

Software Selection, Adoption, and Retirement

Delegation of Authority to Select Software

As the governing body of the school district, the Board of Education (BoE) is legally responsible for the selection any software embedded within BoE adopted curricula for the Thompson School District. The BoE delegates authority for selecting this software to the professionally trained personnel of the district. Other administrative, organizational, and instructional software may be adopted according to the following policy without BoE approval.

The Board of Education (“Board”) is required by state law to determine the educational programs carried on in the schools of the Thompson School District (“District”). The selection of administrative, business, organizational, and instructional software shall be aligned with the District’s academic standards; educational objectives; compatibility, privacy, and security requirements; and licensing or use privileges, as determined by the Board from time to time. In recognition of the highly specialized skills required to analyze, evaluate, and otherwise review software and other technology resources used on District-owned technology and systems, the Board hereby delegates to District support staff, coordinated by Innovative Technology Services leadership, the Board’s authority to review and select software in accordance with this policy.

Preliminary and Quality Assurance Review – Phase 1

To ensure and maintain the quality, functionality, and worth of software used by District staff and students, new or replacement software must be reviewed by the Innovative Technology Services (ITS) Chief Technology Officer or designee(s) as part of the initial evaluation and prior to purchase. This preliminary review will include a review of compatibility, technology requirements, privacy policies, terms of use, and licensing. For instance, any initial sales meetings with software vendors should include a member of ITS as part of the software review.

For purposes of this policy, the term “software” shall mean programs installed locally on District-owned computer hard drives or operated through cloud computing, which are used by various end users on a regular basis for business, administrative, organizational, or instructional purposes. This policy primarily applies to enterprise application software. Enterprise application software is large-scale software that is aimed to support or solve the problems of an entire organization. This large-scale

software allows for several different user roles, and the roles define the actions a specific user can perform. Usually this is purchased software that requires a contract.

The term “software” and, thus, the requirements of this policy, do not apply to systems and utility software. This policy also does not apply to mobile device applications (apps), informally known as “click-through apps,” which most commonly exist in the form of iPad apps, Chromebook apps, or browser extensions for students unless the app is a portal to an enterprise level software application. Notwithstanding the foregoing, employees may request an ITS review of any software type prior to use.

Prior to any District employee purchasing or accepting contract terms for enterprise software, it shall be the responsibility of the Innovative Technology Services (ITS) Chief Technology Officer or designee(s) to review the prospective new or replacement software. At a minimum, this preliminary review shall identify the compatibility, technology, hardware, privacy policies, terms of use, and licensing requirements of the prospective software. The Innovative Technology Services Chief Technology Officer or designee(s) shall establish selection criteria based on industry best standards and compliance with federal and state laws, regulations, and rules as well as District policy. Selection criteria of instructional software shall also include the same criteria as is used to select other instructional materials.

Once software has been preliminarily reviewed and approved by the Innovative Technology Services (ITS) Chief Technology Officer or designee(s), it will be catalogued and tracked for upgrades and license renewals. The TSD Digital Learning Catalog contains instructional software titles that go through a summary vetting process by a standing committee that ensures student data privacy and basic functionality. If an enterprise level software title is requested for inclusion in the TSD Digital Learning Catalog, it will be referred back to the requestor to be fully evaluated according to this policy.

All new or replacement enterprise software, even free or trial versions, must go through the preliminary and quality assurance review. Software used by third parties in the performance of services for the District shall also be reviewed in accordance with this policy prior to use with any District system or by any District employee or student.

Evaluation of Software – Phase 2

If software passes the preliminary review and quality assurance and is therefore deemed to function effectively with equipment and software already in use within the District, a formal evaluation of the software will be conducted. This evaluation will

ensure that software supports and is consistent with the general educational goals of the District and the specific objectives for which staff has requested use or purchase of the software. If the software is intended for educational purposes, then the software shall be supported with applicable research demonstrating the effectiveness of the software in achieving the stated goals and purposes.

In addition, the evaluation committee shall consider:

1. training options are offered with the software;
2. support the software will require in future years; and
3. the cost-benefit analysis of the total costs of the software, including licensing, training, hardware, support, and bandwidth.

