

TRANSFER AND ARTICULATION OVERSIGHT COMMITTEE

Meeting Notes

October 25, 2012

10:00 AM - 12:30 PM

Dixon University Center

Harrisburg, PA 17110-1201

Remote Locations: CC of Beaver County, IUP, Montgomery CCC

1. **Roll Call** – See list of attendees at end of notes
2. **Pennsylvania Electronic Student Transcripts and Records System (PA eSTARS)** – Presentation by Chris Hyde, Parchment, Inc.

PA eSTARS is a voluntary statewide initiative for the secure & confidential transfer & digital exchange of student records and transcripts. Transcripts can flow and/or transfer through from Pre-K through 20, from K-12 to K-12, high school to college admissions, and transfer from college to college.

PDE received a federal grant to coordinate PA eSTARS and assist colleges by off-setting the implementation fees. All Institutions of Higher Education (IHEs) – include all TAOC institutions – are eligible to participate. IHEs that sign with Parchment by June 30, 2013, will have their implementation fees of \$3,000 covered by the federal grant awarded to PDE. Parchment will waive additional fees for colleges that signs up by December 31, 2012. The combination of the grant and waiver means colleges can try Docufide for the first (up to) 15 months at no cost.

As part of PDE's contract with Parchment, processing fee is reduced to a maximum of \$3.00 per transcript for the life of the contract (3 years). Most of this cost is borne by the high schools, and either absorbed or passed on to the student.

Recent Pennsylvania postsecondary additions to the platform include Drexel University, Temple University, Northampton Community College, Bucks County Community College, Delaware County Community College, and Montgomery County Community College. West Chester University of PA received 7,000 high school transcripts via the system in 2011.

Parchment's eTranscript service is called Docufide. Parchment offers webinars to demonstrate the system. Docufide aligns to the college's business process and based on what works for each institution. Colleges can participate regardless of their current Student Information System. Implementation is simple, requires minimal IT time, and can go-live within a matter of days.

Transcripts are exchanged in manner compliant with FERPA. The system involves multi-layer security procedures. System is a pass-through, meaning data is sent on request and must be retrieved by the receiving institution within 48 hours, otherwise it disappears. Colleges do not upload data to Parchment or PDE. In fact, PDE is not involved in the system at all. Transcripts are sent from the sending college through the Docufide system directly to the receiving college.

Any IHE can receive digital images student transcripts for free. Colleges must subscribe with Parchment to send electronic transcripts and to receive transcripts in a data format compatible with their SIS. "Parchment Discover" is a data tool that allows colleges to analyze data from the system (i.e., demographics of students requesting/sending transcripts).

PA Commission and PASSHE's Office of the Chancellor are assisting PDE and Parchment with outreach. Jill Hans, Deputy Secretary of Postsecondary and Higher Education, sent an email

announcement to all IHE presidents in September. Mary Francis Archey (CCAC) asked if information could be presented to the CC presidents at their next Commission meeting. Lauren agreed to follow up with Diane Bosak.

Chris Hyde's presentation slides are attached in Appendix F. More information is also available online:

- www.PAeSTARS.com.
- A list of participating IHEs is located at <http://www.paestars.com/postsecondary/>.
- Video Testimonial from the Director of Admissions at the University of Indiana-Purdue (IN): <http://vimeo.com/52590461>

3. Updates/Announcements

Josh Perri is no longer with AcademyOne. Questions should be directed to Karen Todd (ktodd@academyone.com) or Erik Shepski (eshepski@academyone.com) at 610-436-5680.

Julie Rau at PDE is assisting Julie Kane with meeting logistics and will be emailing TAOC members with updates and agenda items.

- Current TAOC Membership Roster
 - See Appendix A (*Revised to include Ira Blake (Bloomsburg) who was accidentally omitted*)
 - Dr. Kenoye Eké is the new provost at Lincoln University and will serve as the institution's primary TAOC representative.
- December 6 TAOC meeting was rescheduled to December 13, due to the Middle States Conference being held that same day. Remote locations at IUP, Beaver and Bucks CCC.
- Proposed Spring 2013 Meeting Dates

Spring 2013 Date	Meeting Type
Thursday, January 17	Full TAOC
Friday, February 1	TAOC Steering Committee
Thursday, March 28	Full TAOC
Friday, April 12	TAOC Steering Committee
Thursday, May 23	Full TAOC
Friday, June 7	TAOC Steering Committee
July	NO MEETING

Meeting time will be 10:00AM-12:30PM as usual. Remote meeting locations will be identified once dates are finalized. Steering Committee dates are tentative; the group needs to meet two weeks after full TAOC meetings. PDE will schedule steering meetings based on member availability.

TAOC members were asked to email PDE by Tuesday, November 6, with any schedule conflicts that would keep numerous members from attending on the above dates (i.e., conferences, sector meetings, etc.)

NOTE: PDE notified TAOC members by email on Nov. 14 that the spring dates were approved.

4. ACTION ITEM: Vote to Approve or Reject August 9, 2012 Meeting Notes

Vote was postponed in order to give TAOC members time to review. Feedback must be submitted

to PDE by Tuesday, November 6, 2012. [The original due date of October 31 was extended due to the hurricane.] Final notes then will be posted on PA TRAC; PDE will notify everyone by email.

NOTE: The August 9, 2012 meeting notes were revised and posted on PA TRAC as of Nov. 19.

