

EXECUTIVE SUMMARY

SYSTEMWIDE ACADEMIC TECHNOLOGY (SWAT) SERVICES

This document describes an ongoing multi-year academic technology pilot initiative that started in September 2001. The purpose of the initiative was to develop structures and practices to leverage the size of the CSU in acquiring and promoting academic technology services and products. This report describes three phases of the project, “lessons learned” from each, and actions taken to modify the project for the next phase. The report concludes with two significant recommendations regarding 1) AT communications in the CSU, and 2) continuation of the SWAT initiative.

Dr. Sorel Reisman
Director, SWAT Services
February, 2003

Phase 1: September 2001 – December 2001

Phase Description and Activities

On October 15, 2001, Dr. Gerry Hanley, Senior Director of Academic Technology in the CSU Office of the Chancellor sent a letter to the members of ITAC, COLD, ATAC, and the CSU Faculty Development Council announcing the creation of SWAT (Systemwide Academic Technology) Services, a *pilot* project. The letter stated that SWAT was being undertaken:

... to bring better academic technology products and services to campus faculty, staff, and students, to reduce campus costs of academic technologies, and to provide better guidance on selection and use of academic technologies, [and that a] small team of CSU campus personnel¹ ... volunteered to develop processes for procuring and disseminating CSU system-wide academic technologies [to] bring significant value to campuses.

The goals of the project included:

- Reducing campus and System costs for academic technology products through “volume” negotiations which campuses could voluntarily utilize;
- Acquiring Systemwide leverage with vendors of academic technology products;
- Establishing a campus-accessible center of information and expertise on academic technology products/vendors/services through a CO-managed centralized repository (database) of information;
- Reducing, for academic technology products, campus assessment and procurement time, hence costs;
- Providing campus guidance for academic technology (teaching/learning) products/vendors/services; and
- Developing support strategies for disseminating and educating campus communities about the availability and use of academic technologies.

The intention of this project was to create processes for the acquisition of academic technology products and services similar to those created and managed by Evan Reader for CSU library database acquisition.²

¹ Mark Thompson – Stanislaus; Norm Nicholson- San Marcos; Bill Evans – Chico; Ed McBride – Long Beach; Susan Kullmann Puz - Pomona

² See <http://www.calstate.edu/SEIR/seir.shtml> for more information on SEIR-System-wide Electronic Information Resources and EAR -Electronic Access to Information Resources.

The formal announcement of SWAT was preceded by a number of planning activities. Dr. Sorel Reisman, a professor of Information Systems, and Academic Technology Coordinator in Cal State Fullerton's Faculty Development Center was appointed Director of SWAT Services in August 2001. His participation was funded by the CO as a ¼ to ½ time position, varying by semester and depending on his availability for release from his campus duties.

At its first meeting on September 25, 2001, the ad hoc SWAT Team met to consider how to address the objectives described above. The Team decided that 1) the creation and objectives of SWAT should be made known throughout the CSU; 2) additional expertise from the CSU was required to assist SWAT in meeting its objectives; and 3) to validate the premises of SWAT, particular vendor product/services should be addressed as "test" cases to determine if SWAT was a viable concept. Accordingly, the Team recommended that SWAT establish contacts with vendors whose products and services represented a range of product/service "types" which were identified as high priority needs of CSU campuses. It should be noted that the Team did not select "low hanging fruit" as a strategy that might ensure success.

Following that meeting:

1) Hanley and Reisman met with CSU groups³ to present the creation of SWAT, soliciting input from each regarding ways in which the SWAT concept could be improved.

2) Evan Reader, Director of EAR and Tom Roberts, Assistant Director of the CO's Contracts and Procurement were invited to participate in an advisory capacity, in the SWAT Team's activities.

