

Palomar College – Program Review and Planning
Non-Instructional Programs
Academic Year 2018-19

Purpose of Program Review and Planning: The institution assesses progress toward achieving stated goals and makes decisions regarding the improvement of institutional effectiveness in an on-going and systematic cycle of evaluation, integrated planning, resource allocation, implementation, and re-evaluation. Evaluation is based on analyses of both quantitative and qualitative data (ACCJC/WASC, Standard I, B.3.)

Discipline: Evaluations & Records/Enrollment Services

11/28/2018

Non-Instructional Discipline Reviewed (Each discipline is required to complete a Program Review)

STEP I. ANALYSIS (Note: Each Department Will Use Their Own Previous Analysis Data)

EVALUATIONS OFFICE	2014-2015	2015-2016	2016-2017	<<Prelim>> 2017-2018	Definitions
Number of FT Staff <i>(Records Analysts, Lead Academic Records Analysts, and Manager, Enrollment and Financial Aid Services)</i>	8.45	7 (6*)	6	6	<ul style="list-style-type: none"> The Lead Academic Records Analyst has been vacant since September 2017. The position is in recruitment. The Records & Evaluations Business Analyst has been vacant Since October 2017. The position is in recruitment. An Academic Records Analyst position has been vacant since May 2018. The position is in recruitment.
In-Person Contacts	TBD	TBD	TBD	TBD	Unable to maintain accurate counts without line management software.
Phone Contacts	9,099	7,310	7,980	7,730	
E-Mail Contacts <i>(Does not include evaluation notification emails)</i>	TBD	TBD	TBD	TBD	
Associate in Arts:					
Approved	949	914	941	853	
Denied	267	296	314	235	
Total	1,216	1,210	1,255	1,088	
Associate in Arts for Transfer:					
Approved	77	104	161	202	
Denied	75	68	103	109	
Total	152	172	264	311	
Associate in Science:					
Approved	778	821	795	775	
Denied	241	253	283	202	
Total	1,019	1,074	1,078	977	
Associate in Science for Transfer:					
Approved	88	107	154	238	
Denied	77	70	98	103	
Total	165	177	252	341	
Associate Degree Totals					
Approved	1,892	1,946	2,051	2,068	
Denied	660	687	798	649	
Overall Total	2,552	2,633	2,849	2,717	

Certificates of Achievement:									
Approved	1,735	1,788	1,776	1,672					
Denied	250	165	207	135					
Total	1,985	1,953	1,983	1,807					
Certificates of Proficiency:									
Approved	280	508	454	684					
Denied	15	28	26	14					
Total	295	536	480	698					
Certificates of Completion:									
Approved	110	109	96	67					
Denied	217	237	186	231					
Total	327	346	282	298					
Certificate Totals									
Approved	2,125	2,405	2,326	2,423					
Denied	439	430	419	380					
Overall Total	2,564	2,835	2,745	2,803					
CSU GE Certifications:									
Full	777	777	811	742					
Partial	277	275	313	200					
Total	1,054	1,052	1,124	942					
IGETC Certifications:									
Yes	251	259	298	235					
Partial	47	44	53	25					
No	13	12	9	11					
Total	311	315	360	271					
Certification Totals									
Full	1,028	1,036	1,109	977					
Partial	324	319	366	225					
Denied	13	12	9	11					
Overall Total	1,365	1,367	1,484	1,213					
Veteran Evaluations	1,016	920	1,027						
SOCMAR/SOCNAV Evaluations									
Camp Pendleton	23	1	0	0					
Transfer Credit Evaluations									
Financial Aid	1,076	1,175	1,297	1,157					
Course Evaluation Requests									
Counseling	372	378	315	79					
Prior Credit Evaluations									
Nursing/Fin Aid only	93	106	120	21					
Life Science Prerequisite Evaluations									
Nursing	176	225	392	458					
Course Repetition									
Petitions	266	358	433	397					
Withdrawals	406	526	377	317					
Academic Standing:									
Dean's List	2,979	2,914	3,046	3,162					
Probation	8,361	7,914	7,475	7,298					
Dismissal (spring term only)	598	518	500	416					
CTE Transitions/Tech Prep (Posted in the spring term only)									

