

TRANSFER AND ARTICULATION OVERSIGHT COMMITTEE
Pennsylvania Department of Education

Meeting Notes

January 28, 2010
10:00 AM - 12:30 PM
Dixon University
2986 North Second Street
Harrisburg, PA 17110-1201

TAOC Updates

Course Catalog Extracts: All of the course extracts have been submitted to AcademyOne and will be uploaded to PA TRAC by February 15.

Curriculum standards subcommittees: Institutions have until Jan. 31 to submit courses to the subcommittees for review. The curriculum subcommittees approve courses through March 15th.

PDE Transfer eNewsletter: Beginning January 8, PDE will distribute electronically a biweekly newsletter pertaining to the statewide transfer and articulation system. This communication is an effort to keep various stakeholders current on system developments and our latest initiative. TAOC members can submit suggestions or announcements to Julie.

Equivalency Synchronizers: AcademyOne had developed an interface that allows for course equivalency information to be electronically loaded into PA TRAC from an institution's information system. As of January, seven institutions had developed and implemented synchronizers. If other institutions are interested, contact Julie Rutledge, who will schedule a conference call to discuss. A synchronizer increases the accuracy of the information on PA TRAC and available to students and at the same time eliminates the need for institutional personnel to enter course information manually into multiple systems.

Expanded Participation of State-related Institutions

In December, PDE met with representatives from the state related universities that have not elected to fully participate in the statewide transfer system – Pitt, PSU and Temple – to discuss a process for identifying Framework courses that they will accept from all of the participating institutions.

In January PDE provided the representatives with several resources to assist them with this task as well as access to Course Equivalency Management Center so that they can view syllabi and related course information. Julie asked that all of the TAOC members be as helpful as possible to the state-related representatives as they enter their work and provide assistance as requested. The deadline for completion is June 15, 2010.

Developing Statewide Program-to-Program Articulation Agreements

Julie reminded the group that at the November TAOC meeting, the group discussed the following:

- Goals and guiding principles for the program-to-program articulation
- A method for identifying parallel degree programs, allowing the group to meet the legislated deadline of December 1
- Criteria for prioritizing the development of the articulation agreements and selecting pilot groups
- Faculty involvement
- Using program articulation committees to develop the agreements
- Two-phase timeline for implementation

Timeline

Since the November meeting, the following has occurred:

- PDE collected program data from the TAOC institutions and identified the pilot areas to begin in spring 2010 as psychology and math, using the criteria suggested at the November meeting.

- PDE distributed to TAOC the list of institutions and programs to be included in the pilot groups and asked members to validate the information.
- PDE revised the timeline for Phase 1 to reflect the comments from TAOC members and to avoid having faculty participation over the summer, if possible. Key changes include:
 - February 2010 – Pilot PACs begin working
 - May 2010 – Pilot PACs complete articulation agreement and submit to TAOC
 - August 2010 – Articulation agreements are finalized
 - Phase 2 remains the same with a start date of July 2010

Pilot PACs

Julie said the role of the pilot PACs is to be a recommending body to TAOC, similar to that of the Curriculum Subcommittees. The purpose of the pilot Program Articulation Committees (PACs) is as follows:

- To outline an agreement that allows a student to transfer an associate degree to a 4-year institution and have at least 60 credits applied toward the graduation requirements of the parallel bachelor degree program.
- To develop an implementation model that can be replicated or expanded for future articulation work related to the initiative.
- To identify potential barriers.
- To achieve early successes.

Julie told the group that the primary goal of any pilot is to develop an implementation model that can be replicated or expanded for future articulation work. She asked everyone to keep in mind that this is a time for the group to test strategies, to see what works and what doesn't and to learn.

