

**MEETING MINUTES**  
**Articulated Transfer Linked Audit System**  
**April 25, 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  
**Karen Sprague**, *Vice Provost Undergraduate Studies*, University of Oregon  
**Joanne Truesdell**, *Assistant Commissioner*, Community Colleges & Workforce Development

**APPROVAL OF MINUTES:**

**MCDONALD:** In the minutes if you find any mistakes, incorrectly attributed comments, or incorrect phrasing, please let Jonathan Jacobs know before the final version is posted. The minutes are posted on our website, <[http://www.ous.edu/workinggroups/EDP/group\\_EDP\\_work.htm#SDTP](http://www.ous.edu/workinggroups/EDP/group_EDP_work.htm#SDTP)>.

**NEXT MEETING:**

**MCDONALD:** I'm hoping this is our last face-to-face. Unless there is a need to meet face to face we will continue with emails and phone calls. Randy thank you for all the budget work. Cindy, thank you for the work getting materials. Thank you everybody else for all your support as well.

**GLOSSARY:**

**ATLAS:** *Articulated 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*

**PRESENTATION UPDATE:**

**MCDONALD:** Cindy presented ATLAS to the Joint Boards at the last OUS board meeting, with very positive feedback. There were problems connecting to the live site, but the quality of the presenters carried past that. There was no question that people understood the power of the software and the capacity to help students. All of your presentations have been well received. We are at the point where most people now understand what ATLAS is, and the next question now is how we pay for it. That is a big transition point. Thank you.

**SOURCE OF FUNDS:**

**MCDONALD:** The governor's staff knows the importance that both sectors have placed on this project. My goal is that this is ready to go in a nice little package for us to jump at any funding opportunities. I know we have a better sense of numbers now than anytime in the past and that is comforting. It is easier to get what you want when you know what it costs. I am starting to look at other sources.

**SENATE BILL 342:**

**MCDONALD:** The CAS system is part of the language, although currently an unfunded reference, on Senator Schrader's Senate Bill 342. The bill deals with JBAC agenda items and includes this project. It used to be a common course numbering bill, but was completely rewritten. Language on the bill is still pending a change from prescriptive to permissive. Whether 342 passes is a question of timing. There is no longer any opposition

There is no house version. Once all changes are made it goes to the Senate floor for a vote and then moves to the house. The problem is timing. Both chambers want to get done in June. It takes time to schedule a bill, have a first reading, and refer it to the floor for a vote.

**TIMELINE:**

**MCDONALD:** We will probably be asked during 2006 to provide an update. Our response will likely be, "The degree audits are being completed on the campuses. We have mapped out ¾ of the major degree pathways for students at CCs and OUS. Some campuses like PSU are at the 99% level. Other schools are moving up and experiencing real progress."

In January 2007, we will need an assessment of where we are in implementation when the next session starts. We can provide real examples. The system will not be perfect in two years. With OSU, UO, and PSU actively engaged I think it will be enough for us to show that a large number of students and their degree pathways are being covered.

**CAMPUS PROGRESS CHART:**

**CHERECK:** We have updates to our chart of campus progress. I will pass this out at the registrars group that meets this week. If somebody wants to add to it they can do what they want. We have added "primary feeder schools" from the OUS fact book to give additional perspective.

**BONTRAGER:** Lane is not on this list for OSU. The feeder schools may need revising.

**CHERECK:** It is intended to provide an overview of where we are and where we need to go. We have added the quantity of lower division collegiate programs and professional technical programs to all 17 CCs. Marilyn at CCWD provided this information. There are many other updates. It is a work in progress.

**TRUESDELL:** If you have this electronically, I can resubmit it to the CCs. The original responses were so simple I wonder if they were missing something.

**CHERECK:** Cindy and I are going to be talking about this at the statewide meeting toward the end of next month. I can make this readily available and that might pique some interest.

**IMPLEMENTATION CONCERNS:**

**HART:** If this were approved and funded, what is the time frame for implementation? Some people think OSU is not ready. Some people can say the degree audits are perfectly accurate, but rules may not be written to cover every possible situation. People all over the internet will use CAS for audits. Students may still get denied, and manual looks will be required. The audits are conservatively written and strictly written. The success of CAS depends on ease of use and getting a good reputation from the get-go.

