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| **Type:** | Technology |
| **Title:** | Technology Refresh Policy |
| **Accountability:** | Institutional Learning & Effectiveness/Technology Services/Chief Information Officer (CIO) |
| **Responsibility:** | Technology Services/Directors of Customer Service and Enterprise Infrastructure |
| **Effective:** | 11/01/2015 |
| **Number:** | P-IT-001 |
| **Version:** | 1.1 |

**Purpose:**

This policy defines what is required to implement/manage a comprehensive technology refresh approach for maintaining existing technology to support students, faculty and staff. Madison College’s core business depends on these technologies; therefore, it is required that a consistent maintenance and upkeep of these tools be in place to deliver the College’s services. This policy defines a standard cyclical investment of resources for technology to ensure the College can provide its services and maintain its operations.

**Statement of Policy:**

Information Technology (IT) is a critical tool for conducting College business.

Madison College will setup an annual update process for technology and allocate the appropriate staff and funding/budget support to effectively manage the implementation of the Refresh Policy.

Madison College’s Refresh program should address legitimate business and educational needs of entire college-community: students, faculty, staff and specialized equipment used at College.

Refresh program should stay current with technology in the market and mitigate risks of service delivery for the College, which includes, preventing the technology infrastructure from reaching its End of Life or End of Support.

Refresh program should follow industry standards and best practices in terms of type of asset, age of inventory, timeframe for replacement, etc.

While meeting the totality of the needs of the College, the Refresh program should be affordable to the College and should minimize support costs and maximize savings through standardization and bulk pricing opportunities and contracts.

Madison College’s Refresh policy is intended to, at a minimum, support refresh of a single primary device per person, across all of the existing devices owned by the College, for people to perform their base work.

Once all of a year’s planned primary devices have been refreshed, if budget permits, additional devices may be refreshed. If desired, departments could fund an additional device’s refresh out of their department budgets using the established IT procurement standards and processes.

Madison College’s Refresh policy addresses three broad categories of technologies:

“Front-end” devices

“Back-end” infrastructure/devices

“Standard Productivity” software

“Non-standard” and “Mission-critical” software also require a refresh; however, these are defined further in the “Software Management” Policy.

Exceptions to policies and standards need to comply with the established “Device Purchase Justification Standard”.

Devices that do not go through this Refresh Policy definition will not be supported.

**Exceptions:**

At this time, Madison College’s **default environment** is PC/desktop-based. Macs, Laptops and Mobile Devices are considered exceptions that need business justification, such as, high mobility usage and unique technical features and functionality.

**Newly created positions and their equipment** will be funded from department funds. These do not constitute “Refresh”. After the initial purchase, the assets will be added to inventory and will, thereafter, fall under the Refresh Program. New purchases should follow the “Technology Hardware and Software Purchase” policy and standards.

**Lost, damaged or stolen items/devices** are not part of the normal Refresh process. These will be evaluated on a case by case basis to determine what funding source should be used to replenish them, such as, department budgets, College emergency funds, or insurance.

This refresh policy also extends to the **Madison College Foundation**, but no other third party entity.

It will be the department’s responsibility to purchase batteries, accessories, or **consumables, which are in addition** to those that are part of the base configuration standard.

**Definitions:**

1. **“Refresh”** means renewing all technology devices and standard productivity software already procured and used at the College. Refresh does not include the following:
   1. the original purchase of any technology,
   2. enterprise and academic software.
2. **“Current”** does not mean “Bleeding Edge”; it means keeping technology working so that:
   1. the work of the college is not hampered/diminished,
   2. the support of the environment is not overbearing/unmanageable,
   3. security and compliance issues do not pose a risk to the college.
3. **Service delivery risk** means not being able to provide the educational and administrative services of the College within acceptable levels of quality. Also, it means mitigating, to a reasonable extent, regulatory, compliance or security risks for the College.
4. **Front-end devices** includes:PCs, Laptops, Monitors, Printers, A/V Equipment. At this time, tablets, mobile devices are not included.
5. **Back-end devices** includes: data center equipment, network equipment, servers, routers, switches, telephony, to support the operations of the College.
6. **End of Life** means the product can no longer be purchased or supported through traditional channels.
   1. Technology that is old, past industry-standard life expectancy, with diminished capabilities.
   2. Technology where parts/components cannot be easily found in the marketplace, so we cannot fix some problems.
   3. Technology that vendors are no longer supporting, hence, if we cannot fix problems, we have no one to help us.
   4. Technology where software compatibility issues emerge when integrated into the overall environment (network, databases, other software, etc.). Also we may not be able to ensure security and compliance requirements.
   5. Technology that requires excessive manpower/resource support to sustain. Staffing requirements and support increases with older equipment.
7. **End of Support** means hardware and software has no security and feature support from the manufacturer.
8. **Per person** refers to the individuals that the College assigns equipment and tools; such as faculty, staff, consultants, students, etc., based on existing programmatic policies and practices.
9. **Single primary device per person** means that the Refresh Program will be budgeted to support at least one individual device per assigned person, across all the devices in the College, so that all functional areas of the College have at least one device to perform their work.
   1. This statement does not mean that additional devices could not be assigned to staff; however, these will need to be department decisions and funded out of department budgets.
   2. If budget permits, refresh of additional devices need to go through the normal refresh inventory assessment process, but get scheduled for refresh after all planned primary devices for a given year have been completed.
   3. Additional device purchases and refresh of any additional devices must still follow the standards set at the College or follow the defined exception process.
   4. **Exception:** Labs and Classrooms have multiple devices covered by the Refresh Program that are used for the purpose of providing instruction to students.
10. **Labs** are common areas used for multiple purposes. Labs need to be flexible in their design and equipment installation. Portable units for use in community centers and prisons can be regarded as a lab as well.
11. **Standardization:** The College supports specific tiers/levels of makes and models of computers with certain basic software to allow diversity in technologies yet provide enough similarities that adequate support can be maintained. Standardization reduces resource needs and costs significantly through software packaging and patch management, bulk purchasing discounts and vendor agreements.
12. **Standard productivity software** includes such things as:Microsoft Office Suite, Operating System, Browsers and other base tools. Madison College will support the current version of software implemented as standard and one prior supported revision; unless there are approved exceptions. (*See IT procurement web page for specific products included on systems.)*
13. **Non-standard and Mission-critical software** includes any additional software that is installed on systems to support the academic/instructional and administrative functions of the College.
14. **Industry standards and best practices** are the common practices that other Colleges or private businesses follow to refresh their technology devices. These practices constantly change with time. See the “Current Technology Refresh Period Standard” for the time periods that are currently used for refresh of devices at Madison College. The front-end refresh standards are defined by Technology Services (TS) and the College Refresh Committee. The back-end refresh standards are defined by the TS Enterprise Infrastructure Team. *Sources used for standards information: Gartner Research, Vendor Recommendations (e.g., Intel, Dell, HP), Typical Practices in Private Business as well as other Colleges (e.g., WTCS).*
15. **Break-fix** is fixing problems or systems one at a time, as they break or do not work anymore. There is no planned replacement, retirement or cascading.