TAOC then split into four workgroups and brainstormed the following as they related to the pilot PACs:

- Composition
- Charge
- Deliverables
- Workflow
- Resources

Composition of the PACs:

In November TAOC discussed:

- Having one faculty member per institution per committee
- Allowing individual TAOC members to appoint their representatives
- Requiring PAC members to be current faculty in the field of study
- Having the PACs led by co-chairs – one from an associate degree institution/one from baccalaureate degree institution

Julie told the group that it is likely that the PACs will not have an equal number of associate & bachelor degree programs. As it stands, the Psychology PAC has 12 two-year and 16 four-year institutions; the Math PAC has 11 two-year and 15 four-year institutions. She reminded them that Act 50 also requires PDE and TAOC to develop processes in consultation with faculty and personnel of the participating institutions.

To help frame the discussion, Julie said TAOC decided the Curriculum Subcommittees would be comprised of the 3 community college representatives, 3 PASSHE representatives and an appropriate number of representatives from the opt-in institutions. Each subcommittee has a chair and a recorder of meeting minutes.

Workgroup Notes:

Suggested membership included:

- Faculty from content area
- PASSHE – Dean of the college rep that program & administration from CC
- Transfer counselors
- A TAOC member who meets the academic criteria
- Possibly faculty representative from east/west part of state from each sector

Recommendations:

- Smaller group that communicates w/their sector so all institutions are represented
- 12-member committee that includes regional and sector representation
 - 2 Faculty CC (1 East - - 1 West)
 - 2 PASSHE Faculty from the discipline (1 East and 1 West)
 - 4 Transfer Counselors (2 CC & 2 PASSHE)
 - 4 TAOC (2 CC & 2 PASSHE)

Comments:

- Timeline is too ambitious
- Faculty workload issues
- Concerned that the PACs would need to be balanced if each group only included a few representatives with an academic area in the discipline.
- Faculty and/or transfer counselors on the PAC would carry the burden of communicating or being everyone else's lifeline to that PAC and providing input or feedback and so forth but that would allow you to not have to have everyone at the table but, in fact, just have a few people at the table but still allow for that external feedback that is going to be so key.
- If all institutions don't participate on a PAC, they may have something decided for them by others.
- After thinking through the dynamics of having reasonably sized groups, we came up with a group consisting of two faculty representative, someone from transfer, registrar, admissions, community colleges and had two from each of those categories, one TAOC member and one person from the opt-ins.
- That second layer where these representatives as part of the charge are responsible for making sure constituents, stakeholders across the institutions from that sector part of the _____
- Julie: I'm seeing a common theme already with communication, representatives communicating with others in their sector and their stakeholders.

DIANE'S GROUP:

Faculty, department chairs (4years)

Transfer advisors (both sectors)

Make-up & balance:

Issue/Barrier:

What is charge to PAC?

What are they defining?

Language

Courses

Core/program

Make-Up

Some faculty

Transfer/Registrar/Admissions

Academic Administration

Representation decided by each sector but balanced by 3 representation areas

6 CCS

6 PASSHE

1 TAOC member

3 Others

Interim of Second Level

Each institution must be included & be able to share issues w/PAC

Each institution (Academic) decides how to organize

Provost

Individual institutional representatives in that area

Members should be selected by the Provost of the institution so that they are aware of what's going on
These members would communicate to TAOC.

- Chairperson of a TAOC Curriculum Subcommittee
- Limit the size of the groups to 12 active representatives from various institutions
- Important to have equal number of representatives from two year and four year institutions
- The way of nominating or identifying those representatives in some sort of rotating grid or along those lines.
- Sectors would submit the names of representatives that they thought would fill these positions on these PACs and that use the criteria that this group really focused on if you want to explain that when we look at this group as a whole, the type of experience that you wanted.
- PACs should include reps who encompass a range of experiences, not just a background in the discipline.
- Rotating membership similar to that which was used for the dispute resolution committee
- 2-step process for reviewing the appointments – first step is sector submits representatives; second step is TAOC reviews the appointees and then TAOC would recommend the members to PDE, based upon the criteria or the experience determined to be important on each PAC

JULIE'S GROUP:

Programs w/articulation agreements

Everyone?

Transfer Counselors

Dean of Arts & Sciences

Curricular exp.

