

**MEETING MINUTES**  
**Articulation and Transfer Linked Audit System**  
**March 23, 2005, 1:00-2:30pm**  
**Oregon State University**

**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

**Randy Hart**, *Policy Analyst*, Oregon State University

**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

**Karen Sprague**, *Vice Provost Undergraduate Studies*, University of Oregon

**Joanne Truesdell**, *Assistant Commissioner*, Community Colleges & Workforce Development

**Bob Turner**, *President IFS*, Western Oregon University

**Valerie Ward**, *Dean of Business, Social Science*, Mount Hood Community College

**Catherine Williams**, *Director of Central Computing*, Oregon State University

**AGENDA MCDONALD:**

- 1) Approve Minutes
- 2) Update Progress,
- 3) Budget
- 4) Web Video recorded at Mt Hood
- 5) Next Steps

**APPROVAL OF MINUTES:**

Minutes from 2/16/2005 ATLAS meeting approved.

If any corrections need to be made to any minutes please contact Jonathan Jacobs ([jonathan\\_jacobs@ous.edu](mailto:jonathan_jacobs@ous.edu)).

**NEXT MEETING:**

April 14 at Oregon State University. Details to follow.

**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

**OUS:** *Oregon University System*

**UPDATE MCDONALD:**

- This will have meaningful impact on students in the very near and long term.
- Conceptually it is a product with a straightforward and beneficial service
- The various audiences who have had a presentation grasped this concept very quickly
- Val and Cindy will present to our Board at their next meeting the benefits of this approach.
- There was a well-received presentation at the Senate Ed committee three weeks ago.
- We have heard nothing negative about the idea.
- Thank you to Valerie Ward, Karen Sprague, Herb Chereck, Robert, Cindy, and others who have been instrumental in our progress to date.

**FUNDING MCDONALD:**

- We need to talk about potentials for each phase, come up with an action plan, and fund it all the way through.
- The challenge right now is finding the funding.
- We need to price it, which we are discussing today.
- We need to identify funding sources to take care of this.
- Unfortunately from a timing perspective this was brought up after the policy packages and the budgets were presented to the governor and legislature. Those who have seen this are supportive of it if we can find the funds.
- We are looking at the state, OUS budget, and grant proposals for funding.
- Hopefully we can find a champion that can find funding for this without taking funding from another postsecondary program.

**COMMUNITY COLLEGE PRESIDENTS:**

ORR: The CC Presidents have not had a chance to meet and look at this. Their attention is on perceived higher priorities at this time.

MCDONALD: Let us know if we can help facilitate that conversation. I want to make sure the CC presidents aren't feeling left out of the loop on this. If nothing else we will produce a one-pager that we can put into one of their packets and that will suffice for attention grabbing for the moment.

**CAMPUS SPECIFIC INFORMATION:**

CHERECK: We are preparing a status report that shows each campus status on:

- The type of student system they have
- The type of degree audit system they have (homegrown or 3<sup>rd</sup> party)
- The percentage of major program degree audits are coded
- The percent of the articulated catalogs that are coded.

We are updating this information for the CCs. Hopefully we will get that within the next 10 days. The information for OUS campuses is completed. OSU has 99% of majors coded. PSU has 100%. SOU has 55%. UO has 65%. WOU has approximately 80%. They are moving along reasonably well. OIT has no majors coded but 100% of their articulations. EOU has nothing.

I have added the Health & Science University. They are interested in this because of the expansion of nursing programs. Even though they are a standalone I would like to make sure they are involved in our discussions.

MCDONALD: Herb and Joanne, I appreciate the hard work and follow-through with the OUS and CC campuses getting responses.

MERCER: It is critical to get the curricular changes and automate the posting so everybody can see them easily. We need an annual summary of what the course and curricular summaries are at each campus. It is a new process that will take some work to do.

**PHASE 1 BUDGET:**

**CHERECK:** Randy Hart has been working on this budget document at the direction of Curt Pederson, at the direction of George Pernsteiner. Randy has spent a lot of time talking with me, Jason Elwood (DARS Director), as well as other users of the CAS system. He has put together a budget proposal for Phase 1 and Phase 2.

