_sheet_gao_duplication.pdf); (https://www.gov.uk/government/news/shared-service-strategy-to-save-taxpayer-money). A third goal of project implementation will be to strengthen the expertise and improve functional knowledge of staff to further develop them in their current role or prepare them for a more advanced position. This goal addresses the sustainability of the shared services agreement well beyond five years by investing, through professional development, in the staff within the business process work group by providing empowerment, feedback, goal-setting, and a solutions-oriented approach to new processes and procedures (www.bridgespan.org). A fourth goal, the major component of the project, is to implement innovative web-based technologies and electronic workflow procedures to create a paperless fiscal services environment. This is truly the heart of the project as it is through the implementation of online human resource applications systems, requisition approval management system, point of sale software, web based substitute placement and absence management, electronic timesheet and attendance modules, electronic board governance/meeting document access, and electronic scanning, storage and retrieval of public records, that the concept of a shared services - complete electronic services delivery model - is realized across all four districts. The online management of board of education documents for all four districts addresses the fifth goal of greater transparency in government. Savings will result in additional resources directed to the classrooms, the last goal.

9. Which of the stated Straight A Fund goals does the proposal aim to achieve? - (Check all that apply)

Applicants should select any and all goals the proposal aims to achieve. The description of how the goals will be met should provide the reader with a clear understanding of what the project will look like when implemented, with a clear connection between the components of the project and the stated goals of the fund. If partnerships/consortia are part of the project, this section should describe briefly how the various entities will work together in the
10. Which of the following best describes the proposed project? - (Select one)

- Student achievement (Describe the specific changes in student achievement you anticipate as a result of this innovation (include grade levels, content areas as appropriate) in the box below.)

- Spending reductions in the five-year fiscal forecast or positive performance on other approved fiscal measures (Describe the specific reductions you anticipate in terms of dollars and spending categories over a five-year period in the box below or the positive performance you will achieve on other approved fiscal measures. Other approved fiscal measures include a reduction in spending over a five-year period in the operating budget approved by your organization's executive board or its equivalent.)

Wherein there currently exists two Treasurers between the four districts, the innovative shared services agreement will create on Chief Financial Officer (Treasurer) serving the four districts. Spending reductions due to the innovative shared services model include the salary reduction attributed to saving one full time equivalent (FTE) treasurer in the amount of $115,316 and related benefits of $40,449 for a total of $155,765. The true "innovative" benefit of the shared services agreement is that each of the four districts receives a percentage of the savings based upon the total enrollment of each district. This concept utilizes the approach that all four districts benefit from the same opportunity. This reduction will be realized in Fiscal Year 2015 and impacts every year in the five year forecast in all four districts. The Business Process Management model (the implementation of web based technologies to streamline tasks and procedures) will also offer savings reductions in the amounts of $2,400 in reduced audit costs due to the accessibility of the document retrieval system (OnBase); the reduction in personnel related costs of $14,323 in salaries and related benefits due to the implementation of Aesop, the substitute placement software in three of the four districts; a reduction in overtime of fiscal services staff in the amount of $7,823 in salaries and benefits due to automated processes, remote access of data; increased efficiencies through elimination of work redundancy and implementation of workflow processes such as RAM (requisition approval manager) system. A significant amount of paper will be reduced as the districts move to a 100% "green" organization goal. The estimated amount of paper and print cartridge savings is conservatively set at $1,000 for a total of $4,000 across the consortia.

- Utilization of a greater share of resources in the classroom (Describe specific resources (Personnel, Time, Course offerings, etc.) that will be enhanced in the classroom as a result of this innovation in the box below.)

Savings generated by establishing a shared services agreement between the four partner districts will be realized by a direct reduction of expenditures in the line item allocated to fiscal personnel costs in each district's general fund. A combined amount of approximately $120,000 is available for additional resources in the classrooms through the implementation of the innovative shared services model. This savings will then be used to offset classroom expenditures such as textbooks and supplies, and reduce (not eliminate) the need for deficit spending. Other savings in resources for classroom teachers will be the amount of time spent tracking absences, substitute requests, paper requisitions, substitute time-sheets, and requests for retrieval of information such as teacher license and individual professional development plans. Point of sale systems will allow for students to move quickly through lunch lines, freeing teachers of lunch room responsibilities and also creating less collection of fees by teachers during their morning routines. Point of Sale will be implemented in one district only as the other three already utilize this system.

- Implementing a shared services delivery model (Describe how your shared services delivery model will demonstrate increased efficiency and effectiveness, long-term sustainability, and scalability in the box below.)

The major components of the grant will be to: 1) Develop a shared services agreement for fiscal services to be adopted by district boards of education for Rittman, Orrville, Green and Southeast school districts in Wayne County, Ohio allowing for four districts to share one Treasurer; 2) Communicate the planned changes in fiscal operations with current staff and communities. 3) Assess the current practices and procedures of fiscal operations including but not limited to the development of annual budgets, fiscal close out procedures for year end, tuition and excess cost billing and reporting, receipt processing, maintenance of federal grant applications and budgets (CCIP), human resource management, payroll processes including W-2 processing, hiring practices, personnel leave and substitute placements, communication with other departments, tracking and ongoing maintenance of district communication such as board minutes, auditor requests, archived information and public records requests, all while maintaining separate distinct entities and proprietary and confidentiality of the information of the four districts involved. 4) Coordinate tasks and needs between all four districts fiscal services departments and create a business model of operations - a Business Process Management model to identify roles, responsibilities and necessary cross training to be developed. This component may result in a change in location of physical office space but it is anticipated each district will offer face to face customer contact for teachers and staff with at least one staff member in order to ensure excellence in customer service focused on continuous improvement; 5) Upgrade technological equipment for fiscal department including computers, printers, scanners, copiers, and tablets to support additional software packages and allow for distance learning meetings among staff members at each of the four districts and also between trainers and staff. 6) Implement software packages to create an efficient fiscal service delivery model that supports the unique needs of each district and also allows for efficiency of operations in all areas. The following software packages have been identified as being the most beneficial in a working group model and interface with current software systems: RAM - requisition approval manager workflow package for processing school purchase requests which allows requisitions to be retrieved electronically, and remotely converted into purchase orders, OnBase - document management system for archiving and immediate retrieval of purchase orders, checks, requisitions, budget reports, personnel files, student files, transcripts, causing a significant reduction in paper used and storage space required for records retention Board Docs - board of education meeting document management for preparation and dissemination of board agendas, minutes and record keeping of the boards of education and also provides a web interface for the public to access board minutes, providing greater transparency; Aesop - This is an automated substitute placement and absence management system that allows substitute teachers to gain online access to daily openings for substitute employment and creates a paper less workflow for processing time-sheets of substitute teachers; Veritime- this is time keeping system for hourly employees to "clock in" and offers a paperless interface with the payroll system. Appitrack will allow for online applications and entry into the system for new employees while offering compliance with EEOC. Sustainability of the innovative shared services model will be realized with the reduction of one treasurer position, the savings of which will be shared by all four districts. This reduction will sustain the cost of the ongoing software licenses allowing for the workload to be expanded in the event a fifth district would want to enter the model.
C) SUSTAINABILITY - Planning for ongoing funding of the project, cost breakdown

