Different Approaches to Reverse Transfer

Thursday, November 7, 2013
3:15pm - 4:15pm
Session: 5.2
Introductions

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University Registrar, University of Wisconsin-Madison
About Madison College

• Founded in 1912
• 140 programs granting associate degrees, technical diplomas & certificates
• 40,000+ Enrollment (~25,000 degree-seeking)
• 18,000+ Admissions Applications processed annually; 50% bringing in transfer credit
About UW-Madison

- Founded in 1848
- Total Research Expenditures: #4
- Total Students: 43,275
  - Undergraduate (29,504)
  - Graduate (9,188)
  - Professional (2,765)
  - Specials (1,815)
- Total Schools and Colleges: 14
- Number of Degrees Awarded Annually: 10,099
Overview

- What is Reverse Transfer?
- Background on UW-Madison/Madison College Agreement
- Operationalizing the Agreement
- Lessons Learned
- A National Approach to Reverse Transfer
What is Reverse Transfer?
Background

- Madison College approached UW-Madison in 2012

- High volume of students who transfer between institutions

- Many students earn significant credits from Madison College and transfer before earning associates degree

- Both schools believed this was good for students
The Agreement (The Details)

- Handles both students who transferred before and after agreement

- Transferred from Madison College to UW-Madison
  - With a minimum of 30 credits from Madison College
  - Completed minimum of 15 hours in residence at UW-Madison
The Agreement (The Details)

Data to be Exchanged:

- First Name
- Last Name
- Middle Name
- Birth Date
- Matriculation Term
- SSN

- Course – Term
- Course – Session
- Course – Subject Descr.
- Course – Course Number
- Course – Title
- Course – Credits
- Course - Grade
Operationalizing the Agreement
Fundamental Principles

- Student consent and FERPA compliance was a must

- Challenge to push the status quo
  - NO TRANSCRIPTS

- Develop a streamlined and secure exchange of data

- A shared approach for communication with students
Two processes were needed
- UW Madison students who transferred from Madison College before the agreement
- Current Madison College students transferring to UW Madison as part of the agreement

Leveraging Credentials Solutions as a mechanism for capturing student consent

Establish a secure and compliant method of data exchange between UW Madison and Madison College
CONSENT

By selecting “I DO wish to take advantage of the Reverse Transfer Agreement” below, you give permission to the University of Wisconsin–Madison to release your demographic and academic data (full name, birthdate, matriculation term, last four digits of SSN, course information including term, session, subject description, number, title, credits, and grade) to Madison College in support of the Agreement. Your confidential records will be used only for the purposes of this Agreement, and this consent will remain in effect indefinitely unless revoked in writing.

- I DO wish to take advantage of the Reverse Transfer Agreement
- I DO NOT wish to take advantage of the Reverse Transfer Agreement
Develop a team of process experts
- Admissions & Records
- Curricular Services
- Academic Advising
- Arts & Sciences
- Institutional Reporting
Madison College Process

- Documenting business processes
  - Data exchange with UW Madison
  - Transfer credit evaluation
  - Academic advising
  - Posting degrees
  - Communications

- Opportunities to optimize our current technologies
  - Credentials Solutions (Transcript Ordering)
  - OnBase (ECM)
  - Oracle PeopleSoft (SIS)
  - Oracle RightNow (CRM)
Madison College Process

- Criteria for granting an Associate’s Degree
  - 30 cr at Madison College as a program student
  - 15 cr at UW Madison
  - No previous degree from either institution
### Pilot Group

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**Spring 2013 UW Madison students who chose to “opt-in”**
Communication Plan

• General Message
  • If student already graduated from a program
  • If student has not completed 30cr at Madison College
  • If student was never in a program at Madison College

• Individualized Message
  • If student has 10 or more credits to complete
  • If student has 9 or less credits to complete
  • If student qualifies for an Associate’s Degree
People...People...People

Madison College
- Stephanie Dean
- Lori McRoberts
- Leah Meicher
- Kevin Mirus
- Annie Neuberger
- Todd Stebbins
- Luis Rey
- Gretchen Rixie

UW-Madison
- Phil Hull
- Scott Owczarek
- Jim Vogel
Measuring Success

- Number of degrees awarded
- Student participation in the process
- Awareness of the agreement
Lessons Learned

• Start discovery process before agreement is signed

• Document processes

• Transfer credit evaluation

• Evaluate opportunities to automate
A National Approach to Reverse Transfer
A National Approach

- AACRAO 2013 – Meeting with National Student Clearinghouse and Registrars

- Leverage the existing framework with the NSC

- Summer 2013
  - Missouri, Texas, and Wisconsin discussed the initiative
  - AAU Registrar’s submitted proposal to NSC

- Fall 2013
  - NSC has agreed to advance the proposal
  - Discussions occurring in Missouri, Texas, and Wisconsin
  - Securing funding for development
NSC Reverse Transfer Data Exchange

- Phase 1
  - Develop a system designed in AAU Registrar Proposal

- Mechanism to:
  - Course file intake process from the host school
  - Reverse Transfer Database
  - Degree Granting Institution (DGI) Request file intake process
  - Matching Processes
  - DGI Response file
  - DGI degree data submission
  - Reporting
  - Auditing
NSC Reverse Transfer Data Exchange

- Phase 1 (con’t)
  - Secure funding sources for development

- 5-6 months of development time
  - Driven by funding allocation

- Missouri, Texas, and Wisconsin would be involved in “proof of concept”

- Open to additional states as requested/desired
NSC Reverse Transfer Data Exchange

• Phase 2
  • Develop functionality for student access
    • Similar to enrollment and degree verify
    • Students can see who submitted information and who has accessed their records

• Some type of mobile access

• Academic record datamart to assist with upholding the integrity of the record
  • Assists in ensuring quality of data submitted
  • Cross-checking with enrollment and degree dates
NSC Reverse Transfer Data Exchange

- Phase 3
  - Maintain NSC’s business model of not charging institutions for the service
  - Covering long-term maintenance and service costs
  - Storage capabilities for various RT agreements and regulations
  - Further notification mechanisms for DGIs, Host institutions, and students
Questions???

Thank You!
Session ID: TH5.2

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Scott Owczarek, owczarek@em.wisc.edu