**SPRAGUE:** Suggestions for language in the budget document:

- Phase 1 Current text: “the costs in this proposal for phase 1 occur at the 7 OUS schools. However students at the 17 CCs will also gain ready access to digital information about OUS degrees and articulation.”
- Suggested revision: “By providing their own course information CC Students can obtain computerized comparisons of their coursework with any of the OUS degree programs.”
- Phase 2 Current text: “... allow students at Oregon’s 17 Community Colleges to obtain computerized comparisons of their coursework to OUS degree requirements.”
- Suggested revision: “Allow them to obtain computerized comparisons of their coursework to their own and other CC degree programs.”

CC students will benefit in phase 1, yet the text says they don’t benefit until phase 2. Dave’s mental image is that phase 1 is vertical, and phase 2 is horizontal.

**RANDY:** As I developed a proposal, the staffing cost was problematic. Owens CC, one of the early adopters for this interface, reported high costs. After some research we determined many of their costs were for running other systems. We have revised our number down to \$75,000 for the CAS-CAPP interface as well as a \$75,000 contingency due to our uncertainty on cost.

**CHERECK:** Owens CC is in the Ohio system. The entire state of Ohio is on CAS. They are running on the banner system. The company that provides this interface advertise an interface for Banner-Capp as well as Peoplesoft, and Janzabar.

**MCDONALD:** We have a one-time grand total of \$519,000 with an annual cost of \$96,000 for phase 1. This would be for all 7 OUS campuses to be up and running with this system. The first year costs will be \$615,000 (\$519K+\$96K)

**HART:** The \$84,000 annual cost is required for the first year. The \$12,000 maintenance cost will probably begin the second year.

**PHASE 2 BUDGET:**

**MCDONALD:** Phase 2 annual costs are in addition to phase 1 annual cost.

**HART:** The \$72,000 annual cost would grow to \$194,000 when all CCs become receiving schools (\$12,000/school). The \$72,000 assumes only the top 6 CCs are receiving schools, including Portland CC, Mt Hood CC, Chemeketa CC, Clackamas CC, Linn-Benton CC, and Lane CC. If there are fewer initial schools the cost will go down. Other campuses can participate as sending schools at no charge.

**CHERECK:** Any school anywhere can send so long as the transfer tables are built into the receiving institutions. The purpose of Phase 2 is for the CCs to be receiving institutions. This means either OUS-to-CC, or CC-to-CC.

**MCDONALD:** I see hardware costs of \$7,000 in phase 1 and \$17,000 in phase 2. From a strategy standpoint I want all hardware cost moved to phase 1, and footnote it that it covers phase 2 hardware needs as well.

**HART:** The \$850,000 labor might be overestimated. We might not need 1 FTE at each CC.

**WARD:** At Mt Hood we devoted 2 FTE for 9 months to get 100% coded. They are reallocated. There were also some indirect project costs.

**MCDONALD:** Some campuses have greater capacity to reallocate depending on the structures.

**PHASE 2 BUDGET (continued):**

HART: It took PSU 3 years with 1 FTE to complete their system. I think 1 FTE per CC is overkill.

CHERECK: Degree coding and articulation tables have to be done at the receiving school that will be awarding the degree or program. It is only one way. What other schools do doesn't matter. You would need to code the courses from the other schools as they articulate to whatever course requirements you have. Sometimes they don't articulate and you transfer them in as elective credits.

TRUESDELL: I wouldn't want to go lower than 1 FTE staffing per CC. Some campuses might require 2 FTE. One campus might have 18 articulation agreements plus 40 professional technical degrees plus one-year certificates plus transfers all on paper that need entering. Some campuses do not have a computerized degree audit system. On the other hand, Tillamook Bay might be five years out before implementation and we probably would not set aside money at this time for them. Not all of them are coming up at once.

CHERECK: We don't know about the degree audit system that Rogue CC, Blue Mountain CC, and Columbia Gorge CC are using. Does IMS have an interface for that?

HART: They claim they do.

CHERECK: It is my understanding that Lane CC is already done. They have coded all of their degree programs and certificates into CAPP. They are already teaching advisors and students to use it.

HART: For startup staff we could estimate that half of the schools would need the 1 FTE the first biennium. We could get money for the remaining schools in the next budget cycle.

MCDONALD: For the legislature it is good to have a really good plan with tight budgets and good rationale. Clearly the first biennial is phase 1. Biennia 2 and 3 will be split for phase 2. What happens in the third biennia will depend on the demonstrated success in the first and second biennia, but it should be a straightforward, end-of-the-process request. At some point we have to figure out how to internalize the annual cost. It is not worth a request to the legislature every two years. The legislature will want us to put it in our base budget.

