1. Support Services Report Template

Report Info

Name of the person completing this report: Angela Schneider
Title of the person completing this report: University Registrar
Service: Transfer Credit Evaluations
Division/College: PEMSA
Supervisor/dean reviewing report: Greg Smith
Name of second reviewer (if necessary): Linda Dalton

3. Mandated Service

Link to Scoring Rubric

1.1 Please indicate below if any aspect of the service is legally mandated by any of the following and provide the relevant reference.

Title 5: Yes
Campus Policy: Yes
Any other: Yes
Federal Law: FERPA

Provide a brief explanation, if necessary, in < 60 words.

Title 5, campus policies, and Assist.Org all dictate how courses taken at other institutions are transferred and applied to the general education requirements at CSUEB.

4. Importance of Service

Briefly describe the service in terms of its primary function(s) and purpose(s) using <120 words

The transfer credit evaluations unit reports under the Office of the Registrar, with the purpose of determining transferrable credit for incoming students and continuing students who take classes outside of CSUEB. Other responsibilities include adjusting transfer credits for current students as policy changes, proactively communicating with students to assist with understanding their transfer credit summary, and proactively communicating with the campus community and advisors to assist with understanding transfer credit summaries and resolving student issues/complaints.

Link to Scoring Rubric

2.1 Who are the primary receivers of this service? (Please enter the percentage of each user group that is relevant)

Students: 75%
Administrators/staff: 10%
Colleges/departments: 15%
Total: 100%

Link to Scoring Rubric

2.2 Please indicate the direct or indirect impact of the service on students for each of the three University Action/Student Impact Areas listed below (for example processing financial aid applications would be direct impact on students while managing utility services would be indirect).
<table>
<thead>
<tr>
<th></th>
<th>Direct Impact on Students</th>
<th>Indirect Impact on Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td></td>
<td>✓</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td></td>
<td>✓</td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your selection for each area.

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Transfer Admission supports community college counselors/teachers and members of the community throughout the Bay Area, California and regional states. On occasion, Transfer Credit questions are posed by community college counselors, etc.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>Providing a timely and correct transfer credit evaluation is crucial to a student’s success and impacts retention and graduation rates. Students require this information for accurate course selection so they don’t enroll in classes not required for their degree or courses already taken at another institution.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>This service assists students in reaching their graduation goals so they can continue on to their subsequent plans of obtaining employment, continuing their education, etc.</td>
</tr>
</tbody>
</table>

Link to Scoring Rubric

2.3 Applying the four choices presented below, please indicate the consequence of NOT having this service on each of the actions in the left hand column.

<table>
<thead>
<tr>
<th></th>
<th>4 - Service provides evidence of direct impact in more than one area</th>
<th>3 - Service provides evidence of direct impact in one area</th>
<th>2 - Service provides evidence of indirect impact in more than one area</th>
<th>1 - Service provides evidence of indirect impact in one area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
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<td></td>
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<td></td>
</tr>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Provide a brief narrative (<60 words each) explaining your choice.

<table>
<thead>
<tr>
<th></th>
<th>Evidence submitted to support the chosen selection (&lt;60 words for each selection)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-college (helping students to enter the system)</td>
<td>Transfer credit questions are posed by prospective students and college counselors, etc.</td>
</tr>
<tr>
<td>During college (helping students succeed while they are at Cal State East Bay)</td>
<td>The Transfer Credit evaluation service is necessary to provide an official evaluation of the incoming credits for new students to assist students in selecting appropriate courses necessary to complete graduation requirements.</td>
</tr>
<tr>
<td>After college (helping students establish meaningful lifework and be socially responsible contributors to society)</td>
<td>Without this service students may take longer to reach their graduation goals which would delay their ability to seek employment or reach their subsequent goals after graduation.</td>
</tr>
</tbody>
</table>
2.4 Alignment with Shared Strategic Commitments

How does this service contribute to or align with any of the eight Shared Strategic Commitments (SSC) listed below?

