

MEETING MINUTES
Articulated Transfer Linked Audit System
February 16, 2005, 11:00-12:30pm
Public Services Building #251A, Salem

Facilitator: David McDonald, *Director Enrollment Services*, Oregon University System
Recorder: Jonathan Jacobs, *Admin Assistant*, Oregon University System

ATTENDEES:

Cindy Baccar, *Associate Director, Admissions*, Portland State University
Bob Bontrager, *Assistant Provost for Enrollment Management*, Oregon State University
Herb Chereck, *University Registrar*, University of Oregon
Jonathan Jacobs, *Admin Assistant*, Oregon University System
David McDonald, *Director Enrollment Services*, Oregon University System
Robert Mercer, *Assistant Dean, Liberal Arts & Sciences*, Portland State University
Ralph Orr, *President*, Tillamook Bay Community College
Joanne Truesdell, *Assistant Commissioner*, Community Colleges & Workforce Development
Valerie Ward, *Dean of Business, Social Science*, Mount Hood Community College

OVERVIEW MCDONALD:

- This group does not need a chair. I will facilitate the meetings.
- UO, MHCC, and PSU spearheaded looking at CAS on behalf of the state.
- A powerpoint on the CAS system has been given to the EDP workgroup, Governor's staff, OCCA, and CCWD. It was well received by all groups.
- This is an opportunity to do something very student focused, benefiting the student in all aspects.
- It is something we can move on quickly for the four-year campuses. 6 of 7 campuses can link-up right away. The 7th is EOU, our campus with the lowest enrollment.
- Some CCs, Mt Hood being one, are further along and can probably link into it as well.
- The combination of helping students and quick results is very appealing.

NEXT MEETING

MCDONALD: TASK: We will need to meet again in the next two or three weeks. Jonathan from my office will set that up.

ACRONYMS:

ATLAS: *Articulation Transfer Linked Audit System*, the name of this workgroup
CAS: *Course Applicability System*, a web-based, publicly available interface for degree and transfer audits
CC: *Community College*
DARS: *Degree Audit Reporting System*, the degree audit system most compatible with CAS
IMS: *Integrated Management System*, the system that allows non-DARS systems to interface with CAS
OLDA: *Oregon Linked Degree Audit*, the old name for this workgroup
OUS: *Oregon University System*

GENERAL PRICING:

MCDONALD: We need to get a good sense of pricing. We know the software cost, but we don't have a handle on how much it costs at the institution level to build the tables, build the articulation agreements to populate this database of articulations.

MCDONALD: I'm struck by the simplicity of the idea and the complexity of the implementation. I think we get one bite at this apple from the legislature. Whatever it is we go after as far as funding, including maintenance, licensing fee, hardware, and staffing, we need to be tight that the request in the biennial period is what we will need to get this up and running so when we go back to the 2007-09 legislative body we can say we spent (example) 1.8 million, this is what you got, this is how its helping, here are students it is benefiting.

ORR: Arizona negotiated a special price on a statewide agreement. The state paid to bring every institution into the program. Is that an option? Through this process every campus that wanted DARS got it. This might have been made available because we were a pilot state.

MCDONALD: I expect that when we start to look at pricing the prices will be differentiated by campus size and current system technology. I expect that implementation will occur over stages. If Tillamook Bay is changing over to Jenzabar you would not want to immediately put another change on top of that. Sequentially we may have this be a multi-biennial rollout.

BONTRAGER: My concern is the longer term expense of running a system that is not an SCT system. That is what makes these conversations difficult. In a near term perspective it would be cheaper to go CAS. Over ten years I can argue that collectively it would be cheaper to operate in the Banner structure.

PRICING – COMMUNITY COLLEGES:

ORR: Pricing that I've heard discussed to this point has not included the 17 CCs having statewide license access to the software. So we can participate between CCs as well as up and down with OUS. I would like to see it brought into the discussion sooner rather than later.

MCDONALD: It has to be part of the process We can look at it all at once or phased in, either way we need a full sense of what the cost is.

ORR: We will get a better price if we do it all at once.

CHERECK: We need a point person from CCs to help with pricing.

TRUESDELL: **TASK:** I'll be on point for CCs pricing. We'll figure that out to the best of our ability. We'll use the registrars. Bob at OSU is familiar so I know he'll be helpful. PSU will be helpful. Valerie Ward and Ralph Orr will be helpful to help guide that conversation and those questions.

TRUESDELL: What is our timeline to get pricing for CC perspective?

MCDONALD: It will be sooner rather than later. This will be a part of the OUS Ways & Means hearing material in phase 1 which is in two weeks.