5. TAOC/PA TRAC Maintenance Activities

a. Primary/Secondary Points of Contact for AY12-13

Julie thanked everyone for submitting their updated contact sheets to AcademyOne. TAOC members are responsible for keeping track of their institutional points-of-contact for TAOC/PATRAC activities and notifying PDE immediately of any changes. AcademyOne sent training manuals to all new contacts and offered webinars/one-on-one training for new CEMC users. TAOC members need to follow-up with their contacts and make sure they completed training. If they still need training, contact AcademyOne.

b. Composite Institutional PA TRAC Status Report as of Oct. 23, 2012 – See Appendix B

The variation in the number of course equivalencies is attributed to equivalency synchronizers. If your institution does not currently have a synchronizer, contact Julie Kane ASAP. If you want to have the PATRAC Widget on your website, you need to have an equivalency synchronizer.

c. Current Activities

i. Missing Course Catalog Extracts

Extracts are still needed from Butler County CC, East Stroudsburg University and Northampton CC. AcademyOne is working hard to get the course extracts loaded into the system. Extracts are loaded approximately 1-2 weeks from the date of submission. Institutions that have not yet submitted extracts need to contact Erik Shepski at AcademyOne immediately.

ii. Course Equivalency Management Center (CEMC)

When a new Course Catalog Extract is uploaded to CEMC, the system automatically detects and highlights any change(s) from the previous extract. An email notification then is automatically sent to the other party in the equivalency. The new course extracts uploads means that CEMC users will be receiving notices to evaluate new courses and/or courses that have changed since originally being evaluated for transfer.

For this reason, it is imperative that TAOC members confirm their institutional CEMC contacts have been properly trained to use CEMC, evaluate courses, establish equivalencies, etc. AcademyOne offered three webinars in September for new and existing CEMC users. However, according to AcademyOne, there are a few new CEMC users who did not attend and have not contacted AcademyOne for training.

iii. Importance of Keywords in Degree Program Search Database

At the August 9 meeting, TAOC discussed the limited search capabilities of the Program Search Database accessible via PA TRAC. AcademyOne confirmed the primary cause is the limited use of keywords by submitting institutions.

- Community Colleges and Opt-Ins provide keywords when they upload their degree program information.
- Eric Zeglen from PASSHE's office of the Chancellor provides program information for all of the PASSHE universities. Therefore, PASSHE universities must provide keywords to the Office of the Chancellor in order for them to carry-over into the PA TRAC system. See Eric Zeglen for details.

iv. Statewide P2P Articulation Database – **May 15, 2013** is the deadline to identify articulated associate degrees and parallel bachelor degrees effective Fall 2013.

6. Statewide Program Articulation Agreements

a. Statewide P2P Report

The "P2P Status Report as of Oct. 24 2012" was sent as a separate handout. A more current version (dated Nov. 12, 2012) accompanied the draft October meeting notes and will be posted on PA TRAC. Members are welcome to share the report with their campuses as needed.

PDE needs assistance developing the webpage(s) that explain Statewide Program Articulation to the public. Specifically, PDE needs help with wording, look/feel of the pages, testing the searchable database, etc. Mike Hannan (Edinboro) suggested using a small student focus group.

The following individuals volunteered their services. Julie will contact everyone to discuss next steps.

- Ira Blake
- Ted Nichols
- Mike Hannan
- Ginny Mihalik
- Kathleen Howley (OOC) offered to allow PDE to consult with Diane Haas, the OOC's web designer.

When conducting a course equivalency search on PA TRAC, Framework courses are noted by "yes" or "no" in a column called "Transfer Framework Course". Unfortunately, Bill Sands (IUP) said there is a misconception that courses tagged "no" do not transfer, which isn't the case; "no" courses simply mean the courses don't qualify for universal transfer under the 30-credit Framework. PDE agreed to look into this and work with AcademyOne to find a better solution.

b. Fall 2012 Compliance

PDE collected Accuracy Verification Statements from all TAOC institutions in August. At that time, 25 of 33 participating institutions were compliant.

- All 5 opt-in institutions are compliant
- Seven of the 14 community colleges are compliant. A majority of the non-compliant colleges expect to be compliant by Spring 2013. (due to need to develop or modify courses, etc.)

- Thirteen of the 14 PASSHE universities are compliant. One university is working on bringing its associate degrees in Business and PK4 into compliance.
- Majority of non-compliant institutions expect to be in compliance by spring 2013

Institutions gave the following reasons for non-compliance:

- Developing new courses to meet agreement requirements
- Program and/or course modifications need to be approved through college governance system
- Program does not meet the Framework requirements included in agreements such as Biology, Computer Science and Mathematics
- College's general education curriculum is not limited to Framework courses
- Current associate degree programs do not meet the approved P2P requirements and have not been modified to meet them

The AVS is now a report feature accessible from directly from the P2P database. When it's time to submit the AVS in January 2013, PDE will email each institution's point of contact for the P2P database with instructions for downloading the AVS *directly from the P2P database* and submitting it to PDE. More details about this process will be provided at the December TAOC meeting.

May 15 is the deadline to identify articulated associate degrees and parallel bachelor degrees effective Fall 2013.

c. Pending Agreements

- i. Political Science – The Poli Sci PAC has submitted a final draft to PDE for TAOC review. PDE will email TAOC members on Nov. 5 with a link to the agreement and the voting form. Primary members then have until Nov 9, 2012 to cast their votes to approve or reject. (NOTE: Deadline extended via October 31, 2012 email from Julie Kane, due to weather-related closings). Votes to reject must give a reason for rejection. Even if your institution doesn't have the program available you still have to vote. Majority vote (23 votes) is required to approve.
- ii. Music – Julie Kane will get back to you on this in the near future
- iii. 4-8 Education – Joel Geary (PDE) has agreed to assist the 4-8 PAC. PDE is working with Joel to find dates that he can meet with PAC members in Harrisburg.
- iv. Secondary Education – PDE will work with Francie Spigelmyer and get this back up and running