11. Financial Documentation: All applicants must enter or upload the following supporting information. The information in these documents must correspond to your responses in questions 11-14.

* Enter a project budget in CCIP (by clicking the link below)

Enter Budget

* If applicable, upload the Consortium Budget Worksheet (by clicking the link below)

* Upload the Financial Impact Table (by clicking the link below)

* Upload the Supplemental Financial Reporting Metrics (by clicking the link below)

Upload Documents

For applicants without an ODE Report Card for 2012-2013, provide a brief narrative explanation of the impact of your grant project on per pupil expenditures or why this metric does not apply to your grant project instead of uploading the Supplemental Financial Reporting Metric.

The project budget is entered directly in CCIP. For consortia, this project budget must reflect the information provided by the applicant in the Consortium Budget Worksheet. Directions for the Financial Impact Table are located on the first tab. Applicants must submit one Financial Impact Table with each application. For consortium applications, each consortium member must add an additional tab on the Financial Impact Tables. Partners are not required to submit a Financial Impact Table.

Applicants with an "Ohio School Report Card" for the 2012-2013 school year must upload the Supplemental Financial Reporting Metrics to provide additional information about cost savings and sustainability. Directions for the Supplemental Financial Reporting Metrics are located on the first tab of the document. If your organization does not have an "Ohio School Report Card" for the 2012-2013 school year, please provide an explanation in the text box about how your grant project will impact expenditures per pupil or why expenditure per pupil data does not apply to your grant project.

Educational service centers, county boards of developmental disabilities, and institutions of higher education seeking to achieve positive performance on other approved fiscal measures should submit the budget information approved by an executive board or its equivalent on the appropriate tabs of the Financial Impact Table. Educational service centers should use the "ESC" tab and county boards of developmental disabilities and institutions of higher education should use the "non-traditional" tab.

12. What is the total cost for implementing the innovative project?

Responses should provide rationale and evidence for each of the budget items and associated costs outlined in the project budget. In no case should the total projected expenses in the budget narrative exceed the total project costs in the budget grid.

187,790.00 State the total project cost.

* Provide a brief narrative explanation of the overall budget.

Purchased Services - one time implementation costs $44,328 of the following software suites: Aesop, RAM, OnBase, Applitrack, BoardDocs, Point of Sale system, Veritine. These various systems will interface with the current payroll and accounting software and enable the staff to significantly reduce the amount of paper, hours, filing, and data input to process the work in the fiscal services department. Additional training costs for staff have been estimated at $2,000 per district ($8,000 total) to cover mileage and travel costs. Staff will be trained in "lean" operations training by the Auditor of State as well as take part in a Business Process Management implementation strategic plan session. Purchased Services - ongoing software licenses $55,714. The same software mentioned previously requires ongoing annual licenses, which includes ongoing professional development and support. Capital Outlay $59,748 will enable the districts to purchase personal computers, dual screen monitors, keyboard and mouse for each work station in the treasurer; s office. The upgrade is necessary for the computers to handle the robust software packages being implemented. Efficient office copiers with scanners will be purchased to allow for electronic filing of incoming mail and invoices. TCCSA will assist the districts in the purchase of the hardware to ensure state bid prices prevail. The State Auditor’s Office will assist the district in monitoring the grant and providing performance measure in which to assess successful implementation. The Auditor, s Office has estimated the cost of the Performance audit and initial analysis to cost $20,000. The total of the project is $187,790. $55,714 represents costs that must be sustained.

13. Will there be any costs incurred as a result of maintaining and sustaining the project after June 30th of your grant year?

Sustainability costs include any ongoing spending related to the grant project after June 30th of your grant year. Examples of sustainability costs include annual professional development, equipment maintenance, and software license agreements. To every extent possible, rationale for the specific amounts given should be outlined. The costs outlined in the narrative section should be consistent and verified by the financial documentation submitted and explained in the Financial Impact Table. If the project does not have sustainability costs, applicants should explain why.
14. Will there be any expected savings as a result of implementing the project?

Yes

Applicants with sustainability costs in question 13 or seeking to achieve significant advancement in spending reductions in the five-year forecast must address this response. Expected savings should match the information provided by the applicant in the Financial Impact Table. All spending reductions must be verifiable, permanent, and credible. Applicants may only respond "No" if the project will not incur any increased costs as a result of maintaining and sustaining the project after June 30th of your grant year. The Governing Board will use the cost savings as a tiebreaker between applications with similar scores during its final selection process. Cost savings will be calculated as the amount of expected cost savings less sustainability costs relative to the project budget. 

120,794.00 If yes, specify the amount of annual expected savings. If no, enter 0.

