

**ILLINOIS TRANSFER AND ARTICULATION INITIATIVES
ANNUAL REPORT 2012-2013**

Submitted for: Information.

Summary: A primary goal of the *Illinois Public Agenda for College and Career Success* is to “Increase the number of high-quality postsecondary credentials to meet the demands of the economy and an increasingly global society.” One of the recommendations identified under Goal 3 is to “Strengthen articulation through stable funding and expansion of transfer tools such as u.select and the Illinois Articulation Initiative and through development of an objective measure of transfer and acceptance of credits.” The Illinois Articulation Initiative (IAI) continues to be the primary statewide vehicle for encouraging transferability among postsecondary institutions in the State of Illinois. The u.select project (formerly the Illinois Course Applicability System), has been implemented and continues to complement the IAI while significantly enhancing the availability and accuracy of transfer information to allow even more effective and efficient degree completion. Due to cuts in the state’s budget, both projects are under serious threat. In an effort to improve the pathways for students entering community colleges undecided about their intended transfer destination, significant changes have been made over the last three years to expand the scope of IAI to include acceptance of the major recommendations by public universities. This item reviews the current status of the IAI and u.select projects, highlights the past year’s activities, and outlines the challenges facing the projects in the near future.

Action Requested: None.

STATE OF ILLINOIS
BOARD OF HIGHER EDUCATION

**ILLINOIS TRANSFER AND ARTICULATION INITIATIVES
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Executive Summary

A primary goal of the *Illinois Public Agenda for College and Career Success* is to “Increase the number of high-quality postsecondary credentials to meet the demands of the economy and an increasingly global society.” One of the recommendations identified under Goal 3 is to “Strengthen articulation through stable funding and expansion of transfer tools such as u.select and the Illinois Articulation Initiative and through development of an objective measure of transfer and acceptance of credits.” The Illinois Articulation Initiative (IAI) continues to be an important statewide vehicle for encouraging transferability among postsecondary institutions in the State of Illinois. A more recent statewide transfer and articulation project, u.select (formerly the Illinois Course Applicability System or CAS), continues its expansion. IAI and u.select are complementary, both enhancing the availability and accuracy of transfer information and fostering more effective and efficient degree completion.

Planning for the Illinois Articulation Initiative (IAI) began in January 1993, and the General Education Core Curriculum (GECC) was implemented in the Summer of 1998. The IAI GECC was designed to ease transfer for students among Illinois colleges and universities. May 2013 marked the end of the fifteenth year of implementation. In addition to the adoption of the GECC, several major/discipline panels have been convened to recommend preparatory coursework at the lower division level. Over the last several years, concerns have arisen that as increasing numbers of students have begun their postsecondary careers starting at community colleges, there is a growing need to provide assistance in successfully transferring major coursework. Although substantial effort has gone into creating specific transfer agreements between community colleges and their partner transfer institutions, there are many students who enter community colleges undecided about their intended transfer destinations. For these students, significant changes have been made over the last three years to expand the scope of IAI to include acceptance of the major recommendations by public universities. Until the fall of 2010, the major panel recommendations have been advisory only, but this agreement to accept the panel recommendations will offer students undecided about their intended transfer destination additional guidance in the process.

Twelve years ago, the u.select project was initiated to offer Illinois students specific and detailed information on how their coursework will transfer among institutions and how it may or may not count towards a baccalaureate degree. This web-based program allows students to compare the courses they have completed to degree requirements at participating schools. A planning guide, which matches courses to degree requirements, outlines what additional coursework is needed to complete the degree. The u.select initiative had been funded through a series of Higher Education Cooperation Act (HECA) Grant appropriations. Funding for the program has been limited due to state budget constraints.

This report begins with a brief history of the development and implementation of the IAI. It then discusses the current status of statewide transfer policy including the IAI, u.select, and other transfer projects; transfer issues that have been raised and attempts to address these issues; and other related transfer concerns. The report then includes a summary of highlights from this past year's activities, concerns relative to funding, a listing of participating schools, and considerations for the future.

Brief History

The Illinois Articulation Initiative. In January 1993, the Illinois Board of Higher Education (IBHE), the Illinois Community College Board (ICCB), and transfer coordinators from Illinois colleges and universities jointly launched the Illinois Articulation Initiative (IAI) to ease the transfer of students among Illinois public and independent, associate and baccalaureate degree-granting institutions. The IAI grew out of the IBHE's 1990 undergraduate education policies on transfer and articulation. The IAI was originally developed in three phases. Phase I focused on developing a general education package, the General Education Core Curriculum (GECC). Phase II expanded the project to create models for easing transfer into baccalaureate major programs. Twenty-five Major/Discipline Advisory Panels have participated in identifying lower division coursework that prepares students for studies in baccalaureate majors. Phase III instituted the process of regular five-year reviews designed to ensure that the panels' recommendations continue to be relevant and accurate.

Through the IAI, Illinois has developed one of the most comprehensive course approval and quality assurance processes in the nation, assuring that all approved courses are comparable and meet the high standards established by faculty panels. As of September 2013, there are 195 GECC course descriptions, and the IAI database includes 10,255 courses in the GECC with 6,904 currently remaining active. There are 265 major course descriptions, and the IAI database has tracked 13,239 courses in the majors with 2,294 currently remaining active.

u.select. Eleven years ago, the u.select project was initiated to offer Illinois students specific and detailed information on how their coursework will transfer among institutions and how it may or may not count toward a baccalaureate degree. This web-based program allows students to compare the courses they have completed to degree requirements at participating schools. A planning guide, which matches courses to degree requirements, outlines what additional coursework is needed to complete the degree. The u.select initiative had been funded through a series of Higher Education Cooperation Act (HECA) Grant appropriations. Recently, funding for the program has been limited due to state budget constraints.