**Short-Term Limitations:**

The current refresh practices of replacing about 1/3 of the entire pool of assets will be followed for three (3) years until the College has caught up its inventory to industry standards. After this time period, this refresh policy will be reviewed and updated, taking into consideration new methods for performing Refresh, such as, leasing, Bring-Your-Own-Device options, and other options, which require significant environmental and infrastructure changes to implement and shift of costs from capital to operations.

**Roles & Responsibilities:**

**Technology Services/Customer Service team** is responsible for leading the operations administration of the Refresh program within acceptable timeframes to ensure input from user-community, planning and budgeting. Also, they are directly responsible for the Refresh of the “Front-end” devices for all common areas of the College, such as, Labs, Classrooms, Kiosks, etc. (Conference rooms belonging to a particular program/department will be refreshed as part of the assets of the program area or department.)

The **Refresh Committee** will act as the operational and administrative Governance body of the “Front-end” devices and “Standard Productivity” software Refresh program. They are responsible for evaluating the existing environment and its asset inventory information; setting an appropriate refresh cycle; defining the acceptable standards for devices and software; and communicating the refresh update plan and prices to the College at-large.

Interests for the **Refresh Committee**, minimally, has the following requirements:

A **Charter** defines the Committee’s operating structure.

The Charter will be reviewed by the IT Shared Governance Council.

The Committee will ensure that there is college-wide **representation and communication** on the process of annual refreshes.

The Committee will establish a set of **objective** **guidelines to determine the priority** of refresh of assets.

The Committee will ensure the **appropriate due diligence**/forecasting, cost estimates, prices and standards are set prior to performing any annual refresh.

The Committee will ensure that **equipment configurations definitions in common areas**, such as, Labs or Classrooms, are for maximum utilization of the environments.

The Committee will ensure that the **administration of the Refresh program** will be efficient, inclusive and comprehensive, cost-effective and minimize operational support resources and needs.

**Technology Services/Enterprise Infrastructure team** is responsible for leading the administration and operations of the Refresh “Back-end” program and devices.

**Budget** is responsible to plan for the appropriate levels of annual funding to support a cyclical investment in both “Front-end” and “Back-end” technologies, while taking into consideration the overall context and total budgetary needs of the College. This includes:

Receiving budgetary need data for Refresh from Technology Services to inform the budgetary allocation decisions.

Updating historical budget allocations appropriately based on cost changes or due to new equipment/assets added to the College environment as a result of grants or other special projects, such as, facilities expansions.

If funds are not available for defined needs, in sufficient amounts, due to an emergency or approved alternate uses of funds; in subsequent years, catch-up provisions should be planned.

Regardless of funds available to conduct a refresh, serious consideration should be given to set aside funds for “Break-Fix” each year at approximately 20% of planned/needed refresh funds.

**Caveat**: It is understood that given the fiscal position and defined priorities of the College, Budget may be limited in fulfilling these responsibilities and the College accepts the risks.

**All College personnel** are expected to exercise care to **assure against theft and damage** of equipment provided to them. In situations where negligence, carelessness, or willful and intentional conduct result in damage or loss of equipment, the cost for its repair or replacement may be the responsibility of the department or employee.

**Consequences of Non-Compliance:**

* Going outside the framework of this policy can result in escalation of issue to appropriate managers, the Vice President responsible for the functional area, the Provost, President/Cabinet.

**References:**

* Device Purchase Justification Standard.
* Current Technology Refresh Period Standard.
* Front-End Device Refresh Standard.
* Software Management Policy.
* Technology Hardware and Software Purchase Policy.

**Modification:**

Modifications to this policy should be coordinated through the IT Shared Governance Council and the College’s Shared Governance process.

**Revision History:**

| Version | Date | Description of Changes | Author/  Editor | Approved  By |
| --- | --- | --- | --- | --- |
| 1.0 | 09/17/2015 | Creation of policy by Shared Governance/IT Council | Mirwais Qader, CIO | Shared Governance, IT Council |
| 1.1 | 02/05/2016 | Change made to College personnel responsibility statement to make it consistent with Wisconsin Statute 103.455 i.e.,  From: negligence or violations of this policy  To: negligence, carelessness, or willful and intentional conduct | Mirwais Qader,  CIO  (Recommendation by Mensah K. Lassey) | N/A |