Yes, the project has annual expected savings in the amount of $176,508. This number is the gross savings prior to the sustainability costs required. (See the Combined budget of the FIT, attached). The savings is the direct result of the reduction of 1 FTE (Full time equivalent) treasurer, salary ($115,316) and related benefits ($40,449). There is also a savings included in salary and benefits on the combined schedule that is related to a reduction of approximately .25 FTE for a substitute "caller" position three of the four districts, a total of $14,343 (salary and benefits) that will no longer be necessary upon the implementation of the AESOP software. The savings to the four districts in the consortia is shared, per student ADM, under one innovative shared services agreement between the four boards of education. An anticipated reduction of $2,400 is included for less "lookup" time required by the auditor's office as documents will be readily accessible online through the online documentation archive system, OnBase. Paper and ink cartridge reductions in use are estimated at $4,000 ($1,000 per district). This is a conservative estimate as the price of paper continues to increase above the rate of inflation. The implementation of a Business Process Management model requires that the four districts all be using the same software platforms for the same tasks, This is necessary because one employee in the work group will be processing all the same work for each of the four districts and he/she must have access to the exact same software in each financial suite. Because financial records must be maintained separately for compliance purposes, it is necessary that each district purchase software licenses separately for each technology platform. In many cases, the project's partner, Tri-County Compuer Services Association, is able to negotiate a group rate for the software. Therefore, an annual sustainability cost of $55,714 is built into the project for the annual ongoing cost of the software licenses. Other costs added to the grant are one time implementation costs and do not affect sustainability (hardware purchases, training). The software companies offer ongoing training as part of the annual license renewal package and the hardware will be purchased with maintenance agreements as part of the package. The gross savings above of $176,508 less the annual sustainability cost nets annual expected net savings of $120,794 as shown on the combined FIT. Anticipated hardware purchases include upgrade workstations - 4 per district (pc, dual monitors, keyboard and mouse), digital copier (one per district) with networking capabilities - to eliminate costly printers and printer cartridges and have the capability of scanning to one desktop folder. It is anticipated the districts will include an extended warranty with the workstations and operate the copiers on a cost per copy maintenance agreement which replaces existing cpp agreements in the district and so does not add additional cost, but does add functionality to the back office work. An additional cost that is not ongoing is the cost of the State Auditor's office to assist in a performance audit for analyzing the successful implementation of the grant. This cost is estimated at $20,000 and while not a sustaining cost, could stretch beyond the June 30, 2015 deadline date due to the timeliness of completing an audit.

15. Provide a brief explanation of how the project is self-sustaining.

All Straight A Fund grant projects must be expenditure neutral. For applications with increased ongoing spending as documented in question 11-14, this spending must be offset by expected savings or reallocation of existing resources. These spending reductions must be verifiable, permanent, and credible. This information must match the information provided in your Financial Impact Table. Projected additional income may not be used to offset increased ongoing spending because additional income is not allowed by statute. Please consider inflationary costs like salaries and maintenance fees when considering whether increased ongoing spending has been offset for at least five years after June 30th of your grant year. For applications without increased ongoing spending as documented in questions 11-14, please demonstrate how you can sustain the project without incurring any increased ongoing costs.

For educational service centers and county boards of developmental disabilities that are members of a consortium, any increased ongoing spending at the educational service center or county board of developmental disabilities may also be offset with the verifiable, permanent, and credible spending reductions of other members of the consortium. This increased ongoing spending must be less than or equal to the sum of the spending reductions for the entire consortium.

Explain in detail how this project will sustain itself for at least five years after June 30th of your grant year.

The innovative shared services model is an relatively new concept in public school districts. The main concept is to find a way to reduce costs...
and streamline operations to create a more efficient environment in which to process routine tasks and procedures. The four districts in Wayne County, Rittman, Orville, Southeast and Green are committed to the project by creating sustaining value through the reduction of an administrative position (treasurer) which will result in a shared savings of $155,765 in salary and benefits. Because of the type of work processed in a treasurer's office, it is very easy to create a central processing area for certain procedures such as payroll and accounts payable. Therefore, it is possible to sustain the work of all four school districts through the savings generated by the reduction of a supervisor, and the added value of creating a common process for each job function in the office. Therefore, this project will allow the staff in the fiscal services office to become more efficient in their work and offer support through cross training that will sustain the work for many years to come. This type of model creates lasting value to the staff and to the customers they serve by offering employees and vendors the most efficient model of processing available to public school districts in Ohio. Other savings of reduced audit costs, reduces paper usage and costly ink cartridges for printers, as well as additional reduction of staff through elimination of redundancy, allows for savings of $20,743 annually. The implementation of a Business Process Management model requires that the districts all be using the same software platforms for the same tasks, This is necessary because one employee in the work group will be processing all the same work for each of the four districts and he/she must have access to the exact same software in each financial suite. Because financial records must be maintained separately for compliance purposes, it is necessary that each district purchase software licenses separately for each technology platform. In many cases, the project's partner, Tri-County Computer Services Association, is able to negotiate a group rate for the software. Therefore, an annual sustainability cost of $55,714 is built into the project for the annual ongoing cost of the software licenses. Other costs added to the grant are one time implementation costs and do not affect sustainability (hardware purchases, training). The software companies offer ongoing training as part of the annual license renewal package and the hardware will be purchased with maintenance agreements as part of the package. The net savings of the model is $120,794 annually.

D) IMPLEMENTATION - Timeline, scope of work and contingency planning

16. Please provide a brief description of the team or individuals responsible for the implementation of this project, including other consortium members and/or partners.

This response should include a list of qualifications for the applicant and others associated with the grant. If the application is for a consortium or a partnership, the lead should provide information on its ability to manage the grant in an effective and efficient manner. Include the partner/consortium members’ qualifications, skills and experience with innovative project implementation and projects of similar scope.

Enter Implementation Team information by clicking the link below:

Add Implementation Team

For Questions 17-19 please describe each phase of your project, including its timeline, scope of work, and anticipated barriers to success.

A complete response to these questions will demonstrate specific awareness of the context in which the project will be implemented, the major barriers that need to be overcome and the time it will take to implement the project with fidelity. A strong plan for implementing, communicating and coordinating the project should be outlined, including coordination and communication in and amongst members of the consortium or partnership (if applicable). It is recognized that specific action steps may not be included, but the outline of the major implementation steps should demonstrate a thoughtful plan for achieving the goals of the project. The time line should reflect significant and important milestones in an appropriate and reasonable time frame.