Statewide Transfer Policy

Goal 3 of the *Illinois Public Agenda for College and Career Success* is to "Increase the number of high-quality postsecondary credentials to meet the demands of the economy and an increasingly global society." One recommendation of Goal 3 is to "Strengthen articulation through stable funding and expansion of transfer tools such as u.select and the Illinois Articulation Initiative and through development of an objective measure of transfer and acceptance of credits." The progressively more diverse population of students has increased the need to facilitate transfer on behalf of Illinois students and institutions of higher education.

According to data from the Fall Enrollment Survey, student transfers within Illinois totaled 58,066 for the Fall semester of 2011, some 8.4 percent of the total Fall 2011 enrollment of

689,171 in the state. Of these, 25,238 transferred from a community college down from 27,240 in Fall 2010; 5,104 transferred from a public university down from 5,377. 3,786 from an independent not-for-profit institution down from 4,039. 642 from an independent for-profit institution down from 686, and 23,296 from other institutions down from 25,185.

Sector Transferred From	Students	Number of Students	Percent of Total Transfer Students	Percent of Total Undergraduate Students
Community Colleges		25,238	43.5	3.7
Public Universities		5,104	8.8	.7
Independent Not-for-Profit		3,786	6.5	.5
Independent For-Profit		642	1.1	.1
Other Institutions*		23,296	40.1	3.3
Total All Sectors		58,066	100%	689,171

* Out of state, foreign, and unknown/unreported origin

The sector to which the largest number of students transferred was the community colleges, with 16,740 students, followed closely by the public universities with 15,981. A significant number of students transferred to independent not-for-profit institutions (12,031) and independent for-profit institutions (11,384). Some 1,930 Illinois students transferred to out-of-state institutions operating in Illinois.

Sector	Number of Undergrad Students Transferred To Fall 2011	Total Fall 2011 Undergraduate Enrollments	Percent of Transfers to the Sector of the Total Undergraduate Students
Community Colleges	16,740	336,539	5.0
Public Universities	15,981	152,442	10.5
Independent Not-for-Profit	12,031	128,462	9.4
Independent For-Profit	11,384	60811	18.7
Out-of-State, Operating in IL	1,930	1097	17.7
Total All Sectors	58,066	689,171	8.4

There are four broad categories of students for whom transfer policies are designed: students who know the institution to which they intend to transfer and know the major they wish to pursue; students who have a preferred transfer institution but are undecided about a major; students who know their major, but not their preferred transfer institution; and students who know neither their intended transfer institution nor their major. For students who begin their higher education experience without knowing their major or the institution to which they wish to transfer, the IAI provides an invaluable tool. The student can complete the IAI General Education Core Curriculum to satisfy general education requirements at any of the 111 participating Illinois institutions regardless of the program or institution later decided upon by the student.

For those who do not know their transfer institution but know the intended major, the baccalaureate major panel recommendations can serve as a guide to help students until they decide on a transfer institution. The current IAI and institutional transfer and articulation

agreements work well for most students, particularly for program to program articulation agreements. However, the system could do more, especially for those students who enter community colleges with an intended major, but without an intended transfer destination. There had been several attempts over the years to gain full acceptance of the major panel recommendations by receiving institutions, but these attempts had not borne fruit. Increasing scrutiny of this issue over the last few years has led to renewed efforts.

Past attempts at gaining acceptance of the recommendations have failed to produce agreement due to many curricular concerns. The chief problems stem from the differences between institutions about what constitutes the appropriate courses to be offered at the freshman/sophomore level for many majors. There have been concerns that variation in mission across four-year institutions, heavy course requirements in many majors, and the requirements of specialized accreditation in some fields will be compromised as a result of the acceptance of these course recommendations. However, working through the IAI panel structure and with a group of public institution academic officers, acceptance of the Major Panel recommendations has been completed with all majors having been through the acceptance process.

Under the plan, the public universities were asked to accept the Major Panel course recommendations and be added to a list of receiving institutions that have agreed to the recommendations. If there was a curricular issue that did not allow them to do so, they were to provide feedback to IBHE or ICCB IAI staff to suggest revisions of the courses or their approval criteria that would allow the institution to accept the major recommendations. Staff worked to combine the feedback received and provided the information to the panels to facilitate modifications. In the future, independent institutions will be given the opportunity to accept the recommendations under the same terms and be added to the web page lists. Each Major Panel iTransfer webpage indicates the current major course recommendations and a list of all institutions that agreed to those recommendations. The supporting memos and acceptance lists are available on the IAI website at <http://www.itransfer.org/iai/container.aspx?section=faculty&subsection=other&topic=iaidoc>.

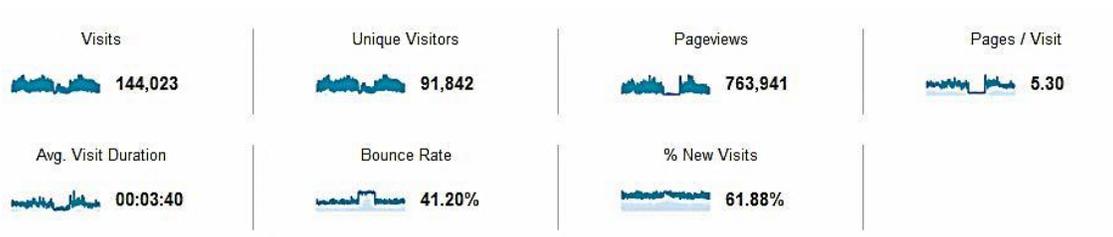
Both IAI and u.select have continued as vehicles for advancing transfer and articulation across the state. In addition to regular meetings of panels and committees dealing with IAI and u.select, these initiatives have continued their ongoing activities. There are 111 participating institutions from all sectors, 98 as full participants and 13 as receiving only institutions. Over 700 faculty members, transfer coordinators, and institutional administrators have actively participated in IAI. One of the valuable by-products of the IAI panel structure is that it provides faculty members from different sectors a conduit to have meaningful communication about curriculum. This helps to overcome misperceptions that sometimes develop between faculties in different sectors.