Faculty

Chairman of Curriculum Committee

Small groups – 8 – 12 ppl w/equal representation

Equal # of 2 & 4 year institutions

Criteria

Curriculum exp.

Administrative exp.

Developing articulations

Knowledge of discipline

TAOC exp.

Understands process & procedure (i.e. Registrar)

Transfer knowledge

1. CC & TAOC members meet as group & submit names for consideration

2. Rotating membership on each PAC

3. 2-step process to review appts.

Appointments

Institution nominates

TAOC rec. to PDE

Nomination Call/Wording is important

Need to be specific in the ask

Need to get experience of appointment in order to consider/approve

Look at points in student life cycle

Each institution has a representative on each PAC so the balance on the committee would be 2/3 faculty and 1/3 other individuals who serve as resources in operations, administration, transfer, articulation etc.

Institution would recommend 2 names to TAOC.

TAOC would then review the recommendations and determine who should serve

Faculty members need to determine the agreements, not individuals who don't have the content expertise

Issue: The faculty from the four-year institutions may not know what outcomes they expect at the end of a four-year program, which means the PACs need to determine the competencies they want or expect the two-year institutions to flow into.

Faculty from the 4-year institutions should be equivalent to “x” amount of experience, not a person that is new – a person who has an understanding about the equivalency between curricula at the various institutions from both respects.

JIM’S GROUP:

- Individual members should be full-time faculty with an academic degree in the discipline
- The Committee as a group should include:
 - PAC Chair (or parallel)
 - Someone with experience in higher education administration/operations
 - Someone with experience in transfer, such as a registrar
 - Someone with experience in articulation
 - Someone with experience in program outcomes/competency/assessment
 - A college dean
- Must be "super majority" of faculty on each PAC
- Colleges would nominate 2 people to serve on each PAC
- PACs would include one representative from every institution that has a program included in the articulation agreement

Deliverables & Charge

In November, TAOC discussed using the PACs to identify learning competencies required for a student to enter a parallel bachelor’s degree program at the junior level.

The charge of the Curriculum Subcommittees two years ago was to develop and agree to a set of standards against which to evaluate potential course equivalences against agreed-upon foundation courses in their discipline areas. The deliverables were a list of first-year courses and course sequences for the framework category that the subcommittee oversaw.

JIM’S GROUP:

1. Matrix of what exists in terms of the various curricula, competencies and outcomes at the 2-year and 4-year institutions
2. Set of competencies all students in each discipline are expected to have after two years – that is for the 4-year and 2-year institution as well as the 4-year in terms of grouping together
3. Specified content areas expected to be covered; such as, algebra, calculus
4. Matrix documenting how each institution meets that competence

PACs are looking at disciplinary competencies, not general education competencies and requirements.

How an institution meets competencies will vary & integrity of variation is respected

Diane’s Group

Identify is needed by the student for seamless transition from the two-year to the four-year level

Discussion of the competencies and that participation needs to result in a discussion with PAC reps

As a charge there needs to be an embedding of the guiding principles, consideration of major requirements and competencies and recognition of program variations

Deliverables

- Program-to-program articulations that include competencies, full junior status, all credits applicable to graduation requirements
- List of issues and challenges that come up with discussions
- Recommended process for future PACs
- Identify resources used in making determination
- Process for review based on future program changes

DIANE’S GROUP:

Charge

1. What is needed (by student) for seamless transition to junior level (in program)

1. Program to program articulation

Program equivalences

Includes:

Skill set needed by student for success at the 4-yr institution

Competencies: Full jr status w/all credits applicable to grad requirements

Competencies years/end/outcomes 4 years/entry as juniors (for 4 years what do they require of their own students at junior level)

2. Identify issues/challenges in discussions

Recognition of variances in "program" requirements among all participating institutions

3. Identify resources used in making determinations

4. Process for review based on future program changes

What are "major" requirements?/Major & cognate

2. Require participation of each institution in discussion of competencies up to PAC reps

3. Within charge:

- **Embed guiding principles**
- **Major & cognate**
- **Competencies**
- **Recognize program variations**

Deliverables

The community colleges have a number of articulation agreements with the senior institutions.

