

Purpose

The purpose of this policy and procedures is to ensure educational technologies, software, and resources align with and promote the basic mission of the College. The SHSU COM establishes educational technologies, software, and resources in partnership with Information Technology services for the use and benefit in its conduct of academic, business, and other official operations.

This policy promotes the following goals:

- To ensure that educational technologies, software, and resources acquired fit within the scope of the identified need;
- To provide consistent implementation measures for optimization and utilization;
- To ensure that use of the educational technologies, software, and resources is consistent with the principles and values that govern the SHSU COM and institution; and
- To streamline and prioritize educational technologies, software, and resources projects that are critical to operations.

Scope

This policy and procedures apply equally to all SHSU COM administration, faculty, and staff.

Policy Statement

1. SHSU COM administration, faculty, and staff are responsible for following the SHSU IT acquisition process as mandated by The Texas State University System Rules and Regulations (III-19.3) and outlined in SHSU Policy IT-S03.
2. Upon discovering a need for educational technology, software, or resources the identifier will present the need to their respective Department Chair. If the Department Chair agrees with the need, the identifier will establish a COM Project Team with Program Support and Resources (PSR) comprised of prospective users and impacted stakeholders to begin the discovery process.
3. The established COM Project Team and Program Support and Resources will follow the required phases outlined in the procedures section of this policy when researching, acquiring, and implementing new educational technologies, software, or resources. Certain educational technologies, software and resources will not necessitate the completion of all outlined procedures. This will be determined by Program Support and Resources and Information Technology during the discovery phase.

4. It is the Identified Software Lead's (primary software user) responsibility to update the Academic Leadership Council after each phase is complete or if at any stage the projected deployment date is compromised due to an unforeseen event (i.e., limiting resources, technical change, etc.).
5. When the life of the educational technology, software, or resource is up for renewal, it is the responsibility of the Identified Software Lead to reconvene the COM Project Team and Program Support and Resources. A review of utilization and impact reports provided by the vendor will be used to determine if the contract is renewed, replaced, or absolved due to minimal use or no continued need present.
6. All new technology acquisition requests must be approved by the Academic Leadership Council no less than 90 days (about 3 months) before the desired implementation date. All technology acquisition renewal requests must be approved by the Academic Leadership Council no less than 60 days (about 2 months) before the desired renewal date.

Procedures Technology Acquisition New

1. Discovery Phase: The COM Project Team and Program Support and Resources will analyze the identified need, current issues and challenges, and potential solutions which may include alternative options to acquiring a new educational technology, software, or resource. During this phase, the team will request demos for the desired educational technology, software, or resource as needed. This phase will also capture information related to costs, accessibility, and compliance.
2. Approval Phase I: Upon identifying an appropriate educational technology, software, or resource that meets the identified need, the Identified Software Lead will provide the Academic Leadership Council with a written request to move forward with acquiring the selected tool.

The request must include:

- a. Requesting department or individual.
- b. Vendor name and contact information.
- c. Needs assessment summary.
- d. Impact statement.
- e. Associated costs and if it is contractual or one-time.
 - i. Contractual requests will include the terms of the agreement.
- f. Funding source.
- g. Deployment timeline.

If the Academic Leadership Council approves the request, the Identified Software Lead

can move forward in the acquisition process. If the Academic Leadership Council denies the request, the COM Project Team and Program Support and Resources will determine alternative solutions.

3. Approval Phase II: The Identified Software Lead will complete the Technology Acquisition Approval Form required by Information Technology.
4. Procurement Phase: The Identified Software Lead will purchase the educational technology, software, or resource according to the SHSU procurement policies and procedures. The approved Technology Acquisition Approval Form must be attached to the Bearkat Buy requisition.

Phases 5 – 9 Applicable to Software Acquisition Only

5. Design Phase: The COM Project Team, Program Support and Resources, and Information Technology will work with the vendor's customer success representative to determine the design of the software. In this phase, a solidified project timeline is created, and decisions are made regarding system configurations, data import and management, accesses, and standard utilization procedures.
6. Development Phase: The Identified Software Lead and COM Project Team will complete all necessary customizations, configurations, and buildouts of the system. The Identified Software Lead alongside Program Support and Resources and the vendor will develop user training material.
7. Testing Phase: Once the development phase is complete, the COM Project Team will complete testing of the software to determine if the functionality aligns with the project requirements and goals.
8. Deployment Phase: The Identified Software Lead will work with the Marketing and Communications Coordinator to create and send communiques to affected users. All training materials are finalized and centrally located for end-user access. For optimal utilization, training is scheduled for users to transition to the new software.
9. Maintenance Phase: As needed, the Identified Software Lead will maintain the software by providing support to end-users, managing software updates or upgrades, and creating configuration changes as use evolves.

Procedures Technology Acquisition Renewals

1. Utilization and Impact Review Phase: The Identified Software Lead will work with a COM Project Team comprised of primary users and Program Support and Resources to

review utilization and impact reports, typically provided by the vendor.

2. Approval Phase I: Upon identifying a need to renew the software or resource based on utilization and impact reports, the Identified Software Lead will provide the Academic Leadership Council with a written request to renew the selected tool.

The renewal request must include:

- a. Requesting department or individual.
- b. Vendor name and contact information.
- c. Utilization and Impact reports.
- d. Associated costs and if it is contractual or one-time.
 - i. Contractual requests will include the terms of the agreement.
- e. Funding source.
- f. Renewal timeline.

If the Academic Leadership Council approves the renewal request, the Identified Software Lead can move forward in the acquisition process. If the Academic Leadership Council denies the renewal request, the COM Project Team and Program Support and Resources will determine alternative solutions.

3. Approval Phase II: The Identified Software Lead will complete the Technology Acquisition Approval Form required by Information Technology.
4. Procurement Phase: The Identified Software Lead will purchase the software or resource according to the SHSU procurement policies and procedures. The approved Technology Acquisition Approval Form must be attached to the Bearkat Buy requisition.
5. Maintenance Phase: As needed, the Identified Software Lead will maintain the software or resource by providing support for end-users, managing software updates or upgrades, and creating configuration changes as use evolves.

Reference

Version 1.02

Approved by: Academic Leadership Council, March 2024

Reviewed by: Courtney West, Senior Associate Dean of Educational Affairs, February 2024