Over the last year, the iTransfer team has continued to improve service and usability of the site to its constituents. Our focus has been to develop and deploy various web resources to help our users find, locate, and navigate the iTransfer.org site and the necessary IAI related information more easily. Through the last year, the iTransfer Coordinator continued to assist with panel related activities as well as serve as contact and information resource for iTransfer and IAI.

In order to better serve the variety of constituents that use the site, the iTransfer staff has utilized a variety of sources to obtain user data and feedback. We have continued to refine and improve the iManage system which allows for all administrative functions for institutional course submitters and IAI related personnel to access information regarding IAI courses. We have developed mobile functionality for faculty members to use during the course review process.

The iTransfer web site serves current and potential students in Illinois higher education, parents, faculty/advisors, administrators, planners, registrars, admissions staff, and the public at large.

In our 15th year of working with the site, it continues to be an essential tool for these constituencies. Between July 1, 2012 and June 30, 2013, the site processed 144,023 visits to the site with 91,842 being unique visitors. These figures demonstrate a small downward change over last year's totals but remain an example of high volume user traffic through the site. On average, the site provided 5.3 pages of information per visit and handled a total of 763,941 page views. The average visit duration was 3 minutes, and 40 seconds. Some of the differences in usage figures and other site statistics are due in part to the development of a mobile application for panel members to cast course recommendations through their mobile devices during the spring review cycle. We were not tracking visits to the mobile site due to its development mid FY 12/13. These figures will be included in next year's report and we are anxious to see what the development of mobile applications does for our site usage.



Improving successful transfer in Illinois involves a comprehensive approach, not just reliance on IAI and u.select. Different tools need to be employed in a coordinated fashion to improve transfer. Other state level policies continue to advance that will help to smooth the transfer process. For example, the Common Core Standards, which were adopted in June 2010, and the American Diploma Project efforts are intended to help to eliminate remediation through the coordination of high school graduation standards and college readiness as well as increase communication of expectations by higher education institutions. The Dual Credit Quality Act aims to standardize and facilitate the expansion of dual credit opportunities in Illinois. This will enable the accumulation of transferable credit more easily, but relies on the well developed Illinois Articulation Initiative structure to help to increase course transfer legitimacy. Not every student transfer problem can be solved through state policy, but these policies should be implemented in a coordinated fashion to open the widest pathways possible to help students achieve successful transfer.

Many other tools are available to facilitate student transfer in Illinois. Students who already know their transfer institution destination are advised to make use of existing individual articulation agreements between institutions. Such articulation agreements between the sending and receiving institutions are the primary conduit for transfer and are able to provide specific detail to students about courses to take at partner institutions for successful transfer. For those who know their major as well, specially designed and named associates degrees have been developed in conjunction with the Illinois Community College Board, such as the Associate of Fine Arts (A.F.A.) degree. The Community College Compact Agreement (the Compact) is still used by many Illinois institutions. The Compact originated December 1, 1970, with the Illinois Board of Higher Education adoption of "A Resolution on Transfer Equivalency of the Junior-Community College Associate Degree in Baccalaureate Sequences." The Board directed public senior institutions to declare that a transfer student in good standing, who has completed an

associate degree based on baccalaureate-oriented sequences, be transferred from an Illinois community college to an Illinois public university at junior status having met lower division general education requirements of the senior institution. And of course, all transfer students benefit from effective advising. Effective advisors provide the information to students about all of these pathways for navigating through the transfer system.

In FY 2013, the following projects and activities were completed.

Staff:

1. Monitored and maintained iTransfer business continuation activities to include existing systems and function - revised as necessary.
2012-2013 activities undertaken
 - iTransfer staff continued to edit, refine, and “fine tune” systems, including marketing activities to effectively meet client needs.
 - Technologies were updated and new servers were purchased.

2. Installed and implemented new software and hardware to facilitate database and web application design.
2012-2013 activities undertaken
 - Reviewed current software on the market to ensure iTransfer is utilizing technologies appropriate to best functionality.
 - Programs necessary for keeping the servers secure and running at peak performance were updated and installed as necessary.
 - Created and deployed a mobile site to assist faculty members in voting and panel activities within iManage while using mobile devices. This was deployed in January of 2013.

3. Continued to upload courses into the course review system for panel review at spring and fall session meetings.
2012-2013 activities undertaken
 - This included monitoring the electronic processes involved in submission and via iManage and working to improve performance and user satisfaction.

4. Attended various IAI GECC and Major Panel meetings in spring and fall sessions.
2012-2013 activities undertaken
 - This included the use of the web conferencing program called AnyMeeting and conference calling was also made available to remote participants.

5. Created meeting summaries for iTransfer staff meetings attended.
2012-2013 activities undertaken
 - All meeting summaries for iTransfer managed panels were posted to the appropriate place on the iTransfer site, utilizing the iManage Meeting Management system.

