

Guiding Themes

Four of the eight Academic Technology Initiatives (ATI) identified in the 2003 ATPC report are initial priorities by the Executive Council. They are: Student Success, Foundational Skills, e-Learning Framework, and Digital Marketplace. The System-wide Acquisition of Technology (SWAT) efforts are aligned with CSU system processes, priority projects and tracks: *Delivering on Promises* (ongoing projects) and *Building Academic Technology Communities For Action* (new projects).

[Reference]

http://its.calstate.edu/academic_technology/atpc.shtml

http://its.calstate.edu/systemwide_it_resources/IT_resources.shtml

Deliverables of SWAT-II “Initiation Strategy” (Mar-Sep ’04)

1. Identify toolsets/processes/criteria/compliance driven measures in support of the start up / launch of a system-wide academic technology deployment and services, integrating ITIL/itSMF “best practices”.
2. Identify an effective strategy for assessing and actively assuring that recent ADA compliance regulation and laws as they impact academic technology are properly incorporated into our overall CSU deployments.
3. Inventory existing academic technology contracts/services at CSU and campus levels within the determined academic technology scope.
4. Conduct selected pilot(s) to validate proposed SWAT-II model and integrate “lessons learned” (e.g. ADA software, training and services; Learning Management Systems, software metering-license management tools).
5. Develop and communicate an improved governance model and SWAT-II process to primary stakeholders (e.g. ATCC, ITAC, DAT, CAT, CATS, CMS, COLD, NTA, procurement officers) and secondary stakeholders (e.g. Faculty Development Directors, Library technology staff).
6. Articulate FY 04-05 recommendations at end of “Initiation Strategy”, including opportunities for procurement, relative priorities, resources and timelines to facilitate evolution of the “digital marketplace” into an institutionalized program.

Stakeholder Representation (Jan-Jun ’04)

Stakeholder representation will be reviewed annually, with nominations put forth in May and assignments effective July 1 with the start of each new academic/fiscal year. SWAT-II initial assignments are proposed as follows:

Stakeholder Group	Chancellor’s Office Staff	Team Members
ATCC	Gerry Hanley	Jerry Hanley
ITAC	Mike McLean	Mike Berman
DAT	Lou Zweier	Jay Field
CATS	Abbe Altman	Dale Kohler
CMS	Hilary Baker	As Needed/Delegated
COLD	Evan Reader	TBD (volunteer/nomination)
Faculty Development Council	Mary Allen	TBD (volunteer/nomination)
NTA	Mark Crase	Johanna Madjedi
Contracts and Procurement	Tom Roberts	Greg Melnyk/Brenda Tesch

“Carry Over” Items From SWAT-I

1. ADA compliance measures: SB 302 and Accessible Web Sites mandate
2. ALEKS math and arithmetic assessment tool and tutorial; pilot in progress
3. Learning Management Systems: Blackboard and WebCT status updates on contracts executed Jul ’03
4. Macromedia: renewal due in March 2004
5. Turnitin: monitor and maintain (low admin overhead)
6. Consolidation of existing campus contracts (e.g. MATLAB, LabVIEW)
7. Anti-virus and desktop management tools

Appendix A – SWAT II Process (Optimized “End-State”)

Process	Activities	Outcome	Lead	Support
Needs Assessment and Analysis	<ul style="list-style-type: none"> Conduct needs assessment and interest levels for initial acquisition/negotiations priorities of all CSU's (Include UC's and CCC's if they will be using the MEA(s)). Inventory existing academic technology contracts and services at CSU and campus levels. Evaluate and determine funding options Identify compliance driven measures Identify toolsets and processes for assessing demand and common elements for “system-wide” academic technology Articulate criteria and processes for determining criteria Analyze responses, develop use cases, and identify strategic opportunities 	<p>Identify scope of products and services to pursue and relative priority.</p> <p>Implement working tools and processes that support above.</p> <p>Articulate initial priorities for SWAT II acquisition / negotiations</p>	<p>Cal Poly SLO</p> <p>Contract & Procurement Svcs</p>	<p>Stakeholder and Chancellor's Office Representation</p> <p>CSU-Chancellor's Office Contract Services and Procurement</p>
Conduct Feasibility Study	<ul style="list-style-type: none"> Develop requirements, conduct feasibility study (e.g. checklists, per EO862). 	Completed and approved Feasibility Study	SWAT-II Team	<p>Stakeholder and Chancellor's Office Representation</p> <p>CSU-Chancellor's Office Contract Services and Procurement</p>
Proposal Development and Solicitation process	<ul style="list-style-type: none"> Develop RFI/RFP, Determine suggested contractor list to invite to bid 	Posting of RFI/RFP	Cal Poly, SLO	ITS and Contract & Procurement Svcs
Proposal Review and Selection	<ul style="list-style-type: none"> Evaluation of proposal(s) via documented process Select Finalist(s) 	Completed evaluation of proposals. Selected finalists	Cal Poly, SLO (May want to consider inviting other campus' to be on Eval team)	ITS and Contract & Procurement Svcs
Negotiation process	<ul style="list-style-type: none"> Negotiation of agreement(s) in conjunction with articulated funding, 	“Best and final offer” is vetted with ITAC or	SWAT-II Team	Stakeholder and Chancellor's Office Representation

Process	Activities	Outcome	Lead	Support
	<ul style="list-style-type: none"> support resources • Coordinate with ATI and/or campuses (as needed) • Finalize contract terms and conditions 	designate(s); deal is negotiated for needed product(s) and/or service(s).		CSU-Chancellor's Office Contract Services and Procurement
Complete Contract	<ul style="list-style-type: none"> • Write contract 	Signed contract.	Cal Poly, SLO	Stakeholder and Chancellor's Office Representation
Contract Execution	<ul style="list-style-type: none"> • Coordinate with ATI and/or campuses (as needed (UC's, CCC's (See Needs Assessment and Analysis). • Identify and document best practices for contract management, maintenance and renewal 	Communicate clear plan to campuses for deployment. Articulate on-going Chancellor's Office staff and resources required for sustainability		
Products and Services Deployment	<ul style="list-style-type: none"> • Manage contract (announcements, training, etc) • Provide deployment support • Publish review of utilization metrics, service and support issues twice yearly 	Products and services are efficiently deployed and utilized; intervention and escalation is invoked if/when needed.	<p>Campus Contract Services and Procurement</p> <p>IT managers</p> <p>Technical Support Staff (e.g. CATS)</p>	<p>Stakeholder and Chancellor's Office Representation</p> <p>CSU-Chancellor's Office Contract Services and Procurement</p>
Product Performance Review	<ul style="list-style-type: none"> • Review of utilization metrics, service and support issues • Review of needs assessment, (competitors and compliance measures within prescribed process prior to contract evaluation and renewal) 	Decision to renew, defer, renegotiate, consolidate or exit contract.	SWAT-II and ATI Team(s)	<p>Stakeholder and Chancellor's Office Representation</p> <p>CSU-Chancellor's Office Contract Services and Procurement</p>