PRICING – LICENSE FEE:

HERB: Curt Pederson (OSU) and I spoke with Jason from DARS to get a better understanding of projected costs per campus. The current arrangement is that each school will pay a license fee. The cost gets very complicated because it is based on the number of students you have.

MCDONALD: When will they have a firm pricing?

CHERECK: The way they were talking it is very close.

WARD: We can propose being a pilot.

WASHINGTON STATE CAS IMPLEMENTATION

ORR: Will Washington state be the pilot for the subscription service?

MCDONALD: The head board folks in Washington are not sold on one system. They are still debating between CAS, ARTSYS, or maybe homegrown. They are interested in doing something, but they don't know exactly which system they will use.

CHERECK: I couldn't imagine considering this as a homegrown project.

TRUESDELL: Washington might be in a good position to be homegrown because their existing University and CC system currently is a homegrown centralized database. I agree that I wouldn't want to tackle it in Oregon in a homegrown way.

FACT FINDING – EXISTING MODELS:

CHERECK: In Ohio, IMS (system for CAS interface with non-DARS schools) has been used at all CCs and four-year schools without DARS. They have about 100 active campuses.

ORR: DARS recognized years ago that they live in a Banner world and have worked on their interface for that.

CHERECK: Miami of Ohio is a Banner school.

BACCAR: It might be interesting to talk to some of the schools in Ohio that use CAS but don't have DARS. Those schools could tell us just how difficult it is to implement this.

CHERECK: There are a lot of questions we can't provide an answer to. One of the things we might want to consider is bringing in an IMS person and a DARS person and have them here for a day of consulting. Tell them this is what we have and have them outline our problems and try to give us a feel of staffing issues and long-term maintenance issues we need to be concerned of.

MCDONALD: The key would be to give all campuses a chance to be there. We might even use two days.

CHERECK: I think it's more of a system level. Why talk about it at a campus level?

MCDONALD: What Bob needs to do at OSU is dramatically different from what UO would need to do and it would have different cost drivers as a result.

WARD: Whoever is working with University of Miami Ohio folks, we do not need to reinvent the wheel. They have done this at other states, and they have models for how many resources it might take at a CC, even if it is a wild guess. They can create a model showing what could conceivably happen in Oregon. It takes away the concern that you would have about us knowing how many resources. The vendor can tell us their cost experiences. Bob at OSU can tell us the costs as a non-DARS participant. Who can take the lead working with Jason or University of Miami Ohio to get resources?

MERCER: **TASK:** I could certainly talk to them.

FACT FINDING – SPREADSHEET

CHERECK: I did a survey to determining what student systems and degree audits existed throughout the state. At CCs there is an array of student systems and degree audit systems. I did this to get a better understanding and feel for what's going on statewide. Two columns need to be added to this spreadsheet.

- Column three will be where each school is in programming degree audits.
- Column four will be where each school is in programming transfer/articulation tables.

For third column, a staff member in our office will contact each school to find out their projected date for implementing their coded degree audits.

TRUESDELL: I will do the same for the Community Colleges. At CCs we have to be very specific what we ask. Do we want to know if their ASOT is in place, AAOT, other articulation agreements?

CHERECK: Valerie Ward can give us an example of what we want to ask with MHCC's projected progress.

WARD: MHCC is doing pilot testing right now. We entered our programs first (AAS, Tech Prep), then AS, ASOT, and AAOT will be last. Hopefully by the time we get to AAOT most of the work will be done by other programs. Implementation projected to be June 1.

CHERECK: You are entering all programs, degrees, as well as certificates awarded?

WARD: Yes

CHERECK: That is the real question we need to know. Once complete, it can tell a student who wants to come to your school what they need to take if they want to go there and complete a program. It also works for your own students.

BACCAR: Column four is needed because some campuses might have degree audits, but no transfer tables.

WARD: MHCC coding includes CC to CC, and articulation agreements to four-year schools.

BACCAR: Are you including transfer tables in that projection?

WARD: Yes. They're loading them as they sign them. We have one at PSU that the ink isn't even dry on.

CHERECK: What I mean by an articulation table is how a PSU course articulates to MHCC. I would want it course by course.

WARD: It's important to get the right person and say the right words to be consistent.

TRUESDELL: We need to define column four as "articulation/transfer tables". Some CCs will have articulation tables, and others will have transfer tables. I want to ask the right questions when I speak to campuses. I think everybody else is programming in the same sequence as MHCC (start with AAS degrees, then ASOT and AAOT). I can craft what I think is the right question to ask for the spreadsheet.

MCDONALD: **TASK:** Herb, please continue to be guardian of this spreadsheet.

