MDHE Committee on Transfer & Articulation
Meeting Minutes
Governor's Office Building, Rm 315
Friday, October 21, 2016
10 A.M. – 3 P.M.

Attendees: Michael Olsen, Beverly Schenkel, Benjamin Howard-Williams, BJ White, Seth Carruthers, David Jones, Krystal Lang, Brooke Lockhart, Amy Werner, Artie Fowler, Kim Harvey

Absent: Gavin O'Conner, Ahmad Sims

1. Welcome/Approval of Minutes
   a. Call to order by @ 10:04 by Beverly Schenkel, recognition of service for past-chair Michael Olsen.
   b. Motion to approve (with minor edits – remove Dixie, correct spelling of Michael's name) min by Seth Carruthers, 2nd by BJ White
      i. Approved Unanimously

2. Treasurer's Report
   a. MRT – No changes, balance stands at $7,823.83
   b. COTA – $58.80 taken out for policy meeting held at Westminster College 9/27/16. New balance is $10,872.71

3. Policy Work Group Update
   a. Amy Werner - Discussed Credit Transfer policy changes/updates with Rusty Monhollon, Assistant Commissioner of Higher Education, last week. Monhollon felt December target approval date is ambitious, recommends moving policy review and approval back to February Board Meeting, to then be announced at the annual COTA Conference.
   b. Question from Michael Olsen – Guidance on policy vs. rules, which should come first?
      i. Werner - Current legal counsel is more focused on rules filed with Sec. of State than the policy, which COTA had treated as driving rule formation. Per Amy – would like to take both the policy and rules forward to the board at the same time.
   c. New section – MDHE legal counsel has also suggested moving the transfer credit rules out of the rules related to Residency and instead be established as their own, separate chapter.
   d. BJ White – Monhollon's response on other proposed changes from the COTA Policy group?
      i. Werner - Stamp of 42 hr block shouldn't have opposition, Monhollon to provide update back to us by the end of the year.
      ii. Agreed that students should be provided a copy of the Rights & Responsibilities (physical or digital), agreed,
      iii. COTA Complaint process to be aligned with the complaint policy specified in SB 997, which is more complicated than the current process, but will give COTA's oversight and review functions more teeth.
   e. Other SB 997 Updates
      i. 42 hr general education block, who will be included in that group? Hope to have administrators represented in the group, Rusty's reading of the bill's language limits to teaching/research faculty. Still being discussed, no determination yet. Schenkel's concern to include administrators with understanding of how to deploy and implement policy changes and the implications for practitioners.
      ii. Werner advised COTA members to expect communication from MDHE to institutional Chief Academic Officers shortly requesting recommendations to serve on the state's general education committee.
   f. Related to General Education block, Math Pathways Concerns

      i. Community Colleges are worried about developing math pathways that may not transfer onto the 4yr institutions. Plan is to include math pathways in the 42-hour block.

      ii. Math pathways will require students to pick a mega-major that will direct students to an area-focused math course which may not apply if the students changed mega-major.

      iii. Goal is Fall 2018 to have Math Pathways defined and deployed,

  g. Additional Policy Updates

      i. Olsen - When will we have a finalized policy draft to share with the full COTA? CCAO will review in December, do we want COTA to have a chance to review and provide feedback?

        1. Werner - will create homework for the full group, to be discussed further at November Conference call.

        2. Objective - Have full Policy Committee gather and finalize the policy segments each on took on into a full draft. Target date to submit to full COTA is Nov 1. All track changes may not be available due to how many people have been involved.

4. Conference Work Group Update

  a. Carruthers - Haven't yet met as a full group. Conference timeline has been put together and will be reviewed after the general COTA meeting today.

  b. Werner - Save the Date has been sent to the old COTA Conference registrants a few weeks ago (2015 attendees only). Werner is looking for as many past attendee lists as possible to create a master list. Currently cannot locate, requesting COTA members to pull what we can and send back to her.

  c. Call for Conference Proposals - Would like a call for proposals to be sent out within the next week. Goal will be to reply with proposal approvals by Friday, December 23 to give presenters 2 months to prepare.

      i. No plan currently to provide different tracks for presentations. May provide tracks based upon what is submitted.

  d. Past Presentation Feedback

      i. Positive feedback on Policy Workgroup, Hot Topics session

  e. Suggested Sessions

      i. Carruthers: Math Pathways (Bruce Vandal of Complete College America suggested Math Pathways speaker), SB 997 (both direction from MDHE on implementation and impact on practitioners/students/policies at colleges and universities around the state)

        1. Werner to contact Vandal about presenting at the 2017 COTA Conference. COTA could pay for him to drive-in, likely could not afford to fly him in.

      ii. Other suggestions

        1. Technology platforms, Online tools, Online Degree Completion, Dual Enrollment, Advising Tracks, Dual/Co-Enrollment (both 2yr and 4yr institution), 2yr & 4yr relations, Transfer Orientation

  f. Conference Registration Update

      i. Werner - Bid to accept Credit Cards for registration online is $10,000 from the state's Office of Administration. Is currently the only state-approved option, so will likely be unable to accept credit cards for 2017 conference registration, instead will need to be paid by check.

        1. Request in to allow institutions to call the credit card servicer to pay over the phone, no decision yet.

      ii. Web form to allow online registration is currently under construction, will be ready mid-November.

      iii. Werner to share Save the Date, will send out to COTA members, asking the members forward out their various professional memberships, internal constituencies, etc. It is also on the MDHE website.