**BONTRAGER:** From OSU's standpoint, I know about the different voices in the conversation. Could you make the case we wouldn't be ready? Possibly, but who would be? Would it drive policy decisions? Yes, but forcing the issue would be a bonus.

**CHERECK:** OSU has their degree audits done. All the issues will be resolved for your primary feeder schools. You probably will not have Willamette University because they are not a feeder school. Our primary objective is to work on the articulation with two-year and primary feeder schools in the state to address some of the political concerns that have been raised about losing credit as some have defined it or taking unnecessary credit.

**BACCAR:** At PSU we started using CAS before we got 100% clearance of the degree plans. We put them online as each one cleared the department. There is never 100% degree audit. It can be 99.98%. That is a lot more information than nothing.

**CHERECK:** Each institution has issues they need to deal with. We have to see the forest through the trees. Our job is to make this application available. We are providing a tool to replace manual processes that were fraught with error and problems.

**HART:** If an institution tries to keep up with others, and implement CAS without being ready, it could be a black eye for the campuses that are ready.

**CHERECK:** CAS is working successfully. If it doesn't work at one institution, then they need to do what they need to do to make it work.

**SPRAGUE:** An incremental approach one program at a time, such as what PSU did, is the best way to go. We will have sufficient disclaimers, and be honest about what information is available.

**BACCAR:** We do say it is an advising tool that. It is not official until it is looked over by a human. It is the best information we have. It is conceivable that there is a degree program out there that computer software cannot automate. You still put the part that can be automated, the other part you say this will be reviewed by...

**BUDGET:**

**HART:** Major changes since our last meeting: Phase 1 and Phase 2 are broken apart differently. We want to bring some CC activity early on. We are building transcript interfaces that allow CC feeder schools to import their transcript into CAS rather than enter it manually. It doesn't affect CAS fees, but it increases interface fees. Phase 2 will see CCs implementing degree audits and accepting requests for transfer into their programs. Phase 2 is expensive in general because of the preparatory work on degree audits at CCs that need to be done to allow it to work.

**BUDGET DOCUMENT QUESTIONS:**

**MCDONALD: Question:** Looking at annual cost on page 4: Can we save \$84,000 in annual costs by purchasing the license to the software in the second year of the biennium? That way we can use the first year to get the degree audits completed.

**HART: Answer:** Yes. If we aren't going to use it we shouldn't purchase it. We would have to determine when the CAS launch date was. It might vary depending on who is ready.

**TRUESDELL: Question:** The page 4 subscription fees detail 7 initial campuses. For maximum flexibility, could those be encompassing both University and CCs, so it can be 7 campuses period instead of specifically the 7 OUS campuses.

**CHERECK: Answer:** We are asking for \$84,000 for 7 OUS campuses plus \$36,000 for 3 CCs. I agree that it doesn't need to be split 7-3. It can be whoever is ready.

**CHERECK: Question:** Looking at the budget you mention capacity freed up of 73 FTE. The expectation might be that 73 jobs go away.

**MCDONALD: Answer:** It is basically a credit savings representing the number of credits students save in an FTE count. We could serve 73 other full-time students instead of students replicating credits.

**SPRAGUE:** Let's call that "additional student capacity."

**COMMUNITY COLLEGE PROGRESS:**

**TRUSEDELL:** Lane CC, Mt Hood CC, and Portland CC are expected to use CAS right away.

**CHERECK:** Has anybody told them?

**TRUESDELL:** Those three are the most likely candidates. My people are working with them. Potentially Linn-Benton CC will be ready on a small scale with OSU. Chemeketa is close also.

**BACCAR:** Mt Hood CC has been using DARS and Portland CC has been using CAPP for a number of years.

**TRUESDELL:** My understanding is Lane sprouted up with CAPP quickly and is ready to move on to the next stage. These three CCs would be ready to move into CAS around July 2006. If we have other campuses that can get there sooner we need to help move them along before the end of the biennium.

**MCDONALD:** We need to especially help the heavy feeder CCs. For building momentum for the next biennium it makes sense to have those schools represented.