You can argue the methodology as to how the institutions got there but the bottom line is there is a grid where “x” amount of community colleges have “x” amount of degrees with the senior institutions so why would we go backward and start at a course-to-course level when we already have this work that’s done so what we are doing is looking at the commonalities that are already in existence with these articulation agreements. I would like to take it at a more macro level then looking at the course-by-course level because if you go course-by-course, we’ll never get done so work with the framework of the articulations that are already in place – look at those outcomes and competencies and the PAC group will analyze those rather than go to the course level. IF there is a dispute at that level, that could possibly open the door to talk about a course here or to talk about a course there. We want to focus on the macro rather than the micro.

Julie: Sounds like focusing on the commonalities and then negotiating differences.

PAULA’S GROUP:

DELIVERABLES of PAC

If end result is degree competencies; most PAC should be faculty

Do the chosen programs at the associate level meet the general expectations of the 4 year degree

Review the work that has been done. Don’t start from scratch

Grid – plugging in the programs already in place

GAP ANALYSIS

Look at commonalities of already in place articulations

Look at courses only in dispute

Find out if missing pieces & design plug in?

Not expected that all CC programs become identical, nor PASSHE's

Work at Macro level, not micro.

Deborah: One of the things that I heard here was very germane to our particular discussion about the idea of staying at macro level but also looking at learning outcomes and learning competencies—we have to define that more clearly but one of the charges we would like them to do is to figure out what learning outcomes are actually essential for the change into the 60-credit to the junior status so from the first 60 to the junior status should be 120-126 depending on the program, The way that which we can do that _____ is clearly articulated _____ so then if we could do these

competencies/learning outcomes, it will also give some flexibility to the different schools because sometimes you end up giving them courses that _____ credit outcome and that way be able to incorporate all the different ways in which the different schools might show that particular number. Now the trick is going to be groups to come up with or agree upon what learning outcomes are at the sophomore/junior level

The other thing is we said we really do want to look at just the major right now but theoretically because the past has always been done and add the gen eds _____ agreed upon but I will say it's _____

JULIE'S GROUP:

Charge/Deliverable

Program-Program articulation

Not course equivalency

To develop a way for the AA or AS to transfer in it's entirety to a BA/BS in parallel major

Based upon competencies/learning outcomes

What competencies prepare a student for advanced standing?

Need to answer question: What competencies prepare a student for advanced standing in major?