**PHASE 1 STUDENT SAVINGS:**

HART: When a student benefits from improved advising they could save 6 or more credit hours from their program to graduate. That would translate to about \$800 per degree. If 150 students benefit they would save \$120,000.

MCDONALD: 4,000 students formally transferred from CC to OUS. We probably have an equal number of students who transferred without reaching a formal transfer point. 150 students saving 6 credits is very conservative

MCDONALD: Washington did a comparable analysis on student savings. Their number is based on the number of credits at graduation of a transfer student compared to a continuing student. In Oregon that number is 15. In Washington it is 8. They cut it in half for a savings estimate of 4 credits. Their methodology is fairly comparable for student savings.

CHERECK: It might be harder to determine if the 6 credit savings applies to CC students as well.

TRUESDELL: After this is running we can follow the cohort through. The speed of getting through will probably improve.

CHERECK: To develop a cost analysis we would need to look at two figures: Can we reduce the number of credits required for transfer student completion from Dave's number of 15? Can we reduce the number of credits when a student transfers in?

MCDONALD: This is an opportunity to come back to the legislature to show them that this works and results in savings. It is a credibility opportunity.

**PHASE 2 STUDENT SAVINGS:**

MCDONALD: The CC student savings needs adjusting from the \$800 tuition savings for students because CC tuition is lower.

TRUESDELL: You will be saving in OUS institution dollars because you won't know until you hit. You're not likely to get back and figure out how to get those at the CC because it doesn't work that way.

MCDONALD: What about the students taking the AA and transferring inter-institutionally.

TRUESDELL: That would be about \$1,200/person. The number of students would be much larger because we would be looking at more than 150 students between CCs.

MCDONALD: Please try to get a good number.

**CAMPUS SAVINGS:**

HART: There are university benefits as well. We can free up those 6 hours of capacity per student. The replacement value of those credits in 2004 is \$6,502 in university savings.

MCDONALD: The university savings are nebulous to measure. I would have a hard time making that argument with a public audience.

TRUESDELL: A different methodology: We could calculate the savings in student FTE as additional person capacity at the universities.

CHERECK: The impact of the dollar figures is greater.

TRUESDELL: If we can't defend the numbers they are hard to use.

CHERECK: 150 students saving 6 credits would give you 60FTE savings.

TRUESDELL: We could get a dollar figure by multiplying 60FTE by the factor of an FTE in tuition.

MCDONALD: I think the 60FTE alone has value along with the \$120K in savings to students. In phase 2 you have the same calculations for CC in savings.

CHERECK: From Randy we need clarification on the \$6,502 to see where it came from.

**SAVINGS GENERAL COMMENTS:**

TRUESDELL: OUS students do transfer between OUS schools. It does not happen as frequently as CC students transferring to OUS, but there is a savings there.

CHERECK: Transfer from OUS to OUS is not planned as it is from CC to OUS. Not many students plan to go to PSU for a year or two and then transfer, although I am sure it happens.

MCDONALD: SOU has many students who start their studies at SOU planning on transferring to OSU or another UO campus. It is a more common occurrence, although unfortunate for SOU.

HART: Phase 1 CC benefit: any CC can upload their course catalog into CAS. The student then doesn't have to type in their transcript; they can pick the courses. You get the right types and values to compare in the degree audit with no typos. There is work to upload the catalog, but it is free to the CC.

**SUBSCRIPTION VS LICENSE MODEL:**

CHERECK: License model facts:

- The OUS one-time fee is \$85,800 with annual maintenance of \$15,400.
- The CCs have a one-time fee of \$165,184 with \$29,733 annual maintenance.
- The license fee is based on headcount. (subscription is flat fee/campus)
- Headcount will impact the front-end cost and the percentage on the maintenance fee.
- Headcount is determined from the IPEDS report.
- Our role and responsibility in the maintenance thereafter is the big question

RANDY: I was able to clarify with Jason Elwood (DARS) that the license model is going to continue as an option. Over a four-year period it would be about half the cost out of pocket compared to the subscription approach. I have only done an initial look at the license model. I need to get a good handle on is the technical staff needed to run it ourselves. It might end up being comparable or less cost.

MERCER: Check with Cindy Baccar because PSU currently uses the license model.

CHERECK: The subscription model is not available today. There is no certainty on when the subscription model will be available. Currently DARS is transitioning from a license fee to a subscription fee. Their lawyers are telling us it will be a week or two (which could mean two months) before the subscription model is available. It would be prudent for us to go down that path rather than paying the license fee and converting to a subscription at a later point in time.