Courses Students	57 1,077	62 1,091	114 1,043	
RECORDS OFFICE				
Number of FT Staff	3	3	3	
In-Person Contacts	12,794	TBD	TBD	Unable to maintain accurate counts without line management software.
Phone Contacts	12,821	11,919	11,430	7,904
E-Mail Contacts	TBD	TBD	TBD	TBD
Outgoing Transcripts				
Total	29,610	30,231	28,819	
Electronic	8,416	11,329	23,294	
Paper	21,194	18,902	5,525	
Incoming Transcripts				
Electronic				
Paper	6,089	6,674	7,174	
Verifications				
Current Enrollment, Dates of Attendance, Financial Aid, Investigations, Good Student, etc.	2,246	2,125	1,844	
Grade Changes	1,082	971	837	
Student Petitions				
Petitions to Withdraw	682	694	635	
Academic Renewal	535	529	535	
Credit by Exam	64	69	65	

I. A. Reflect upon and provide an analysis of the four years of data above

Over the past few years, California legislative changes and federal government regulations have continued to impact the Evaluations and Records areas. Beginning this year, the new state funding formula will also affect the Records and Evaluations offices. We feel we are getting better prepared for the increased workload and our ability to strongly contribute to the Guided Pathways initiative and awarding of degrees and certificates to enhance the college's funding through upgrades to our technology (PeopleSoft pages, TCE, Degree Audit, Academic Advising) along with our longtime vacant positions being replaced.

The number of financial aid Transfer Credit Evaluations and Veteran Evaluations have remained fairly steady, but the deadlines imposed have required significant workload shifts in order to prioritize these processes to meet mandated deadlines. Significant work has been recently made to begin automating transfer credit course work to meet these timelines and reduce the need to radically shift priorities throughout the year. It will take a year or more to see the real benefit of the automated Transfer Credit Evaluations as more articulation or equivalency rules are built through a new tool called Rulemaker. We will carve out time this year to build rules from TES and our local colleges to make this tool more effective. We are also looking for gains in the efficiency of processing the ever growing number of ADT's by the state's deadline by using Transfer Credit Evaluations.

Other areas of improvement we are working on is:

- Online graduation application. This will allow student to apply quicker giving us more time to complete the evaluation.

I. A. Reflect upon and provide an analysis of the four years of data above

- Grade posting. The current process calls for a staff member to verify the grade submission and post grades on a per class basis. We have identified a delivered PeopleSoft function that will allow for grades to be posted at the time of faculty submission. Additionally, Deans will have the ability to check on the status of grade submissions for their areas.
- Automate grade adjustments. We will no longer need to rely on students to notify our office about retaking a class and filling out a grade adjustment form. This is a significant time saver for staff time and students will know sooner what their likely academic standing will be.
- Utilize Transcript Express. We now have a tool that allows us to enter transcripts from other schools into our system at a 50% greater efficiency than in the past. Getting student transcripts into the system more efficiently allows counselors access to more up to date student information. Students and departments on campus utilizing Degree Audit will also have more up to date information regarding a student's progress toward their stated degree requirements.

In short, investing in PeopleSoft upgrades and the replenishing of staff vacancies will lead to greater efficiency allowing us to meet all District, state, and federal deadlines. There is far more work to be done, but with a continued investments in technology (PeopleSoft), we will continue to create efficiencies that will benefit both students and the institution.

The Records Office continues to process an extraordinary amount of paper documents. OnBase has assisted with the retention of these documents, but there is still a manual process to scan and index each piece of paper, transcripts included. The Workflow module will provide easier management of documents and follow-up with students, faculty, and staff. Additional support to create the electronic forms and workflow has been requested. Filling our vacant Business Systems Analyst position will lead to progress in this area. Transcript Express will create quicker data entry. We are continuing to ask for an additional Enrollment Services Specialist/Records position to manage the tasks associated with the document imaging and Transfer Credit implementations.

I. B. Please summarize the findings of SAO assessments conducted.

OnBase workflow has not been launched yet for the Evaluations and Records areas. Work in this area still needs to be done.

Palomar academic plans are built in the PeopleSoft degree audit. Communication on the status of new degree and certificate requirements with the Instruction office needs to be refined. Often, we are out of sync on the status of what's available and the requirements or what courses are needed to complete degree and certificates. By refining work in this area collaboratively, we will ensure that Degree Audit is accurate and up to date.

All of Mira Costa College transfer credit articulation rules have been uploaded to PeopleSoft. In the next month, we will run all of Mira Costa's transfer credit rules for all students with Mira Costa coursework and update their degree audit.

I. C. Reflect upon the SAO assessment findings in Box B above. Discuss overall observations and any areas of concern or noteworthy trends.

The investment in technology and hiring staff has been instrumental in getting closer to where we need to be to respond to MIS, SSSP and funding formula changes. There is still work to be done and a continuing investment will be needed to meet and keep up with all of these demands.

