



# ***Working Together... for Ohio Transfer Student Success***

OATN Technology Steering Committee

April 11, 2019

Dave Sauter, ODHE Consultant

DaveSauterODHE@outlook.com



Department of  
Higher Education

 **OhioHigherEd.org**



# Agenda

- **CTAV** Project – Career-Technical Articulation Verification
  - Continuing from Shane Degarmo presentation
  - Pilot Project and Focus Group
- **SGCT** – Statewide Guarantee Credit Transfer Initiative
  - Historical Review
  - Current Status
  - HEI AC File Research, AYs 2016 through partial AY 2019
  - HEI AC File Future Research, full AY 2019
- **TEP** - Transcription Exploratory Project for the ATC
  - Historical Review
  - Selected Issues: Adding Details; Repository for Grade Key URLs and CTAG forms; Native/Non-Native Credit; Disaggregation of Block Credit
  - Pilot Project
- **Q&A**

# OATN October 16, 2018 Meeting

*"Mr. Dave Sauter gave an overview of both projects (SGCT and TEP) with key updates.*

- ***Documents shared*** with the committee included the Transcript Exploration Project Summary/TEP, Timeline for the SGCT project, HEI Alternative Credit File Codes and Definitions (with potential changes), Transcript Evaluator Survey Summary, and finally a copy of Lorain County Community College's ATC changes that accommodate CTAG, Military, and AP credit as it relates to SGCT.
- *The topic of **native vs non-native credit** was discussed.*
- *One key item was the issue of **residency**, and policies that surround a student graduating with the required credit hours from their home institution. A suggestion was made to ask institutions if they have waived the residency requirement in the past, and if so how many times." (half allow for waiving)*

# CTAV: Career-Technical Articulation Verification

- Chancellor top priority
- Goal: Eliminate the secondary school paper CTAG form
- Timetable is Fall 2019, process re-design to move from paper to electronic format
- Communication plan drafted with ODHE, 4 Pilot institutions, and Dave Sauter
  - Lorain, OSU, OU, and Wright State
- Project Manager assigned

# CTAV - continued

- ODHE focus group met February 28, 2019 to explore the initiative: *(review Focus Group Minutes handout)*
  - Review structure to access and retrieve CTAG credit from HEI; online process with ODE
  - Provide feedback and identify potential issues, including insuring students receive full and appropriate program-specific credit
  - Review communications: CTAG policy change for grading "...no longer requires grade of 'C' or better...end-of-course exams...used as a measure of student learning and a condition for earning credit"

# CTAV - continued

- Since the February focus group the Pilots have responded to follow-up questions: *(Pilot questionnaire copy circulated)*
  1. Identify or affirm institutional liaison for CTAG
  2. Identify individuals/offices who should receive CTAV communications
  3. Describe current CTAG process and proposed CTAV process
  4. Identify, if known, institutional data re: students who have not successfully completed CTAG(s)
  5. Review the OTC transcript and process
- Institutional matrix of pilots' responses developed by Dave Sauter to record Pilots' five responses



# SGCT: Statewide Guarantee Credit Transfer Initiative 2016 Charter and History

- Standardized coding, reporting, and possible transcription of the 23 SGCTs
- An Ohio initiative to impact secondary and postsecondary Ohio public institutions (and private) if students “circulate to success”
- Recall "Chris' Story" ...from the document: *"Seven institutions...so as Chris looks back: credits via the home institution and credits transferred in, seamlessly reported, transferred, evaluated, and articulated – standard and timely processes...and success for Chris...ultimately a graduate degree."* (copy circulated)

# SGCT History...continued

- ORC 3333.16: Universal course equivalency classification system, state institutions of higher education
- Early on...Mini-grants for Career-Technical Credit Production resulted in a May 2016 project start
- How?...SGCT Committees, institutional liaisons, WebEx's, surveys, pilot projects...Ohio-wide "boots on the ground" input and recommendations
- OACRAO, OATN, OTC – workshops, presentations, and conversations to help SGCT progress
- October 31, 2017: Approved coding – found on HEI site – with ongoing review of definitions (user-input)



