



## Pilot Institution Feedback Assessment Executive Summary

Beginning fall, 2013, eleven high-volume transfer institutions previously participating in reverse transfer agreements volunteered to pilot recommended strategies from the MRT Implementation Manual. Piloting implementation through each phase of the process will provide valuable information for participating institutions before statewide implementation in 2014, while also giving pilots an opportunity to identify potential technology and communication barriers in readiness. In December, 2013 all Pilot Reverse Transfer Coordinators completed a Feedback Summary Questionnaire to begin tracking progress toward statewide scale-up.

### Institutional Partners

4-year Institution	2-year Institution
Columbia College	Moberly Area Community College
Missouri State University	Ozarks Technical Community College
Missouri Western State University	Metropolitan Community College North Central College
Northwest Missouri State University	Metropolitan Community College
University of Missouri-Columbia	Moberly Area Community College
University of Missouri-St. Louis	St. Louis Community College

### General Results:

1. Four-year institutions reported a total number of 2,255 eligible students were contacted by 4-year institutions primarily through email and postal, with 108 students opting-in and 2 students receiving Associate degrees. 4 students responded but did not opt-in, 2 of which had already received their AA's at the time of contact.
2. All institutions have either completed or nearly completed their MRT websites based on the templates provided.
3. All institutions but one have registered with the National Student Clearinghouse.
4. Very few questions have been raised by students. Those coming in primarily concerned the cost of joining MRT or degree requirements.
5. The Implementation Manual was most useful in defining institutional roles and responsibilities, along with its FAQ's. Recommendations for improvement included
  - Include a section on data points and student responsibilities
  - Formatting issues related to page numbering and blank sections
  - Providing sample communication and case scenarios after piloting
  - Examples from each software platform detailing the process

6. Not all institutions have developed a formal process for tracking students through completion.
7. The primary concern regarding state-wide roll out for MRT involved the need for a more standardized process for the timing of sending transcripts among institutions and how students will be tracked between multiple partnerships at any one institution.

### **Responses from Pilot Institutions**

1. Institutions were identified for Questions II and III, which were specific to the institution's progress. Other questions were bulleted.
2. If respondents answered "N/A," or "no suggestions," they were not included.

### **II. Description of activities conducted in fall 2013**

1. **Columbia College.** The college modified a report, some of the processes for identifying eligible students and the correspondence that we used for our previous reverse transfer agreement with MACC for the MRT process. We used this updated information to identify, track, and notify the eligible students. We have also developed the MRT website and signed the transcript agreement with the NSC. We are currently working with the NSC to develop the PDF transcript sending process and we are working on the process for automating the sending for all the community colleges in the state.
2. **Missouri State University.** MIS(computer services) has begun developing a website for student opt-in, managing and tracking opt-in status, and automatically generating PDF transcripts and reports. We will have this system in place during Spring 2014. In addition we have developed our institutional website:  
<http://www.missouristate.edu/admissions/reversetransfer.htm>, as well as pulling the eligible students.
3. **Missouri Western State University.** Set-up processes to pull the group of students, based on state policy who should be invited into the Reverse Transfer program
  - Pulled the opt-in statement off the admission application
  - Students were invited through email and could opt-in through a web-based system
  - Process was created to generate PDF transcripts
  - Registered for ETX with the National Student Clearinghouse
  - Website was established for MRT
4. **Northwest Missouri State University.** The Registrar established an ETX mailbox with the National Student Clearinghouse in order to facilitate the exchange of PDF documents between schools. Substantial testing has been done on the exchange of documents to ensure it was operating properly;
  - A MRT webpage was developed and published on the Northwest public website. The page was built using the recommendations of the steering committee. It contains links to MDHE's webpage, the statewide policy for MRT and the FAQ's page that was established for the MRT program. The page also contains unique information about the process that Northwest and MCC has established for implementing MRT between our two schools
  - The form that was built in Northwest's student information system was to accommodate the opt-in/graduation form for students to submit indicating their interest in participation in MRT. The

form was built in the secure area of the system to allow us to authenticate that it was the student who granted us permission to release their transcript.

- A population select was written in order to identify the students eligible for the MRT program.
- A letter was written to invite students to participate in MRT and sent via email and snail mail to eligible students. The letter instructed the students to log into the secure student system and complete the form to indicate their interest in MRT.
- An email response was written and an automated email trigger was built to provide a response to all students who submitted an opt-in/graduation form.