SPRAGUE: If we start with the license model is their some charge for conversion?

CHERECK: No. The subscription is more for the maintenance over time. They have many campuses using the license model.

RANDY: License fee is a much more complicated model. Ohio used license fee because subscription was not available. They had three options, centralized, regional, and subscription. The one they chose was complicated but showed a long-term cost benefit.

RANDY: Ohio gave us an estimated price on the license model but it was only for phase 1. License fee costs are complicated and hard to explain. You have to have someone managing the license fee annually. The subscription is clean and easy to figure annually.

TRUESDELL: I need to know who to follow up with on headcount. Of the 330,000 that we have in annual headcount I am curious to find out if Ohio student headcount is adjusted for the types of students they serve. In statute they have a different mission. They possibly don't have adult continuing ed, adult basic ed, lower ESL as part of their headcount where it counts as part of our headcount. I want to make sure we are comparing apples to apples for negotiation.

MCDONALD: Please spend some time flushing out the differences in costs and services.

**CATALOGUE HISTORY:**

TURNER/MCDONALD: If you have changing degree requirements this electronic system will still allow students to do a degree audit based on the old catalog, correct?

MERCER: At PSU, any student can use a catalog in effect to graduate as long as it is not older than 7 years at graduation. The CAS system asks for your catalog year. The oldest one we have online with CAS is 88-89.

CHERECK: In the degree audit system we have different catalog years. At UO the student's catalog year is based on admission. You can use a more recent catalog but not an older one. The 7-year limit still applies. If we have a student who started in 1995, they could pick any catalog from 1998 to present.

**UPLOAD TRANSCRIPT:**

HART: Another feature is the capability to request your transcript to be automatically loaded. Participation level will go way up when that feature is available.

TRUESDELL: That would be the crux on how CCs would get the funding. The student could then request a load of their transcript electronically without manually entering courses. If CAS sits on top of the CC it pulls that information out electronically. It can pull PSU and marry it together to provide an audit. They would not need to consult an advisor.

CHERECK: The process you described is an upload. I think we are 1-5 years out on that. An electronic exchange still requires the data to still be reentered.

SPRAGUE: Is it doable without another system we don't presently have?

HART/MCDONALD: The software permits it as long as the campus has done the steps necessary to utilize the function in the software.

CHERECK: There is nothing to preclude PSU from doing that today if we can send the transcript by EDI. The software can allow it.

MERCER: There may be some EDI thing that the state may need to buy or participate in to allow that. Maybe CAS has a component that would provide that.

CHERECK: It is not their responsibility. It is the sending institution that needs to have the ability. It is a question of who is EDI compatible.

TRUESDELL: Not all CCs have EDI capabilities. It is one more thing we need to put on the checklist to prepare for this. I would assume there is not a lot of security when I look at my transcript for advising. Maybe EDI needs to be a line item in our Phase 2 request.

HART: I have not had EDI come in to the pricing structure at all for ATLAS.

HART: There are two levels of request. One would be the actual transfer of the course information when a student transfers. The other is the upload of information into the degree audit for advising purposes.

MERCER: We do have the CAS system up and running. It is only hand input with students self-reporting their coursework. Students cannot currently send transcripts to CAS electronically.

SPRAGUE: Now when we get CAS at UO, without doing anything else, can a student at the UO enter in their ID number and ask for a comparison of coursework with PSU.

HART: My understanding is yes.

CHERECK: No. The capability is there. We don't have the ability to send the electronic transcript to PSU.

HART: CAS provides that.

CHERECK: You have to upload it somehow into the CAS system.

HART: The CAS interface does that. Once you get it going with the DARS institution.

CHERECK: Somebody has to place a request to send the stuff to PSU. It has to pull the information out of the database to send to them.

**UPLOAD TRANSCRIPT (continued):**

HART: CAS allows the student to log in to their account. The fact that they are DARS institutions, a student can click and get their transcript. Then they ask CAS to compare it to PSU degree requirements. CAS sends back the report showing the planning guide. It is built into CAS. There is no EDI involved.

CHERECK: I don't believe it. You have to have security to authenticate the requestor. Somebody has to pull the data out of your system. CAS cannot do it.

TURNER: If a student can pull up their record and send it to a printer, they should be able to upload it to CAS.

CHERECK: I'm not saying you can't do that. What that capability is and how it takes place is unclear at this point.