6. Assisted participating institutions with staff training and technical directions/implementation.
2012-2013 activities undertaken
 - Explored creating a training channel to house training implements within iManage for institution staff and faculty utilizing the system. This is being programmed into the redesigned iManage.

- Explored creating a training section within the main iTransfer site for students and visitors to assist in obtaining information and utilizing the site. This training section won't require a login of any kind. This project is on hold until our iManage redesign is deployed in January 2014.
 - Continued to offer training online, one-on-one, and in person, when possible, for participating institution staff and faculty. Online webinar and training was offered through our free provider AnyMeeting.
 - Began work on refining training opportunities for new faculty serving on panels. Further work will be undertaken in FY 2014 with significant assistance and input from IBHE and ICCB IAI staff.
7. Responded to IAI Steering panel directions in response to program evaluation process.
- 2012-2013 activities undertaken**
- As requests and needs were identified by the Steering Panel, staff worked to implement recommendations for IAI and iTransfer.
8. Researched web site and server technologies to ensure that iTransfer.org reflects current web practices and changed accordingly.
- 2012-2013 activities undertaken**
- Continued to adjust site based on usability studies and marketing plan to make the site more user friendly.
 - Continued to refine and develop the Faculty channel and Transfer Coordinator channel for easier navigation within the site by our stakeholders. As a result of this process, it was determined that having two sections for each identified immediately on the site was not necessarily assisting users in obtaining the information for which they were visiting iTransfer. Staff has begun the work of exploring and defining a walk through basis, similar to the student section, to allow administrative visitors find their information more intuitively.
 - Continued to refine and further develop the iManage system. As part of this investigation and work, it was determined that in order to enhance ease of use and functionality for constituents, a reprogramming and redesign was needed. This was due to vast expansion of the product from its original design. This reprogramming redesign will be deployed in January 2014.
 - Staff also refined the following items in the existing iManage
 - o Refined the agenda/minutes section to allow increased ease in transferring the agendas created for meetings to minutes and uploading them to the meeting summaries page within the site.
 - Developed and deployed a new Program Management channel within iManage that will allow iTransfer and Board staff the ability to create new projects, prioritize projects, and manage the completion of projects.
9. Continued to develop and implement the IAI/iTransfer marketing plan.
- 2012-2013 activities undertaken**
- With the iTransfer "portal", the marketing plan continued within FY 2013 with its focus to encompass "all things transfer" in Illinois. As a result of review material on the site to this end, it was determined that the information included on the site for military and veteran students was lacking. Staff created a subcommittee to assist in the redesign and expansion of this section. The current plan is to deploy this redesign with the release of the reprogrammed iManage.
10. Continued technology research, development and implementation plan.

2012-2013 activities undertaken

- iTransfer staff met frequently to discuss projects, marketing opportunities, and look at refining site aspects to increase satisfaction with site functionality. This included a few all-day meetings in FY 2013.

11. Prepared annual report and identified specific goals for coming year.

2012-2013 activities undertaken

- The annual report was completed, shared with appropriate Board representatives, and deployed on the iTransfer site before mid-September 2012.

12. Continued to provide support to our Board constituents.

2012-2013 activities undertaken

- Staff continued to provide assistance and support to the IBHE and ICCB staff as necessary. This included phone meetings and trips out of town to programmatic meetings in Springfield and other locations. Training was also offered whenever board representatives requested it.

13. Continued to review and refine the iTransfer operations manual and Business Continuation Plan. Staff expects a complete revision to be accomplished in late FY 2013 or early FY 2014.

2012-2013 activities undertaken

- Completed and stored with appropriate staff in May 2013.

14. Continued updates to the iTransfer website to refine the site as the state of Illinois comprehensive “portal” for transfer student information

2012-2013 activities undertaken

- Staff continued to review Google analytics, site navigation, and user feedback to improve functionality and design of the site.

15. Added content based on recommendations from the IAI Advisory Committee, IAI Steering Committee, IBHE, and ICCB

2012-2013 activities undertaken

- As changes in information were announced, the site was updated to reflect any changes and recommendations provided by constituents.

16. Developed and completed of projects as they arose.

2012-2013 activities undertaken

- The Articulation Advocate section of the site was redesigned to accommodate some updated functionality and provide a more meaningful experience for users.

The training sessions for this year included the following:

- Training on the website and WebReview at the fall and spring Transfer Coordinators’ Meeting.
- Training for new staff at IBHE
- Online webinars and one-on-one training opportunities offered to new staff and faculty members on panels as requested for the iTransfer.org site use and the iManage system.

This year, iTransfer staff focused on improving the usability and functionality of the site for our stakeholders while maintaining consistency in the quality of service and communication tools

utilized. The iTransfer.org site has continued to be a primary resource for those interested in transfer and those who work with the transfer students of Illinois.

In the next fiscal year, new projects will be explored, developed and will be rolled out to improve performance and experience within the site. These will include, but are not limited to:

- Expansion of the mobile site and enhanced functionality for even more users on mobile devices
- Re-designed and improved iManage system. This will include enhanced functionality, training tools, and other key improvements.
- Enhancements of the main iTransfer.org site for military and veterans students seeking transfer and educational opportunities in the state of Illinois.
- Enhancements to the main iTransfer.org site as needed with the expectation of a re-design to better serve our constituents and to further improve functionality.

FY2014 u.select Goals and Objectives – a Description of Work Activities

The Goals of the u.select Project in 2014 are five-fold: implementation, promotion, collaboration and coordination, maintenance, and evaluation. These goals continue the direction articulated in 2013.