5. **University of Missouri-Columbia.** In August 2013, the University of Missouri using our previous reverse transfer guidelines with MACC identified and contacted potential reverse transfer students from Moberly Area Community College. Our selection criteria included any student who had completed 15 or more credits at MACC, 15 or more credits at MU, and who also had 64 or more total credit hours. Interested students then contacted the MACC MRT to discuss their options for receiving an associate's degree through reverse transfer. During FS2013, we met with MACC to develop a plan for contacting new SP2014 students using the MRT guidelines. We also identified reports and programs that needed to be revised or developed to support MRT.

6. **University of Missouri-St. Louis**

- Set up student groups for tracking through MyView
- Received first eligible student list from IR
- Checked for students with 60 or transfer hours reported to be sure they had no degree (60 names eliminated from contact list)
- Send first round of communication to MRT eligible students from STLCC ( 372) Oct. 24- first class mail)
- Set up website under UMSL Transfer Services ( November 1)
- Send second communication via email to same group minus those who had already responded ( 11/20)
- Interviewed student respondents 10/25-12/10
- Forwarded completed opt in forms to STLCC

7. **Metropolitan Community College.** Set up account with NSC

- Created a student group within PeopleSoft for tracking purposes
- Active Reverse Transfer web page on mcckc.edu
- Had our legal department approve opt-in form
- Communicated regularly with NWMS regarded MRT issues
- Sent communications to the three students that have opted in

8. **Moberly Area Community College.** In Fall 2013 we conducted a reverse transfer initiative in conjunction with University of Missouri-Columbia. Students, selected from MU's search criteria, were invited to participate in the reverse transfer program via an email invitation from MU Provost's office. These students were instructed to contact Moberly Area Community College's reverse transfer coordinator, Amy See, if interested in participating in the program. MACC RTC then contacted each interested student asking them to send a copy of their MU transcript to the MACC registrar to be evaluated for degree completion through reverse transfer.

Of this pool of 222 students selected by MU, ten students contacted MACC's RTC, but no student had obtained the qualifications to complete an AA through reverse transfer at this time. Amy See contacted each student to advise him/her on the course(s) that would be needed to complete an AA degree through reverse transfer. Students were encouraged to continue working with an advisor at

MU to concurrently complete courses needed for both the reverse transfer degree and the MU bachelor's degree if possible.

9. **North Central College.** Attendance at pilot group teleconference
10. **Ozarks Technical Community College.** An initial planning meeting with MSU was conducted, we signed a contract for ETX with NSC, and published our MRT website. Additionally, we have regularly been in contact with MSU.
11. **St. Louis Community College.** We are piloting with UMSL. As the MRT for STLCC, I have stayed in close communication with Melissa Hattman during the pilot. We have met twice in person and communicated often via email. Other activity is described below.

### III. Describe the results obtained to date

1. The website has been developed and can be found at <http://web.ccis.edu/en/Offices/Evaluations/Missouri%20Reverse%20Transfer.aspx>. It helped having other websites up and running to see what needed to be included. We found **15 eligible students this fall and all 15 were contacted by email**. We were contacted by 5 of the students, but two of them already had associate degrees with MACC that weren't coded in our system. We ended up with **3 eligible students that opted in** to the program this term. We recently signed up with the NSC and haven't sent any transcripts through the ETX process yet.
2. We do have our website done. We pulled **1106 eligible students for OTC**, but due to the timing that we pulled these names we have elected to wait until January to begin contacting students. Note that we are sending via ETX, but none so far for MORT.
3. **504 students emailed; 66 opted in;** 84 transcripts have been exchanged
4. Northwest **identified and contacted 36 new transfer students** during the Fall 2013 trimester to invite them to participate in the MRT program.
  - A MRT webpage was published on the Northwest public website.
  - A MRT form was published in Northwest's student information system.
  - Two students responded to the invitation to participate and submitted the opt-in form.
  - Transcripts will be sent during the spring 2014 trimester.
5. **222 students were contacted regarding reverse transfer and 10 students responded to MACC RTC.** The reverse transfer website has been developed but is not yet live
6. Web site is a work in progress as more information becomes available
  - Number of eligible students: 432
  - Number contacted: 372 (letter and email)\*\*
  - Number Responded: 33
  - **Number opt-in as of December 9: 26**
  - First transcripts will be sent via ETX after the fall semester is complete
  - \*\*60 eligible students removed from list as they had already posted AA degrees but UMSL had no record
7. **Three Northwest Missouri students have opted in.** NWMS will send the transcripts next week once grades have been posted.
8. To date MACC is currently working on setting up the MRT RV website on our website to inform and direct students interested in the MRT program. MACC Reverse Transfer team has met with MU to move forward with another invitation to students in the Spring 2014 semester.
9. Reverse transfer website is active. No opt-in forms or transcripts received yet from 4 year institution
10. At this time MSU is planning to notify eligible students during the first part of the spring semester. The OTC MRT website is live at <http://www.otc.edu/registrar/24496.php>.

