

Transfer Within & Without

Rolling out the TCS

PCCAT 2019 CONFERENCE

JUNE 2019

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Why do we care about Student Mobility?

BC's credit transfer system helps **diverse learners access** and **achieve** life-long **educational goals**. Enabling students to **begin studies** in **home communities** by ...

- providing **aligned pathways**
- facilitating **transition and retention**



Access
Affordability
Flexibility
Efficiency
Success

45% of bachelor grads attend more than one institution

57% completed in the region they graduated HS

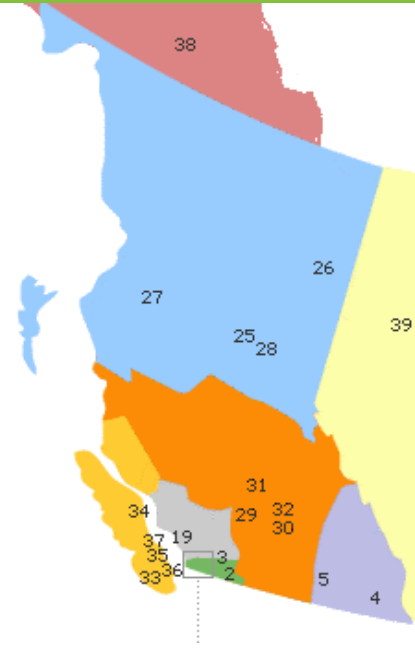
400,000+ credits

54,000+ mobile students

50% of students report PSE debt with avg debt ~**\$27K**

Fast Facts - Canada

- ❑ total pop. +37M
- ❑ main driver of pop. growth is intl migration
- ❑ +54% migrants are b/n 15 – 39 years old





Est. 1989

Oversees the BC Transfer System

Facilitates admission, articulation, application b/n PSIs, education ministries, public & private education sectors

19 member Council, appointed

3 standing committees (Research, Admissions, Transfer)

68 articulation committees

Post secondary institutions

- 25 public
- 12 private
- 2 out of province



manages online services

- **BC Transfer Guide**
- **Transfer Credit System**



Workflow & transfer tables

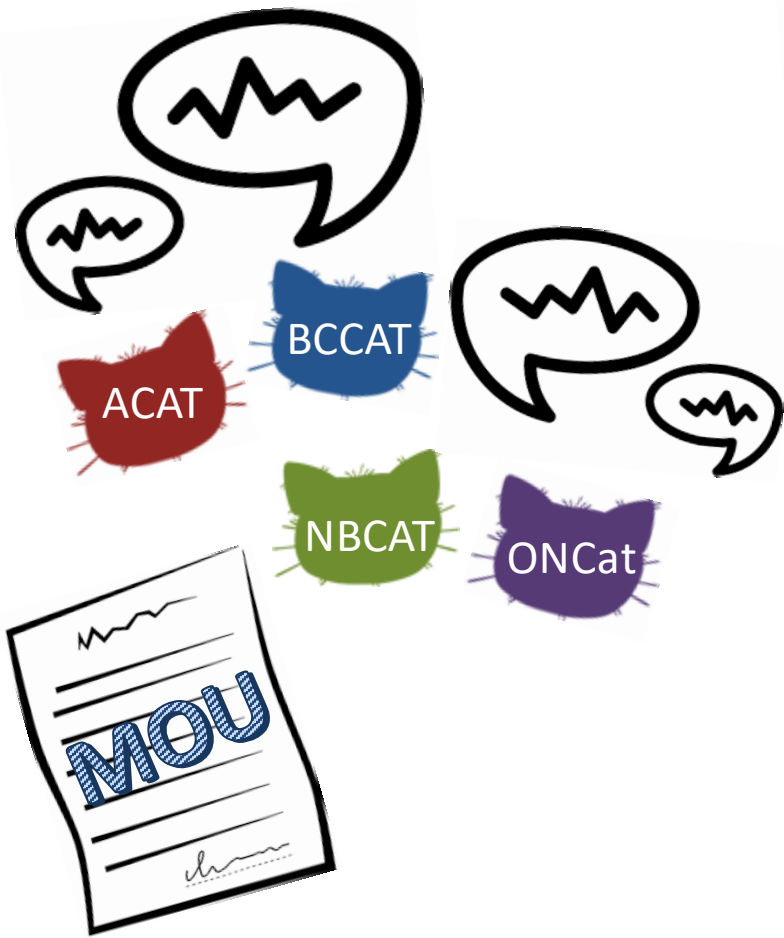
- Sender institutions can submit requests for articulation
- Receivers can respond
- Results are sent to BCCAT to be published on BC Transfer Guide
- Receivers can also establish credit for each other's courses at any time
- Houses PSIs transfer agreements together and related outlines