3) SWAT Team members formed sub teams, each with the purpose of exploring potential Systemwide agreements with the companies Blackboard, WebCT, Turnitin.com, Macromedia, Adobe, and Smarthinking. These vendors were selected because they represented different kinds of licensing opportunities; server-based products (Blackboard, WebCT), application service provider (ASP) (Turnitin.com), shrink-wrapped software (Macromedia, Adobe), and a then-unsolicited vendor (Smarthinking). More important in these choices however, was the fact that each (except for Smarthinking) was deemed to be very important to CSU campuses by the SWAT Team. (Smarthinking had approached SWAT for consideration when the company learned of SWAT's creation.)

³ COLD (Hanley); AIRC (Hanley); CSU Faculty Development Council (Hanley & Reisman); CO Contracts and Procurement (Reisman); SEIR (Reisman)

Lessons Learned

As a result of the work that took place in the next three months, particularly the vendor meetings, the following observations were made:

- The existing SWAT Team did not provide a representative enough structure of Systemwide academic technology constituencies when negotiating with vendors.
- Once negotiations/discussions are initiated with a vendor, it is essential that these continue in a meaningful and serious manner.
- SWAT required additional and broader CO resources.
- The existence of SWAT and its mission needed to continue to be made known throughout the CSU.

Recommendations

- It was decided that all discussions with vendors should continue and that possible Systemwide agreements should continue to be explored.
- The initial “prototype” SWAT Team volunteers recommended that they be disbanded and a new, reorganized SWAT Team be created.

Phase 2: January 2002 – July 2002

Phase Description and Activities

As a result of the recommendations discussed above, three activities were undertaken by SWAT in the next phase of its operation: 1) reorganization of the SWAT Team, 2) continued promotion of SWAT's existence in the CSU, and 3) continued discussions with vendors.

1) Based on the first SWAT Team's recommendation that the existing SWAT Team be disbanded and that a newly constituted Team, better representing CSU constituencies be formed, letters of invitation were sent to the chairs of ITAC, ATAC, CSU Faculty Development Council, Directors of Academic Technology, COLD, AIRC, CATS, and the bookstores, requesting that each provide one representative to a newly constituted SWAT Team. A representative from each organization was appointed⁴ and SWAT took on a completely new structure. A SWAT listserv was created to serve as a means of expediting communication among SWAT Team members.

2) As part of SWAT's ongoing activities, and with the deliberate intention of making its existence better known in the CSU, meetings were held to talk about SWAT, and SWAT letterhead was created for use in subsequent letters to campuses.

3) A meeting of the new SWAT Team was held and it was agreed that in order to capitalize on the vendor discussions that had begun earlier, additional action regarding each should be undertaken⁵. These included:

- **Learning Management Systems:** In order to gain a better understanding of the status of LMS use throughout the System, an online Systemwide survey of learning management system use was conducted. This survey and the automated reports generated from the database were developed by resources from CUDA (Center for Usability in Design and Assessment) at CSU Long Beach. CUDA services were "loaned" for this project because there were no CO resources available to do this work within the required timeframe.

⁴ Dave Carey (Northridge) – AIRC; Mike Parker (Fullerton) – ITAC; Vicki Casella (San Francisco) – Faculty Devevelopment Council; Sylvia Mangubat (San Diego) – Bookstores; Bill Evans (Chico) – CATS; Warren Ashley (Dominguez Hills)– DAT; Sandy Parsons (San Marcos) – ATAC; Carlos Rodriguez (Sacramento) – COLD

⁵ No further action on Adobe was taken because, unbeknownst to the SWAT Team, a Systemwide agreement with that company already existed.

A Systemwide meeting of learning management system users was held in March, 2002 to solicit input from campuses and to meet with the LMS vendor management teams of Blackboard and WebCT. (The LMS survey described above was distributed to CSU attendees.) Vendors were presented with issues, questions, and problems, and asked to respond verbally at the meeting and subsequently in writing, to additional questions posed by the CSU attendees. This activity resulted in teams of CSU volunteers' reviewing all the responses in preparation for a CSU request to meet with the vendors to begin discussions regarding possible Systemwide agreements.