**HART:** How do we determine the additional student capacity at CCs from credit savings?

**TRUESDELL:** \$330,600 represents the cost savings of students who would otherwise take courses "outside" of the degree path. Additional Student FTE available in the Table of Estimated Benefits is 125:

1.  $\$330,600/\$57$  (04-05 Average cost per credit hour CC)= 5,800 credit hours
2. 1 credit hour is 11 contact hours = 11
3.  $5,800$  (credit hours) x 11 (contact hours)= 63,800 contact hours
4. 1 FTE = 510 contact hours
5.  $63,800(\text{contact hours})/510$  (1 FTE contact hour) = 125 FTE

**HART:** I will include a footnote explaining how this was obtained.

**TRANSCRIPT UPLOAD:**

HART: All campuses can upload transcripts without the CAS interface, and are only charged for the interface. IMS claims to have transcript-loading interfaces written for all of the systems used by our CC campuses. I don't know how many have been tested.

CHERECK: The interface is in XML. Our privacy and security concerns have been addressed. I would approach this aspect of the system with optimism as well as caution. It is a relatively new technology that has not been tested and tried. It does not use the traditional EDI application we have developed on a statewide basis. It is certainly conducive to look at it, but we should use caution that it won't be an instant problem solver for uploading the transcript.

BONTRAGER: I think transcript uploading will create the desire and expectation to use CAS.

TRUESDELL: Realistically if the CCs end up not being able to move forward with CAS for budgetary reasons, at least having the ability to upload transcripts to move people forward is going to solve a whole host of issues. The transcript module is a much better option than manually entering in your 97 courses.

HART: I believe Ohio is the lead state using transcript uploading software. Illinois and Arizona use it also. I believe Arizona sent a report to their legislature indicating huge jump in usage when they utilized a transcript upload system.

BACCAR: Did these states write their own transcript uploader or purchase it?

HART: I don't know. Jason Elwood (DARS) is very professional and is not a tricky software vendor. They are from higher education.

**TRANSCRIPT UPLOAD, EDI vs XML:**

MCDONALD: It sounds like the conversation about the EDI/XML issue at our last meeting is resolved through the availability and potential success of XML.

CHERECK: That's an option. The other option is to keep EDI. The XML technology will ultimately replace EDI over the course of 2-9 years. EDI is a fixed-point record that is uploaded into a data system. XML is a web-based application transmitted over the internet.

HART: The University of Texas folks that oversee EDI implementation are looking at replacing EDI with XML.

TRUESDELL: There are a few CCs that use EDI. Depending on the ease of implementation of XML, if it is easier than EDI, it could be an intermediary step.

**TRANSCRIPT UPLOAD, OFFICIAL TRANSCRIPTS:**

BAACCAR: A PCC student would authenticate against the PCC database, and bring the transcript into CAS. To transfer, do they still need to send an official transcript to PSU?

HART: Your CAS account is filled with coursework by hand and/or transcript upload. Expected coursework can be added as well. I don't know if you can make that an official thing.

MCDONALD: A separate part of the data package allows the horizontal transfer of transcripts electronically. This is independent of CAS, a completely separate system. It allows the official transcript to be sent electronically from PCC to PSU.

BACCAR: We need it to be clear to students that the transcript in CAS will not send an official transcript to PSU.

CHERECK: You still have the same issues of confidentiality and security. The person making the request has to have the authentication. I believe transcript uploading will be phased in. We will initially allow for manual entry, and develop the transcript interface.

**INTERFACE DESIGN:**

**BACCAR:** Where are the degree programs kept? Will the campuses send their programs to the central server or will the central server reach into each campus?

**HART:** CAS sits on top as a communication tool that requests data of the different CAPP or DARS systems on each campus. The campuses will still maintain the degree tables and articulation tables locally. There is no central copy of them at all except as requested by the individual students on their accounts.

**MCDONALD:** The only difference for PSU if we had a central server in Corvallis would be that the IT folks would have a different interaction but your office would still maintain the degree audits as they have always done.

**SPRAGUE:** Right now CAS has the capacity to reach into all the schools in the state, but since PSU is the only one hooked up that is the only one it reaches into.

**SUBSCRIPTION vs LICENSE FEES:**

**HART:** **LICENSE MODEL:** If you look at the overall cost CAS would be less if we were to license and run it ourselves. We have higher initial costs, but after three years you break even and start saving money. At 9 years we would save \$240,000 (\$26,000 per year of operation). That's about 25% of the total. At year 6 you are only saving about 20%.