17. Planning - Activities prior to the grant implementation

* Date Range May 1, 2014 - August 1, 2014

* List of scope of work (activities and/or events including project evaluation discussions, communication and coordination among entities).

May 1, 2014 - July 15, 2014, District staff will work to closeout fiscal reporting for Fiscal Year 2014. Staff will begin to document responsibilities with the annual reports so that processes can be combined for greater efficiencies in the future. June, 2014 - Upon successful grant award, all district boards of education will be notified of the processes necessary to establish the business process work group within the Treasurer's office staff across all four districts. Fiscal services staff will be made aware of their specific tasks, roles within the work group model. Cross training needs will be established and staff will be empowered to seek out their partner districts; staff to coordinate job roles, duties, function and training. July 1, 2014 - TCSCS and a representative from each of the four districts will meet to determine the implementation timeline of each of the major components in the grant. July 1, 2014 - August 1, 2014 - The Auditor of State’s office will be contacted for assistance in securing an auditor to assist with the oversight of the implementation of the grant and establishment of performance indicators (specific data to be measured). Specific audit objectives will be developed in coordination with the performance audit measures used to assess performance of operations of Ohio public school districts and specific to the major components of the grant.

* Anticipated barriers to successful completion of the planning phase

Time necessary to allocate duties and responsibilities will be the biggest barrier as the grant award will be announced during the busiest time of year for the fiscal services staff which is year end fiscal closeout. Availability of auditors could also be a barrier as they begin the annual process of auditing school district books immediately after the June 30 closeout. And additional barrier is resistance from staff to coordinate efforts in a working group model as opposed to individually. www.skinnyohio.org offers the following barriers that currently exist that the Business Process Management model will attempt to overcome: - Single Points of Failure If only one person in an organization has the knowledge or ability to support a given technology and goes on vacation or retires the organization will be at risk. - Inflexible Division of Labor If the organization has new employees, and employees that are highly specialized, with an influx of new workloads the end result is an inability to share the workload amongst the team members. - Lack of a Team Atmosphere Without the ability to learn multiple job functions, or incentive for employees to take responsibility for other knowledge areas, there is the potential for a cross-discipline problem and a lack of ownership of the problem. - Rotation of Duty as a Security Principal The rotation of duty concept argues that setting up job role rotations on a scheduled basis makes inefficiencies and corruption easier to identify and resolve. - Lack of Variety Cross Training is meant to expand the knowledge area and introduce new challenges, leading to more variety in the day to day workload; carrying the advantage of providing a fresh perspective to old problems.
18. Implementation - Process to achieve project goals

* Date Range: July 1, 2014 - June 30, 2015

* List of scope of work (activities and/or events, including deliverables, project milestones, interim measurements, communication, and coordination).

July 1, 2014 - TCCSA and a representative from each of the four districts will meet to determine the implementation timeline of each of the major components in the grant. July 1, 2014 - the Auditor of State's office will be contacted for assistance in securing an auditor to assist with the oversight of the implementation of the grant. Specific audit objectives will be developed in coordination with the performance audit measures used to assess performance of operations of Ohio public school districts and specific to the major components of the grant. July 1, 2014 - Hardware will be purchased to support additional software applications. August 1, 2014 - December 31, 2014 - Staff will be assigned to specific tasks and roles within the four districts. Staff will begin to cross train on common functions. Each component in the grant will be identified with a specific implementation date in conjunction with TCCSA's personnel, when appropriate data network relationships, components and staff necessary for successful implementation are available. Payroll related functions work best to implement on a calendar year cycle (January - December), while budgetary changes may be implemented when staff is trained on each component during the course of the fiscal year (July - June). July 16, 2014 - June 30, 2015 - After the implementation of each major component, the processes and procedures will be reviewed by an external auditor to determine whether internal controls exist to ensure separation of duties and tasks, as well as that safeguards are in place to protect from co-mingling of district funds, and the potential for fraud and risk of theft is non-existent. The report of the external auditor will also serve as the mid-term review of the implementation and success of the project.

* Anticipated barriers to successful completion of the implementation phase.

Barriers to success exist from the standpoint of timing of implementation and coordination of cross training, and re-assignment of duties all while existing fiscal service operations continue in all four districts. It is also possible that multiple applications will be implemented at the same time creating the need for a longer implementation phase. The grant applicants are fully aware that payroll, annual budgets, teacher contracts, five year forecasts and board and staff relationships don't stop for the implementation of the major components of this grant. It is therefore important that each component be weighed and prioritized to reach maximum successful benefit to each member district and least amount of disruption to district employees.

19. Summative Evaluation - Plans to analyze the results of the project

* Date Range: June 30, 2015 - September 30, 2015

* List of scope of work (activities and/or events, including quantitative and qualitative benchmarks and other project milestones).

At the close of business, June 30, 2015, each district's fiscal reports are audited by an external auditor. Included in this audit, will be a summative evaluation of the implementation of the grant's major components, and the processes and procedures developed to ensure fiscal integrity. Specific audit objectives will be established for the oversight of the grant. The auditor's scope of work will include, but is not limited to: IT governance and practices; Safeguards of student information as well as login and accessibility safeguards for staff to ensure district fiscal databases remain separated and secure; Core Responsibilities of the Treasurer's Office - each budgetary and payroll aspect that involves combined staff working in each district's data will be reviewed for internal control procedures and efficiencies; Organizational Structure - Span of control of the Business Process Working Group, hierarchy of reporting between superintendents and the treasurer, staff members, and board of education, will be reviewed to ensure utmost protection and safeguards of individual district data; Operations, communications and a technical assessment will be performed by the Auditor of State's office; Specific Operational Processes - The Auditor's office will assess and document the specific operational practices that are new to each school district to ensure that efficiencies exist and are tracked within the scope of the grant, and contained within each performance measure of the annual audit, so that the final financial audit for fiscal 2015 contains necessary documentation for future auditors to assess the operations of the fiscal cooperative. Summative Evaluation: Each of the four district's boards of education will receive a summative report of the implementation of the grant's major components, and a management report documenting the auditor's recommendations for improvement, if necessary.