- Turnitin.com: An agreement was negotiated to provide free unlimited Systemwide access to the Turnitin.com service in order for campuses to experiment with and understand the service's features and capabilities. The "trial" was to begin in the summer and continue through December. Because it was difficult to ascertain exactly who on any campus should be informed of this agreement, an announcement was sent to every campus provost, faculty development center director, and library director. SWAT Team members were also asked to notify their constituencies via their own listservs.
- Macromedia: Macromedia offered the CSU an opportunity to negotiate an improved licensing agreement predicated on certain volume forecasts. The SWAT Team, via its members' listservs and letters from SWAT to targeted campus representatives, collected forecast data that allowed the CO's office of Contracts and Procurement to finalize an improved agreement with Macromedia. Because of the absence of campus contacts specifically tasked with academic technology responsibilities, it was necessary to send multiple requests for these forecasts to every campus, sometimes resulting in the reporting of redundant data. However, once the data were in, the CO was able to sort through the results and negotiate a new contract with Macromedia. When the agreement was finalized, SWAT Team members were asked to notify their constituencies of its existence via their own listservs.

One of the problems that resulted from this agreement was the creation of a product order process that was clumsy and difficult for campuses to understand and use. The Director of SWAT received many emails and complaints about the difficulty of ordering products under the new agreement. It should also be noted that the process, handled by the CO's Office of Contracts and Procurement, while ostensibly being Web-based and automated, is in fact heavily dependent on CO staff for order fulfillment and is not cost effectively scalable for additional products or high order volume.

- Other: Because of the time commitment required to work with the vendors listed above, the company Smarthinking was informed that SWAT was unable to pursue discussions regarding the company's products/services. (The

Director of SWAT began and continues to receive vendor solicitations and campus recommendations for academic technology opportunities that could truly be of benefit to the CSU.)

Lessons Learned

- The SWAT Team structure did not provide a means for collecting accurate system/product forecasts that vendors required in order to provide the CSU with their best offers.
- Campuses appreciated the opportunity to participate in and receive the results of the online survey. However, as invaluable as many found this kind of service to be, it was very time consuming, requiring significant expertise to develop and manage.
- There are no uniform, dependable, responsible centralized contacts on CSU campuses with whom the CO (or any other campus) is able to reliably communicate regarding a range of campus academic technology issues.
- There was a need to develop methodologies for efficiently communicating and delivering to campuses, SWAT-developed services, programs and agreements. In particular, the Macromedia experience demonstrated that the CO has no formal processes or mechanisms for announcing Systemwide agreements or services.
- The CO Contracts and Procurement Website is too arcane and diverse, and does not address the specific needs of CSU members who require order or order status information about academic technology products and services.
- There does not exist in the CSU an effective and efficient electronic means for collecting academic technology data from campuses
- The CO Office of Contracts and Procurement is not staffed to provide order fulfillment for academic technology products/services. It is not clear at this time, who or what other department might be tasked with this addressing this need.
- SWAT discussions with vendors, once begun, must continue, and possible Systemwide agreements should be pursued.
- Despite the fact that there are many academic technology opportunities that the CSU could capitalize on, SWAT resources are severely limited. With the current set of resources SWAT is unable to pursue or address new vendor opportunities that present themselves.

Recommendations

A meeting of the SWAT Team was held on July 15, 2003 to address next steps to be taken based on the lessons learned. Their recommendations were:

- Create a SWAT Website to act as a central repository of information regarding SWAT and Systemwide academic technology products and services.
- Form two negotiating teams, one each for Blackboard and WebCT, and begin serious discussions regarding possible Systemwide agreements with those vendors.
- Continue working with Turnitin and develop methodologies for assessing the free trial of the service with a view towards developing an RFP for plagiarism detection services.
- No action was recommended to address the order fulfillment issues described above.
- No action was taken to obtain additional SWAT resources to pursue other academic technologies, nor to develop other projects similar to the online LMS survey.