I think we need to hash out some of these things and get this foundation worked out but just so that you are aware, the curriculum subcommittee process when it began, this the process that helped to form the framework was that they had collected—they, meaning you, TAOC—had collected all of the foundation courses from the institutions and identified the common course titles which is very similar to what we were talking about—I think over here in this one corner—was that you collect the information that's out there and look for the commonalities and then they came up with a list of possible course titles that would fit into that framework. They then submitted that, that's one of their deliverables—and that was submitted to TAOC. Once approved, then they also collected the syllabi for each course on the list. They were able to then—through the syllabi for those different course titles because again, now we had taken it from this funnel down into something more manageable, they were able to then look and say what are the common learning outcomes that we see on the syllabi—again, this is just how one of the groups did it. Then, they agreed as a group on the commonalities. They negotiated the differences and they developed an equivalency standard for that category based on the outcome of their prior work. There was a check and balance process in place because at that point when they developed the equivalency standard, it was submitted to TAOC for review and then TAOC looked at it, evaluated it, sent it back, well, we have some concerns--maybe language, whatever and it came back to them. So, again, I am going to just skip over that part today but as you leave here today, I would like you to be thinking about what is the process for identifying these commonalities and the differences. How can the pilot PACs build on the existing structure and process which again is something that we've been hearing a little bit about in this room. What is the articulation process at your institution and what are some of the best practices or the components that possibly could translate into the work that we're doing here and then again at what point would you recommend that the checks and balance occur. I mentioned a couple times where the subcommittee with their work would take it and say, this is what we've done so far. That's a milestone. There's another deliverable. This is what we end up with and at the end, then, like I said, we have a list of courses and equivalents from all of your institutions that line up to the framework. So, what I would like to talk about now in our last 15 minutes or so, are the resources that we think that the PACs need. I know that we haven't necessarily discussed or come to any agreement or consensus on exactly what they are going to be doing but I still think that we have a general sense of the type of work they're going to be doing and who is going to be doing it. I see integration with all of you saying it needs to be an integrated PAC of some sort. We need to bring in different constituents who are stakeholders and have a different knowledge that they'll be bringing to the table. However, if you have one person who is versed in transfer and articulation and another one who is versed in curriculum, is there information that both of those people need in order to do some of this work or in order to inform the other one. So, think about it this way. I want you to consider what types of resources are needed to achieve some of these goals that we've been talking about and to end up with an articulation agreement that allows for the full transfer of the AA or AS into the parallel program. These are just some thoughts. Definition of terms – I think I heard Deb say something about definition of terms, competencies versus learning outcomes. Policies. There was a lot of discussion in my group having to do with academic passport. But if you were—maybe if you are an opt-in, academic passport doesn't mean anything to you so is that something that needs to be provided? What about accreditation or Middle States policies? What about PDE policies? Again, accreditation standards, curriculum. We said that—if we were to go with this group and we get a matrix of the curriculum and look for commonalities, someone has to collect that. Where are we getting these agreements? What about course equivalencies, best practices. These are just some things off the top of my head when we were working. So, in the last couple of minutes, I'd like you just to come up with a list of resources. I'll collect

those and look for commonalities and see what would be helpful to put together into what we've affectionately called a toolkit but I know not everyone really enjoys that title. But, again, what kind of resource pack or whatever do we need to provide.

Resources

- Existing articulation agreements in these disciplines
- Statement about the framework
- Goal is of the pilots
- A list of the program learning outcomes by institution
- Catalogs or catalog extracts relative to programs that can identify with the learning outcome
- A resource person who identifies transfer workflow expert to assist the group with processes in this work
- Somebody who knows academic planning as opposed to simply academic advising or expertise in the content area
- Someone who has expertise as a career planner
- National best practices that other states have already adopted relative to this system-to-system articulation
- Identify challenges and roadblocks other states have encountered
- A webinar on learning outcomes and relation to the competencies
- Directory of names, contact information for people within these disciplines, either departmental chairs or divisional deans
- Electronic resources to facilitate the meetings from a distance and eliminate the need to members to always meet in person

Jim's Group

- History of the legislation
- Glossary of terms (i.e., define competency, learning outcome, articulation agreement, etc.)
- Best practices – 2+2+2
- Robert's Rules
- Group facilitator – an objective facilitator who doesn't have anything to gain or lose
- Syllabi for the programs included in the PACs
- Schedule of meetings
- Timeline
- Best practices from the states that already have statewide articulation agreements
- Point person at PDE and TAOC for the PACs

Paula's Group

- Collect competencies or accreditation practices and principles from organizations related to math and psychology
- List of competencies expected at each level of the program
- Admission, retention and graduation requirements for the 2- and 4-year degree programs
- Transfer policies
- A resource who has a working familiarity with the PA TRAC website and search features to assist members with using the site to complete their work
- Compensation for the PAC members.

JIM'S GROUP:

- **Understanding of what is meant by competency**
- **Math HS standards for starting point – ADF Amer Diploma Project**
- **Math 2+2+2 stud USF grant**
- **Current Artic agreements/checksheet**
- **Programs Outcomes**
- **Rules of Order**
- **Not syllabi – lead to course – course not prog – prog**
- **Point of Contact who serves as a liaison between PACs and PDE/TAOC**
- **Legislation & "history" of foundation**

- PaTrac info etc
- Common place on internet portal minutes/agenda
- Schedule for meetings/timeline
- Best Practices – who has competencies already (Bologna Process)e.g. N.C. (literature review)
- "Catalogs" copy for each program