# SGCT - Status Today

- Current status of the ODHE SGCT project – institutional success using the 23 SGCTs, not just the prior 7-9 codes; broad use of the codes for March 2019 reporting to the HEI AC File (17 of 23 codes used)
- Revised SGCT definitions – the document evolves to reflect user input, e.g., Transcript Evaluators (*copy circulated – SGCT codes/definitions document*)
- Pilot schools (headed up by “piloteers”) developed SIS-specific best practices and roadmaps e.g., Banner, PeopleSoft...to assist peer SIS schools
- Six different SISs in use by the 36 Ohio Public post-secondary institutions

# SGCT Status Today...continued

- Selected Positive Outcomes
  - Institutional teams emerged to work on coding: IT, IR, Reg, Adm, Tr Ctr, Provost, etc. "Camaraderie!"
  - Increased understanding of the various SGCTs: tests such as AP, transfer courses such as MTAG and CTAG, and home/native course
  - Improved institutional processes for transfer credit from the broader team's work on project
  - CTAV project and Grade Key URL interest emerged

# SGCT Status Today...continued

- Maximize not only credits earned, but via the 23 codes, award credit specifically to meet program requirements and degree attainment!
- 2.7 Million transfer credits/113,000 transfer classes each year to the 36 public institutions from Ohio, U.S., International
- Successful HEI reporting by March 4, 2019  
...prepping for 2020 HEI AC File reporting

# SGCT HEI AC File – Research March 2019

- First reporting period for 23 codes – March 2019
- Developed 3 reports: summary research document, matrix of AYs 2016-2019 usage of codes, and HEI AC File data per specific codes (*copy circulated, summary report*)
- Process: compare AYs 2016, 2017, and 2018 with AY 2019 (summer and autumn 2018 data...not spring 2019) (*handout, HEI AC File Matrix, AYs 2016-2019*)
- No "backtracking" to prior years' of student transfer credits
- SGCT project premise: "best possible" reporting for 2019; "full utilization" of codes by 2020...due to admission cycle timing (*see quote, next slide*)

# SGCT HEI AC File Research – continued

- From January 2019 Transfer Evaluator Survey Response Report:
  - *"In prior conversations regarding March 2019 and 2020 reporting, institutions are aware the 2019 first reporting period will be as robust as possible due to the timing of institutional administrative updates occurring after some students have been admitted and prior to the academic year 2019 being completed.*
  - *March 2020 will be the first time institutions will be expected to report on all incoming students' transfer coding."*

# SGCT HEI AC File Research – continued

Selected Successes: *(see prior handout – HEI AC File matrix)*

- Evaluators: use of new codes, "better" use of existing codes (e.g., AS vs. AP)...evaluators' process improvements were cited. Also from January 2019 Transfer Evaluator Survey

Response Report, these comments:

- *We took this time to program institutional articulation tables with other institutions' equivalencies, e.g., coding TAGS, OTM, MTAGs*
- *We were able to enhance, revamp, and in some cases correct past practices since the SGCT project is enabling a more holistic overview of transfer coding*

# SGCT HEI AC File Research – continued

- 13% of AY2019 coding utilized new codes, even without a full 2019 AY year and all institutions not yet utilizing the new codes (2 not reporting to HEI; at least 2 only using the generic coding)
- OT/Other Credit non-educ, TC/Transfer Credit educ, and OC/Outside Coursework (to be retired) reduced from 79.3% AY 2016 to 68.5% AY 2019, a decrease of 10.8% - less generic code use in favor of specific codes being utilized
- AS/Advanced Standing and AP/Advanced Placement increased between 2-3%...likely instead of generics



# SGCT HEI AC File - Future Research

- September 2019 re-run AY 2019 data for full-year SGCT code usage; update the matrix and review
- Continue the November 2018/March 2019 research report to assess outcomes, including:
  - Report total usage of 23 codes, comparing full AY 2019 with prior three AYs data
  - Review overall use of generic OT/TC for further decreased usage & increased use of 21 codes
  - Review decreased use of LE/Life Experience and OC/Outside Coursework, both to be retired
  - Review if all 36 institutions are reporting to HEI
  - Review broader use of 23 codes by all 36 institutions as some not yet fully utilizing the 23; 17 of the 23 codes used thus far Sum/Aut 2018