IMPLEMENTATION – DUPLICATION OF WORK

ORR: Something we did at Arizona State (ASU). The legislature appropriated money for the entire project including staff that worked at ASU on behalf all of campuses. ASU did some work that that made it easy for other campuses to copy information and for coding. At PSU has work been done that would enable schools to copy over the basic transfer information?

BACCAR: We built the rules one way. Potentially, somebody could copy the information and reverse it. You would have to examine each rule because you might not want everything reversed.

CHERECK: The articulation tables are built at every school, but how that course at your school transfers out to other schools is not really relevant in your incoming tables.

MCDONALD: **TASK:** Cindy, can you call ASU and get a sense from their perspective what they did. Then you can translate it into your worlds which are the most technical.

BACCAR: I can call Amy Spring. She attends the DARS conferences and works with the state.

CHERECK: Also call Kevin McKisson, the ASU system registrar.

IMPLEMENTATION – CAS

BACCAR: CAS has interfaces with Jenzabar, Banner, and Peoplesoft.

CHERECK: 2/3 of Oregon campuses with 80% of the student population can have a CAS implementation

BONTRAGER: **Concern:** integration software. It is never as easy to implement as it is presented. OSU uses a CAPP degree audit system (not DARS). There is a greater cost to OSU in staff and programming, time. OSU will have to make a decision whether or not to go to DARS thinking about long-term implications.

BONTRAGER: CAS is a great direction to move. Of the three larger universities, OSU is in a less advantageous position. We still are supportive, but we want to go in with our eyes wide open. There is a large resource issue for us and for CCs that don't already have DARS.

WARD: I remember 10 years ago Agnes was pulling her hair out with implementation. I hope it is easier now.

BACCAR: Implementation of degree audit (DARS) is a lot of work for any campus no matter what system you use. Once you develop DARS, CAS comes in and sits over the top and drills into the system. The CAS implementation is mild compared to the pain of implementing DARS. For those of you who do not use DARS the pain will be a bit more difficult, but we don't know if it is extremely difficult or just another step.

BONTRAGER: **TASK:** We'll do some research and try to find a clear path to a smooth implementation. We need to see what it will take to bring everyone on board. It just makes sense.

IMPLEMENTATION – STAFF LOGISTICS

BACCAR: Upfront there is a lot of work to do. How do you take the people you have that are already too busy and retask them to build this thing?

CHERECK: At CC level you can't.

ORR: In Arizona the state appropriated money for staff to make that happen.

MCDONALD: **TASK:** I'll follow up with how Arizona got this funded so we have that model also.

CHERECK: Val, How many people did MHCC dedicate to the coding of degree audits?

WARD: No new staff, we retasked 2 FTE.

CHERECK: You redeployed existing staff, but some schools will not have the staff to do that. If we said for one year we get one person to do it, we can get a one time allocation of \$50,000 for each CC to code. That is still cheap in the long run vs stringing it out over a 5-year period. There will be different costs associated with CC implementation.

ORR: Another model to consider is on the state level a hosting institution hiring individuals who are expert coders who circulate among the schools from largest to smallest.

BACCAR: You need the staff on each campus for the ongoing maintenance. Some schools thought to pull advising experts and those with a knack for rules and computers to form work teams. Everybody can suffer a little while to let somebody work on a project for the short term and be creative about the way they staff this.

ORR: I don't necessarily believe every school needs to learn how to do it. The Washington model has centralized data in one office so expertise can be affordably trained to higher levels. That model can work. If you took all the rural CCs and hired experts on state level, and each campus forwarded catalog changes electronically, it would make much more economic sense than having several small schools maintain that expertise. If you have some other system you have to build your own anyway.

BACCAR: That group would need to have access to the campus DARS system.

IMPLEMENTATION-TWO PHASE SYSTEM

BACCAR: Even at phase one when the OUS campuses are up, I can enter my CC course history into my profile, and get any transfer information to any program at an OUS campus. Phase two benefits include be the ability to automatically retrieve information from (example) Tillamook Bay, then see how the Tillamook coursework would transfer to Clackamas or any other CC that is CAS active. Another example, if a PSU freshman drops out, and wants to take their credits to Chemeketa, if Chemeketa was active with CAS (Phase 2) they could see exactly how their PSU courses would transfer in. Phase one requires a smaller investment in the CC world in training to help advisors know how to access the system, and use the investment of the university level. Phase two is to see what it takes to get all CCs in that same ability to link to CAS.