* Anticipated barriers to successful completion of the summative evaluation phase.

Barrier to successful completion of the summative evaluation phase would be inability to secure the external auditor for such work. A private audit firm could be secured for this work as well.

20. Describe the expected changes to the instructional and/or organizational practices in your institution.

The response should illustrate the critical instructional and/or organizational changes that will result from implementation of the grant and the impact of these changes. These changes can include permanent changes to current district processes, new processes that will be incorporated or the removal of redundant or duplicative processes. The response may also outline the expected change in behaviors of individuals (changes to classroom practice, collaboration across district boundaries, changes to a typical work day for specific staff members, etc.). The expected changes should be realistic and significant in moving the institution forward.

Please enter your response below:

The most critical change to the organizations involved in the Innovative Shared Services model is the change in job function for those working in the Treasurer's office. The initial steps below are critical to the success of the project and need complete buyin from the staff for implementation. 1) Coordinate tasks and needs between all four districts fiscal services departments and identify roles, responsibilities and necessary cross training to be developed. This component may result in a change in location of physical office space but it is anticipated each district will offer face to face customer contact for teachers and staff with at least one staff member in order to ensure excellence in customer service focused on continuous improvement. Treasurer needs to get acquainted with fourth district's staff and consider the best way to divide the work across district boundaries. Districts are geographically close, but could be as much as 15 miles apart from north to south. Treasurer needs to identify what services are best provided in the "home" district and what services can be centralized or combined into one person's job to create efficiencies. 2) Upgrade technological equipment for fiscal department including computers, printers, scanners, copiers, and tablets to support additional software packages and allow for distance learning meetings among staff members at each of the four districts and also between trainers and staff. 3) Develop a timeline for implementation of various software programs and coordinate implementation with other routine projects and work. 4) Communicate, communicate, communicate with staff about the changes. Let staff know how best to get questions answered as the person they need to work with may not be physically located in the district where
they work. Go onboard communication and clear messages about service delivery and high expectations. 5) Use methods such as survey monkey to find out how the staff is reacting - both the staff in the shared services model, and the external stakeholders such as teachers and staff members using the fiscal services model. Make changes as necessary without compromising the savings.

21. Describe the rationale, research or past success that supports the innovative project and its impact on student achievement, spending reduction in the five-year fiscal forecast or utilization of a greater share of resources in the classroom.

The response should provide a concise explanation of items which provide rationale that will support the probability of successfully achieving the goals of the project. Answers may differ based on the various levels of development that are possible. If the proposal is for a new, never before implemented project, the response should provide logical, coherent explanations of the anticipated results based on some past experience or rationale. For projects that have been implemented on a smaller scale or successfully in other organizations, the response should provide the quantifiable results of the other projects. If available, relevant research in support of this particular proposal should also be included.

Please enter your response below.

All of the four schools in the 4 Districts Innovative Shared Services proposal have existing shared services agreements. Success of these partnerships greatly enhances the probability of success of this application for an expanded shared services agreement, beyond the boundaries of sharing administrators, to streamline the actual work processes that are going on in the fiscal services offices and generate annual savings over $120,000. Orrville City Schools and Rittman Exempted Village Schools have been joined through an administrative compact, sharing administrative services (Beginning of 2007-08 school year - these two schools share Superintendent, Treasurer, and other staff from Administrative Team. Additionally, the two districts have also been able to share teachers, order a larger volume of supplies, and share buses for field trips). Cost-savings have occurred through collaboration - reported annual savings: $387,819.00, reported one time savings: $42,300.00. Green Local Schools joined the shared services agreement with Rittman and Orrville for purposes of sharing only the treasurer. Green Local Schools also has a shared services agreement with the Wayne County Career Center for transportation, nursing services and computer technicians. The agreement between Green and WCSCC is cost neutral but allows for the expertise to be located in specific areas such as the transportation work is done in Green's bus garage and computer tech work is done by the Career Center. Southeast Local Schools joined the Rittman-Orrville compact for the purpose of sharing the superintendent. Because these four districts (excluding the Career Center) are close in geographic proximity (central and eastern Wayne County), the ability to be located in one area and working for all four districts is much easier and physical presence, in the event of a meeting or collaborative project takes only a few minutes. Ohio is a leader in the shared services concept and many models are available for consideration on the website http://skinnyohio.org. At that site, interest in shared service information can be found by viewing the publication: "Beyond Boundaries: A Shared Services Action Plan for Ohio Schools and Governments" described as "a comprehensive study of public policy recommendations, potential collaborations and needed changes to the overall way of doing business in Ohio's public sector. This roadmap, developed by the Kasich administration in partnership with local officials from across the state, provides additional tools to further remove barriers that stand in the way of saving Ohioans’ tax dollars through collaboration. Beyond Boundaries provides ten signature recommendations as well as information and tools needed by local leaders to help them realize the benefit of shared services opportunities. Local leaders have to take immediate, broad action. This requires leadership and vision from all. The overriding objective of this plan is to provide leaders a roadmap for taking important next steps to succeed". The Greater Ohio Policy Center (GOPC) recently released three independent reports identifying nearly $99 million in savings from governmental collaboration. GOPC's findings suggest that there are significant savings such as service improvements available to local and state agencies that purchase and maintain fleet equipment, chart routes for service provision, do bulk purchasing, and/or operate more than one location. These three reports highlight opportunities at the state and local levels to maximize existing resources for enhanced service delivery and cost savings to taxpayers. Research supporting the shared services model can also be found outside the state of Ohio: A Study of the Use of Business Process Modelling at Suncorp - Initial Insights -November 2011 (Contact: info@apromore.org);

22. Describe the overall plan to evaluate the impact of the concept, strategy or approaches used in the project.

This plan should include the methodology for measuring all of the project outcomes. Applicants should make sure to outline quantitative approaches to assess progress and measure the overall impact of the project proposal. The response should provide a clear outline of the methods, process, timelines and data requirements for the final analysis of the project's progress, success or failure. The applicant should provide information on how the lessons learned from the project can and will be shared with other education providers in Ohio.