7. Transfer Credit Framework

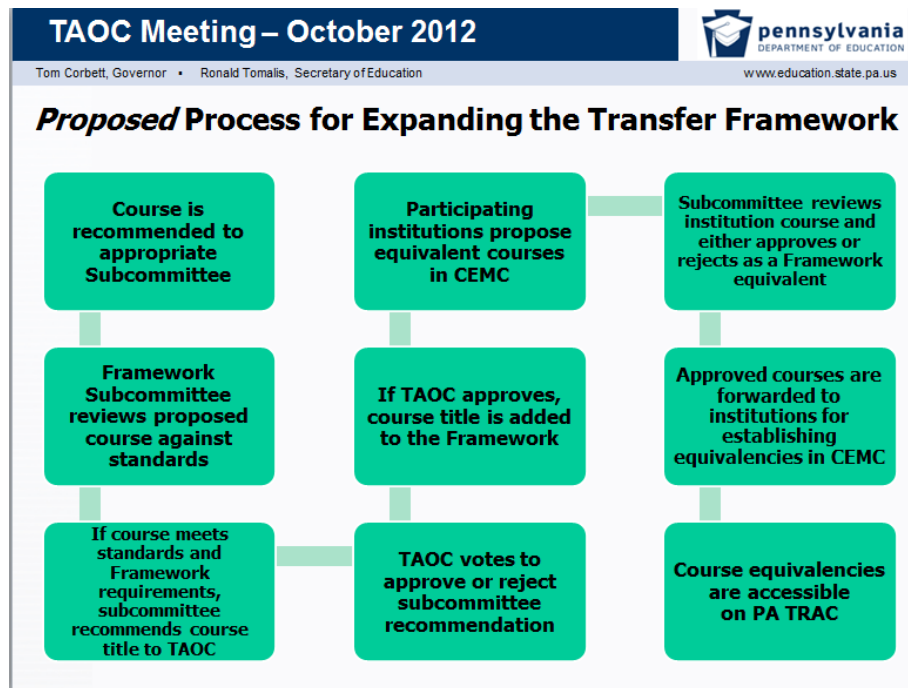
a. Framework Standards Subcommittee Members – See Appendix C (Revised)

TAOC cannot move any Framework work forward until all subcommittee positions are filled. TAOC policy requires every fully-participating institution appoint a representative to serve on one of the four subcommittees. Several proposed courses are stuck in subcommittee review because membership has changed.

Notify PDE of any committee member changes and new appointments by Tuesday, November 6, 2012. (NOTE: Deadline extended via October 31, 2012 email from Julie Kane, due to weather-related closings.) Subcommittee members should be appointed according to their interests and academic background.

NOTE: Standards Subcommittees are now at capacity. Appendix C reflects recent changes.

- b. Process for Expanding the Transfer Credit Framework Titles and Proposing Courses to Subcommittees



At the August meeting, TAOC agreed to use the above process to consider new foundation-level course titles for the Framework. This is the process that TAOC used originally to develop the Framework.

TAOC members should email suggested Framework course titles, along with course descriptions and any other related information, to Julie Kane by Friday, November 9, 2012. (NOTE: Deadline extended via October 31, 2012 email from Julie Kane, due to weather-related closings).

Suggested titles must be foundation level courses with general titles. Foundation courses are the type of coursework typically completed in the first and second year of any bachelor degree program. PDE has a list of suggested Framework titles already started. That list includes courses proposed by the PACs, the Standards Subcommittees and TAOC members.

After Nov. 9, PDE will forward the list to the Subcommittee chairs for consideration. Recommended course titles will then be forwarded to TAOC for consideration. See above process.

8. DISCUSSION ITEM: Policy Regarding Dispute Resolution Subcommittee

Legislation mandates that TAOC to have a Dispute Resolution Subcommittee (DRS).

- TAOC’s policy regarding the committee is found in Appendix D.

- Appendix F shows the membership rotation. The seven members serve staggered 3-year terms.

The DRS has never convened, but must be prepared to meet, if the need arises.

PDE has received numerous inquiries about the dispute resolution process and colleges concerned that their fellow TAOC institutions are not implementing statewide articulation in accordance with the legislation or TAOC policy. Before getting PDE or the Dispute Resolution Committee involved, the primary TAOC members at the two institutions involved in the dispute are advised to try and resolve the issue directly. If the issue remains, then the TAOC member who raised the concern should notify PDE (Julie Kane) who will help determine if the issue should be referred to the Dispute Resolution Committee.

The current Dispute Resolution Policy was developed when the transfer system only included Transfer Framework courses. Now that the system has been expanded to include statewide program articulation and transfer of Framework courses by the state-related universities, TAOC needs to review the policy and ask the following questions:

- Does the policy for this committee and process fit the current transfer system?
- Is the process clear?
- Does it meet our needs?

The Commonwealth authorizes entities to operate as postsecondary institutions through legislation and State Board policies. However, the transfer legislation does not indicate what actions TAOC or PDE should or may take in cases of non-compliance.

In the past, when PDE found an institution to be out of compliance, PDE would notify the TAOC member and institution president in writing of the offense. More often than not, the issue was quickly resolved once it was brought to light and the appropriate people were tasked to correct it.

Members should come to the December 13th TAOC meeting prepared to discuss in more detail. TAOC members with suggested changes should email PDE as soon as possible, if they want those changes included in the December agenda.

9. New Business

- Revising Approved P2P Agreements

Barbara Ford (MontCo) said at least three P2P agreements (approved by TAOC in 2011) require the full 30-credit Framework be completed as part of the articulated associate degree. This is causing compliance issues, because the Framework is not a common general education core and the Framework does not include all course options in an institution's general education curriculum.

Julie said there are two ways to address this issue:

1. TAOC can expand the Transfer Framework to include more foundation level course titles – which TAOC is in the process of doing.
2. TAOC members can propose amendments to the agreements.

According to TAOC policy,

Once a statewide program-to-program articulation agreement has been approved by TAOC, no amendments to the agreement can be offered by any party within the initial six (6) months of the agreement. After that time, a TAOC member with a proposed amendment to an approved agreement should submit the change to PDE.

Amendments that seek to alter the substantive nature or intent of the agreement in any part must be forwarded to the appropriate PAC for review and consideration. The PAC will then make a recommendation to the TAOC, and TAOC shall approve or deny the proposed amendments.

As of the October meeting, no one has provided any amendments to PDE. Proposed amendments need to be submitted ASAP, if they are to be reviewed by TAOC at the December meeting.

- List Serve for Individuals Implementing P2P at the Institution Level

Jean Berkeley (Carlow) proposed TAOC establish a list serve or some other vehicle of communication for individuals at the institutions who implementing statewide P2P. PASSHE and the community colleges have affinity groups for registrars, transfer counselors, admissions officers, etc. However, members of Opt-ins also need support.

Tracey Schoolcraft (Ship) will look into setting up a list serve group through the university. Jean offered to assist with leading this effort. If a list serve can be organized, PDE will notify TAOC members with instructions for joining.