<table>
<thead>
<tr>
<th>Reinforce academic quality through open-minded inquiry, innovative teaching, engaged learning, and distinguished scholarship</th>
<th>The completion of the transfer evaluation plays a vital role in providing academic quality to students by ensuring all prior course work is documented and there is a clear path to graduation.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enhance our inclusive campus, responding to the backgrounds and interests of our diverse community and promoting their academic, professional and personal development</td>
<td></td>
</tr>
<tr>
<td>Serve students first, by expanding access and enhancing each student’s educational experience and prospects for success as a graduate and lifelong learner</td>
<td>Incoming transfer students must have their transfer credit evaluations completed in a timely manner with accurate information to start off on the correct academic path at CSUEB. Also, emphasis is placed on providing clear, consistent and timely information to students.</td>
</tr>
<tr>
<td>Foster a vibrant community through enriched student services and student life that support student engagement and learning</td>
<td></td>
</tr>
<tr>
<td>Contribute to a sustainable planet through our academic programs, university operations, and individual behavior</td>
<td></td>
</tr>
<tr>
<td>Continuously improve our efficiency, transparency, and accountability while practicing mutual respect, responsiveness, and collaboration across the University</td>
<td>Share information and collaborate with other departments on campus to provide a channel of communication about transfer credit issues. Providing clear, consistent and timely information to students, advisors, and the University community.</td>
</tr>
<tr>
<td>Support the civic, cultural, and economic life of all communities in the regions we serve through partnerships that promote education and social responsibility</td>
<td></td>
</tr>
<tr>
<td>Demonstrate our continuing record of leadership and innovation in higher education, focused on 21st century skills, including science, technology, engineering, and mathematics (STEM)</td>
<td></td>
</tr>
</tbody>
</table>

2.5 How might the demand for this service change over the next five years? (Please choose one category below).

 Likely to increase

Provide a rationale for your choice (assumptions, impact of new policy, etc.) in <120 words.

This is dependent on the enrollment goals of the University, but the number of transfer students has increased over the past three years from approximately 2800 to 3800 students. State mandates like SB 1440 (Star Act) and the increase in self support degree programs will continue to increase the work load.

3.1 Do you assess the quality of the service you provide?
If “Yes”, what benchmarks, best practices or measures of success, either internal or external, do you use to measure service quality (e.g., timeliness, accuracy, adequacy, meeting deadlines, satisfactory completion of assignment, etc.)? Please describe in <120 words. If no, please explain.

1. Lack of errors reported in the transfer credit evaluation and the timeliness in which they are completed.
2. Meeting the current goal of delivering an evaluation within the student’s first two terms of attendance.
3. Meeting internal processing deadlines and benchmarks.
4. High level of student/staff satisfaction (low complaints).
5. Fast response on incoming inquiries.
6. Successful collaboration with other CSUEB departments.
7. Positive feedback from academic advisors.

3.2 During the last three years, have you adopted any measures to improve the quality of this service? Please describe in <120 words.

On June 1, 2013 this service was moved from the Admissions Office to the Registrar’s Office so there would be staff solely dedicated to providing transfer evaluations due to the rapid growth in transfer application processing workload. A supervisor was assigned to conduct quality checks on all evaluations, work with the technical staff to resolve problems with the CAAR, and improve efficiencies. In the past, evaluations were not always completed during the student’s first two terms of enrollment. A change was made to work on evaluations for all enrolled students versus all admitted students. A new communication was also developed to provide important information to newly admitted transfer students, and a transfer credit website and workshop are under development.

3.3 What idea(s) do you have for improving the quality of this service within existing resources (e.g. development of benchmarks, surveys, feedback, etc.)? Please describe your plan(s) in <120 words.

1. Continue to work with the technical staff to make sure the CAAR (electronic degree audit) functions to place courses accurately.
2. Develop a transfer credit workshop for all transfer students, and a transfer credit website.
3. Additional technical support for all programmatic changes.
4. Creation of enhanced reporting.