A new and separate opportunity from McGraw Hill, regarding an online (Web-based) mathematics remediation system called ALEKS was initiated between the vendor and the CSU. Because of the merits of this system and its potential value to the CSU, the CO is pursuing the opportunity on behalf of SWAT.

Phase 3: August 2002 – Present

Phase Description and Activities

Most of the activities related to SWAT since August 2002 have focused on addressing the communication- and vendor-related issues identified and/or initiated in previous phases of SWAT's existence. A SWAT 'value chain analysis' that was presented at that meeting was used as the basis for a preliminary SWAT Website design, and CO technical resources were recruited to begin implementation. This effort was intended to address the problem of the absence of a central repository of information regarding academic technology for the CSU. Unfortunately, due to limited availability of the SWAT Director (campus obligations during the fall semester reduced his availability for SWAT activities), the Website was initiated, but not developed.

Vendor activities continued as follows:

- **Learning Management Systems:** In order to pursue "serious" negotiations with WebCT and Blackboard, two volunteer CSU negotiating teams were formed, one for each vendor.⁶ In August, based on the Systemwide LMS meeting held in March, data collected following that meeting, and related phone conference calls, the teams "crafted" a letter to each company, inviting them to begin a dialogue with the CSU, with the objective of negotiating Systemwide agreements for their products and services. The letters were mailed in September. As a result, three negotiating meetings were held with Blackboard (Steve Hoffman, CEO and his negotiating team) and with David Ernst and the CSU Blackboard negotiating team; two similar meetings were held with WebCT (Executive Vice President Peter Segall and his negotiating team) together with David Ernst and the CSU WebCT negotiating team.

In preparation for those meetings, the Director of SWAT emailed all campus CIOs requesting up-to-date information regarding the status of their campus' LMS contract. This information was compiled into a comprehensive report used by the CSU teams in the vendor meetings, and the report has been distributed to some requesting campuses. As of this date, the CSU negotiating teams have agreed that an RFP should be issued, requesting bids for a Statewide LMS initiative. The schedule targets mid-March for release of

⁶ For Blackboard – Hye OK Park (Fresno); Roger Parker (Hayward); Ed McBride (Long Beach); Warren Ashley (Dominguez Hills); Dave Sharpe (San Diego)
For WebCT – Bill Post (Chico); Spencer Freund (Sacramento); Mike Berman (Pomona); Cathy Cheal (Northridge)

the RFP with the hope that a Statewide agreement can be concluded by June 30, 2003.

- Turnitin.com: In preparation for the Systemwide deployment of the trial of Turnitin.com, a set of online evaluation procedures for campus users together with reporting processes were developed by the SWAT Director and implemented by CO technical staff. As a result of the trial period, an RFP soliciting anti-plagiarism services was written by the SWAT Director and posted to the CO's Contracts and Procurement Website in October. Three vendor responses were received, and following a rubric developed by the CO's Office of Contracts and Procurement, the proposals were reviewed by SWAT Team members (COLD, AIRC, Faculty Development Council, and ATAC representatives). Turnitin.com was unanimously selected by the reviewers, and following lengthy negotiations, terms of an agreement were reached in December 2002.

The terms were based on Systemwide student headcounts and required SWAT to inquire about each campus' willingness to participate. Letters were also sent to provosts in January, soliciting their participation. (Copies were sent to each campus library director and faculty development center director.) At the end of January, the CSU had reached the minimum Systemwide headcount that would result in a 40% discount for all participating campuses. The contract was finalized and signed in February 2003, more than 15 months after the first contact had been made by the first SWAT Team.