- Assessment Subcommittee

Julie asked everyone to confirm the individuals listed on the subcommittee are still able to serve. Any changes should be emailed to PDE. [Note: Appendix C has been revised to reflect updates as of Nov. 19.)

Tom Gregory (Penn College of Tech) is the TAOC chair of the subcommittee. Keith Brown from the National Center for Education Statistics has offered to assist TAOC and the subcommittee with this work. Keith has been instrumental in developing real-time transfer reports in North Carolina.

Once the subcommittee is at capacity, PDE will work with Tom et al to schedule a kick-off meeting.

10. Next meeting: Thursday, December 13, 2012 from 10AM-12:30PM in Harrisburg and from remote locations at IUP, CC of Beaver and Bucks County CC

October 25, 2012 Meeting Attendees:

Institution	Attendee	Location
Bloomsburg University of Pennsylvania	Ira Blake	DUC
Bucks County Community College	Barbara Ford	MCCC
Butler County Community College	Richard Laughner	CCBC
California University	Stan Komacek	DUC
Carlow University	Jean Berkeley	CCBC
Cheyney University of Pennsylvania	Latashia Johnson	Phone
Clarion University of Pennsylvania	Lisa Hepler	Phone
Community College of Allegheny County	Frances Dice	CCBC
Community College of Beaver County	Mary Frances Archey	CCBC
Community College of Beaver County	John Gall	CCBC
Community College of Philadelphia	Judith Gay	Phone
Community College of Philadelphia	Susan Tobia	MCCC
Delaware County Community College	Grant Snyder	MCCC
East Stroudsburg University of Pennsylvania	Yun Kim	DUC
East Stroudsburg University of Pennsylvania	Van Reidhead	DUC
Edinboro University of Pennsylvania	Mike Hannan	DUC
Harrisburg Area Community College	Cindy Doherty	DUC
Harrisburg Area Community College	Erica Steenland	DUC
Indiana University of Pennsylvania	Bill Sands	IUP
Indiana University of Pennsylvania	Jeanie Brosky	IUP
Indiana University of Pennsylvania	Bob Simon	IUP
Kutztown University of Pennsylvania	George Paterno	DUC
Kutztown University of Pennsylvania	Carlos Vargas-Aburto	DUC
Lackawanna College	Erica Barone-Pricci	DUC
Lehigh Carbon Community College	Tom Leamer	DUC
Lehigh Carbon Community College	Virginia Mihalik	DUC
Lock Haven University of Pennsylvania	Jill Mitchley	Phone
Luzerne County Community College	Dana Clark	DUC
Luzerne County Community College	Libby Yeager	Phone
Mansfield University of Pennsylvania	Peter Keller	DUC
Millersville University of Pennsylvania	Robert Smith	DUC
Montgomery County Community College	Victoria Bastecki-Perez	MCCC
Montgomery County Community College	Joan Bettinger	MCCC
Montgomery County Community College	Michael Rivera	MCCC
Northampton Community College	Mark Henry	Phone
PA Commission for Community Colleges	Laura Runyan	DUC
PASSHE	Kathleen Howley	DUC
PASSHE	Jim Moran	DUC
PDE	Julie Kane	DUC
PDE	Julie Rau	DUC
Pennsylvania College of Technology	Thomas Gregory	DUC
Pennsylvania Highlands Community College	Ted Nichols	IUP
Reading Area Community College	Kevin McGovern	MCCC
Saint Francis University	Pete Skoner	IUP
Shippensburg University of Pennsylvania	Tracy Schoolcraft	DUC
Slippery Rock University of Pennsylvania	Elizabeth Stevens	CCBC
Slippery Rock University of Pennsylvania	William Williams	DUC
Temple University	Michele O'Connor	MCCC
University of Pittsburgh	Patti Mathay	CCBC
West Chester University of Pennsylvania	Joseph Santivasci	MCCC
West Chester University of Pennsylvania	Linda Lamwers	DUC
Westmoreland County Community College	Bob Wright	CCBC

Appendix A: Primary TAOC Membership Roster (as of October 23, 2012) – Revised

TAOC Institution	Primary TAOC Rep.	Title	Email	Phone
Bloomsburg University of PA	Ira Blake	Provost & VP of Academic Affairs	iblake@bloomu.edu	570-389-4308
Bucks County CC	Annette Conn	Provost & Dean of Academic Affairs.	conna@bucks.edu	215-968-8049
Butler County CC	Francie Spigelmyer	Vice President for Academic Affairs	frances.spigelmyer@bc3.edu	724-287-8711
California University of PA	Stan Komacek	Associate Provost	komacek@calu.edu	724-938-4830
Carlow University	Karyn Sproles	Dean, College of Arts & Sciences	kzsproles@carlow.edu	412-578-2043
Cheyney University	Ivan Banks	Provost & VP of Academic Affairs	ivan.banks@cheyney.edu	610-399-2279
Clarion University	Ronald Nowaczyk	Provost & VP of Academic Affairs	rnowaczyk@clarion.edu	814-393-2223
CC of Allegheny County	Mary Frances Archey	VP for Learning & Student Development	marchey@ccac.edu	412-237-3126
CC of Beaver County	Melissa Denardo	VP Learning & Student Success/Provost	melissa.denardo@ccbc.edu	724-480-3439
CC of Philadelphia	Judith Gay	VP for Academic Affairs	jgay@ccp.edu	215-751-8351
Delaware County CC	Virginia Carter	Provost	vcarter@dccc.edu	610-355-7178
East Stroudsburg University	Yun Kim	Associate Provost	ykim@esu.edu	570-422-3856
Edinboro University	Michael Hannan	Provost & VP of Academic Affairs	hannan@edinboro.edu	814-732-2729
Harrisburg Area CC	Cindy Doherty	Interim Vice President, Hbg Campus	cadohert@hacc.edu	717-221-1774
Indiana University of PA	Gerald Intermann	Provost & VP of Academic Affairs	intemann@iup.edu	724-357-2219
Kutztown University	Carlos Vargas-Aburto	Provost and Vice President for Academic & Student Affairs	cvargas@kutztown.edu	610-683-4155
Lackawanna College	Jill Murray	Executive VP/CAO	murrayj@lackawanna.edu	570-504-8111
Lehigh Carbon CC	Tom Leamer	VP of Academic & Student Services	tlearner@lccc.edu	610-799-1517
Lincoln University	Kenoye Eké	Provost	keke@lincoln.edu	484-365-7436
Lock Haven University	Donna Wilson	Interim Provost & VP of Academic Affairs	dwilson@lhup.edu	570-484-2121
Luzerne County CC	Dana Clark	Provost & VP of Academic Affairs/Dean of Nursing & Health Sci	dclark@luzerne.edu	570-740-0422
Mansfield University	Peter Keller	Provost & VP of Academic Affairs	pkeller@mansfield.edu	570-662-4804
Millersville University	Vilas Prabhu	Provost & VP of Academic Affairs	Vilas.Prabhu@millersville.edu	717-872-3596
Montgomery County CC	Victoria Bastecki-Perez	VP of Academic Affairs and Provost	vbasteck@mc3.edu	215.641.6482