The 4 District ISS team will secure the services of the Auditor of State’s office to evaluate the implementation of the project. JG Coorey, as named as a partner in this application is the contact auditor with the Auditor of State’s office. The Auditor’s office will utilize the expertise of the Ohio Performance Team (OPT) to assess the Business Process Work Group’s strategies and methods established to generate efficiencies in the fiscal operations of the four districts. At the conclusion of the project, the OPT will provide a final performance audit report of the findings. The team will also conduct mid-reviews. Performance audits provide elected officials and government employees with an objective, third-party analysis of their operations to help them improve performance, reduce costs, and make informed, data-driven decisions. The Auditor of State’s office conducts performance audits of Ohio’s schools, local governments and state agencies. The Ohio Performance Team (OPT) has completed 49 performance audits of local governments, identifying $63.7 million in potential savings with an average return on investment of $24 for every dollar spent to audit. Additionally, OPT has completed four performance audits of state agencies, identifying $78 million in potential savings with an average return on investment of $47. The Auditor of State's Ohio Performance Team remains committed to using Lean Six Sigma tools and methodologies. Six Sigma focuses on the elimination of variation within processes. The lean approach focuses on the elimination of waste and the implementation of standard work. Both sets of tools and methodologies are widely used by top private sector companies, and the Auditor of State's Ohio Performance Team is on the forefront of bringing them to Ohio government. The Ohio...
Performance Team has embraced both foundation aspects of the Lean Six Sigma approach as integral to identifying and achieving greater operational efficiency and effectiveness.

* Include the method by which progress toward short- and long-term objectives will be measured. (This section should include the types of data to be collected, the formative outputs and outcomes and the systems in place to track the project’s progress).

| The 4 District ISS team will seek the assistance of the Ohio Performance Team to establish short term and long term goals. The long term objectives will be consistent with the initial goals established in the executive summary: The overall goals of the business process work group model are: 1) align information, system and service quality of fiscal services between all four districts; 2) reduce replication of work; 3) strengthen the expertise and improve functional knowledge of staff to further develop them in their current role, or prepare them for a more advanced position; 4) eliminate paper processes and create more efficient means of communication and access to information by implementing innovative web-based technologies and electronic work flow procedures; 5) increase transparency in government; and 6) create a greater utilization of resources in the classrooms of all four districts. Short term goals will be established using criteria from the Ohio Performance Team. Data sources such as quantity and quality of work will be utilized as a base point. The following information shows the type of data that will be gathered and measured. While the goal may not decrease the quantity of the work, the efficiency of how the work is processed is the overall goal. Checks PO’s W-2s Receipts Payroll checks #Pays Rittman 2,209 1,381 232 515 24 Orville 2,648 1,830 350 1,091 24 Green 2,504 1,447 317 1,035 24 Southeast 3,423 2,086 451 682 26 | |

* Include the method, process and/or procedure by which the project will modify or change the project plan if measured progress is insufficient to meet project objectives.

| The Auditor of State will include recommendations for improvement at all mid-point reviews and in the final summative performance audit. The 4 District implementation team fully intends to work with the Ohio Performance Team to implement their recommendations. The OPT has proven success in establishing criteria for creating efficiencies in operations. |

23. Describe the substantial value and lasting impact which the project hopes to achieve.

*The response should provide specific quantifiable measures of the grant outcomes and how the project will lead to successful attainment of the project goals. Applicants should describe how the program or project will continue after the grant period has expired.*

Please enter your response below.

As stated in the goals in the executive summary, the Innovative Shared Services model will achieve substantial value and lasting impact by 1) aligning the information, system and service functions of the fiscal services department in such a manner as to achieve the greatest economies of scale and efficiencies in operation. Specific quantifiable measures will be a reduction in the number of calls, problems, issues handled by each individual school district treasurer’s office, reduced time spent in research, and improved response time to customer questions. 2) the Business Process Management model is implemented, the second goal will begin to be realized - that of reducing replication of work. The lasting value in this area is quantified by elimination of many processes that are unnecessary or redundant thereby allowing staff members to focus on creating additional value through improved work processes, additional areas identified for potential streamlining and more reliable reporting of data to outside entities (ie, STRS, SERS etc). One area of lasting substantial value that is often overlooked when trying to streamline job functions is that of cross training. The projects’ third goal is to strengthen the expertise and improve functional knowledge of staff to further develop them in their current role, or prepare them for a more advanced position. In the June 2011 article: “A Cross-Training Rundown - A look at the most prevalent uses of cross training in today's public workforce”, author Heather Kerrigan states: “Creating a flexible workforce is becoming increasingly necessary as states, cities and counties continue to face budget troubles, lose older employees to retirement and wrestle with the need to retain the best and brightest. Across the country, cross-training is helping governments maintain a high level of service delivery with fewer staff and resources.” Ms. Kerrigan points out that a model in Daly City, CA has resulted in cross training assisting in succession planning. She writes "As participants are exposed to the workings of other departments and positions within city government, department heads are responsible for coaching and mentoring to ensure the program achieves its desired outcomes, which include energizing the next generation of government leaders, creatively solving upcoming staffing shortages while under budgetary constraints and maintaining a high level of service delivery". The greatest source of grant outcomes is contained in the fourth goal which is to eliminate paper processes and create a more efficient means of communication and access to information by implementing innovative web-based technologies and electronic work flow procedures. The implementation of multiple software programs integrated into the current payroll and accounting software allows the fiscal services staff to attain a higher level of efficiency. When just one process, OnBase, was implemented at Canton City Schools in 2005, the district was able to eliminate 11 filing cabinets of payroll records, convert a storage room into an office by eliminating boxes of records, and reduce a full FTE by increasing the response time in retrieving records electronically (source, team implementation member Judy Robinson implemented OnBase into the HR Department in Canton while serving as HR Director). The combined size of the Rittman Orville Southeast Green ISS is about half the size of Canton in comparison to staff count and students. With OnBase alone, these numbers would indicate that it will be possible to reduce a half of a position once the application is up and running. Since OnBase is only one component of the complete Business Process Model, greater efficiencies will be realized once it is all in place and will be monitored by accessibility to data of the general public through opinion surveys. The ultimate goal of the project is to free up resources and redirect those to the classrooms for the benefit of the students.