The category of implementation refers to ongoing efforts to expand participation on three fronts: 1) bring fully licensed institutions up to full participation through the development and/or installation of interfaces with institutions' student information systems, course equivalency guides (CEG) and degree audit systems; 2) increase the license level of sending institutions – those participating through the submission of course banks only – to that of receiving institutions with CEG or degree audit capability; and 3) to identify and target new institutions for participation – particularly Illinois private institutions and out-of-state feeder institutions.

In many ways increased participation and higher implementation are primary goals, yet they are the least attainable given sustained reductions to the grant allocation. Most expansion efforts require additional funding for licensing and implementation. Without additional funding, potential for expansion in 2014 is limited. For this reason project staff have the added goal to develop new collaborations that may yield supplemental funding sources. Staff will also continue ongoing efforts to bring licensed institutions into full participation and to identify/target institutions that are able to pay independently for their licenses – particularly Illinois private institutions, some community colleges and out-of-state feeder institutions.

IMPLEMENTATION

Objective: Implement u.select across more of the state (and nation)

Increase the number of users: CollegeSource, the maker of u.select, is in the process of converting to a new release of the system, called Transferology, due for release in 2014. The changes are intended to streamline the site, to make it more student-friendly, to move institution/staff functions away from student-use pages, to reduce the system's reliance on other systems, and to be more responsive to system capacity. The u.select Illinois staff will work closely with institutions and will increase student-directed outreach in order to help participating institutions and potential users with the transition. The support of u.select Illinois staff will be critical to ensure continued growth throughout this process.

Increase the number of participating institutions: Wider implementation is key to enhancing the value of u.select. In every training, at every institution, staff hear the same plea: we need more receiving institutions to make the system more attractive to students and advisors. Slowly, that objective is being achieved. In 2013, the u.select Illinois project expanded to include another private institution, Columbia College of Chicago.

Increase the level of licensing and/or implementation of currently participating institutions: During 2013, several Illinois institutions increased their participation level in u.select, including Chicago State University, Governors State University, Loyola University Chicago, National Louis University, and St. Xavier University. Project staff maintain close contact with institutions on the path to implementation in order to provide technical assistance and to help keep the focus on the value of achieving full implementation, especially in terms of its benefit to students. The new 2014 release of u.select (i.e., Transferology) is intended to improve the threshold for participation by reducing the system's reliance on interfaces and therefore reducing the institutions' IT investment.

Explore other vendors' products: A significant opportunity for the growth of u.select is its further integration with another CollegeSource product, TES® (Transfer Evaluation System). TES is an interactive database of course data from institutions of higher education throughout the country. CollegeSource states they will continue efforts to maximize integrations between TES and u.select in 2014 and beyond.

As part of the annual renewal process for the u.select Illinois subscription agreement (a sole source procurement), project staff are required to evaluate competitor products and assess their capability to provide the functions available in u.select. This evaluation is also good standard practice to stay abreast of developments in the field of transfer advising tools.

PROMOTION

Objective: Promote the use of u.select by relevant audiences

A grand system counts for little unless it is used. We have found that students discover u.select even before it is marketed at an institution but the use is limited unless that institution and the state promote its purpose, explain the features, and make the system known. To that end, several promotional activities are planned, in part through financial help from iTransfer.org. Promotion, the second facet of FY2014 activities, will continue to be carefully managed in order to produce only the products and services that return the greatest benefit.

Develop and distribute promotional materials: Due to the continued budget restrictions in 2014, one primary goal is to expand promotional efforts that rely on technology so as to reduce costs. Staff plan greater reliance on carefully placed links on institution and organization sites throughout the state. When the new release of u.select goes live in 2014, a thorough review and updating of all institution/organization links will be key to successful marketing.

Project staff will continue collaborative marketing ventures with iTransfer/IAI including the highly successful promotional bookmark now offered in the original and bilingual (English/Spanish) versions. A business card sized option was developed in 2013 as a spin-off from the bookmarks. This smaller item fits easily in any wallet and reduces the content to one key phrase, the web address and the resulting Quick Response Mark (QRM) to access the site. At less than half the size of the bookmark, this new card is also less costly to distribute and cheaper to print.

Another popular item has been the “How To” card, walking users through a few basic steps of the most popular functions. In 2014 the printing of this document by project staff will be very limited. Instead, the focus will be on distributing the customizable, electronic file to institutions for their production.

With the new 2014 release of u.select (i.e., Transferology), CollegeSource has committed to marketing the product direct to students and to assisting states with rebranding efforts. A trademark logo and coded link provided by CollegeSource should help ensure direct access is maintained throughout the transition.

Publish and distribute quarterly newsletter: u.select Illinois News, a quarterly newsletter is distributed electronically to the u.select listserv and is available on the iTransfer.org/u.select website. It is an excellent communication tool for providing institutions with updates, information on functional enhancements, training opportunities, usage reports, and answering frequently asked questions. It also contains recurring segments for “Tech Tips” and a “Feedback Forum.” In 2014 staff will seek to expand the newsletter audience.

Institution-specific advisor training reference guides: With the increased efforts toward advisor training, Project staff created the u.select Reference Guide for advisors. This enhanced training tool was distributed at all advisor training sessions and via email upon request. It was also made available on the u.select website. These efforts will continue in FY2014.

Conduct training and presentations to promote use of u.select: The u.select Illinois Project staff provide training and presentation sessions to a variety of audiences, including advisor training sessions; presentations at local, regional, state and national association meetings/conferences; institutional meetings; and directly to students at transfer events. These presentations promote the use of u.select and encourage users to participate in continuing promotion and evaluation. The goal for 2014 is to maintain advisor training levels while increasing student outreach. These efforts will be especially pertinent to the successful transition to the new release of u.select (Transferology) when it goes live (estimated to be during the second quarter of calendar year 2014).