TAOC Institution	Primary TAOC Rep.	Title	Email	Phone
Northampton CC	Jeffrey Focht	VP of Academic Affairs	jfocht@northampton.edu	610-861-5434
Pennsylvania College of Tech	Thomas Gregory	Assoc. VP for Instruction	tgregory@pct.edu	570-326-3761
PA Commission for Community Colleges	Diane Bosak	Executive Director	dbosak@pacommunitycolleges.org	717-232-7584
PA Department of Education	Jill Hans	Acting Deputy Secretary, Office of Postsecondary & Higher Education	jhans@pa.gov	717.787.5041
PA Department of Education	Julie Kane	Coordinator, Statewide College Transfer & Articulation; Chair, TAOC	jukane@pa.gov	717-772-3643
Pennsylvania Highlands CC	Edward (Ted) Nichols	VP for Academic Affairs and Student Services	enichols@pennhighlands.edu	814.262.6474
PA State System of Higher Education	Jim Moran	Associate Vice Chancellor for Student and Academic Affairs	jmoran@passhe.edu	717-720-4200
Pennsylvania State University	Robert Pangborn	VP & Dean for Undergraduate Education	pangborn@psu.edu	814-863-1864
Reading Area CC	Wade Davenport	Provost & Senior VP of Academic Affairs	wdavenport@racc.edu	610-607-6213
Saint Francis University	Pete Skoner	Assoc. Provost	pskoner@francis.edu	814-472-3085
Shippensburg University	Barbara Lyman	Provost & Senior VP of Academic Affairs	bglyman@ship.edu	717-477-1371
Slippery Rock University	William Williams	Provost & VP of Academic Affairs	william.williams@sru.edu	724-738-2001
Temple University	Michele O'Connor	Assoc. VP for Undergraduate Studies	michele.lynn.oconnor@temple.edu	215-204-0550
University of Pittsburgh	Juan Manfredi	Vice Provost for Undergraduate Studies	manfredi@pitt.edu	412 624 07 90
West Chester University	Linda Lamwers	Provost and Vice President for Academic Affairs	llamwers@wcupa.edu	610 436-3405
Westmoreland County CC	Nicole Reaves	Vice President of Academic Affairs and Student Services	reavesn@wccc.edu	724-925-4212

Appendix B: Composite PA TRAC Status Report for Participating Institutions as of October 23, 2012

Notes:

1. The Program Search allows students to search for institutions by program of study. Program Search data is provided by each participating institution. The Office of the Chancellor provides this information for all 14 PASSHE universities.
2. The Course Search allows students to search for institutions based upon specific course criteria. The database is populated by course data provided by each institution.
3. The Course Equivalency Search allows students to find out whether specific courses taken at one college will transfer to another college.
4. A "Request for More Information" icon is located at the top of each institution's College Profile. Requests are electronically submitted to the point of contact responsible for maintaining the institution's profile.

Institution	Program Search	Course Search	Course Equivalency Search			College Profile			
	# of Programs in Program Search	# of Courses in Course Search	#of Current Equivalencies (IN)	#of Current Equivalencies (OUT)	TOTAL # of Course Equivalencies (IN & OUT)	Profile Views	Profile Views (Last 30 Days)	Request Info Page Views	Requests Info Page Views (Last 30 Days)
Bloomsburg University	201	2,245	31,390	8,528	39,918	12,135	516	1,793	33
Bucks County CC	86	784	6,087	15,617	21,704	11,282	410	1,636	24
Butler County CC	90	1,473	1,330	4,673	6,003	3,661	171	1,453	15
California University	250	1,497	59,311	6,493	65,804	11,452	570	1,336	29
Carlow University	69	929	3,281	1,093	4,374	4,533	255	899	27
Cheyney University	50	1,590	2,014	2,641	4,655	9,824	353	1,761	24
Clarion University	179	2,454	58,134	6,382	64,516	9,063	393	1,829	26
CC of Allegheny County	176	2,396	1,207	11,617	12,824	7,415	311	1,574	10
CC of Beaver County	82	456	1,286	4,940	6,226	7,911	299	1,627	15
CC of Philadelphia	220	792	5,858	11,693	17,551	8,532	379	1,858	20
Delaware County CC	112	797	14,320	10,660	24,980	10,663	394	1,532	20
East Stroudsburg University	162	1,545	53,751	6,207	59,958	10,509	371	2,013	96
Edinboro University	222	2,310	1,388	8,612	10,000	8,403	382	1,794	28
Harrisburg Area CC	187	1,297	1,446	13,610	15,056	9,405	325	1,615	21
Indiana University	213	2,394	72,080	9,836	81,916	9,736	311	1,592	21
Kutztown University	149	3,354	43,805	7,945	51,750	10,625	341	1,660	27
Lackawanna College	67	288	1,086	3,543	4,629	3,092	123	1,205	12