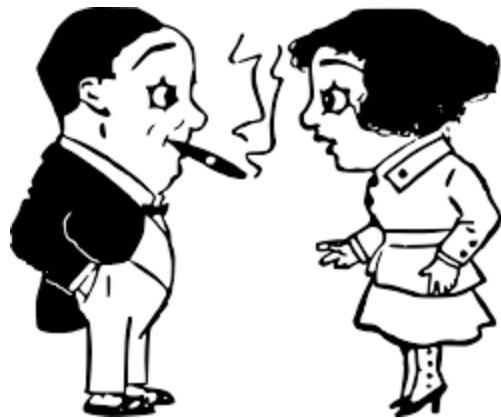
New & Upcoming Features

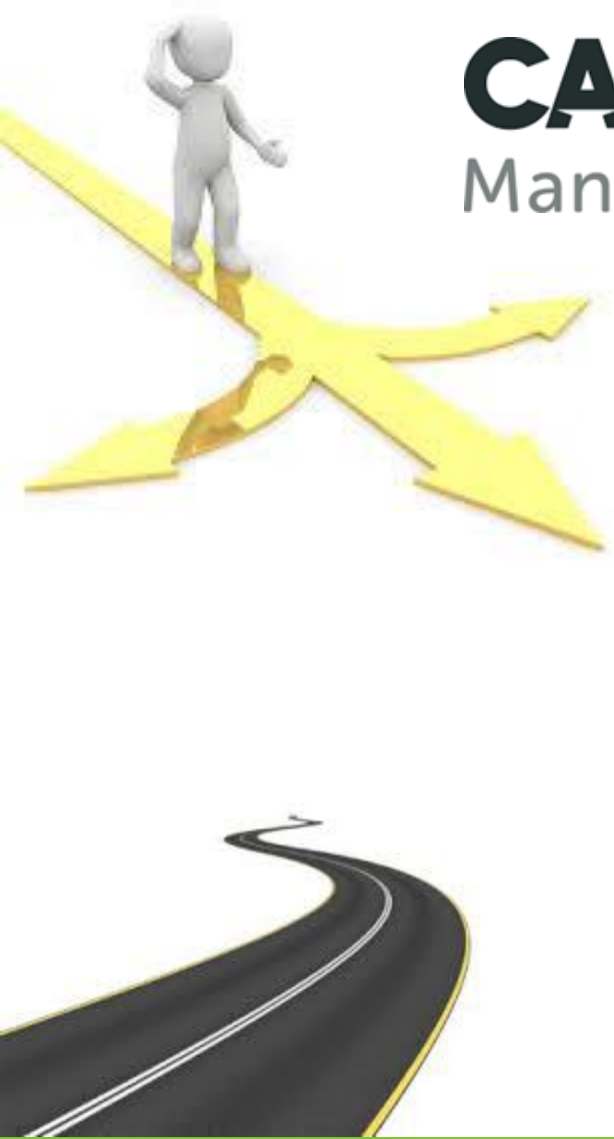
- Articulation builder
- Automated expiry dates and renewal dates
- Evaluations through email or online interface
 - Multi-agreement management
 - Triangulation
 - Decentralization allows for layered approval





In 2014, four provincial credit transfer councils sign MOU to work together to enhance higher education credit transfer and student mobility within and across their jurisdictions, and on a pan-Canadian basis.





CAMPUS Manitoba



In 2014, BCCAT offered to share its technology with CampusMB for redevelopment.

Collaborative partnership b/n CampusMB & BCCAT. CampusMB would get BCCAT's transfer credit evaluation system to redevelop for their own jurisdiction. In return, BCCAT would receive its own instance of new TCS for its own use.

Manitoba business need:
provincial level systemic transfer system

University of Manitoba business need:
manage their internal transfer tables



CAMPUS Manitoba



New Manitoba government elected in April 2016, ending former governments 17 years in office.

TransferMB project was deprioritized and funding promised for institutional implementation of TransferMB was pulled.





- BCCAT's time to play with the new TCS!
- Due to competing priorities, TCS project roll out began March, 2017
- Anticipated launch: Summer 2017
- 2 rounds of UAT testing
- Delays due to more development
- Soft launch: Feb 2018

UAT



Rounds 1 & 2

15/10 post secondary institutions **volunteered**

23/17 transfer credit **specialists** participated



USER TESTING
IS SUCH SWEET
SORROW



Interviewees

“BC has ... developed ... what is possibly the **most extensive credit ... transfer** arrangement in the **world.**”

Bekhradnia, *Higher Education Policy Institute (UK)*

The Developer



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Challenges

How to share IP b/n two independent but non-legal entities that are associated with two legal entities?