24. Describe the specific benchmarks, by goal as answered in question 9, which the project aims to achieve in five years. Include any other anticipated outcomes of the project that you hope to achieve that may not be easily benchmarked.

*The applicant should provide details on the quantifiable measures of short- and long-term objectives that will be tracked and the source of benchmark comparative data points. Responses should include specified measurement periods and preliminary success points that will be used to validate successful implementation of the project. If a similar project has been successfully implemented in other districts or schools, identification of these comparable benchmarks should be included.*

| * Spedning Reduction in the five-year fiscal forecast |
| The specific benchmark to be achieved in this goal is a reduction of salary and benefits of one FTE (Full time equivalent) administrator/treasurer and also part time substitute caller position and realize those savings in the five year forecast of all four districts. |
Reductions were also estimated to reduce audit costs and cost of paper and ink cartridges due to the implementation of online, web focused technologies. Other anticipated outcomes that are not quantifiable would be additional staff that may no longer be needed due to efficiencies in operations, reduction of office space and overhead costs due to coordinated workflow processes.

* Utilization of a greater share of resources in the classroom

This is the ultimate goal of the 4 District Innovative Shared Services for Business Process Management. While all four districts face deficit spending currently or in the near future, the shared services model is not the ultimate solution. However, all efficiencies realized by operational savings will directly impact the amount of resources available for classroom instruction. The savings could be targeted toward a specific initiative, such as Third Grade Reading Guarantee to provide additional reading materials for students not on track. Such an initiative is totally at the discretion of the local district.

* Implementation of a shared services delivery model

The quantifiable measures of short- and long-term objectives that will be tracked and the source of benchmark comparative data points for the Innovative Shared Services model will be developed in coordination with the Auditor of State’s office Ohio Performance Team. The team will meet with the project implementation team to determine accurate measurement points and dates. As a frame of reference, the processes of each employee’s duties will be tracked as to process time, quantity of work and errors. This information will be gathered prior to the change in any given procedure. At least quarterly, the same data will be collected and compared to the base data. The OPT will determine whether the project implementation is improving processes to the point that greater efficiencies are being realized. This could be number of reports generated electronically vs. on paper, number of records request tracked and amount of time it takes to fulfill such requests, amount of time spent in data entry vs. Automatic upload of payroll time-sheets from the VeriTime and Aesos software packages. It will be important to establish the baseline data at the start, prior to implementation of any new procedures or processes. The five year goal will be that greater efficiencies than the sustainable savings will be realized through the efficiencies gained by the establishment of the Innovative Shared Services model and Business Process Management system.

* Other Anticipated Outcomes

It is highly likely that this model will garner enough interest, once the Business Process Management model has been fully developed, that the four districts may want to create a Council of Governments and offer fiscal services support to other public school districts in the area.

25. Is this project able to be replicated in other districts in Ohio?

Yes

No

If the applicant selects "Yes" to the first part of the question, the response should provide an explanation of the time and effort it would take to implement the project in another district, as well as any plans to share lessons learned with other districts. To every extent possible, applicants should outline how this project can become part of a model so that other districts across the state can take advantage of the learnings from the proposed innovative project. If there is a plan to increase the scale and scope of the project within the district or consortium, it should be included here.

* Explain your response

This project is able to be replicated between districts that are seeking to create efficiency in operations and are forward thinking in their approach to work flow models and business process models. The following are the key elements of replicating this project: 1) Two or more districts develop the concept of a shared services model (use www.skinnyohio.org as a resource). Discuss similarities in the district and also non-similar characteristics. Are there any barriers that would keep a shared service model from being successful (board willingness to share staff, proximity to offices, values and core beliefs of the districts - ie philosophy of education). It is important for all parties to understand that while these agreements are entered into usually for purposes of cost reduction, the single most important factor for success is the relationships between the parties. There has to be an underlying acceptance that duties can be completed without physical presence of the employee, and that resources must be aligned so that each district is willing to sacrifice in the short term to create lasting value in the long term. Once these discussions take place, then it is feasible that districts with common goals could discover ways to benefit from each others strengths. 2) Identify possible services that could be combined for efficiency purposes, or utilized by both entities to determine if a partnership opportunity exists; identify duties, roles, tasks, responsibilities that would shared; complete a SWOT analysis of strengths, weaknesses, opportunities, threats of the partnership. 3) Brainstorm, talk to all parties involved, develop a recommendation 4) District leaders discuss with local boards of education 5) Develop a shared services agreement with an "out" clause in the event the situation does not work out As far as the replication of this specific project, the relationships have been developed over time. The need for streamlined processes has greatly exploded with the reality that the treasurer/CFO will be serving four districts with four unique staffs working for him. The savings is a huge benefit to combine the work into a shared services fiscal model, but the work has to become more efficient in order to ensure the success of the partnership.

By virtue of applying for the Straight A Fund, all applicants agree to participate in the overall evaluation of the Straight A Fund for the duration of the evaluation time frame. The Governing Board of the Straight A Fund reserves the right to conduct an evaluation of the project and request additional information in the form of data, surveys, interviews, focus groups and other related data on behalf of the General Assembly, Governor and other interested parties for an overall evaluation of the Straight A Fund.

PROGRAM ASSURANCES: I agree, on behalf of this applicant, and any or all identified consortium members or partners, that all supporting documents contain information approved by a relevant executive board or its equivalent and to abide by all assurances outlined in the Straight A Assurances (available in the document library section of the CCIP).