Staff will continue efforts to promote the use of u.select planning guides over the static transfer guides, specifically with advisors as they help students plan for transfer. Planning guides are an excellent tool for advising students toward degree completion, rather than just admission, and are a valuable resource to help students understand how specific coursework may be used to fulfill degree requirements. This should help reduce the number of extraneous classes taken by students.

Conduct annual statewide meeting: One of the most important events undertaken by u.select Illinois is the annual statewide meeting, which gives participating institutions a voice in the use, promotion, and evaluation of u.select. In the past, these gatherings have been important forums for guiding the initial construction of the Project, have allowed staff to showcase student support of u.select, and given an opportunity to relate the different approaches to use by advisors. In 2014 the statewide meeting will be an essential forum to help facilitate successful transition to the new release of u.select (Transferology).

Project staff promote attendance of the statewide meetings by seeking new venues and innovative solutions to the travel restrictions and budget cuts faced by many participating institutions. In 2012 the statewide meeting offered three times, in different regions of the state

including one in Chicago. The effectiveness of multiple meetings received positive evaluations and will be undertaken again in 2013 and 2014 if venues are available.

Provide transfer data: Project staff compile data collected by IBHE, and have for many years, to create statewide summaries and detailed institutional-specific data for a single year. The Statewide meeting continues to be an excellent opportunity to disseminate this transfer data. This report is the only source of available data on the transfer of students to and from institutions in Illinois except by subscription – and then high-level analysis – through the National Clearinghouse.

Website update: The iTransfer.org/u.select website is the object of continued collaboration between IAI and u.select to give students the full spectrum of transfer information available. By combining the sites, duplication is reduced and each project benefits from traffic brought to the site by the other.

A thorough review and update is scheduled for the u.select portion of the iTransfer.org website in 2014. While it is always important to provide updated information, training resources and promotional information, it will be especially critical in 2014 to help facilitate successful transition to the new release of u.select (Transferology).

COORDINATION AND COLLABORATION

Objective: Coordinate u.select activities with other organizations involved in transfer; collaborate to realize efficiencies

Coordinate and collaborate with iTransfer: IAI/iTransfer.org and u.select are working together to promote their mutual interests. One very successful ongoing project has been the printing of a small, durable bookmark that shows both iTransfer and u.select information, available in both an English and bilingual version. This medium easily reaches students to inform them of the presence and utility of u.select. The very cost effective bookmark works well by directing students to the iTransfer.org/u.select website where much more extensive and complete transfer information is provided for students.

The iTransfer/IAI and u.select Illinois Project staff collaborate on more than the aforementioned website and bookmark projects. In 2013 the teams partnered, together leadership of the Illinois Academic Advisors Association (ILACADA) to provide advisor training throughout the state on transfer resources. The two staffs also collaborate on disseminating information statewide; the u.select Illinois staff publish updates in the IAI newsletter and the semiannual Transfer Coordinator Meeting includes a u.select Illinois update presentation. Further, the u.select Illinois staff promote use of the IAI course articulation information displayed in u.select and work with institutions to maintain the integrity of that information. In FY2014 staff in both projects will continue to be vigilant and mindful of the impact the information in one system has on the other and of the benefits to seeking collaborative projects.

Promote sharing of information and collaboration across states: Many of the issues facing u.select in Illinois also are issues for other states using u.select. During the current grant period Project staff worked collaboratively with colleagues in Indiana, Oregon, Minnesota, and other states to address these issues. Chief among them is the need for interfaces between u.select and the many student information systems in use. This collaboration has resulted in a continuing dialog with CollegeSource and others on the development of interfaces with SunGard (Banner CAPP and DegreeWorks) and Oracle (PeopleSoft). Further, Project staff continue to lead a

multi-state, multi-institution collaboration to develop an interface between u.select and Colleague (the degree audit module of ellucian, formerly known as Datatel). The primary goal of these collaborations is the development of effective, affordable solutions for all concerned. These efforts will be continued in 2014.

MAINTENANCE

Objective: Maintain the u.select project infrastructure

The fourth goal planned in 2014 is maintenance: ongoing support necessary to keep the product fresh, response to changes in the product by the vendor, and administrative tasks that move the project forward.

Assist u.select Illinois participating institutions in conversion to new release (Transferology): With a new release of u.select (Transferology) coming in 2014, this goal will be especially critical to maintaining project success. Project staff will assist institutions in the transition; disseminate information on the changes to advisors and students; assist in updating all links to u.select; and perform new maintenance procedures required under the new release.

Maintenance of current implementation: Maintenance of already complete functions of u.select often requires support or corrective action as institutions upgrade existing systems and/or change hardware, personnel, and information systems.

A few examples of this include maintenance of institution links, logos, program files, and the restoration of interface functionality between u.select and institutions' student information systems (SIS) when disrupted by external factors, such as expiration of security certificates, URL changes, and SIS upgrades.

Annual maintenance of u.select includes the process of collecting course bank files, verifying the validity of file format and data, reformatting as needed, and importing the formatted course bank files into u.select. Inherent in the process of course bank collection is an effort to increase the number of submitting institutions by providing technical assistance as needed with institutions' efforts to gather or establish the course data.

The 2014 release of u.select (Transferology) will require project staff to collect course equivalency files from non-DARwin/non-u.achieve institutions as well. This process will occur twice per year and will include verifying the validity of file format and data formatting to prepare for import by CollegeSource.