Institution	Program Search	Course Search	Course Equivalency Search			College Profile			
	# of Programs in Program Search	# of Courses in Course Search	#of Current Equivalencies (IN)	#of Current Equivalencies (OUT)	TOTAL # of Course Equivalencies (IN & OUT)	Profile Views	Profile Views (Last 30 Days)	Request Info Page Views	Requests Info Page Views (Last 30 Days)
Lehigh Carbon CC	108	1,088	1,380	10,408	11,788	10,000	377	1,490	20
Lincoln University	39	681	1,305	1,724	3,029	7,518	211	1,671	21
Lock Haven University	164	1,415	35,918	6,688	42,606	9,395	288	1,519	26
Luzerne County CC	105	928	619	9,748	10,367	9,741	331	1,633	23
Mansfield University	179	1,896	25,613	7,002	32,615	12,943	338	1,569	26
Millersville University	256	1,760	14,944	7,686	22,630	12,371	478	1,428	19
Montgomery County CC	109	977	1,398	13,344	14,742	9,655	359	1,522	26
Northampton CC	114	988	1,291	11,929	13,220	8,641	271	1,701	22
Pennsylvania College of Tech	156	1,430	49,701	4,935	54,636	9,586	269	1,586	19
Pennsylvania Highlands CC	74	553	1,208	3,070	4,278	2,389	257	938	7
Reading Area CC	60	501	1,553	6,550	8,103	8,049	259	1,690	19
Saint Francis University	65	795	1,661	2,582	4,243	8,341	268	2,429	23
Shippensburg University	222	2,455	21,095	5,747	26,842	8,948	352	1,665	86
Slippery Rock University	252	2,260	57,488	7,255	64,743	6,366	282	1,354	19
West Chester University	282	4,591	9,839	9,897	19,736	12,947	510	1,757	15
Westmoreland County CC	144	838	1,279	6,755	8,034	7,414	304	1,769	19
TOTAL	4,844	49,757	584,066	249,410	833,476	292,545	11,058	52,898	838

Appendix C: TAOC Subcommittee Members as of November 16, 2012

English/Public Speaking Subcommittee (Categories 1 & 2)		
TAOC Institution	Member	Title
Community College of Philadelphia	Susan Tobia, Chair	Assistant Vice President for Academic Affairs
Community College of Beaver County	Hope Gossard	Assistant Professor of Developmental English
Pennsylvania Highlands CC	Michele Rice	Dean for Teaching, Learning and Assessment
Clarion University	Kimberly Verdone	Dir-Student Services, College of Arts and Sciences
Edinboro University of Pennsylvania	Kathleen Golden	Department of Communication & Media Studies
West Chester University	Hyoejin Yoon	Special Assistant to the Provost
Lackawanna College	Erica Barone-Prizzi	Associate VP for Academic Affairs
Cheyney University	Tamara Hollins	Faculty Member
Reading Area Community College	Kevin McGovern	Associate Vice President for Academic Affairs

Math/Natural Sciences Subcommittee (Categories 3 & 4)		
TAOC Institution	Member	Title
Bloomsburg University of Pennsylvania	Jonathan Lincoln, Chair	Assistant VP of Academic Affairs
Millersville University of Pennsylvania	Robert Smith	Dean, School of Science and Mathematics
East Stroudsburg University	Olivia Carducci	Professor, Mathematics
Kutztown University of Pennsylvania	Michelle Hughes	University Registrar
Community College of Allegheny County	Frances Dice	Asst. Dean of Academic Management
Saint Francis University	Pedro Muino	Professor, Chemistry
Montgomery County Community College	Andrew Ippolito	Assistant Dean
Carlow University	Nancy Jacqmin	Professor, Mathematics
Lincoln University	John Chickwem	Dean of the School of Natural Sciences and Mathematics

Humanities/Fine Arts Subcommittee (Category 5)		
TAOC Institution	Member	Title
Slippery Rock University	William Williams, Chair	Provost and VP for Academic Affairs
Mansfield University of Pennsylvania	Karen Guenther	Professor, History
Luzerne County Community College	Mary Stchur	Chair, English Department
Northampton Community College		
Westmoreland County Community College	Andrew Barnette	Dean of Public Service, Humanities and Social Sciences
Indiana University of Pennsylvania	Joan Vandyke	Professor, Theatre and Dance Department
Lehigh Carbon Community College	Ginny Mihalik	Transfer Counselor

Social/Behavioral Sciences Subcommittee (Category 6)		
TAOC Institution	Member	Title
California University of Pennsylvania	Melanie Blumberg, Chair	Professor, History & Political Science
Shippensburg University	Tracy Schoolcraft	Assoc Provost and Dean of the Graduate School
Lock Haven University	Lynn Bruner	Assistant Professor, Psychology Department
Bucks County Community College	Catherine McElroy	Dean, Academic and Curricular Services
Butler County Community College	Francie Spigelmyer	VP of Academic Affairs
Delaware County Community College	Grant Snyder	Vice Provost for Student & Instructional Support Svcs.
Pennsylvania College of Technology	Susan Koons Slamka	Assistant Professor of Psychology/Human Services
Harrisburg Area Community College	Patty Collamer	Professor, Sociology

Assessment Subcommittee		
TAOC Institution	Member	Title
Penn College of Technology	Tom Gregory, chair	Assoc. VP for Instruction
Bucks County CC	Christine Boyle	Executive Director, Research and Assessment
Montgomery County CC	Joan Brookshire	Associate Vice President of Academic Affairs
CC of Allegheny County	Mary Kate Quinlan	Director of Assessment and Achieving the Dream.
West Chester University	Joe Santivasci	Assistant Vice President for Enrollment Management/Registrar
Bloomsburg University	Sheila Dove Jones	Director of the Office of Planning and Assessment
Saint Francis University	Pete Skoner	Associate Provost
PASSHE/OOC	TBD	
PDE	Julie Kane	Coordinator of Transfer and Articulation, PDE

Appendix D: Overview of Dispute Resolution Subcommittee

Overview

Created by legislation, the Dispute Resolution Subcommittee (DRS) provides a mechanism for resolving institutional disputes that emerge in TAOC or subcommittee deliberations regarding, but not limited to,:

- course equivalency standards
- courses submitted to meet equivalency standards
- statewide program articulation agreements
- articulated associate degree programs
- parallel bachelor degree programs

If the institution involved in the dispute has made a sincere effort to resolve the dispute but has been unable to do so, the DRS will act in a mediation role, when asked by the institution to do so, in an attempt to reach an outcome satisfactory to all sides.