3.4 What ideas do you have for improving the quality of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Increasing staff levels proportionate with the increased volume of transfer students is crucial to improving the accuracy in and timeliness of evaluations and information provided to the constituents. Delivering an accurate evaluation in the student’s first term of enrollment would contribute to student success and reaching graduation in a timely manner.

3.5 Do you use any formal or informal process to assess the level of satisfaction of the service users?

Yes

If yes, describe the process and most recent results in <120 words. If no, please explain.

Informally, the supervisors monitor the transfer credit email to assess any complaints related to dissatisfaction from the constituents. The members of the transfer credit advisory group also report any issues. Complaints from student and feedback from
staff/faculty on campus also assist in measuring the level of satisfaction.

3.6 The university recently conducted a customer satisfaction survey for some services (results for this service are attached, if applicable). Do you have any comment or response to the results? Please describe in <120 words.

The student survey covered this service, with usage between rarely and sometimes. Students rated importance higher than other services covered by the survey (4.58 out of 5) but quality lower (3.86, compared with the university average of 4.06).

3.7 Do you have any formal or informal guidelines for personnel in your department regarding how to treat/interact with receivers of this service?

Yes

**If yes, please describe in <120 words. If no, please explain**

Consistent with PEMSA’s culture of service, the staff are trained to respond to inquiries when possible even if outside their area of service, and to provide professional and detailed responses. Feedback is provided to staff when communications are not up to the required standard. There is also a policy document maintained and accessible to staff, and coding procedures are documented so that consistent information and service is applied when dealing with the receivers of the service.

3.8 Does your service have annual goals (targets) of achievement regarding the quality of the service provided?

Yes

**If yes, describe the annual quality goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.**

The current goal is to deliver an accurate transfer credit evaluation within the student’s first two terms of enrollment, respond to all inquiries in a consistent and timely manner including tickets opened by staff/faculty on campus, and process all athletic certifications by the established deadlines. It has been challenging to achieve these goals given the increase in applications and enrolled students with no change to staffing levels. At times, students do not receive their transfer credit evaluation in their first two terms and must wait several enrollment cycles before an official audit is processed. Athletic certifications must be completed accurately and by the established deadlines (up to 1000 students/year) due to Division Two requirements.

3.9 Does your service have annual goals (targets) of achievement regarding the quantity of service provided?

Yes

**If yes, describe the annual quantity goals (targets) and indicate if the service achieved those goals (targets). Please provide evidence, if possible, in <120 words. If no, please explain.**

The current goal is to deliver a transfer credit evaluation within the first two terms of a student’s attendance. This goal has not always been met due to the increased number of applications to process in the admissions office which is the reason this service was moved to the Office of the Registrar. However, this deadline will continue to be a challenge with current staffing levels due to the increased number of enrolled transfer students, especially for Fall admits which is the highest term of transfer students admitted (2,200 students for Fall 2013). The number of transfer students has increased by 1000 in the past 3 years. This service must also process up to 1000 athletic certifications annually.
6. Efficiency of Service (cost effectiveness)

4.1 Using the spreadsheet provided for all employees in your department, please distribute salaries of individuals across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

164899

Attach your allocated spreadsheet here.
Registrar Allocations.xlsx

4.2 Using the spreadsheet provided, please distribute your department’s annual operating expenses across all services provided to reach an educated or reasonable estimate of the cost of providing the service.

0

4.3 Using the spreadsheet provided, please distribute the square footage of work space across all services provided to reach an educated or reasonable estimate of the use of this resource.

225

Attach your allocated spreadsheet here.
Registrar Allocations.xlsx

4.4 During the last three years, have you adopted any measures to improve the efficiency (cost effectiveness) of providing this service (e.g. reducing salary costs, operating expenses or use of space, or increased output without increasing cost. Etc.)?

Yes

If yes, please describe the measures in <120 words. If this is a new service introduced over the past three years, please indicate. If no, please explain.