11. I met with our web development staff early in November and shared info provided to us to serve as the template for building our site. I asked that it be live by February 2014, thinking that would likely be the earliest that most folks would need info from the 2-year side.
- STLCC received the first batch of 15 opt-in forms from UMSL on November 6. Since that date, UMSL has emailed an additional 11 opt-in forms, for a total of 26 students.
  - We discussed a plan for STLCC to sign the opt-in form and forward it by email to the student so they would have a copy and know that STLCC is aware they have met with UMSL and chosen to opt in. I reached out to the other two-years via the listserv to find out what they were doing for the initial communication to the student, but received no response. At this point, we have not communicated with the students in the pilot program from the two-year side, but hope to do so before winter break.
  - We have not yet sent or received transcripts via ETX. We anticipate doing so in mid-January 2014 after the fall grades are posted.

#### **IV. What questions did students raise?**

- No students directly contacted the Registrar's Office or the Admissions Office about the Reverse Transfer Program.
- Students asked if there is any cost to earn the associates while still at Northwest. Also, how do they get signed up (though this was included in the letter), and do they have to take additional courses at the 2-year institution
- Nothing unexpected yet- the issue is they do not read materials thoroughly so explanation needed of fundamentals in face to face meeting.
- One student asked if the program cost anything. One student was already a graduate of MCC and was curious why she received communication.
- No unusual/unexpected questions arose. Most students contacted by MACC's RTC seem to have a sufficient understanding of the program, and a reasonable expectation of the resulting evaluation.
- Students have questions about what classes they need to take at their 4-year institution to complete their degree at OTC. We are working on posting our transfer equivalencies online to allow easy access to the information. Additionally, we will be sending students who opt-in a degree audit showing needed courses. This was an expected question; however, it is a significant communication undertaking.
- As a two year institution we have not yet had questions from students.

#### **Which were unexpected?**

- Can they participate in graduation at STLCC when the degree is finished?

#### **V. Implementation Manual**

##### **a. Describe how Implementation Manual was used.**

- I read the manual when I first received it to get up-to-date on the agreement and the steps involved. It is now used mostly as a reference document.
- We have read it and shared it with folks who will be involved on campus.
- To look up MRT policy, FAQ's, look at other school examples. Many items we did not need to review since we understood things from the meetings and conversations with the other pilot schools.

- The entire manual was extremely helpful and read from cover to cover. It was very helpful to have the actual House Bill included, as well as the glossary of terms.
- For keeping me on track step by step; keep notes completed.
- The Implementation manual was used as a guide for the initiative. It answered many of our institutions questions and provided needed details.
- The implementation manual was used as a guideline to develop our MRT process
- I think it will be a helpful tool, but during the pilot program I found it lacking information for the 2-year schools, especially in the form of sample communication.
- The IM was used as a road map for the process. I distributed it to the two people on my team who will be assisting in the RT process.
  - I appreciated the step-by-step/forms for how to set up the account the NSC. I also found the breaking it down by 2-year and 4-year responsibilities to be helpful.
  - Once we have the pilot finished, it may be nice to have a school on each software platform detail their student communication process. (PeopleSoft, Banner, etc)
- We've used the manual as a basic outline to continue contacting and informing students of the reverse transfer program, and to further streamline contact with current and prospective reverse transfer students.

#### **b. What parts were most useful?**

- I found the FAQ's and glossary sections to be the most helpful.
- Our responsibilities as a 4 year
- The pages that I had earmarked were the pages on Institutional Activities, particularly the steps listing what action each institution would complete. Also, the page discussing, forms, policy, and the appendices area were also extremely helpful.
- The list of institution activities was very helpful. It clearly broke down the expectations for all parties involved
- The institutional activities section was most helpful
- The framework outlined specifying responsibilities for two year and four year institutions is particularly helpful in determining a direction to move forward from.
- Explanations of who is responsible for what.