Further enhancement of degree audit is well underway and has been very successful. Testing is currently being conducted by the Evaluations, Financial Aid, Counseling, and Veterans areas. Full implementation and rollout to all staff and students is not far off. Adding the Transfer Credit Evaluation component to Degree Audit will create greater efficiencies in completing student evaluations and allowing students to know how close they are to meeting their desired

I. C. Reflect upon the SAO assessment findings in Box B above. Discuss overall observations and any areas of concern or noteworthy trends.

degree or certificate. Running "What If" scenarios will also allow students to explore degree options and to preview what requirements a specific course will fulfill.

We are sun setting these SAO's and revamping to meet new District need. Next year's SAO's will be:

- Increase the use of Degree Audit with the enhancement of Transfer Credit Evaluations to staff, departments (Counseling, Financial Aid, Veterans) and to students.
- Increase the number of transcripts fully evaluated in PeopleSoft.

STEP II. PLANNING

Reflecting on the 4-year trend data, the SAO assessment results, and the college's Strategic Plan 2019, describe/discuss the discipline planning related to the following:

II. A. Program changes and improvements (consider changes due to growth in FTES and Headcount, CSU/UC transfer language updates, articulation, workforce and labor market projections, certificate or degree completions, etc.)

- Build out transfer credit rules in Rulemaker to enhance Transfer Credit Evaluations.
- Increase the number of transcripts entered and evaluated in PeopleSoft.
- Utilize degree audit for awarding degrees and information querying.

II. B. Additional programs to develop (consider enrollment trends, student demands, wait times, comprehensiveness, etc.)

- Transcript exchange w/Mira Costa and CSUSM
- Automate and notify students of not meeting eligibility requirements from the previous term
- Implement test tables to store and equate eligibility and requirements
- Explore moving transcript processing from the campus to Credentials
- Utilize PeopleSoft for enrollment verification processing

STEP III. RESOURCE REQUESTS FOR DISCIPLINE:

III. A. Describe the resources necessary to successfully implement the planning described above. Provide a detailed rationale for each request by referring to the analyses of data and SAO assessment results in Step I and/or to any other evidence not apparent in the data or SAO Assessment results.

a. Equipment (per unit cost is >\$500) Enter requests on lines below.

Resource	Describe Resource Requested	Prioritize these requests 1,2,3, etc.	Strategic Plan 2019 Goal/Objective Addressed by This Resource (Link)	Provide a detailed rationale for the requested resource. The rationale should refer to your discipline's plan, analysis of data, SAO assessments, and/or the College's Strategic Plan	Estimated Amount of Funding Requested	Will this be one-time or on-going funding?	Is resource already funded (in part or in full)? If so, name source. Why is that source not sufficient for future funding?
a1.							
a2.							
a3.							
a4.							
a5.							

b. Technology (computers, data projectors, document readers, etc.) Enter requests on lines below.

Resource	Describe Resource Requested	Prioritize these requests 1,2,3, etc.	Strategic Plan 2019 Goal/Objective Addressed by This Resource (Link)	Provide a detailed rationale for the requested resource. The rationale should refer to your discipline's plan, analysis of data, SAO assessments, and/or the College's Strategic Plan	Estimated Amount of Funding Requested	Will this be one-time or on-going funding?	Is resource already funded (in part or in full)? If so, name source. Why is that source not sufficient for future funding?
b1.							
b2.							
b3.							
b4.							
b5.							

c. Budget for 4000s (per unit cost is <\$500 supplies) Enter requests on lines below.

Resource	Describe Resource Requested	Prioritize these requests 1,2,3, etc.	Strategic Plan 2019 Goal/Objective Addressed by This Resource (Link)	Provide a detailed rationale for the requested resource. The rationale should refer to your discipline's plan, analysis of data, SAO assessments, and/or the College's Strategic Plan	Estimated Amount of Funding Requested	Will this be one-time or on-going funding?	Is resource already funded (in part or in full)? If so, name source. Why is that source not sufficient for future funding?
c1.							
c2.							
c3.							
c4.							
c5.							

d. Budget for 5000s (printing, maintenance agreements, software license etc.) Enter requests on lines below.