MCDONALD: Why don't Herb and Randy talk about it and come back with the capabilities. What can happen from an upload standpoint?

**ONLINE PRESENTATION:**

MCDONALD: We are demonstrating the online ATLAS presentation available at [www.mhcc.edu/atlas](http://www.mhcc.edu/atlas). How difficult would it be to process edits or revisions?

WARD: On the technical side not difficult at all if the speakers can be coerced to retake.

MERCER: The presentation is an hour long, broken up into four distinct parts.

WARD: I hear a lot of room for compression. For a new viewer the initial PowerPoint could be scaled way down. The value has been the demonstration of what students get immediately with CAS.

SPRAGUE: That is another way to show people very quickly what this is. I've created a fake account and set up courses so you can view degree audits that have been run. I also explained how to search for comparable courses. I also explain how to run your own degree audit. It is do it yourself.

MCDONALD: This online presentation is the substitute when we can't provide a demonstration. Maybe modularizing this presentation would make it easier for the viewer to go directly to the topic of CAS they are interested in.

CHERECK: The costs presented here are not current. We need to change or omit that section.

MCDONALD: We should omit it. We want them to be convinced of how useful and wonderful it is and not get hung up on the cost. Cost is better discussed in person.

SPRAGUE: Who are we trying to communicate this to? I bet it is to people who aren't in higher education. They need a few ideas and a little introduction to why it is a good thing without all the stuff we are adding at the beginning for ourselves.

SPRAGUE: Maybe the presentation can get to the point a little faster.

MCDONALD: I like Cindy's quote. That to me takes the mystery out and makes this clear. People like transparency and that portrays visual benefits to the student. We need that for the first impression detail.

HART: Possibly add a statistic from the fact book such as of the 12,534 OUS undergrads, 19% were transfers from Oregon CCs.

MCDONALD: That is a good suggestion to show the need for something like this. Another piece is the average baccalaureate recipient that was a transfer from CC to OUS had an average of 15 credits more when graduating.

**ONLINE PRESENTATION (continued):**

**TURNER:** It would be worth having an interactive presentation. The understanding is immediate once you've seen it, but it would be helpful to have a page of bullets to take away.

**WARD:** Would Herb and Karen be willing to work with me to redefine the PowerPoint? I can see what the technician can do to edit out what we don't want.

**WARD:** The rest of you please visit the website, view the rest of it, and provide comments.

**PRESENTATION AUDIENCES:**

**WARD:** I have received a request from the Community College CIA to get a presentation within two weeks.

**MCDONALD:** I see this helping the staff members of the elected officials. I see this helping our colleagues. Maybe IFS would be interested. I see the value of having this tool available complemented by the in-person visits.

**MCDONALD:** The CIA has an interest in this. The IFS likely wants a presentation. The OUS Board will have a presentation in a week, and the provosts and presidents will be largely covered. For OUS we need to present this to the student affairs and services folks. We need to have the CSSA view a presentation as well as the Student Affairs Council (SAC).

**NEXT STEP – LEGISLATORS:**

**MCDONALD:** The key legislators we have to work with are the Ways & Means folks. George wants to do this as a Ways & Means phase 2 item. Phase 2 of W&M will probably be between the 2<sup>nd</sup> and 4<sup>th</sup> week of April. Gretchen introduced it in her presentation in phase 1.

**SPRAGUE:** We introduced this to Senator Schrader in a meeting with Schrader, George Pernsteiner, and myself. I gave him a one-page handout from the committee meeting. I created a fake account, but there wasn't enough time to demonstrate it. I sent him directions, but I don't know if he has looked at it.

**NEXT STEPS MCDONALD:**

- We will have one more meeting to tie up loose ends before Ways & Means
- We will keep 1 FTE in CC for staff support, but phased in over two biennia.
- Joanne Truesdell will follow up on conversation with CC headcount.
- Joanne Truesdell will get good numbers on CC student savings
- Randy Hart will move all hardware costs to phase 1 to make a single line item.
- Randy Hart will analyze the license and subscription models to determine the better approach.
- Randy Hart and Herb Chereck will follow up about uploading transcripts and the technical side
- Randy Hart will clarify the \$6,502 in campus savings per student
- David McDonald will produce a one-pager for CC Presidents
- Presentations for CIA and CSSA need to be coordinated
- Herb Chereck, Karen Sprague, and Valerie Ward will redefine the PowerPoint presentation.