#### **c. What parts need improvement?**

- There are sections like IT Resource's, Communication, etc... in the manual that have nothing but a cover page. I believe that if they are putting these sections in the implementation manual they should put something in these sections. I know part of the reason these sections are blank is because we are to update these sections with information. However, I would recommend providing some information for each section if they are to be part of the manual.
- FAQs need additional information (MRT student responsibilities, etc.); need to add a student checklist (maybe posted on Websites as well to be given to Opt-in students)
- We didn't find a section which listed the data points that we would need to provide regarding the students participating.
- Samples of communication and case scenarios which I'm sure will be established as we complete the pilot.

#### **d. Suggestions for improvement**

- When an email or some type of notification is sent to the group, you could include a recommended area to add the information within the Implementation Manual. The manual is meant to be a working document. If important information goes out later it may be good to tie it to the Implementation Manual.
- The one thing that could make it better to navigate would be to have consecutive page numbers throughout, rather than some numbering in one section and not another

## **VI. National Student Clearinghouse.**

### **a. Did you register for ETX?**

- Yes
- Yes
- Yes
- Yes, we registered in September. This was a simple process that involved faxing a form.
- Yes
- Yes
- Yes
- Yes
- Yes
- We have not registered. We just received the contract back from legal. We did not already have a signed agreement in place. We will be submitting as a system by the end of the year
- Yes

### **b. If so, did the process work smoothly?**

- We sent the paperwork in a couple times to get the right naming convention, but it went pretty smooth.
- Yes
- Yes
- We have not yet had a chance to transmit a transcript since this will be done at the end of the trimester after grades are posted.
- Yes, per registrar, However we are now hearing that UM system schools will have to exchange 2013 transcripts other than through ETX as it is not ready.
- We have not received any transcripts yet through MORT mailbox, however we have been receiving and sending transcripts electronically through the NSC for some time
- Yes
- Yes the NSC was very responsive to our questions and the process on their end was fast
- There was a lack of information on how login info would be received once registration was submitted. I had to call and request the login info and had assumed I would automatically receive it after submitting our school's request to participate. I began receiving emails saying I had info to pickup, but did not have communication telling me how to logon and pick it up.

### **c. Suggestions for improving the process**

- As discussed in the meeting, be ready to begin receiving and processing ETX transcripts as soon as the inbox is turned on. The process is very straightforward and we feel it is not necessary to spend time in a "testing period" for this process.

- It would be helpful if NSC mailboxes could only be visible to the institutions in MO and
- not to the general public. We do not want students to accidentally choose these.
- We would like to see the name changed from MORT to MRT.
- As the designated provider of service, I would like to see NSC offer a tutorial on how the process works, showing what the schools see when they visit the site to send or receive information.

## **VII. Tracking process for students**

- Right now the group is pretty small so they are being tracked manually. We have the students on a spreadsheet and check them individually. We will check to make sure they are enrolled. If so, we will have a transcript sent to MACC. If not, we will check with them and see if they are continuing on at the college and in the MRT program. If not, we will remove them from the program and notify MACC.
- Before we go live with all community colleges in Missouri we plan to automate the process. We still need to work out the sending of electronic transcripts through the NSC. We need to develop a batch process that will allow us to automate the sending of electronic transcripts each term and allows us check and make sure that the students we are sending out transcripts for are currently enrolled. We then need to test the processes with MACC before we expand the process to all community colleges in Missouri.
- We plan to create a table that will store the students who have been sent the original invitation and all future contact.
- Worked with the Registrar to set up student groups in My View. The following groups have been set up at UMSL:
  - MRTC – MRT Complete
  - MRTE - Eligible
  - MRTI – Opt in
  - MRTN – No Response
  - MRTO – Opt Out
  - MRNA – No Action
- Currently, we have created a student group to identify these students. Once we receive notification of opt-in, these students are placed in this student group for tracking purposes.
  - Since we have five campus, we're still determining how to allocate RT students accordingly for the degree audits every term. I hope to have approval on our proposed process from the campuses this week.
- At this time we do not have an elaborate system of tracking the students. Our plan is to develop a special code that can be noted in our student information system. We will then be able to pull reports on the students based on the system code. We are still determining if we will need a code for each 4-year institution we will be working with in the future or if we will be able to use the same code for all students.
- We are working on how to automate the process; it is very manual and time consuming at our institution. I'm concerned when we complete the pilot and go live, that we will have the technology and staff to streamline the process.