MCDONALD: The parallel I see in phase 1 is how AAOT has been for years as far as student direction. The benefit is seen as going from CC to OUS campuses, as well as between OUS. Phase 2 adds the ability to go CC to CC, and OUS to CC, so you have a completely multidirectional circle. There are two discreet phases because the 2nd phase requires bolstering of the degree audits at the CC level. That may be a very good CC package for 07-09. We can figure out how to do that in two phases.

BACCAR: If every CC supported this so that the schools that are ready to go with it can do their part, all CCs will obtain huge benefits. When the CC is advising students for transferring, they have a wealth of information at their fingerprints.

ORR: I'm worried about calling a CC and asking the pricing question. They won't know how much this will cost their campus unless you want all 17 CCs to start calling DARS and CAS. They won't know staffing requirements. They are going to give a rejection message because they won't have enough information.

TRUESDELL: I don't think of it that way. There are three tiers. The first tier of the process at the CC is to talk about the demo and demonstrate the process to the advising staff. That's one piece, and that is where your advisors are sold. The challenge is trying to gauge the amount of technical assistance and hardware necessary to support becoming a participating CAS institution.

ORR: I think that piece will sink this because we don't have much time. If we concentrate on phase one, which benefits everybody regardless of their degree audit system (or lack of), we can come back in phase two and say that it would work better if we find a way to connect what has been put in place with your own degree audit system. I'm afraid the fear of the full implementation will cause it to sink.

BONTRAGER: That's why the piece that I'm talking about OSU doing is so critical. We are in active conversation with 10 CCs in the state for dual-enrollment. For us to even speak to that, even in the near term is going to be helpful. Then we will take every opportunity, including ORACRO, Dual-Enrollment conference May 2-3, to get at the advisors and registrars.

ORR: I would urge folks to put in place phase one, the part that benefits everybody with virtually no pain.

CHERECK: Rather than create a false impression of where we are going to go we focus on the automation of a campus's degree audit. The next part of that is whether you want to become a player in CAS. You don't have to be, but it will create something that will benefit your internal students, which is where the focus ought to be. We ought to come up with funding which would allow each campus to have a person to code the degree audits for whatever degree audit system they have.

CHERECK: The difficulty is preparedness and trying to project the cost.

ORR: I don't think two years from now we will be any more prepared than we are now.

CHERECK: We should move while it is fresh in everyone's mind, and there is interest and enthusiasm with the legislature, I would hate to see two years down the road there is no support.

ORR: There will also be a perception created that we fixed the problem, but they will still be hearing horror stories from students. I advocate doing it all at once.

MERCER: A two phase implementation will take two or three years.

ORR: I think the entire package ought to be sold now.

MCDONALD: The challenge in selling it now will be communicating at the CC level so you don't raise the red flags. The thing that will kill us is if we sell it and it does really well at committee, but a senator will go to a CC and ask if it makes sense. If he gets a response that the CC does not know about it or is opposed to it, it will die.

TRUESDELL: **Phase 1 for the OUS system will look different than a simultaneous Phase 1 for CCs.** We don't want CCs to believe they are doing the same thing at the same time as OUS. We can't have all 17 CCs believing that by tomorrow they need to get there.

ORR: My school hasn't even started. It would probably be 2 or 3 years before we could even be in a position to tie DARS into Jenzabar. I think now is when the momentum is there to get this done.

GENERATING SUPPORT

CHERECK: It is not something all campuses have to come up with tomorrow. They can be phased in over time. Jason said you have to work with success stories. We have one already with PSU.

MERCER: Political suggestion: The student databases that are currently not compatible tend to be the most geographically isolated places. We know from our own experiences that students from those areas have the most difficult access to getting advising information. They can't just drive up the street to OSU or PSU. We need a way to tell legislators that this is even more necessary for those students in rural areas.

CHERECK: We are trying to take what has been a paper and pencil process and automate it. This is a tremendous challenge for folks who don't feel they have computer hardware and software to support it. This is an opportunity for those schools who might otherwise never get a chance to automate their degree audits with the funding we request regardless of what they are currently doing.

BACCAR: I spoke with an advising person at Chemeketa. They have 1 person who does transfer evaluation. Advising centers are waiting 5 or 6 weeks to get an official transfer evaluation. The advisors are telling the student "this is my best guess, but I'm not sure about this course so wait for the evaluation." The advisors want this system because it will remove the guesswork.

MCDONALD: These stories help us sell this type of service to all audiences, legislature and presidents. The service to student and the current dilemma we have as far as advising support.

COMMUNITY COLLEGE CONCERNS:

ORR: At the CC President's council, many presidents will say they are not compatible with the system and will not support it. The message needs to get out clearly and strongly that this will benefit every CC and every higher ed institution in the state regardless of whether they have a compatible system. Those who have a compatible system will benefit even more.