- Macromedia: During this phase, campuses knowledgeable of and wishing to participate in the existing Macromedia agreement corresponded endlessly with the SWAT Director regarding the difficulty of ordering/acquiring Macromedia products. The CO Office of Contracts and Procurement revised the ordering processes making it somewhat easier for campuses to order off the agreement. It should be noted that the current order fulfillment process is very labor intensive, not automated, and not scaleable if volumes of Macromedia orders increase significantly. Because they are so labor intensive, the processes are self-limiting should the CSU wish to negotiate similar agreements with other vendors.

As a result of Macromedia's participation in the July SWAT Team meeting, meetings with Macromedia were held in January 2003 to explore reduced pricing opportunities for CSU students' wishing to purchase Macromedia products. Those discussions followed other informal discussions with Sylvia Mangubat, the SWAT Team bookstore representative regarding issues that might concern the CSU bookstores. The discussions to date indicate that the CSU could provide students with significant savings for Macromedia products if there existed e-commerce facilities that could do online order fulfillment for authenticated CSU students. Discussions and investigations are ongoing to

determine if such a service could be available through the CO's Contracts and Procurement's contacts.

- McAfee Software: In November 2002, CSU Contracts and Procurement was approached by McAfee Software to ascertain whether the CSU would be willing to offer McAfee products to the CSU at a reduction in retail prices. There was no requirement for an agreement, or for the CSU to guarantee minimum purchases, or for the CSU to provide any support at all between any campus wishing to purchase their products and the company itself. The Director of SWAT serendipitously learned of this offer in January and has since contacted the company who is keen to proceed. Unfortunately, due to limited resources, no further action has been taken at this time.

Lessons Learned

- It is unwise to commit SWAT to any technical (computer-dependent) projects with the current absence of assigned technical resources. It is simply not possible to develop a complex Website without dedicated resources. It would be impossible to *maintain* such a Website even if it were developed.
- There is a significant need for a CSU Web presence where AT technology information is collected, maintained, and disseminated.
- It is difficult to obtain the status of campus AT projects and activities because most campuses do not have a single position/person responsible for knowing/understanding the status of AT on their own campus.
- SWAT's constituency-based representation model may be "politically correct," but it has not addressed the campus communications gap problem. Every campus does not have a voice in SWAT Team discussions yet every campus has a choice to participate in SWAT projects. If campuses don't participate in the planning and development of systemwide opportunities, it is very challenge for them to commit to participating in the opportunities.
- Though the Measures of Success report provides findings about CSU's progress on its Integrated Technology Strategy, it does not provide the type of information required for Systemwide procurement and dissemination of academic technology. Regular data collection and reporting on academic technology needs, usage, and value must be a service provided by SWAT and coordinated on behalf of campuses.
- Except for SWAT, and in some few exceptional circumstance (i.e., Microsoft), there is no single person or organization that can be considered a competency center for negotiating for AT products/services on behalf of the CSU. Consequently there is no pattern of experience and knowledge to draw

upon when negotiating for new AT products/services. This has led to some confusion regarding who is really responsible for negotiating specific forecast “numbers” with vendors.

- The RFP generation process that SWAT used for Turnitin.com is unacceptable. SWAT’s requirements are relatively low priority in the process, hence it is impossible to schedule any new vendor/product solicitation in which the RFP process is required. It took approximately four weeks for the text of the SWAT-written RFP for Turnitin.com to be posted to the CO Website.
- There needs to be rubrics developed for reviewing responses to RFPs. The reviewers for the anti-plagiarism responses commented that the rubric that was used for that project focused on “feeds and speeds” of the vendor responses and not on the material content. Fortunately for this particular project, the CSU had the benefit of the free trial with Turnitin.com and was quite able to overcome this perceived deficiency in the process.
- Once a contract is signed, the work is just beginning. There are no resources available to oversee and derive additional benefits from the vendor relationships that result from lengthy negotiations. For example, Turnitin.com provides outstanding resources for exploring and reporting on the use of the ASP service for all of the CSU. There is little doubt that campuses would value such information. With the Turnitin agreement the CSU has the opportunity to develop Systemwide programs regarding anti-plagiarism, working with existing CSU groups such as COLD, the Faculty Development Council, etc. There are no resources at all, available to do this.
- Currently, SWAT Services is significantly under-resourced. A management structure and resources are required to explore new cost-saving opportunities with existing and/or new vendors.
- The reputation that SWAT has developed among the campuses that are aware of SWAT’s existence appears to be positive. Unfortunately, that reputation will suffer as expectations for SWAT are not met. The reason for this is that SWAT does not have enough dedicated resources to satisfactorily complete the few things it has begun, let alone take on new ones.

