**REVIEWED** VERSION 2.0

# Project Details

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| Title | Improving Transcript Analysis Procedures | Status | REVIEWED |
| Category | 6-Supporting Institutional Operations | Updated | 09-26-2011 |
| Timeline | | Reviewed | 10-07-2011 |
| Planned Project Kickoff 07-01-2009 | | Created | 11-24-2009 |
| Target Completion 05-30-2010 | | Last Modified | 10-07-2011 |

- 1:

**Project Accomplishments and Status**

- A:

  - The previous transcript analysis process was labor intensive and, at times, too slow to provide vital information in a timely manner. Further, it did not take full advantage of new technology and software made available to the university. The university has witnessed a dramatic increase in the size and complexity of its applicant pool. Transfer applicants and incoming classes have increased each year since AY 2008. The number of admitted transfer students for Fall 2011 was a 30% increase from Fall 2010. As a result, the previous transcript analysis process, which may have served the university well in the past, needed to be "modernized." In the past, two evaluations were completed for each student. A preliminary evaluation was done prior to the student's arrival at USM. Once classes began, an entirely new "final" evaluation was completed. Both evaluations were done with paper and pencil. When the "final" evaluation was completed, a hard copy was mailed to the student along with a form letter and a summary page. The final phase of the transcript analysis procedure is to actually post the transfer credits onto the student's USM transcript. Final evaluations and posting of transfer credits for students who entered in Fall 2010 were still being completed mid-way thru Spring 2011 semester. The process was further complicated by use of multiple transfer evaluation forms that had been developed as general education requirements were customized for new programs.
  - Over the past year, multiple evaluation forms were condensed so that only three types exist and all were converted to electronic templates. Previously transfer equivalencies were stored both on-line and in large paper copy binders. The paper binders were eliminated. Previously new equivalencies were determined by locating and sending course descriptions to academic departments for decisions. The two analysts in the Registrar's Office have been empowered to make basic decisions on new equivalencies. When they are uncertain, the Registrar is consulted and occasionally the academic chairs. Transfer evaluations are completed only once. Each evaluation is saved electronically, a copy is emailed to the student and to the student's advisor. An electronic copy of the email is stored for reference. The two analysts also now have access to the Admission module to enter the total number of credits accepted for transfer. This provides immediate access for Admission personnel as well as Financial Aid staff. All evaluations for incoming transfer students were completed prior to the start of Fall 2011. A goal has been set to have all transfer credits posted onto USM transcripts by mid-October 2011.

- R:

The University of Saint Mary (USM) is making good progress toward the achievement of the Action Project goals. Significant improvement has been made to the transcript analysis process. USM is commended for implementing the recommendations of the new registrar which were based upon consultant feedback. These actions reflect USM's commitment to to improving support for institutional operations, AQIP Category 6.

- 2:

**Institution Involvement**

- A:

This project involved representatives from all of the offices affected by the project, including the Registrar, Admissions, Financial Aid, Advising, Retention Specialists, Online Programs, Athletics, and Veterans Affairs.

- R:

USM involved a wide range of key stakeholders but does not provide detailed information regarding roles and responsibilities of these stakeholders. USM is encouraged to more clearly define the duties of the various offices involved in the Action Project. By doing so, USM increases the likelihood of generating broad based involvement and support for the Action Project, which is a Principle of High Performing Organizations.

- 3:

**Next Steps**

- A:

See answer #1. Outcomes will be measured by the timing of information provided to Admission staff, Financial Aid staff, incoming students and academic advisors.

- R:

USM's focus on the timely completion of transcript evaluations reflects its commitment to supporting institutional operations, AQIP Category 6. USM may want to consider incorporating stakeholder feedback in the evaluation plan of this Action Project. By doing so, USM demonstrates its focus on key stakeholders, a Characteristic of High Performing Organizations, as well as its commitment to planning continuous improvement (AQIP Category 8) of its student service processes.

- 4:

**Resulting Effective Practices**

- A:

  - Multiple evaluation forms were condensed so that only three types exist and all were converted to electronic templates. Previously transfer equivalencies were stored both on-line and in large paper copy binders. The paper binders were eliminated. Previously new equivalencies were determined by locating and sending course descriptions to academic departments for decisions. The two analysts in the Registrar's Office have been empowered to make basic decisions on new equivalencies. When they are uncertain, the Registrar is consulted and occasionally the academic chairs. Transfer evaluations are completed only once. Each evaluation is saved electronically, a copy is emailed to the student and to the student's advisor. An electronic copy of the email is stored for reference. The two analysts also now have access to the Admission module to enter the total number of credits accepted for transfer. This provides immediate access for Admission personnel as well as Financial Aid staff. All evaluations for incoming transfer students were completed prior to the start of Fall 2011. A goal has been set to have all transfer credits posted onto USM transcripts by mid-October 2011.

- R:

USM described several effective practices resulting from this Action Project, including: the consolidation of multiple evaluation forms; and the increased speed of transcript review, acceptance of transfer credit, and communication to key service offices. USM is providing leadership support which is a Characteristic of High Performing Organizations as well as demonstrating its commitment to Understanding Students' and Other Stakeholders' Needs (AQIP Category 3).

- 5:

**Project Challenges**

- A:

  - Fall 2011 has become the new benchmark for the transfer evaluation process. The Action Project will be deemed successful if all evaluations are completed prior to the start of a semester and all transfer credits are posted to the USM transcript prior to the opening of registration for the following semester. The will be a challenge, but one we believe we can meet. Thus sucess of this project will be measured by the timing of information provided to Admission staff, Financial Aid staff, incoming students and academic advisors. For this and other reasons noted above, we would like to continue this project for one more year and then retire it.

- R:

It seems reasonable for USM to extend this Action Project for one year in order to respond to 2011-12 performance results. In the coming year USM will be advantaged by proactively collecting and analyzing these results and developing strategies for further improvement. In doing so, USM demonstrates its commitment to Measuring Effectiveness (AQIP Category 7). USM is commended for its good progress toward achieving the goals of this Action Project.