# PROJECT INFORMATION

Project Name

Implementation of Transferology

Requestor

Clint Rebik, Vikash Lakhani

Acct/Dept.

Registrar

Divisional VP

Peg Blake - Enrollment Mangagement & Student Affairs

Stakeholders

Project Champion

Clint Rebik, Vikash Lakhani

Primary Customer(s)

Campus-wide

What problem are you looking to solve?

HSU is continually looking at new ways to market to, and recruit, new transfer students. The Transferology network from CollegeSource does this by providing a nation-wide presence for recruiting and a venue for publicizing our transfer articulations. Transferology works with TES – the Transfer Evaluation System also from CollegeSource. Institutions build and store equivalencies in TES that are subsequently uploaded to Transferology on a weekly basis. This keeps the data fresh and up-to-date. HSU already has hooks into TES so this would complete the transfer package and provide a new low-cost recruiting answer to HSU's problem.

The CO has a two year pilot agreement with CollegeSource and 8 CSU campuses. Angela Williams from the CO personally discussed the pilot with HSU's Registrar at the SUR meeting earlier this year and asked HSU to join for the 2nd year engagement with CollegeSource. The CO is paying for the pilot subscription licenses but campuses will retain on-going annual subscription costs if they choose to continue use after the pilot.

## Which departments or processes are affected?

As a recruiting tool, this product would benefit a multitude of departments on campus (from the Registrar's Office to Academic Departments/Colleges to Housing to Athletics) by   clarifying coursework articulation.for out-of-state transfer students. The tool would affect the Admissions Advising process by providing a first time experience between students   shopping for a new school and HSU Admissions Counselors, creating an early relationship which can lead to increased enrollments.

## What is the consequence of not doing this project?

If we do not move forward with the 2nd year pilot opportunity with the CO, we are jettisoning the advantage of using CO funding to investigate a potentially successful   recruiting tool.

## What would a successful solution look like?

Work with the Chancellor's Office and vendor CollegeSource in their 2nd year pilot to: configure the Transferology Connector tool, clean-up articulations to offer better matches      to inquiring students, establish an advisor presence to draw in students through the Transferology network, determine cost benefit (baseline recruiting numbers before going live,   then again in 6 months and at the 1 year mark to determine improvements) and based on the CB returns establish on-going operational funding.

## How else might you solve this problem?

While PeopleSoft has incredible functionality and potential benefits for other scenarios, in this circumstance the benefit from Transferology is the established network the vendor has   created, and the ability to utilize other tools from the same vendor for a robust end-to-end solution. At present, there is no way to allow anyone from the outside world to register   and access PeopleSoft production which would be required for this project.

## Strategic Objective(s)

☐Prepare students for meaningful relationships across differences.
⬛Prepare students for socially & environmentally responsible leadership.
☐Prepare students for sustainable environmental & financial stewardship.
⬛Strengthen partnership with local communities.

## How does this project align with HSU's strategic objectives?

Objective 1.5 of Strategic Objective #1 above states that HSU "will expand and support a diversified, globalized, and culturally expanded campus by increasing the enrollment of   international and non-resident students."  Specifically, Objective 1.5 goes on to state that HSU will "increase out-of-state student enrollment by 10 each year."  By creating an HSU   presence on the Transferology network, we become highly visible in our support and recruitment of out-of-state students, a connected player (rather than an outlier) in the objectives of the Chancellor's office, and a partner with educational communities (Strategic Objective #2.)

What resources will this project require?

Staff from the Registrar's Office (DARS Encoder, Articulation Officer, Transfer & Graduation Counselors, Advisors, Registrar) will be required and they are aware of the project. ITS staff
– Sabre Stacey, Mike Bradley and Dale Sanford.

## DEADLINES

What is your deadline?

5/31/2016

And is your deadline a hard deadline?

No

Why must the project be completed by this date?

This is the end date for the 2nd year pilot currently in progress between the Chancellor's Office and CollegeSource. Decisions need to be made by this date to determine the need   for on-going funding to pay the annual subscription.

## COSTS

Funding Availability?

○ Fully Funded - includes initial and on-going costs

◉ Partially Funded - only initial OR on-going but not both

○ No Funding - for initial or on-going costs

○ No Hard Costs

Estimated annual initial costs

$0.00

Estimated annual on-going costs

$9805 + 3%

Explanation of annual estimates

The Chancellor's Office (CO) is currently in their 2nd year of piloting Transferology with 8 CSU campuses (year 2 of a potential 3-year pilot.) Eric Forbes and Angela Williams have   requested that Humboldt join the pilot in year 2. The CO is paying for the subscription license during the pilot but campuses are expected to fund the subscription going forward if   they choose to continue using the tool. (Although not guaranteed, it is projected that the CO may fund year three of the pilot, but budget approvals are yet to be determined.) The   vendor's annual subscription costs increase year to year by 2-3% in January. The cost as of January 2015 was $9805.

## TECHNICAL SECTION

Type

New

Affected or Related Systems/Modules

- ☐ 25Live
- ☐ Academic Works
- ☐ Biddle
- ☐ Blackbaud (Raisers Edge)
- ☐ CASHNET
- ☐ Class Climate
- ☐ CLETS (CA Law Enforcement Telecommunications Sys)
- ☑ College Scheduler
- ☑ DARS/U.achieve
- ☐ Drupal
- ☐ Facilities
- ☐ Faculty Center
- ☐ Google
- ☐ Hobsons
- ☐ KBox
- ☐ MAP-Works
- ☐ Maxient
- ☐ Moodle
- ☑ myHumboldt Portal
- ☐ Nolij
- ☐ OBI
- ☐ PBX
- ☐ PeopleSoft Campus Solutions
- ☐ PeopleSoft CFS
- ☑ PeopleSoft HR
- ☐ Pyramed/Propharm
- ☐ Questica
- ☐ Resource25 (R25)
- ☐ Schedule25
- ☑ Student Center
- ☐ Studio Abroad
- ☐ SPURR (Energy Data Management Sys)
- ☐ Other

Other Affected or Related Systems/Modules

N/A

Considerations / dependencies

As the CO is already in their 2nd year pilot, it would be ideal to act expediently to take advantage of the CO's funding for this pilot year.

Information Technology (IT) Feasibility Statement

This potential project has been discussed with Mike Bradley and Dale Sanford as well as Sabre Stacey. One of the components needed to work with Transferology was installed during our

u.achieve/DARS upgrade this past spring but left in a non-active state. Transferology is a nation-wide network designed to help students explore their college transfer   options. Students login to the network site and add coursework, exams and/or military learning experiences to see which schools available in the network have matching courses that   may be awarded if they transfer. Another option available to students is the ability to search for classes to take at another school that will transfer back to their current school.

Students are also able to ask questions and request advising from a potential school. The site that Administrators/Advisors will access is Transferology Lab, which allows management of course equivalency tables to improve transfer equivalencies, manage programs, create course bundles, and advise and recruit students.

**ADDITIONAL INFORMATION**