Responsibilities

The DRS will conduct the following activities:

1. Hold meetings as the needed;
2. Submit a report to the full TAOC on the specific nature and resolution of disputes as they arise and are resolved, and
3. As necessary, bring to the floor of TAOC suggestions and a rationale for changes in the Purpose, Composition, or Operating Policies and Procedures of the Standards Subcommittees.

Membership

The DRS is comprised of a subset of voting members of TAOC.

Membership shall consist of the following:

1. The Secretary of Education, or a designee, who shall serve as Chair.
2. Three TAOC members representing the Community Colleges.
3. Three TAOC members representing the PASSHE institutions.
4. One member representing the independent and state-related institutions of higher education that elects to participate in the TAOC.
5. Additional members may be added by the Chair of the Subcommittee.

The DRS may also include one member representing the PA Commission for Community Colleges and one member representing the PASSHE Office of the Chancellor.

Members serve a staggered three-year term with rotation by college so that each year one member of the community college sector and one member of the PASSHE sector shall be replaced. The member representing the participating independent institutions of higher education shall serve for three years. Additional members appointed by the chair will serve for a period of three years. If a member is not available to serve at any time during the three year term, the member may assign an alternate representative from their institution or organization.

The rotation by sector is as follows:

- *Community Colleges:* Montgomery County Community College, Community College of Beaver County, Community College of Philadelphia, Community College of Allegheny County, Northampton Community College, Harrisburg Area Community College, Bucks County Community College, Reading Area Community College, Butler County Community College, Pennsylvania Highlands Community College, Lehigh Carbon Community College, Luzerne County Community College, Delaware County Community College, Westmoreland County Community College

- *PASSHE*: West Chester University, Shippensburg University, Millersville University, Bloomsburg University, California University of Pennsylvania, Cheyney University, Clarion University, East Stroudsburg University, Edinboro University, Indiana University of Pennsylvania, Kutztown University, Lock Haven University, Mansfield University, Slippery Rock University
- *Independent and state-related institutions*: Lincoln University (By date that the participation agreement is signed), St. Francis University, Lackawanna College, Pennsylvania College of Technology, Carlow University.

Initial terms of committee members:

- Montgomery County Community College and West Chester University will each serve one year terms, ending June 30, 2009. Community College of Allegheny County and Bloomsburg University will begin a three year term on July 1, 2009.
- Community College of Beaver County and Shippensburg University will each serve two year terms, ending June 30, 2010. Northampton Community College and California University of Pennsylvania will begin a three year term on July 1, 2010.
- Community College of Philadelphia and Millersville University will each serve three year terms, ending June 30, 2011. Harrisburg Area Community College and Cheyney University will begin a three year term on July 1, 2011.

Institutional Dispute Resolution Process

A participating TAOC institution may request a resolution by the DRS to disputes that arise relating to the transfer and application of credits. Contentious issues may include the following:

- A TAOC Curriculum Standards Subcommittee denying a course for transfer as a foundations course;
- A TAOC Curriculum Standards Subcommittee denying a new course title for inclusion on the Transfer Credit Framework; or,
- A TAOC Curriculum Standards Subcommittee approving a course that another institution deems non-transferable.

The Institutional Dispute Resolution Process is as follows:

1. The institution submits documentation in writing to the DRS Chair and indicates the details as they relate to the following:
 - a. Specific transfer and application of credits;
 - b. The efforts that the college has made to resolve the dispute; and
 - c. The desired outcome of the dispute resolution.
2. Within ten (10) days of receiving the dispute, DRS will decide if it has jurisdiction over the dispute and how to proceed.
 - a. If the issue presented is one of compliance, the DRS will notify the violating institution in writing of the issue and instruct the institution on the problem needs to be corrected to bring the institution back into compliance.
 - b. If the issue does not involve compliance, then the DRS will notify the disputing parties in writing as to the next course of action.
3. The DRS Chair notifies the Institution identified in the complaint and requests a response to the complaint within ten (10) business days.
4. The DRS Chair schedules a meeting of the Subcommittee within 30 days of receiving the response and sends the dispute specifics and the rebuttal response(s) for review prior to the meeting. Any DRS members identified in the dispute will excuse themselves for that particular case. An alternate TAOC representative may temporarily be appointed to the committee by the

Chair so no less than three community college representatives, three PASSHE representatives, and one independent representative are present at the meeting.

5. The DRS Chair convenes the DRS for the purpose of investigating the complaint. When a single location for the meeting is prohibitive, the meeting may be conducted via teleconference. The institution identified in the dispute has a right to be present at the meeting.
6. The DRS will propose a resolution to this dispute by consensus within ten (10) days. If a consensus cannot be reached, the DRS Chair will have the responsibility of making the final determination of the resolution. Any determination made will be binding upon the parties.
7. The institution and TAOC Curriculum Standards Subcommittee will be notified in writing by PDE as to the final decision and must abide by the final decision.