TRUESDELL: Advisors want CAS because it makes their work easier. The registrars are nervous because they don't have funding for the transition period. The presidents are concerned about telling their deans of students, "Here is one more thing." In the next two weeks we have five CCs that are laying off 60 staff and cutting infrastructure, and are not in a good frame of mind for more. We need two messages: We are in the middle of pricing this in order to make it effective at the CC level, and we do not want to create an unfunded mandate. The important thing is to identify to all that this is a great thing. We are exploring and wanting to know from the school what they expect are the costs and implications of implementing this. We want to prepare them.

MCDONALD: **TASK:** Ralph, if you can carry that message your voice will have greater credibility than any of ours.

ORR: It is important to work with CC registrars. What I see happening is the legislators will turn to the CC president in their area and find out if the campus supports the program. The president will turn to their staff and ask if it is a good thing.

CHERECK: If the presidents have not been part of the discussion they will not support it.

ORR: I brought this up at the last president's council. A good half of them were soundly against it because they see it as a forced conversion from their current system.

ORR: Registrars and advisors will be clamoring for this if they know what it is and what it does. We need to get those groups sold on this quickly so they will sell their presidents who will in turn sell their legislators

ORR: Can we recruit champions of the advisors or registrars at CCs who are actively using CAS through PSU? We would get a lot more traction if you had those individuals carry the message to their peers.

ORR: One thing the presidents will ask is if this affects the CC support fund. We need to reassure them that this is new money.

LOGISTICS – LEGISLATIVE REQUEST

CHERECK: Someone needs to write the case that precedes the funding request. George Pernsteiner is asking Kurt to put a funding package together. Should there be two funding packages? One for OUS and one for CCs?

MCDONALD: **TASK:** I would go with one. I will work on the funding request. I feel we have much greater strength as a single funding package coming from the governor's office.

CHERECK: **TASK:** I will back out of the narrative and ask Karen Sprague if she can work on that with Valerie Ward. A lot is done, I need some stuff from Ohio state which describes all the benefits. We will circulate that between this group.

ORR: The Arizona CAS website has a narrative that can be used as well.

DEMONSTRATIONS:

MCDONALD: We have talked about possibly scheduling a noon-time show and tell for the legislative ways & means subcommittee members. The most powerful learning tool is to show them how it works for students.

MERCER: **TASK:** We have a multiple school transcript (OUS & CC) to use as a presentation piece at IFS I can send for demonstrations.

TRUESDELL: **TASK:** Presidents council is 2/17. I will get a cursory guesstimate on where they are with degree audits. We could probably get a good pricing guess within two weeks, maybe not all schools reporting.

MCDONALD: **TASK:** Next CSSA meeting is in a month. Let us get this on their agenda.

WARD: **TASK:** CIA meeting is in a month. Let us show them a demo as well.

CHERECK: They can log on to the PSU website today

BACCAR: When PSU introduced this we went out to the CCs to demonstrate, so you might find folks are already familiar with this.

CHERECK: Any CC can create a representation, such as 6 courses from their school, and see a demonstration on how they transfer to PSU today. A demo is there.

WARD: **TASK:** Practical suggestion. I'm seeing an opportunity to get buy in, but we need to do it quickly. I suggest taking the PowerPoint that we have done, videotape Cindy Baccar, and stream it on the web. Joanne can use it as a link as she is talking to people. Anybody can take this show on the road.

MCDONALD: **TASK:** Robert Mercer, can you circle back to IFS to make sure there is communication with our faculty constituents.

CAS - FEATURES

ORR: Even if a campus has no degree audit system, CAS is still a very workable solution for every higher ed institution in the state. Even those institutions without a direct interface could use the system for those who transfer out. It meets legislative intent. We have made transfer easier.

MCDONALD: There will be various levels of total benefit depending on where the institution is. The institution may have less benefit locally, but when their students try to transfer between CC and OUS, the CAS system facilitates that.

CHERECK: I like Jason's descriptor, that you can be either sending or taking. Campuses may only send if they don't have the CAS system.

BACCAR: To implement a CAS system you just connect CAS to the campus's existing degree audit system. CAS is not a database. It is integrated with the degree audit system. What makes PSU accessible to MHCC and TBCC is we go and look at what the CC has done for us and program it into our degree audit database.

NEW NAME:

MCDONALD: We need a better name.

MERCER: We have a suggestion that is a mouthful, but we like the acronym: Articulation Transfer Linked Audit System (ATLAS).

MCDONALD: That's a great starting point.