        1. Will also state registrar list and request it goes out on MDHE Facebook & Twitter.

5. Guest Presentation - National & Missouri Reverse Transfer Update with Brenda Selman & Leigh Durdle

  a. Guests

      i. Brenda Selman, University of Missouri-Columbia Registrar & UM System Director of Student Information System Implementation

  ii. Leigh Durdle, UM System Director of Student Information Systems, Project Manager PeopleSoft Student Administration

b. MRT Refresher
  i. 3-phase process, reached out to new students, all existing students, and stopped-out students to notify them about MRT process/program.
  ii. When we left this in April, question posed do we need to form a new sub-committee for the next phase for MRT? Holding pattern since then.

c. Brenda Selman update
  i. As part of the rollout of MRT, wasn't really an existing avenue to share transcripts or info within the state or across stateliness. Spoke with NSC and other states doing reverse transfer, developed a relationship with NSC for file sharing. Due to legislative deadline placed upon MO, had to have our MRT up and running before NSC's file exchange process was complete. So, NSC was able to provide the MORT Box to share secure PDFs.
    1. Noted nationally by NSC as one of the few states with a state wide policy, agreement, and system to facilitate exchange.
  ii. Limitations of MORT Box system
    1. Manual review of PDFs at the degree granting institutions
    2. Locked within MO
    3. 2/3 of our students swirl
    4. Challenges to consider
      a. What is in the student's best interest?
      b. How can we serve those who swirl in and/or out of MO?

d. NSC National Reverse Transfer (NRT)

e. Three phases, currently working on the first phase.
  i. Sharing of information is one of the key questions for NRT - does COTA want to suggest we shift to a new model (national file exchange) or do something in tandem with the current system?
  ii. Pilot Flat File Exchange for NSC
    1. UMSL, Columbia, Moberly
      a. Columbia doesn't get a lot of transfer students, so not a lot of usage of the flat file tool.
      b. Durdle has created a process to allow the MRT and NRT to run in parallel.
      c. Support MO students on the current system, and students from KS or another state
  iii. Pros and Cons of Different Options
    1. Pros of moving to File Exchange
      a. Moving to a system that could pick-up info beyond MO.
      b. Single file submit to NSC rather than multiple drops for each request / institution involved. Create once, NSC will parse out as needed.
        i. NRT process - doesn't require a digital transcript, rather a data set that is sent to NSC.
      c. If we can send attendance/transcript data to NSC now, will be able to send to this tool.
      d. NRT process will include (automatically) a review of NSC data to find out if the student already has a credential rather than the 4yr institution having to do that request manually.
      e. EASY - just FTP your selected data sets to NSC - they review and provide academic data to participating 2yr institutions.
      f. Unique portals for Students, Host Institutions, and Degree Granting Institutions.
        i. Student Portal is up and running now.
      a. NSC notifies DGI whenever data arrives

f. Phase 2 & 3

      i. Phase 2 - single portal to see (for students) - who has accessed my record and what did that record say?

      ii. Phase 3 - Preliminary to help 2-yr schools apply the logic of their degree audit to the dataset from NSC to streamline determination of who is eligible for the Assoc. degree.

         1. Selman - Likely a stretch goal for the foreseeable future.

g. Durdle – Parallel Process for MU

      i. Took the original MRT effort and worked to integrate the national RT effort. Goal is to illustrate that there was relatively little additional effort involved in adding the NRT option to the current MRT process.

      ii. Implementation guide MU is creating with NSC - can send to Werner to share out to COTA members.

      iii. See Leigh's PP Slides for full details

h. NOTE - Individual schools can opt into NSC to share Reverse Transfer information even if the state, as a whole, does not.

      i. Nancy Penna is the contact at NSC.

i. DGI experience with NRT - from the registrar's side

      i. 2yr institution receives the data file, ingests the information into their SIS, then goes through their normal transfer/degree audit process.

      ii. If the 2yr institution isn't ready to ingest the data, then it becomes a very manual process for the 2yr.

      iii. Lots of support from NSC, allowing the 2yr schools to lean on the NSC rather than the 4yr school or MDHE.

         1.

j. COTA Discussion on MRT

      i. Who is currently using this? Build a use group to provide support and feedback to implement this tool. Contact Michelle Black @ NSC to get details on who is deploying this tool in the region that we could learn from / partner with.

      ii. Pleased to hear that it can be an either/or/and use of the system, rather than being forced one way.

      iii. What was presented re: NRT is really a technical solution, so would need to determine how to utilize this opportunity on the ground.

      iv. Recommendation - Add NRT session to the COTA Conference - discuss this new opportunity

         1. Also discuss communication and outreach, get input on engagement efforts with students. Other items to discuss:

      v. Amy to setup a conference call with Michelle Black at NSC to discuss technical details

         1. FERPA rules

         2. Data included in the update files

         3. List of participating institutions in the NRT

         4. Perhaps invite participating institutions in the region to join us for the COTA Conference pre-session aimed at MRT Coordinators.

6. Missouri Reverse Transfer Workgroup Update / Discussion

a. Invite MRT's for a pre-conference session

b. $7,000 of MRT funding available,

      i. Use to arm our MRTs with takeaways they can use with students, advisors, other constituencies

         1. MRT Workgroup to review current materials and consider revisions / additional resources.

      ii. Develop Action steps and resources to engage constituent groups to support/utilize MRT

c. Motion by Artie Fowler for COTA to provide pre-conference session for MRTs and to pay for all MRTs to then stay for the COTA conference.

      i. 2nd by Krystal Lang, Approved unanimously

7. Additional Discussion Item:
    a. Early College Advisory Board Participation
    b. Need a COTA rep to serve in an advisory capacity for one of their work groups. Amy Werner to connect Seth Carruthers with the MDHE coordinator for that board, get more details, then provide information to the full COTA

Next Meeting: November 21 by phone.

Meeting Adjournment at 2:48pm.