Subscription service agreement with CollegeSource: In the previous grant years, u.select Illinois negotiated equitable terms for the subscription service renewal contract with CollegeSource. CollegeSource has announced that a small price increase is anticipated for 2014 renewal agreements. Staff continue to explore alternate funding sources, as well as institutional and regional alliances to overcome financial obstacles.

Attend users' conference: Attendance and participation at the annual users' conference hosted by CollegeSource benefits the Project in many ways, including training workshops and presentations, networking with staff from other states and with CollegeSource staff, receiving status reports on the progress of implementation in other states, and giving and receiving updates from CollegeSource in a face-to-face format. At current funding levels, no funds are available to staff to attend this important event. The u.select Illinois Project Coordinator served as a presenter at the 2011, 2012 and 2013 conferences. Funding was provided by the University of Illinois for

participation in these meetings. It is unknown whether this support from the University of Illinois can continue in 2014.

EVALUATION

Objective: Evaluate the strengths and weaknesses of the u.select Project

Evaluative activities provide the feedback loop to continually improve the product and staff service. Project staff seek to keep u.select in step with institutions, state and national organizations. At the annual statewide meeting participating institutions are asked for their input on u.select and receive status reports on various project initiatives. Through monthly Advisory Committee meetings project staff disseminate information about u.select and get valuable feedback from committee members representing community colleges, public and private universities, ICCB and IBHE. The project staff also compile usage statistics for participating Illinois institutions and maintain a user survey tool for direct feedback. This feedback provides a policy framework to direct project staff activities across a wide spectrum of issues.

Prepare proposal and evaluation materials: Project staff prepare annual evaluation plan activities based on feedback obtained from users, the statewide meeting, members of the Advisory Committee, u.select exit surveys, and feedback provided in training and presentation evaluations.

Solicit feedback at statewide meeting: The statewide meeting affords an opportunity to receive firsthand evaluation and feedback on u.select and its staff. A written survey is conducted to gauge the satisfaction of the content, format, presentations, accommodations, and delivery of the materials as well as the system satisfaction and support needs of participating institutions.

Solicit feedback and direction from u.select Advisory Committee: The Project is directed by an Advisory Committee that meets monthly. Currently both ICCB and IBHE provide a committee representative. Other participants include representatives from DePaul University, Eastern Illinois University, Illinois Valley Community College, Kaskaskia College, and the University of Illinois Chicago. Through its monthly meetings, this committee provides invaluable feedback and direction for the Project.

Evaluate information from user statistic reports: Enhanced reporting processes for user statistics has allowed u.select Illinois and the participating institutions to gather more information on specific usage patterns, user source schools, user target schools, user geographic information, and most frequently utilized features. This information was very valuable during 2013. Reporting capabilities will be further enhanced under the new 2014 release of u.select (Transferology).

Evaluate information gathered through u.select exit surveys: Another data source for evaluative information has been the exit survey submitted by u.select users. In 2013 the survey was updated based on feedback from users, participating institutions, and the u.select Illinois Advisory Committee. This streamlined, updated exit survey was implemented in January of 2013. The data will be fully reviewed and analyzed for the 2013 statewide meeting. It is anticipated that the exit survey will be revised again in 2014 to reflect the new functions of the 2014 release of u.select (Transferology) to help maximize the benefit of direct user feedback.

Foster open communication with partner institutions: Project staff foster open communication with partner institutions through the use and maintenance of a listserv;

publication of a quarterly newsletter, including a “Feedback Forum” section that encourages reader input; and by participating in CollegeSource Client Forums. Staff will maintain and strive to expand these avenues of communication in 2014.

Produce self-study: In order to improve the Project services, the u.select system itself, and the products offered to promote u.select, a self-study will be undertaken at the end of the grant year. Each of the objectives articulated in the grant will be evaluated to determine:

- 1) Have the specified goals and objectives been achieved?
- 2) What may have hampered achievement of the goals and objectives?
- 3) What factors contributed to successful achievement of the goals and objectives?
- 4) Do the goals and objectives sufficiently address Project improvement?
- 5) What population was served in achievement of the goals and objectives? Was a portion of the intended population not served? If so, why and what will be done to remedy this problem?
- 6) What new factors were introduced or what changes occurred that were not foreseen? How did these circumstances affect the project? What will be done in the future to respond?

Illinois Participating Schools and Colleges

All Illinois associate and baccalaureate degree-granting institutions are eligible to participate in the Illinois Articulation Initiative. Institutions may participate in the Illinois transferable General Education Core Curriculum agreement and/or in one or more of the several Baccalaureate Majors' agreements, with the level of participation in Baccalaureate Majors' agreements depending upon whether or not the institution offers a program in the specific major. Currently there are 111 schools participating in IAI (the General Education Core Curriculum and/or the Illinois Baccalaureate Majors' Curricula).

IAI Participating Schools

Full Participating Schools There are 98 schools recognized by IAI currently as full-participation schools.