IP Questions:

- who **owns** the intellectual property,
- who has what **derivative rights** to use and modify,
- who is **responsible for data**, and
- who **holds data**?

Legal clarification took ~18 months

INTELLECTUAL
PROPERTY

Challenges



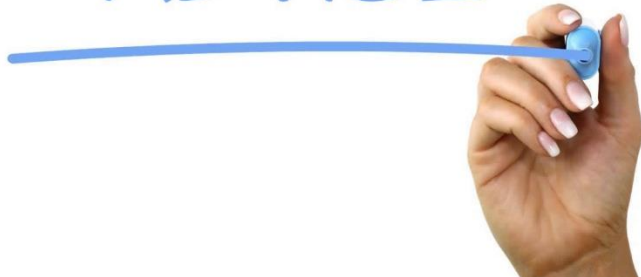
Complexity in transfer arrangements exist between jurisdictions.

How transfer is structured can be different and there may be **layers that are relevant** in some jurisdictions and not so in others.

The Executive Director

- Sort **IP hurdles** in advance
- Have full **funding** for development and implementation before you start
- Have the **leaders in govt bodies involved earlier** as some councils are part of govt with different legal & and business process needs than those that operate independently

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Challenges

- ❑ Old system **data model** carried data in text fields, preventing data referential integrity and automatic updates & made data migration challenging and time-consuming
- ❑ PSIs typically maintain **2 data sources** with duplicated info: internal transfer tables + BC TCS
- ❑ Issue of **managing inconsistency**, leading to situation of awarding transfer credit inconsistently. Unless PSI prioritized BC TCS, **quality assurance** was poor.

The Technology Director

- ❑ No other jurisdiction **tracks student mobility** the way that we do. If you don't track student mobility, it's more difficult to build your business case, which is necessary particularly if your sector-level org is embedded w/n govt
- ❑ Great **value in collaborating**, building off systems that already exist rather than developing a brand new stand-alone product

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The Developer

Challenges

- ❑ Greatly underestimated **support institutions would need**. PSIs data extraction and clean up took months.
- ❑ Loading agreements once Manitoba PSI extracts were cleaned up was relatively easy. With BC, huge **migration from old system** and data in string making data migration more complicated and time-consuming

The Developer

Assessment of fit. Could TCS work for your jurisdiction?

- Will process to production be supported?
- How does transfer work in jurisdiction?
- Is course outline considered IP of faculty?
- In BC, institutions use acronyms, which are used in TCS
- Can data in institution's internal tables be appropriately re-structured?

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The Developer

- ❑ Development process **several months to a year**. Depends on institutions' circumstances, # of other projects that involve technical team, coordination of change mgmt plan, empowered champions, training needs, & data extraction and cleanup.
- ❑ **Budget** substantive but not prohibitive. CampusMB's development budget was ~\$250k, which was barely enough

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- ❑ Explore **cloud** environments with high level cloud providers, Microsoft and Google, now providing Cdn-based service

The Stakeholders: Institutions



+19,000 students annually
offering +160 programs
Lansdowne and Interurban
campuses

+1,100 employees
\$126M annual budget



Undergraduate institution
providing academic, career, and
continuing studies courses to
+23,000 students annually



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BC's largest university
+65,000 students annually
Vancouver & Kelowna main campuses

+16,000 faculty and staff
\$2.6 billion annual budget



Challenges



Langara.

THE COLLEGE OF HIGHER LEARNING.



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The Stakeholders: Institutions

☐ Resourcing & Restructuring

Ideally, 3 FTE for all TC work. In 2014, 1 FTE for incoming TC work. Outgoing remains Academic Advising.

~1 ½ years ago Transfer and Articulation area restructured. Have 2 full time positions & 1 assistant.

TC manager position eliminated in 2010, revived in 2016. Before, advisors portfolio. In 2011, 1 FTE for TC work until 2016, one more FTE. More recently, new TC Manager hired.