## **VIII. Did any unforeseen technical issues arise?**

- We haven't had any yet
- This is likely unique to MSU since we are using a custom ordering system, but we are working with NSC to request updated registry data that we can store in our system. They are working on providing us with an easy way to maintain this data based on their registry information. This is not an issue for any institution using NSC's ordering system.

- Just that I needed special security clearance to access and update these student groups.
- Currently, we have created a student group to identify these students. Once we receive notification of opt-in, these students are placed in this student group for tracking purposes.
- Not directly
- Not at this point. However, we haven't received transcripts yet so that's to be determined.
- We are still working on being able to produce a PDF transcript that will pass through the ETX correctly. Our Information Technology department is working on this issue.

**b. If so, how were they addressed?**

- Yes
- Since we have five campuses, we're still determining how to allocate RT students accordingly for the degree audits every term. I hope to have approval on our proposed process from the campuses this week.
- The list serve was very helpful
- We have not asked for any assistance yet.
- I did not receive the assistance I needed through the list serve, but found the two videoconference meetings to be helpful.

**c. Was the assistance received in a timely manner?**

- I felt very good about the response time to others

**IX. Support from the Implementation Work Group**

**a. Did you need assistance from the work group?**

- I contacted Crystal Kroner a few times, but I never contacted the group.
- Not at this time
- Yes, mostly in terms of schedule and deadlines
- Not at this point. However, we haven't received transcripts yet so that's to be determined.
- I did reach out to the workgroup via the listserv, but do not believe there is a lot of information to share at this point. Hopefully that will increase once schools become more active with the MRT processes.
- At this point we've not sought any assistance from the work group, other than what has been presented in the implementation manual.

**b. If so, did you receive the assistance you needed?**

- Yes

**c. Was the assistance received in a timely manner?**

- Yes

**IX. What changes need to be made before the state-wide roll out?**

- I believe there is going to be a lot of confusion if some things aren't standardized before the state-wide rollout. It was mentioned that institutions can negotiate with each other concerning how often transcripts are sent. If that is the case we and every other school will have multiple processes for sending out transcripts. I would recommend that all 4 year institutions send transcripts for all eligible students at one time every 16 week term once grades are posted. The two year college can decide when they wish to review the transcript. Also, this gives a double-check every term to make sure the correct students are in the program. Both the two and four year college can review what is sent and what is received and make sure it matches.
- Ensure the 2-year institutions understand the expectation that courses being taken at the 4-year school will be used to complete the requirements for the grant
- Is there a plan for how multiple institutions will communicate with each other regarding students who opt-in? For example I know Dixie is the contact at MSU and I know when she is planning to contact students. I can't really imagine how my office will keep track of multiple institutions all sending opt-in information at different times.

## **X. Other comments and suggestions.**

- Even though electronic and systematic processes have been set-up for reverse transfer, this is a very manual process. We would like to pursue any opportunity which allows us to be more efficient while following state policy and providing the students what they need.
- I become involved in this process fairly late, so forgive me if the suggestion has been made. Has there been consideration for an electronic, statewide opt-in form where the four-year student could have a drop-down option to select the two-year school? Once selected/submitted, an auto email could be sent to both the four-year and the two-year as notification. (This is similar to how we handle our dual-credit students.)
- The most challenging issue to date seems to be pulling cohorts and defining the students in a four-year school's database to a manageable and relevant pool of candidates. Students who have not accumulated enough credit hours at the four-year institution may not have a strong interest in RT at this time. Conversely, waiting too long to contact a student may exempt the student from the program if said student does not opt-in in a timely fashion. Also from the perspective of a two-year school, finding ways that we can take the initiative to find and contact possible student candidates is an ongoing project for us at MACC.
- We are still 100% on board. This is going to be great for students and institutions.
- I have found there needs to be much more discussion at the 2-year level within the individual institution to decide how the process will work. In many cases, we will need to find options for course equivalencies that may not have been considered in the past. For example, for capstone or cornerstone courses, PE requirements that might exist at one institution but not another, etc. Also, decisions must be made on which catalog the transcripts are being evaluated – is it the catalog when the students last attended the 2-year, the catalog in which they opt in to the MRT program, or the current catalog when the first transcripts are received from the 4-year institution. I tried to generate discussion on this during the videoconference, but assume from the lack of input, that other institutions are experiencing the same issues.