Two-Year Public Institutions (48 schools)

Black Hawk College
Carl Sandburg College
College of DuPage
College of Lake County
Daley College (Richard J.) (CCC)
Danville Area Community College
Elgin Community College
Frontier Community College (IECC)
Harold Washington College (CCC)
Harper College
Heartland Community College
Highland Community College
Illinois Central College
Illinois Valley Community College
John A. Logan College
John Wood Community College
Joliet Junior College
Kankakee Community College
Kaskaskia College
Kennedy-King College (CCC)
Kishwaukee College
Lake Land College
Lewis & Clark Community College
Lincoln Land Community College
Lincoln Trail College (IECC)
Malcolm X College (CCC)
McHenry County College
Moraine Valley Community College
Morton College
Oakton Community College
Olive-Harvey College (CCC)
Olney Central College (IECC)
Parkland College
Prairie State College
Rend Lake College
Richland Community College
Rock Valley College
Sauk Valley Community College
Shawnee Community College
South Suburban College
Southeastern Illinois College
Southwestern Illinois College
Spoon River College
Triton College
Truman College (Harry S) (CCC)

Wabash Valley College (IECC)
Waubensee Community College
Wilbur Wright College (CCC)

**Two-Year Independent Institutions
(3 schools)**

MacCormac College
Northwestern College
Springfield College in Illinois

Four-Year Public Institutions (11 schools)

Chicago State University
Eastern Illinois University
Illinois State University
Northeastern Illinois University
Northern Illinois University
Southern Illinois University Carbondale Southern Illinois University Edwardsville University of Illinois at Chicago
University of Illinois at Springfield
University of Illinois at Urbana-Champaign Western Illinois University

Four-Year Independent Institutions (36 schools)

Aurora University
Benedictine University
Blackburn College
Bradley University
Concordia University Chicago
DePaul University
DeVry University
DeVry University, Chicago
DeVry University, DuPage
Dominican University
Elmhurst College
Illinois College
Illinois Institute of Art
Judson University
Kendall College
Lewis University
Lexington College
Lincoln Christian University
Lincoln College
MacMurray College
McKendree University
Midstate College
Millikin University
National-Louis University
North Central College
North Park University
Olivet Nazarene University

Quincy University
Robert Morris University
Rockford College
Roosevelt University
Saint Xavier University
St. Augustine College
Trinity Christian College
Trinity International University
University of St. Francis

Receiving Only Schools

There are 13 schools recognized by IAI currently as receiving-only schools.

If an institution is listed as a "Receiving only" institution, you should be aware that the college or university will take a completed GECC package from any of the full participating institutions listed above. However, should students decide to transfer from your "Receiving only" institution to another institution without a completed GECC package, they will not be considered as having completed their general education requirements. It is strongly recommended that students work with academic advisors at both their current and future institutions in the event that they decide to transfer from a "Receiving only" institution.

Two-Year Public Institutions (0 schools)

Two-Year Independent Institutions (2 schools)

Solex College [R]
The College of Office Technology [R]

Four-Year Public Institutions (1 schools)

Governors State University [R] - working with IBHE and the IAI panels to get full participation with a full complement of IAI GECC courses

Four-Year Independent Institutions (10 schools)

American InterContinental University [R]
Argosy University [R]
East-West University [R]
Eureka College [R]
Illinois Institute of Technology [R]
ITT Technical Institute [R]
Knox College [R] Lake Forest College [R]
McKendree University [R]
Resurrection University [R]

Considerations for the Future

Smooth transfer pathways play an important part in achieving the goals of the *Illinois Public Agenda for College and Career Success*. Improving degree attainment, enhancing affordability, and increasing the number of credential holders in Illinois are all facilitated through an effective transfer system. As part of the Board's ongoing commitment to enhancing transferability in the state, IAI and u.select continue to be vital tools. Plans for the near future for IAI and u.select reflect this commitment.

The process of formalizing the acceptance of the course recommendations of the IAI Major Panels has been an essential part in the continued success of IAI. This plan has attempted to address concerns that have been ongoing with the Major Panel recommendations. IBHE and ICCB staffs have worked with IAI and are dedicated to making sure that there continues to be progress on this issue, and as with last year, this will be the central focus for this year's IAI plans.

Staff will continue to monitor the findings of independent studies undertaken by institutions of their own transfer students as well as national trends in transfer initiatives. Additionally, as more institutions are available to students on u.select, a variety of user survey data will provide a picture of student use and satisfaction with u.select. As recognized in the *Illinois Public Agenda for College and Career Success*, the establishment of a P-20 longitudinal data system to improve accountability is an essential step in researching such education issues. An important tool for measuring of transfer success requires the implementation of a standard student identifying number (student unit record) that will allow comprehensive tracking of students across sectors and levels from preschool through post-graduate education. The establishment of such a system is underway with the passage of Public Act 096-0107, the P-20 Longitudinal Education Data System Act. This system should open the door to a wide variety of research projects that could shed light on the transfer and articulation process, including reaching a clearer understanding of the impact of Illinois initiatives.

Growing interest is being shown in baccalaureate completion agreements across the state. An annual survey of community colleges is conducted by ICCB regarding the availability of baccalaureate completion programs in Illinois with results to be used to identify unmet needs that could be addressed through the addition of more agreements. A process is being considered to formalize the communication of these community college baccalaureate completion needs to the universities. Although currently unfunded, Public Act 96-0535, which was passed four years ago, amends the Board of Higher Education Act to provide that the Board implement and administer a grant program to be referred to as the Collaborative Baccalaureate Degree Development Grant Program. The provision of funding for this grant program could greatly enhance the availability of such baccalaureate completion programs and help to address the disparities in baccalaureate degree completion options in many regions of the state.

The course descriptors for General Education courses in the Illinois Articulation Initiative were developed by faculty panels and identify an agreed-upon content and level of rigor for lower-division courses. These descriptors are being used as a part of the foundation upon which college-readiness standards are being created and to inform high school curricula as part of Illinois' participation in the Common Core Standards project and the American Diploma Project. In addition to other content experts, faculty on the IAI panels will be asked to continue to participate in the implementation of the Common Core Standards and help to build the bridge between high school graduation standards and college readiness expectations.