Resource	Describe Resource Requested	Prioritize these requests 1,2,3, etc.	Strategic Plan 2019 Goal/Objective Addressed by This Resource (Link)	Provide a detailed rationale for the requested resource. The rationale should refer to your discipline's plan, analysis of data, SAO assessments, and/or the College's Strategic Plan	Estimated Amount of Funding Requested	Will this be one-time or on-going funding?	Is resource already funded (in part or in full)? If so, name source. Why is that source not sufficient for future funding?
d1.	TES Software License	4	2.4	Provide catalog and course description access to Evaluations, Counseling, Articulation, and Instruction services staff Provide access to electronic transcript services	\$15,500 \$6,000	On-going On-going	Yes. From Transcript Fees and Matriculation. Yes. From Transcript Fees.
d2.	CCC Tran License	5	2.4				
d3.							
d4.							
d5.							

e. Classified staff position (permanent/contract position requests unique to this discipline) Enter requests on lines below.

Resource	Describe Resource Requested	Prioritize these requests 1,2,3, etc.	Strategic Plan 2019 Goal/Objective Addressed by This Resource (Link)	Provide a detailed rationale for the requested resource. The rationale should refer to your discipline's plan, analysis of data, SAO assessments, and/or the College's Strategic Plan	Estimated Amount of Funding Requested	Will this be one-time or on-going funding?	Is resource already funded (in part or in full)? If so, name source. Why is that source not sufficient for future funding?
e1.	Enrollment Services Specialist/ Records	2	2.2, 2.3, 2.4	Data entry and document imaging to support Transfer Credit and Academic Advising	\$75,000/annually for salary and benefits. \$100,000 (to be shared with Admissions)	On-going On-going	(In Recruitment) SEA
e2.	On-going Consultant Help	1	2.1, 2.2, 2.3, 2.4, 2.5, 2.6				
e3.							
e4.							
e5.							

f. Classified staff position (temporary and student workers position requests unique to this discipline) Enter requests on lines below.

Resource	Describe Resource Requested	Prioritize these requests 1,2,3, etc.	Strategic Plan 2019 Goal/Objective Addressed by This Resource (Link)	Provide a detailed rationale for the requested resource. The rationale should refer to your discipline's plan, analysis of data, SAO assessments, and/or the College's Strategic Plan	Estimated Amount of Funding Requested	Will this be one-time or on-going funding?	Is resource already funded (in part or in full)? If so, name source. Why is that source not sufficient for future funding?
f1.	Temporary/Student Workers	3	2.2, 2.4	Data entry and document imaging for incoming transcripts for Transfer Credit and Academic Advising	\$22,000	On-going	No
f2.							
f3.							
f4.							
f5.							

III. B. Are there other resources (including data) that you need to complete your discipline review and planning?

None

STEP IV. SHARE YOUR ACCOMPLISHMENTS Please include at least one discipline accomplishment that you'd like to share with the college community.

The Evaluations & Records Office:

- Met the ADT (Associate Degree for Transfer) deadline during Fall 2017 and Spring 2018 for the CSU transfer applicants.
- Academic Advising is working with Transfer Credit Evaluations
- Transfer Credit Evaluations from Mira Costa is done
- Degree Audit rules are up to date with the 2018-2019 catalog
- Automated grade adjustments is complete
- Rulemaker tool is implemented and rules are being built for most commonly received transcripts
- Transcript Express is being utilized to reduce the amount of time it takes to enter transcript information into PeopleSoft
- On-line graduation application is live
- Grade posting is processed at the time of faculty submission
- Deans will have ability to see what grades have and have not been submitted

STEP V. ACCREDITATION For programs with an external accreditation, indicate the date of the last accreditation visit and discuss recommendations and progress made on the recommendations.

n/a


STEP VI. COMMENTS Other comments, recommendations: (Please use this space for additional comments or recommendations that don't fit in any category above.)


The investment in technology and hiring staff has been instrumental in getting closer to where we need to be to respond to MIS, SSSP and funding formula changes. There is still work to be done and a continuing investment will be needed to meet and keep up with all of these demands. Utilizing consultants is necessary in this area. They are abreast of PeopleSoft upgrades and changes, are PeopleSoft experts, are up to date on training and innovations that we can't always afford, work on dedicated projects and fill in gaps of expertise that we don't always have on campus. The cost of using consultants is minimal when taking all of this into account.

Please identify faculty and staff who participated in the development of the plan for this department:

Kendyl Magnuson <small>Name</small>	Jamie Moss	Rick Herren	
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<small>Name</small>	<small>Name</small>	<small>Name</small>	<small>Name</small>
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 Department Chair/Designee Signature
 Date: 11/30/18


 Division Dean Signature
 Date: 10/3/18


 Division Vice President Signature
 Date: 12/5/18

- Provide a hard copy to the Vice President Ely no later than November 30, 2018.
- Email an electronic copy to jderrico@palomar.edu by November 30, 2018.