I agree, on behalf of this applicant, and any or all identified consortium members or partners, that all supporting documents contain information approved by a relevant executive board or its equivalent and to abide by all assurances outlined in the Straight A Assurances (available in the document library section of the CCIP). Brett Lance Mark A. Dickerhoof
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<td>Dickerhoof</td>
<td>Treasurer/CFO</td>
<td><strong>Main responsibilities in the project:</strong> 1) Develop a shared services agreement for fiscal services to be adopted by district boards of education for Rittman, Orrville, Green and Southeast school districts in Wayne County, Ohio. 2) Communicate the planned changes in fiscal operations with current staff and communities. 3) Assess the current practices and procedures of fiscal operations including but not limited to the development of annual budgets, fiscal close out procedures for year end, tuition and excess cost billing and reporting, receipt processing, maintenance of federal grant applications and budgets (CCIP), human resource management, payroll processes including W-2 processing, hiring practices, personnel leave and substitute placements, communication with other departments, tracking and ongoing maintenance of district communication such as board minutes, auditor requests, archived information and public records requests, all while maintaining separate distinct entities and proprietary and confidentiality of the information of the four districts involved. 4) Coordinate tasks and needs between all four districts fiscal services departments and identify roles, responsibilities and necessary cross training to be developed. This component may result in a change in location of physical office space but it is anticipated each district will offer face to face customer contact for teachers and staff with at least one staff member in order to ensure excellence in customer service focused on continuous improvement. 5) Secure the assistance of the Auditor of State's office to develop formative and summative assessments to adequately assess learning to adequately formative and summative assessments to adequately assess learning.</td>
<td>**1976-1980 Bachelor of Arts, May 1980, Major in Accounting Muskingum College 2003 - Present, Ashland University, Various Master level courses in Education 1981 - Present, Auditor of State of Ohio and Ohio Department of Education approved classes and seminars. January 2008 to present - Treasurer/Chief Fiscal Officer, Rittman Orrville Compact, The Compact is a shared services arrangement between Orrville City Schools and Rittman Exempted Village Schools for administrative services. Added Green Local Schools to the share services arrangement in August 2011. Major accomplishments and responsibilities: 1) Organized the Districts’ financial operation to operate as one unit. 2) Develop internal control processes to insure independent and separate financial records. 3) Responsible for the financial oversight on over $65 million in construction funding. Total annual savings for both Districts exceeds $270,000</td>
<td>November 2003 to present - Treasurer/Chief Fiscal Officer, Orrville City Schools. Responsible for all financial operations of the school district. Total appropriations for the 2010 - 11 fiscal year were $23.3 million. Major accomplishments and responsibilities: 1) Integral part of District / Community engagement team. 2) Developed long range facility plan through a series of community and staff meetings. 3) Responsible for strategy to finance Long Range Facility plan. Passed Permanent Improvement levy for a continuing period to finance Phase 1 of facility plan. Work on several successful levy committees. 4) Implemented on-line purchase requisition procedures. November 1984 to July 1998 - Treasurer for the Massillon City Schools; Chief Financial Officer for the School District. Total operating budget for FY1998 was $35.7 million. Major responsibilities and accomplishments: 1) Assembled financing package for $20.8 million bond issue to construct a new high school and refinanced bonds saving $1.2 million. 2) Member of Board negotiating team completing over 20 contract negotiations with 4 different unions. 3) Member of the Tax Incentive Review Committee. 4) Implemented on-line purchase requisition procedures. 5) Updated financial Policy Manual and Administrative Guidelines. 6) Worked with State Legislators on writing financial legislation.</td>
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<td>Judith Robinson</td>
<td>Superintendent, Green Local Schools</td>
<td>Integral role in the writing of the grant and facilitation of development of the partners, in particular Tri-County Computer Services Association (TCCSA). As the project starts new, Mrs. Robinson’s role will be one of team facilitator assisting Mr. Dickerhoof in the alignment of duties. Mrs. Robinson will serve as the chief liaison to the boards of education ensuring that all questions or concerns from any of the school board members, or partnering superintendent are answered. Mrs. Robinson will ensure that the districts are fairly represented and that consistency in customer service is a key focus. Mrs. Robinson will serve as the secondary contact on the project in the event Mr. Dickerhoof is not available. Mrs. Robinson was key in establishing Green Local’s first shared services contract with the Rittman Orrville Compact for the services of treasurer when she moved into the role of Superintendent. A second shared services contract was negotiated for transportation supervision and nursing services between Green Local and the Wayne County Schools Career Center. Mrs. Robinson has extensive experience in fiscal services, human resource management and the implementation of software systems, and work group systems to create efficiencies within public school district back office operations. Mrs. Robinson was the Director of Human Resources for the Canton City School District from 2001 to 2007. During that time she was responsible for all HR functions for a staff of 800 teachers and 500 classified workers. Mrs. Robinson has served as a school treasurer in three districts including Rittman Exempted Village and Green Local Schools, two of the districts in this partnership. She was also a fiscal services consultant for the Tri-County Computer Services Association for three years.</td>
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<td>Stuart Workman</td>
<td>Executive Director, TCCSA</td>
<td>Mr. Workman will oversee the implementation of the software applications that are the fundamental basis for creating the efficiencies in operations for the Innovative Shared Services model. Mr. Workman will allocate the appropriate personnel and resources so that each element of the implementation is tested in advance, and the interface exists between the USAS/USPS software and the new software components. Mr. Workman will also coordinate the purchase of hardware, such as pc platforms, tablets, copiers and scanners in order to ensure that all equipment is procured at state minimum bid levels and built at the capacity level necessary to support the robust software applications being implemented. Mr. Workman has been the Executive Director of TCCSA for over 20 years and has the knowledge and understanding of the necessary internal control procedures, networking capabilities and bandwidth, and financial applications required to successfully implement the Innovative Shared Services model for the four districts involved. All four districts utilize TCCSA as network provider and fiscal support services provider. Mr. Workman has knowledge and understanding of the four districts, Rittman, Orrville, Southeast, and Green Local and the fiber networks and wireless networks that exist in each district. Mr. Workman supervises a staff of over twenty people.</td>
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