I have tried to take into account all the costs we would take on by running it ourselves. From the vendor and PSU's experience there is very little expense keeping it going once the CAS and other interfaces are resolved. We would license the product statewide for a big fee upfront based on headcount. The software is housed on our own computers. We are expected to keep it running. We pay a maintenance fee for vendor assistance and software updates. It can be installed on each campus, but the least expensive way would probably be to have a small group of tech people supporting the state on one server.

**MCDONALD:** You are confident that with the personnel that is currently here at Corvallis you can take it on from a technical standpoint.

**HART:** Yes.

**HART:** **SUBSCRIPTION MODEL:** The subscription model makes it a lot different for the vendor. The vendor keeps CAS on their server and handles everything. You don't have to complicate your life with technical people, servers, and software updates. There is no huge cost at the beginning.

**MCDONALD:** It is a question of whether you pay to have them do it in Ohio or save the cost and do it yourself in Oregon.

**JACOBS:** Will they eventually force everybody to convert to subscription model?

**HART:** Jason with DARS led me to believe that they don't intend to bump people off the license option and tie people's hands. His agency wants different ways to offer the program.

**CHERECK:** Another problem is that the subscription model is not on the market. We are doing this on the pretense that it will be available. The subscription model is very attractive to PCC. When you start paying on headcount it is very expensive for them.

**TRUESDELL:** In the negotiation phase we have the ability to rangle our CC numbers down to limit the population to identified majors that will likely transfer rather than all folks.

**LICENSE MODEL BUDGET:**

JACOBS: Our budget here is based on the subscription model. Do we have a cost analysis on the license fee also?

HART: I can prepare something.

MCDONALD: If year three is a break even year, and if we go to a license rather than a subscription model here, what does it do to our bottom line for a phase I-A and I-B? I acknowledge there is a bigger upfront license fee. We have given out the cost for the ATLAS program based on the subscription model and I don't want to change numbers. If you can get license costs for I-A and I-B it would be helpful.

CHERECK: I want you to think beyond cheap. My sense is that you are focusing on dollars. The subscription model long-term selling features are important. You might save \$80,000 but over 4 or 5 years you'll spend \$230,000. We are dealing with an unknown entity to a point.

MCDONALD: It may be that subscription is the right way to go. I'm focusing on getting a sense of what the dollars are. I don't have the licensing dollars are compared to the subscription so I can't make a comparison.

HART: I have the license fee dollars. Year 1 is \$176,311. That is a total outflow made up of \$85,357 license, maintenance of \$15,454, and I'm estimating hardware of \$30,000 and staff of \$45,000. The annual cost is \$33,454/yr with an occasional cost for hardware replacement. We have to negotiate a long horizon on the maintenance fee.

SPRAGUE: If we want to invest in the license model and save money down the road we would need a table that would show how much it would cost up front and the savings achieved down the road.

HART: I have done that. I could summarize this in a table at the end of the document with a comparison for purchase of the license model vs the subscription model. My time-value-money study is assuming an interest rate of 4%.

**POWERPOINT PRESENTATION:**

SPRAGUE: I have made a super-short headline version of the demo. It's a do-it-yourself demo. I have created a fake transcript in a fake account in CAS. The presentation gives directions for how to get into the PSU site to try it out. For somebody who doesn't have much time, it quickly shows them what CAS does.

BACCAR: Has Val put the streaming video out for public viewing? I talked to her briefly, and I heard she was going to take Karen's PowerPoint and replace her section.

SPRAGUE: The streaming video needs a briefer introduction by Val. Maybe they can cut the present version. The most powerful part of the demonstration was looking at a PSU course and seeing all of the other campuses in the state that offer the course for the same credit at PSU. If the PowerPoint focuses on that, and other specific examples, it could be more useful.

BACCAR: Maybe we can have the long version and the short version, depending on who it is for.

CHERECK: It's really for those that aren't involved in the articulation process.

MCDONALD: I see faculty having questions about this, especially those with heavy advising responsibilities.

JACOBS: There have been technology problems accessing the online video. If I have the original PowerPoint, I can go online and download the video, and marry the audio to the PowerPoint file. Anyone with PowerPoint could open it. It is another option to keep in mind to avoid technical difficulties.

SPRAGUE: I will send you the short PowerPoint.

JACOBS: I will look at it and can post it on our ATLAS site.