1. This service was moved from the Office of Admission to the Office of the Registrar on June 1, 2013 so staff could be dedicated to just processing transfer credit evaluations.
2. A change in procedure was made to process evaluations only for enrolled student versus all admitted students.
3. New reports were created to drive work flow and track all transfer credit data.
4. Creation of a new transfer credit email account.
5. A subcommittee of SSAC was formed, the Transfer Credit Advisory Group, with representation from different department on campus to discuss issues and policies related to transfer credit, improve services, and increase efficiencies between departments.

4.5 What idea(s) do you have for improving the efficiency (cost effectiveness) of this service within existing resources (e.g. restructuring, merging, outsourcing, ways to cut costs, technology, etc.)? Please describe those ideas in <120 words.

1. Work with the technical staff to ensure the CAAR (Degree audit system) is accurate so that the staff spend less time in manually reviewing each evaluation.
2. Improve communication to students so they send fewer e-mail inquiries and have a better understanding of the transfer credit
3. Develop a transfer credit website and a workshop for students so they ask fewer questions by phone and e-mail.

4. Increase efficiency by ensuring evaluators in admissions, transfer credit, and graduation produce accurate work so other evaluators do not have to check or change work that has already been completed.

**Link to Scoring Rubric**

4.6 What idea(s) do you have for improving the efficiency (cost effectiveness) of the service if additional resources were provided. Please describe your idea(s) in <120 words.

Additional staff resources are essential to the success of this service, and would result in evaluations being completed sooner, allowing students to understand their degree progress and make accurate course selections. Additional benefits include an overall reduction in time to graduate and increased student success. It is currently a challenge to deliver quality work in a timely manner given the large volume of students while completing all athletic certifications which also have rigid deadlines for compliance with Division Two requirements. Approx. 25,000 is spent annually in overtime to complete the work within the deadlines. Dedicated technical resources are also required to keep the CAAR (degree audit system) updated so the staff spends less time on each evaluation making manual corrections.

**Link to Scoring Rubric**

4.7 Do you have any plan(s) to improve the efficiency (cost effectiveness) of this service in the next 1-2 years (e.g. reducing costs, increasing productivity, etc.)?

No

If yes, please specify whether these plan(s) involve reducing salary costs, operating expenses and/or use of space. Please describe your plan(s) in <120 words. If no, please explain.

Given the existing staff resources, it would be challenging to reduce the costs while still meeting the goals and deadlines expected for this service, including the processing of all transfer credit evaluations and athletic certifications.

**Link to Scoring Rubric**

4.8 Please describe the estimated output for this service for fiscal year 2011-12, quantify if possible (e.g. volume, service tickets resolved, people serviced, appointments, etc.) in <120 words.

In 2011-12 (Summer 2011 - Spring 2012) there were 3,305 transfer credit evaluations to process. This does not include responding to tickets opened by advisors on campus or to students via phone/e-mail. In addition, this service must process up to 1000 athletic certifications annually, which requires an initial review during the term followed by a final review after the term ends.

**7. Other**

**Link to Scoring Rubric**

5.1 Are you aware of services similar to this one that are being provided by another department at CSU East Bay?

Yes

If yes, please provide a list of those departments. How are the services described here similar or different? Please describe in < 60 words.

The Office of International Admissions provides transfer credit evaluations to all students who have taken course work outside the U.S. The results of their evaluation are recorded in the PeopleSoft degree audit system (CAAR).
5.2 Is there anything unique or distinctive about your service? Please describe what is unique or distinctive in <120 words.

Other than International Admissions this is the only service on campus that provides an official transfer credit evaluation to students.

Link to Scoring Rubric

5.3 Are there any additional things about this service that you would like the task group to know? Please describe/explain in <250 words.

Extra resources are crucial to providing accurate and timely transfer credit evaluations to all incoming domestic transfer students. The result would impact the campus at large positively: accurate course selection by students, academic advisors (in AACE, GE and major departments) can provide accurate direction in their advising, students would not repeat courses they have already taken and the number of inquiries by phone/email/in person should decrease if they have the information sooner. The need to provide detailed reporting for athletic certifications also detracts from the ability to process audits without additional staff.