For each major evaluation, the division/department/school leader sponsoring the software request will form a committee to review the software functionality and usability. This committee shall include representation from Innovative Technology Services, Purchasing, and staff from the primary user's organization such as schools, Learning Services, Human Resources, Business Services, Communications, and Operations. If a districtwide adoption is being considered, the committee may include a sampling of school representatives and must contain at least one member of the TSD Cabinet. The committee may consider involving at least two or three parents and students to serve on the committee if the prospective software will be used by students. The committee shall use the consensus method for reaching agreement. The committee shall remain in existence until a final decision to implement or not to implement the software is rendered. This evaluation of software phase shall include any needed competitive bidding or requests for proposal as required by District policy.

Once the evaluation is complete a decision to implement or not implement will be made and communicated to the party requesting the purchase or use. If the decision is not to implement the proposed software, then stakeholders shall have the right to appeal that decision by filing written notice with the TSD Cabinet within five (5) school days of receipt of such notice from the committee. Such notice of appeal shall state the purposes and goals of the proposed software and shall challenge each reason given for why the proposed software would not be implemented. The TSD Cabinet shall make a final determination within thirty (30) days after receipt of the notice of appeal and shall issue notice of a final decision to the person(s) requesting the software as well as the Innovative Technology Services (ITS) Chief Technology Officer.

Software Implementation – Phase 3

Approval of the software purchase and/or acceptance of contract terms must conform with Board policy and purchasing authorization limits. When the software is approved for purchase or acceptance and use, the sponsoring leader that requested the software shall establish a team of staff members to plan for and smoothly implement the software on the appropriate District system or devices. The implementation team must include at least three employees with distinct skill sets and representing relevant District divisions, departments, or schools with the following duties:

- ITS Technical Administrator – Vendor support coordination, license renewal tracking, technical configurations (i.e. network), software updates/upgrades, synchronizations to other software and databases, SIS collaboration, Clever access, and technical support
- User Manager – Routine vendor coordination, license purchasing and renewals, user configurations, new user account creation, credentials management, and end user support
- Department Leader/Manager – communication regarding software release, training requirements, and usage expectations
- Professional Development Coach or Trainer – training on how to use the system to all end users, is responsible for creating a team of trainers, and identifying support individuals and ensuring knowledge transfer of system functionality

Successful implementation depends on initial and recurring training to all existing staff and new staff for all years the software is in use. Short and long term training requirements should be determined by the implementation team before the software implementation is completed.

Software Audit

The ITS division shall periodically audit all purchased or accepted software as is determined necessary by the Innovative Technology Services (ITS) Chief Technology Officer or designee at his/her discretion to ensure continued functionality and effective usage for all end users.

If during this audit, a software program is found to no longer meet the needs of the end users, an ITS or sponsoring District leader will consider forming a new committee to decide if the software should be retired. The criteria for committee formation is based on if the software is still technically functioning and being regularly used by some staff or students. Determination of functionality and usability of the software shall be determined

by this committee (if needed) including users, managers, and a member of the ITS staff. Any replacement for retired software must be approved for purchase or use in accordance with the evaluation and implementation procedures outlined in this policy.

Before software is retired, input and user data from all users must be considered. Software that affects a large portion of staff or cross-functional groups, should not be retired until stakeholders have been consulted and replacement software (if needed) is under preliminary review according to this policy. Once any needed committee has rendered a decision, the committee shall be disbanded.

Software Retirement

If it is determined through the aforementioned procedures that, in fact, the software should be retired, the staff with the duties of *User Manager, Department/Division Leader, and ITS Technical Administrator* and the software sponsor (i.e. principal) will coordinate with current users to plan a smooth transition and removal of the software from TSD systems. Staff will be notified as soon as possible before the retirement of the software. Software will be retired during a time period that is the least disruptive to instruction and/or school/district operations.

Any data within the system should be exported and maintained or securely destroyed pursuant to Business Services - Purchasing Department requirements as outlined in the vendor's contract with TSD and the corresponding data protection addendum and other applicable federal or state laws.

Adopted: January 2020

Cross Ref: DJA, Purchasing Authority
EHAA, Computer/Data Security
EHB, Records Retention
IG, Curriculum Development
IJ, Instructional Resources and Materials
JRCB, Student Information Privacy and Protection