Appendix E: Dispute Resolution Committee Rotation



Institution	1-Jul-12	1-Jul-13	1-Jul-14	1-Jul-15	1-Jul-16	1-Jul-17	1-Jul-18	1-Jul-19	1-Jul-20	1-Jul-21
Montgomery County Community College								X		X
Community College of Beaver County										X
Community College of Philadelphia										
Community College of Allegheny County,										
Northampton Community College,	X									
Harrisburg Area Community College,	X	X								
Bucks County Community College,	X	X	X							
Reading Area Community College,		X	X	X						
Butler County Community College,			X	X	X					
Pennsylvania Highlands Community College,				X	X	X				
Lehigh Carbon Community College,					X	X	X			
Luzerne County Community College,						X	X	X		
Delaware County Community College,							X	X	X	
Westmoreland County Community College								X	X	X
West Chester University,									X	X
Shippensburg University,										X
Millersville University										
Bloomsburg University										
California University of Pennsylvania,	X									
Cheyney University,	X	X								
Clarion University,	X	X	X							
East Stroudsburg University,		X	X	X						
Edinboro University,			X	X	X					
Indiana University of Pennsylvania,				X	X	X				
Kutztown University,					X	X	X			
Lock Haven University,						X	X	X		
Mansfield University,							X	X	X	
Slippery Rock University								X	X	X
Lincoln University										
St. Francis University,	X	X								
Lackawanna College,			X	X	X					
Pennsylvania College of Technology,						X	X	X		
Carlou University									X	X

Appendix F: Parchment PowerPoint Presentation (October 25, 2012)



Pennsylvania Electronic Student Transcripts And Records System (PA eSTARS)






- ❖ PA eSTARS is a *voluntary* statewide network for the secure and confidential digital exchange of student records and transcripts among educational institutions.
- ❖ PA eSTARS is being coordinated by the Pennsylvania Department of Education (PDE).
- ❖ A federal grant awarded to PDE will be used to cover the initial onboarding costs for Local Education Agencies (LEAs) that sign-up before July 1, 2013.
- ❖ PDE has contracted with Parchment Inc. to implement PA eSTARS using the Docufide platform. For a limited time, Parchment is also waiving several fees essentially enabling PA colleges and universities to evaluate the platform at practically zero cost for a full 15 months. Parchment waivers are only available for schools that sign up before December 31st, 2013

2

About Parchment



- ❖ Founded in 2003
- ❖ Leading transcript exchange platform
 - Sent 1.6 million transcripts in 2011
 - On track to send 6 million transcripts in 2012
 - Used in 65 countries
 - 30% of high schools in America use Parchment's technology
 - 148 Pennsylvania K12 schools already use Parchment to exchange student transcripts. Anticipate 90% adoption by 2013
 - Recent PA post-secondary additions to the platform include Drexel, Temple, Northampton Community College, Bucks County CC, Delaware County CC, Montgomery County CC

3

Benefits of PA eStars



- ✦ PA eSTARS allows secondary schools to send student transcripts electronically to colleges at a reduced rate.
- ✦ Benefits:
 - Streamlines the transcript request process for students and schools
 - Reduces the cost to print and mail paper transcripts
 - Allows for the secure and timely delivery of transcripts (and related admissions materials) to colleges and universities
 - Provides a way for students and schools to track the delivery and receipt of transcripts
- ✦ Parchment's platform is called Docufide.
- ✦ SaaS education credential management system
 - Docufide Receiver
 - Docufide Sender



4

What are PA IHE's trying to accomplish?

- ✦ Fran Cubberly from Delaware County wanted to secure transcripts in a more timely fashion to address students who needed these credentials to qualify for Financial Aid
- ✦ Nancy Korn at Bucks County wanted to use Docufide Sender to reduce her paper, printing and staff costs
- ✦ The team at Montgomery County is using the Docufide platform to take a high-touch labor intensive process and making it touch free and completely automated
- ✦ Whatever your goals, the Docufide platform aligns to YOUR existing business processes and workflows




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Docufide Sender

Key Benefits of Sending Electronic Transcripts – Registrar Perspective

- Cost savings in transcript paper, postage, envelopes and staff time
- Operating efficiency gains in administering and managing the transcript process
- Improved service to students – online requesting of transcripts eliminates need for students to visit Registrars' office and streamlines the process; this ultimately benefits student job searches and post-graduate admissions processes
- Improved security of student academic records
- Ability to shift staff to higher priority roles
- Improved service to alumni – greatly enhances ease of transcript ordering
- Supports institutional sustainability priorities and "going green" practices




Private and Confidential Information

Docufide Receiver

Key Benefits of Receiving Electronic Transcripts – Admissions Perspective

- Ability to assist high school guidance counselors by accepting transcripts electronically – this makes the process more efficient at the point of application origination
- Cost savings in staff time previously used to handle and process large volumes of mail (especially at peak deadline times in the admission process)
- Efficiency gains in preparing completed applicant folders for review by admission counselors
- Enhanced applicant ability to track status of transcript (without calling or emailing) – this enhancement is a direct benefit for applicants and the consequent admissions experience they have with the institution
- Improved staff satisfaction
- Provides revenue potential for institutions that support a transcript fee schedule
- Provides tracking and analytical capabilities to aid assessment of college choice patterns and outcomes of recruiting efforts
- Supports institutional sustainability priorities and “going green” practices

Private and Confidential Information



Docufide Implementation

A simple download, little work for your IT

Task Number	Task Name	Duration	Antecedents	Success
1	Install Docu	1 day		Institution, Parchment
2	Determine email domain	1 day		Institution, Parchment
3	Install Call Followup Email	1 day	1	Parchment
4	Complete Software Installation	1 day	3	Institution
5	Submit initial Test File	1 day	2	Institution
6	Submit Transcript Branching Files	1 day	3	Institution
7	Submit Signatures	1 day	3	Institution
8	Submit Data	1 day	3	Institution
9	Submit Logins	1 day	2	Institution
10	Submit Test Transcripts	1 day	4	Institution
11	Setup File	1 day	4	Institution
12	Integrate into Student Address	1 day	4	Institution
13	Outsource Students	1 day	4	Institution
14	Outsource Degrees	1 day	4	Institution
15	Integrate into Degrees	1 day	5	Institution
16	Install Ingest/Verify/Upload Options	1 day	1,10	Institution, Parchment
17	Review Sample Transcript Output	2 days	7,8,9,10	Institution
18	Approve Sample Transcript Output	1 day	17	Institution
19	Installable Staff Training	1 day	20,17	Institution, Parchment
20	Staff Training	1 day	19	Institution, Parchment
21	Send go-live date	1 day	18	Institution
22	Go-live with Docufide Sender	1 day	18,20	Institution, Parchment



Private and Confidential Information



If you would like to learn more about



CONTACT:
 Chris Hyde
 Sales Director – PA
 Parchment, Inc.
 (703) 624-7586
chide@parchment.com
www.PAeSTARS.com



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