Recommendations

A review of the past 1 ½ years of SWAT Service’s activities and “lessons learned” reveals two primary factors that have proven to be continuing obstacles to SWAT’s expeditiously working towards both its original objectives and some that have arisen in that timeframe. These concern 1) communications with

campuses, and 2) the nature of the SWAT organization itself. To address these, the following recommendations are made:

1. Communications with Campuses

A formal CSU council of campus academic technology representatives should be created. The purpose of this council, which would represent all CSU campuses, would, among other things, be to: help to identify (vendor, product, or CSU-focused) AT opportunities based on real campus needs; provide mechanisms and a structure for obtaining reliable forecasts for vendor products/services; provide guidance on assessment methodologies and resources for potential AT products and services; act as a communication medium between campuses and the CO on issues related to AT; and provide guidance regarding vendor agreement negotiations.

The council should be composed of one person from each campus who is responsible for developing and carrying out his/her campus' academic technology strategy. The council representative should be a full time staff person who has the authority for AT, and/or fiscal responsibility for AT, and/or is most influential regarding AT activities on his/her campus.

Rationale. It is clear that there is not a consistent and well-defined organization within the CSU that solely represents campus academic technology interests such as COLD does for libraries and ITAC does for information technology. This has led to many of the communications difficulties and problems discussed above. Unlike COLD, where each member has specific campus responsibilities related to their position as library director, every campus has a different organization and reporting structure regarding AT issues. Consequently it is very difficult for anyone outside of a campus to guess or assume where or with whom AT responsibility lies on any campus. This has made it very difficult for SWAT to communicate across the CSU, regarding AT issues.

Presently, the entity that comes closest to representing an AT council is ITAC. Throughout SWAT's existence, ITAC has consistently proven to be SWAT's most reliable entrée to campus AT interests, activities, etc., mainly because of the overlap and increasing reliance of AT on IT. However, the members of ITAC do not represent a homogenous set of interests since many ITAC members do not report to the academic affairs organization on their campuses. As well, ITAC members have many priorities and AT is not always the highest.

The Directors of Academic Technology is an "affinity group" that has campus representation and is focused on academic technology. This group has started meeting periodically but if they are to provide a critical function in SWAT, the group must develop into a recognized authority.

Other groups that might be the entrée for AT to campuses are the ITL (faculty development centers), or CATS. However, as essential as these organizations are for carrying out AT and other support activities on campuses and in the CSU, neither group typically is sufficiently *influential* to be able to represent SWAT-type interests and activities with any degree of consistency on their campuses. In addition, the role of faculty development centers in AT is not consistent across all campuses.

There are a number of ways in which an AT council could be formed, and there is one way it should not. First, regarding how the council should NOT be formed.

The proposed council must be made up of members, each having AT background, knowledge, expertise, and concern about local and Systemwide AT issues. By representing a variety of organizations as it currently does, SWAT has not had any mechanism for directly communicating reliably with all the campuses, where real, fiscal decisions are made.

A revised SWAT Team, or AT council must address this problem. This could be accomplished in a number of ways. Each campus might select a representative, subject to a set of predetermined criteria, that would ensure that the council consists of representatives with real expertise in AT as well as truly being representative of their campus' AT positions. That representative must be knowledgeable and influential on campus, and AT should be part of that person's pre-defined job description. Volunteer and interested faculty members who may or may not have time to serve, attend meetings, or be listened to on their campus are not candidates for the proposed SWAT council.