# TEP: Transcription Exploration Project ...Beyond SGCT Coding

- Topic arose from SGCT work...explore possibilities to enhance the ATC to reflect evaluator SGCT articulations, in turn to assist receiving institutions' decisions
- 30 institutions participated in questionnaire exploring the feasibility, interest, and need of standardizing credit transfer codes on electronic transcripts exchanged via ATC/Articulation and Transfer Clearinghouse (25 signed MOU, plus 5 of the remaining 11 comprised the 30)
- Eight e-transcript issues evolved in this phase based on prior SGCT work; two webinars Spring and Fall 2018, liaisons provided institutional responses to 66 questions

# 8 TEP Transcription Issues

(**HIGHLIGHTED** issues are continued projects/issues)

- **TOPIC ONE: adding details** to the 23 SGCT codes on the transcript – e.g., AP date and score, MU/LCCC success in 2017 (2019 Pilot project – ability to add details being tested)
- TOPIC TWO: trusting the original source for SGCT data as transcribed by other institutions – vs. “back to the various source(s)” (not currently being pursued)
- TOPIC THREE: XML data imported automatically to institutional SIS – 11 now have this ability
- **TOPIC FOUR: Potential for a State of Ohio Academic Record Repository** – CTAG forms and Grade Legends (CTAV project underway 2019 Pilot project: ability to add grade key URL)

# 8 TEP Transcription Issues ...continued

- TOPIC FIVE: institutional SIS "academic record" as well as varying outputs – e.g., what differences, if any, on the degree audit and transcripts (and other paper and/or electronic documents (2019 Pilot results showing range of possibilities)
- **TOPIC SIX: institutional (native) credit and non-institutional (non-native) credit** (*copies circulated – report and matrix*) – January 2019 survey of similarities and differences in how the 36 define native/non-native credit - February 2019 report highlighted on next slide

# Native/Non-Native Credit – Consultant Report

- Report highlights:
  - 23 of 36 institutions responded
  - Updated definition of non-native credit, "broad enough" for ODHE direction and institutional use
  - 17 of the 23 identified one or more SGCTs as native/home credit...Primarily EX/institutional credit by exam, used by 14 of the 17 schools
  - Credit hours "in residency" exists for all schools; 25% the typical percentage of credits at "home" school – half of institutions would not waive requirement
  - 5 of 23 used one or more SGCTs to impact the GPA
  - Topic may need further review as TEP pilot continues

# 8 TEP Transcription Issues ...continued

- **TOPIC SEVEN: Disaggregated SGCTs** versus Aggregated "block" credit ... need to know specific credits; evaluator workload issue, transcript design issue e.g., 10 classes shown vs. "30 hour block" text (2019 pilot topic – ability to disaggregate being tested)
- **TOPIC EIGHT:** expanding SGCT initiative beyond the 36 Ohio public state institutions – AICUO conversation June 21, 2018; Attendance at the OACRAO workshop October 2018 was evenly split between public and private institutions (topic on hold)

# TEP: Pilot Project January-June 2019

- TEP Pilots: 2-year... Columbus State, Cuyahoga, Lorain, Marion Tech, Rio Grande; 4-year... Shawnee State; each represents one of the six SISs in state
- The project: develop SIS-specific POCs for implementing standardizing coding for e-transcript; identify issues and solutions for the SGCTs
  - Phase One Pilot March 31 deliverables completed: assist with data standards via identifying data sets and data fields for the POC; recommend standards, e.g. fields on the SIS XML, disaggregation of credit, and grade legend URL. April 16 webinar to review work thus far  
*(TEP pilot deliverables copy circulated for review )*



# TEP: Pilot Project January - continued

- Phase Two Deliverables by June 30: outline institutional processes for the codes on the SIS-specific e-transcript via evaluating the POC; detail the processes/solutions; identify issues; develop recommendations to be shared with SIS-specific institutions. Provide a report: success of POC with specific steps; how issues were resolved; recommend best practices
- Dave Sauter overall role: assist with project, track and evaluate the progress, evaluate the best practices for the TEP project



# Q&A

---

## Thank you!

pat YOURSELF,  
YOUR STATE COLLEAGUES,  
and ODHE on the back...  
for **STUDENT SUCCESS**