A Series of Fortunate Events

New Mexico State University used a new approach to achieve a significant increase in the efficiency of renewable energy systems. The university's recent success is attributed to the innovation and collaboration among its faculty and researchers at the TES Equinor Materials and Transmission Lab.
A Series of Fortunate Events

How Metropolitan State University used a pilot appeal system as a catalyst for increasing efficiency in transfer by utilizing CollegeSource's TES Equivalency Workflow and Transferology Lab

Presented By:
Amber Deim, Assistant Registrar
Debbie Pohl, Credential Evaluation & Transfer Appeal Administrator
Nayda Salas-Prough, Credential Evaluation & TES Workflow Liaison
Sam Safin, Credential Evaluation & TES Administrator
Terri Topness, Credential Evaluation & TES Workflow Liaison
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This is Us

- High Transfer
- Non-Traditional Students
- Longevity & Knowledge of DARS Team
- DARS Team Do Not Approve Equivalencies
Transfer Appeal/Equivalency Requests - History of Process

Pushing for Change Since 2012:

- Paper forms
- Loose process for requests
- Few students/advisors requesting equivalencies
- Slow response times
- Little accountability
- Lack of communication - who is responsible?
- Reluctance for change
Transfer Review & Appeal - Pilot Process

• Intention of Pilot: collect transfer data for system

• The Pilot:
  • Six schools were part of the Pilot
  • Went live October 2016
  • Students submit courses for review via eServices
  • Select courses from DARS Report
  • Upload support documents
  • Include note to reviewer
  • Staff is notified via email when something to review

• Still in Pilot Phase:
  • System Office working on enhancements
Transfer Review & Appeal - Pilot Process

• Our Expectations of Pilot:
  • Replace paper forms for GELS appeals

• What Students Use it For:
  • Review for errors & missing courses
  • Math/Science overrides
  • Goal Area review
  • Equivalencies for programs
  • Requests for exceptions
  • Miscellaneous questions

• How it Morphed Into Equivalency Project:
  • Decided to send all courses out for equivalencies
New Processes

Current Processes for Managing Transfer Appeals & Course Evaluations:

- Appeals Connect With Course Evaluations

- Business Process:
  - No longer end point only, with course reviews initiated randomly

- Workload Structure:
  - In addition to student-initiated review, we can create course review evaluation tasks in TES
  - Coursework Evaluated:
    - Transferology Lab "Most Searched," "Unknown Equivalencies"
    - TES Reciprocal Equivalency report
    - Transfer Pathway courses
    - Other
Key Factors - Challenges

- DARS Team Not On Main Campus
- Difficult to Schedule Training:
  - Varied faculty schedules, locations, & preferences
- Some Departments Confused About Their Role:
  - Time to determine evaluators
- Summer Break
- Managing Timelines & Accountability
- Legislative Consequences for Lack of Implementation of Smart Transfer Plan
Key Factors - Strengths

- Deep Knowledge Base of DARS Team
- Support & Input from Provost:
  - Accountability
  - Clear timelines
- Implemented as a Soft Launch
- Consistent Communication & Relationship-Building:
  - One point of contact
  - Enhanced trust & rapport
  - Requested input & acted on feedback
  - Positive reinforcement & expectations
- Simple Training:
  - Met on their terms
  - Step-by-Step printable instructions
  - Training video
Outcomes & Surprises

- Training Went Well:
  - Easy-to-use tools (TES & Transferology Lab) made a difference

- Faculty On Board:
  - They, too, dislike form-and-email-based processes

- Less Reluctance from Departments:
  - Not a loss of control

- Evaluators Gaining Better Understanding:
  - Benefits of equivalencies rather than exceptions
  - University policies and procedures

- Improvements to Current Processes:
  - Additional course review notes now appear in Transferology

- Process Discovery:
  - Equivalency review patterns
Ease of Use

- Ext. Easy (10)
- Easy (3)
- Medium (1)
- Difficult (0)
- Ext. Difficult (0)

"The long list of options when choosing equivalents could be streamlined. However, the notes section is very easy to use."

"My email alert didn't come, but other than [that], it was very easy."

"It becomes easier the more I use it and try more actions."

Time/Evaluation

- Less than 1 Min (1)
- 1-5 Min (9)
- 6-10 Min (2)
- 10+ Min (2)

"10 minutes (I usually check the school website)"

"under 10 minutes for most requests up to half an hour if I need to look up additional information"

"We do it by committee, so after opening the email, I copy/paste into an email and send it out for committee approval. The turnaround time is very quick."

"if I know what my decision is, it takes about one minute"

"20 seconds"

Training Cover Everything?

- Yes (13)
- No (1 - see comment)

"Perfectly"

"I was confused at first about the blank equivalent field - it wasn't clear at first how to handle that."

Future Training?

- TES Hands-On Lab (0)
- Add'tl Documentation (0)
- Yearly Refresher (2)
- None (Contact TES Team as needed) (11)
- Other (1 - see comment)

"Maybe it's hubris to say none, since I'm still in the early stages. But it seems easy."

"I probably will still contact the TES Team to get them even with refresh training."
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Future Aspirations

- Planning Ahead for Transfer Pathway Coursework
- TES + Transferology Integration Enhancement Request
Questions?
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