Another approach to creating an AT council might be as a "subcommittee" of ITAC. Given the increasing dependence of AT on IT, this is not an unreasonable strategy. Subcommittee members might be the ITAC representative him/herself, or each ITAC person might choose their own campus representative, - one who meets the criteria described above. Again, it is important that there be one person per campus, and that person have, as part of their campus responsibilities, academic technology.

Based on the history of SWAT, it is likely that this council would meet four times annually, perhaps including once during the summer. SWAT's responsibilities are year-long, and do not end or go on hold during summer or intersessions. As well, and following proven models (ITAC, COLD), this council should have a chair and vice chair, both elected by its members from within the group, serving for two, two-year terms. Through the chair, the council would work with SWAT Services to accomplish the objectives of Systemwide academic technology in the CSU.

2. Formalize SWAT Services

A new and formal Chancellors Office department of SWAT Services should be created, resourced, and tasked with providing Systemwide coordination of CSU Academic Technology services. The objectives of this department should be to:

- 1. Identify Systemwide opportunities for new AT products and services with a view towards providing campuses with new and exciting AT opportunities in a cost effective manner.*
- 2. Serve as the CSU center of AT information and expertise through a repository (database) of product/vendor/service information.*
- 3. Provide centralized AT product experience and an AT demo-base for campuses.*
- 4. Provide campus guidance regarding academic technology products/vendors.*
- 5. Coordinate the development and delivery of AT services on a Systemwide basis.*
- 6. Develop and provide support strategies for disseminating and educating campus communities about the availability and use of academic technologies.*
- 7. Reduce campus assessment and procurement time and costs through a centralized function of coordination of AT expertise and resources.*
- 8. Act as a centralized function to provide leverage with vendors for campus AT products and services.*
- 9. Reduce costs through "volume" negotiations with vendors.*

Rationale. Academic technology is becoming more and more important throughout the CSU. This is particularly true in view of the trend for increasingly complex AT products to become part of enterprise-wide IT system infrastructures (e.g., learning management systems). The demand for the use of technology in teaching and learning seems to be limitless, especially with the growing importance of the Internet and the World Wide Web in teaching and learning. The complexity and cost of the rising demand across the CSU for AT products and services requires the creation of a new support structure to coordinate Systemwide AT activities while seeking ways to manage the costs.

SWAT, which was created almost two years ago, was a timely pilot project. In many ways SWAT's activities have been ahead of these growing demands. However, SWAT, as it has been constituted, cannot continue to operate as it has, given the expectations that campuses now have regarding AT. The lessons that have been learned since SWAT's inception clearly demonstrate that a properly resourced, permanent SWAT organization is required. We've also learned that many of the kinds of support functions necessary to deliver SWAT services simply do not exist within the CO (nor on most campuses). Hence there is the need to create them within a newly constituted SWAT.

Each of the nine objectives for a new SWAT organization listed above is not new or unique. These objectives were defined at the first SWAT meeting and to one degree or another, have been acted upon. In retrospect, these objectives continue to be important for the creation of this proposed permanent organization. However, to accomplish them will require, in addition to overhead support, the following resources:

1. A full time director of SWAT Services: This person will have the same responsibilities as the director of the pilot SWAT project. In brief, those are to operationalize the objectives listed above by continuing to seek new opportunities that meet the academic technology needs of the campuses of the CSU. The experience of the last 1 ½ years clearly has taught us that all the objectives of SWAT cannot be accomplished with a professor assigned to this position on a part time basis.
2. A full time Website creator and designer: This person would be responsible for designing, building, and maintaining the complex online presence that is necessary to provide and solicit the kinds of information and services required to support the objectives listed above. Two examples will illustrate this need: 1) the SWAT pilot project has required the development of online survey data collection and reporting processes. This was accomplished through the voluntary services of CUDA at Cal State Long Beach; 2) SWAT required the development of a Web presence for the Turnitin.com project – a Website for users, an online assessment tool, and online reporting tools. These were eventually developed by CO IT resources, but they were in fact, a very low development priority for them.