PAULA'S GROUP:

- Articulation agreements, program-to-program already in existence into a grid
- Organization for math – w/'Ametic' & also Psych. w/expectations/competencies of students at each level in math
- Accredited agencies guidelines need to be available
- Need the actual policies of Tran. & Art. & the legis.
- Admission requirements:
- Retention & grad for each institution for each program
- Working familiarity w/PATRAC
- Compensation for PAC members
- Common vocabulary

DIANE'S GROUP:

- Act 50
- Budget
- Clerical support & facilitators
- Copies of existing agreement
- Access to software for group conversation
- Program audits – outcomes for CC degree & outcomes for jr. status
- Curriculum reqs for all institutions
- Accreditation reqs.
- 30 credit framework
- Who has specific degrees
- Meeting location
- Template (for all PAC's)*
- Information/links to other states
- Orientation for PAC's – definitions timeline charge & deliverables
- Access to list/personnel from all institutions pertinent to program, etc.
- Software tools, list serves, etc.

JULIE'S GROUP:

- List of existing articulation agreements
- Framework – What it is? Goal?
- List of program learning outcomes by institution
- Catalogs for programs
- Transfer workflow expert to assist group w/process – to help lend context to work
- Expert who understand Academic Program Planning as consultant
- A planner who knows the flow
- Career Planner
- National Best Practices in other regions in the major & articulation
- Can also ID challenges & solutions
- Webinar about learning outcomes & relation to competencies
- Names/Contact info for discipline chairs at each institution
- Electronic Resources to facilitate meetings
- List of working articulation agreements
- List ID competencies required at 60 credits &/or ID competencies required at end of Bachelor degree

Issues: How does this affect 4-4, 2-2 transfers?

Resources for preplanning such as a template for all the PACs to work off of that have common assumptions and guiding principles

Electronic resources to facilitate virtual meetings and post documents

List of existing articulation agreements in psych and math

Samples of articulation agreements in various disciplines

List of existing course equivalencies and degree requirements

Advising guides

Among the PASSHE universities there are only four articulation agreements in psychology and math. The universities have other articulation agreements that allow students to transfer an associate of arts or associate of science degree to transfer but only four are specific to psychology and math.

Julie: As far as next steps, it really depended on what we got through today what our next steps were going to be but the first is going to be develop an implementation model and distribute to TAOC for review. When I say develop an implementation model, I'm not saying that I'm going to put together everything and say, here you go. We need a starting point. We're going to take these ideas. Look for commonalities. Themes that we're seeing through these discussions. I will put those together and distribute to all of you for review and feedback. We are going to need to schedule the initial pilot PAC meetings as soon as possible because, again, regardless of the process and the appointment and so forth, we have to get this on the books so that people know what to expect. Collecting the resources, again, whether it's facilitators, electronic resources available, collecting the data, we need to start working on that and I may most likely prioritize the resources so, again, it's preplanning. We'll focus on that. We'll get it to them as soon as possible. If there is additional information, we may have to continue to collect that as we go through but with the pilots, given their time frame of about 2 ½ months, a lot of this will need to be selected by PDE and/or TAOC because really they are not going to have time to collect it themselves unlike maybe the PACs or whoever starts this work in the Fall, when they have a year, we can make a request and they can bring this stuff to the table. We need to identify PAC numbers. Once we decide the charge and model that we're using, we have to obviously decide the PAC numbers. These are the dates that I had just come up with but, again, I think that after hearing some of you and I'm going to need to process this evening and tomorrow, they maybe completely unrealistic but we know that it's going to be very tight. A lot of work is going to need to be done here in the next 3-4 weeks. So, again, I want to thank you very much. I think it's been very helpful to hear what everyone else had to say. If you have additional comments that you think about after the fact, feel free to email them to me. I will get information to you as soon as possible. It was really great to see the energy and dynamic in this room. If you have thoughts, let me know. I will send you the PowerPoint. We will be taking the notes, compiling them and they will be distributed. Thank you very much.

Meeting adjourned at 12:34 p.m.