

## **ALBERTA SCHOOL OF BUSINESS PHD PROGRAM POLICY TO FUND SOFTWARE FOR BUSINESS PHD STUDENTS**

### **Purpose of Policy**

Doctoral students in the Alberta School of Business use specialized software, such as NVivo or STATA to conduct research. The costs for software vary – from free for statistical software R to over \$1000 for an outright purchase. Annual licenses are also available; as of April 7, 2014, several cost about \$100 per year. Until the end of FY 2014, the annual license costs were paid for by the Technology Group of the Alberta School of Business. In November 2013, the Technology Group was consolidated into Information Services and Technology (IST) of the University of Alberta; IST does not pay for the costs of software for doctoral students.

The PhD Program wants to ensure that students have the tools required for doing their own independent research, especially their dissertations. The PhD Program also wants to ensure equity among students. The PhD Program is also subject to budgetary discipline. And because software needs can change over the course of a student's program, adaptability to student needs is essential. Therefore, students will receive additional funds to cover software.

### **Funding Mechanism**

The PhD Program introduced Professional Development Accounts (PDAs) on April 1, 2013. The PhD Program will use PDAs to fund software costs. Incoming students will receive an initial allotment into their PDA of \$200 on their arrival. As part of their regular PDA allotment on April 1, every registered student will receive \$200 each year for the first four fiscal years of their program, starting April 1, 2014. If a student's program runs longer than five years, the student should either save money in the PDA or prepare to pay for software directly. This additional PDA allotment is fungible. If a student economizes on software, then s/he can use the money for other professional development activities, and *vice versa*.

### **Revised Annual Expenditure Limit**

The annual limit on PDA expenses is increased to \$2200 per fiscal year, plus a job market conference, to incorporate this new allotment.

### **Software Alternatives**

Software is often less expensive for students and faculty. Also, the University negotiates discounts for software because it is a large buyer. Much software is available for license annually. Advantages of licenses are lower initial cost, greater flexibility to switch software, and periodic upgrades at renewal. Purchasing software provides stability in price and the user environment. Some software may be initially easier to use; these typically have higher prices. There are also levels of functionality from certain providers; doctoral students usually should choose faculty-level functionality to do faculty-level work.

### **Administrative Responsibilities**

The dissertation supervisor or research supervisor should approve software choices. Students should learn when the renewal dates are for specific software before ordering; the appendix lists renewal dates for commonly used software as of April 1, 2014. The person responsible for ordering software for faculty and staff will order software for students. This person will pass the claims through the appropriate administrator in the PhD Office for processing through the PDA. The Associate Dean of the PhD Program shall provide oversight to this policy. These amounts are subject to review with the Director of Finance and Administration.

### **Other Sources of Funding**

Students may be required to use certain software in their work as an apprentice to faculty members on research projects. Ideally, such software should be funded by the faculty from research grants, etc..

### **Appendix: Examples of Software as of April 8, 2014**

| <i>Software</i> | <i>Renewal</i>            | <i>Cost</i> |
|-----------------|---------------------------|-------------|
| EndNote X7      | None                      | \$90        |
| nVivo 10        | July 19                   | \$100       |
| Origin 9.1      | November 20               | \$25        |
| R               | None                      | Free        |
| SAS 9.4         | April 15                  | \$90        |
| SPSS 22         | August 1                  | \$100       |
| Shazam Pro 11   | None                      | \$10        |
| Stata/IC 13     | 1 year from purchase date | US\$98      |

More software is listed at:

<https://ualberta.onthehub.com/WebStore/Security/Signin.aspx?rurl=%2fWebStore%2fShoppingCart.aspx&JSEnabled=1>

Information about R and links to download R can be found at <http://www.r-project.org/>.

Information on Stata, including products and US\$ prices, can be obtained direct at <http://www.stata.com/order/new/edu/gradplans/campus-gradplan/>

Approved by Business PhD Policy Committee, April 10, 2014.