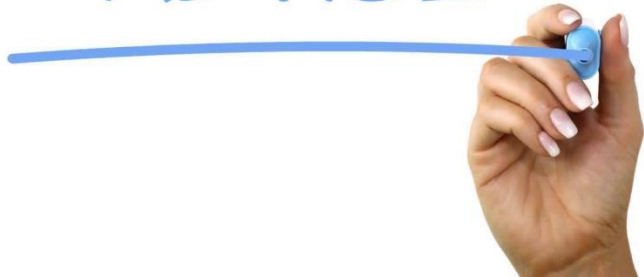




The Stakeholders: Institutions

- System is **predicated on trust**. When we are evaluating TC equivalency, we must trust each other that we are offering good curriculum.
- Pay attention for **big hallmark changes**. Anticipate & address needs for system-wide changes that impact student mobility patterns, which in turn impact transfer system
- As TC equivalency becomes norm, TC & advising need to work together

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- Address **ancillary policy issues**
eg. What is max transferable credit accepted from another institution toward a credential?

Challenges

The Stakeholder: Langara.

THE COLLEGE OF HIGHER LEARNING.

- Getting & keeping articulation **agmts up-to-date** was/is still a challenge, in both systems. Eg. Articulation agmts assessed 20 yrs ago, published on BC Transfer Guide, course has since changed but agmt has not been re-evaluated.
- Lack of **info recorded** in internal SIS
- Diff. **understanding of transfer enviro** & purpose of articulation agmts **b/n Registrars' Office & faculty**
- Obtaining **course outlines** from institutions can be challenging for students

The Stakeholder: **Langara.**

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- ❑ Connect with **other institutional transfer credit specialists**, great resources, a practice of learning from each other to help create transfer practices that are consistent within an institution and among institutions, which ultimately serves transfer system & students
- ❑ For project mgmt, **id crucial pieces** of info that need to migrate before launch
 - ❑ Send a separate email out directed to those institutions that **did not participate** in testing with info on who to contact with questions

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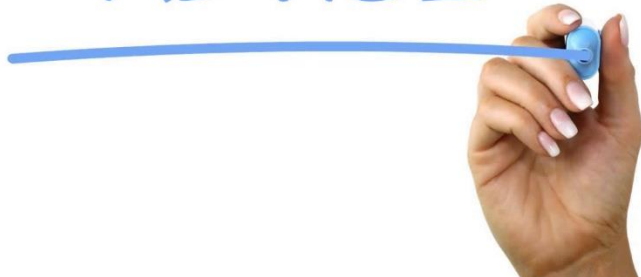
The Stakeholder:



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- ❑ Use **institution's communications team** to communicate project to all involved rather than have staff engage in change mgmt on an ad hoc basis. Project purpose & technical side of project needs to be managed.
- ❑ Communication with every stakeholder to ensure a **similar level of understanding** regarding project. Have senior level **buy in**, the Registrars.

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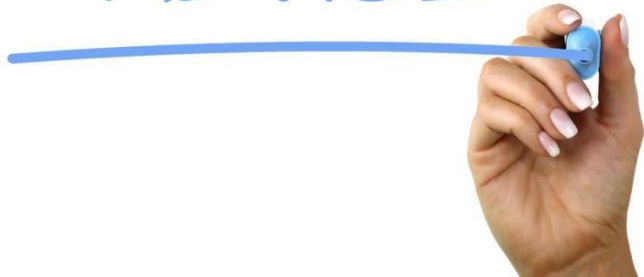
Challenges

- ❑ Managing **stakeholder expectations** when deploying a new system & there are delays. When goal post keeps changing, its difficult for institutions to plan their own onboarding timelines and communicate same to their internal stakeholders.
- ❑ Overlooked a **crucial stakeholder**, the faculty evaluator, in the UAT and consequently, missed development of their interface before the launch. Made it challenging for institutions who had to manage that issue, both in terms of change management and workload.

The Change Manager

- ❑ Aim for **more communication** always.
- ❑ Ask “**Who else** should be involved in UAT?”
- ❑ It may be a good practice in a change management project to have a **regular scheduled communication**, even if there is nothing new to report as it allows those people who have not thus far engaged in the project an opportunity to do so or at least keep apprised of it and keeps the project front and centre of those that it will impact.

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The Change Manager

- We **involved our system users** in UAT of new system, AFTER we had received the already developed new system from Campus Manitoba – don't do that
- Have a **high-functioning relationship** with your software developers
 - Decisions are made in the context of budget, time, workload, and expertise constraints, one makes due; however, it is good business practice to **re-visit those decisions regularly**. See if now would be a better time to make a better decision.

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Coming...

- ❑ COMPLETE: Pilot project with UBC, using their robust data set, to see how TCS can serve as their **internal transfer tables** and **interface with their SIS**
- ❑ Development of **international agmt database** using same workflow
- ❑ Opportunity to support **pan-Cdn publication** of intra- & inter-provincial transfer agmts

For more information on the **TCS**

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