Another requirement that has been identified, yet remains mostly unaddressed is the development of online methods for reporting the results of negotiations of new agreements, and the ultimate activity of providing campuses with easy-to-use online tools for ordering products off those agreements. It is obvious from the experience of SWAT that the CO's Contracts and Procurement (C&P) organization does not have adequate resources nor the kinds of expertise required to support the services that a SWAT Services could deliver across the CSU. While C&P

might ostensibly be tasked with this responsibility, the reality is, based on existing circumstances, that the complex requirements for such services would better serve the CSU community if they were provided from within a context of academic technology expertise.

3. Contracts Administrator: A full time contracts manager is required to participate in the negotiations that take place with a vendor, from initial contact, through contract completion, and beyond. There are many activities that take place when working with a vendor to reach a Systemwide agreement. Many of them require a degree of academic technology expertise that is not available from the CO's C&P. But more importantly, the CO's C&P has priorities that can force AT projects lower in their queue. This is simply not an acceptable way for a SWAT organization to operate when working with vendors.

Slipped schedules, because of changing CO priorities, reduce the leverage of the CSU with vendors when, from their perspective, the CO is not responsive in a negotiation. Since there are so many instances during lengthy contract negotiations where there is a dependency on C&P-like expertise, it is simply unacceptable for an AT negotiation to be negatively affected because of uncontrollable and unrelated priority changes within the CO.

Finally, as SWAT has learned, the signing of a contract is not the end of a relationship with a vendor. If a chosen vendor truly has significant strategic value to the CSU, the vendor will continue to develop new and exciting products and services that could benefit the CSU. It is essential for SWAT to continue working with the vendors after contracts are signed, to realize such benefits and to explore new and useful relationships. Very often there are C&P-like discussions that must take place to actualize such opportunities. Such opportunities need to be acted upon when they present themselves and not be subject to the workload and priority queue of others.

For these reasons, and also for there to be a C&P-like function that has in-depth AT *expertise*, a SWAT position needs to be created as part of the new SWAT Services to off-load SWAT demands from, and to act as, a liaison to the CO's C&P. (It is worth noting that Evan Reader, Director of EAR has encountered similar circumstance and has, within his organization, a position similar to the one described here for AT.)

4. Administrative Assistant. SWAT's activities are many and diverse. They range from standard ones such as making travel arrangements, redirecting phone messages, and disbursing expense report/payments, to those that are very, very SWAT- and AT-specific. For example, through

the use of “borrowed” or “volunteered” resources, SWAT has organized many onsite and offsite meetings for campus, CO, and vendor attendees. “Volunteered” resources have been provided to monitor campus participation in negotiated contracts; to recruit campus vendor assessors; to develop contract monitoring schedules; to interface with vendors; to interface with campuses; and countless other activities that are so essential to maintaining an efficient operation. The list is endless. As the only AT-specific organization in the CSU (if approved), SWAT requires a dedicated AA to keep things running smoothly.

Next Phase: The Future

Over the next few months the CSU will be concerned with many AT issues, some of which have been SWAT’s focus for more than 1 ½ years. It is clear from SWAT’s experiences that there does not exist within the CSU a formal entity with Academic Technology responsibilities such as those undertaken by SWAT. I strongly recommend that the “lessons learned” documented above be factored into the academic technology plans that are being examined for possible Systemwide deployment. More specifically, I recommend that the structure of SWAT described in this report be implemented in order to carry out SWAT’s ongoing activities, but also to act as an agent for possible new Systemwide AT activities.