AQIP Degree Audit Project Team

Doing over next 6 – 8 months

- Set schedule, who on the team, who will be SME’s.
- Discuss nature of what we want to be the end product – might help determine members.
- Review history of Degree Audit attempts over history. Why never completed?
- Discuss most recent activity, w/in 18 months, and research on products available today. Do we have choice in product to use? (ask of team sponsor)
- Define goal of outcome/goal of the audit project.
- Need to know boundaries for this goal from our sponsor.
- What does this fix?

1.) Questions for sponsor: costs, perceived outcomes, select a product or outline choices for EC (final) recommendation, what outcomes are expected – data to be tracked to show achievement.

2.) Outline/flowchart the current process/situation.

History of efforts to implement a degree audit system:
- 1983
- Last 18 months
- AQIP

Problems with previous efforts: don’t agree what we wanted it to do inclusion/process/costs

What is it:

<table>
<thead>
<tr>
<th></th>
<th>Students</th>
<th>Advisors</th>
<th>Faculty</th>
<th>Counselors</th>
<th>Registrar</th>
<th>IR/Others</th>
</tr>
</thead>
<tbody>
<tr>
<td>Course planning</td>
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<td>Degree audit</td>
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<td>Transfer</td>
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Scope 1st (datatel), 2nd (troy’s recommendation), 3rd (other systems)

3.) Advice will be more accessible. Whether or not the student has met the needs of their program of study to graduate. Available for students who do not utilize the counseling/advising options of the college – degree planning vs. audit for graduation.
Define elements of best solution

<table>
<thead>
<tr>
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<th>A</th>
<th>B</th>
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<tbody>
<tr>
<td>Cost – what do we need?</td>
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<tr>
<td>Ease of updates</td>
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<td>User ease of use</td>
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<td>Staff ease</td>
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<td>Integrate w/Datatel</td>
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<td>Allows for use of E-</td>
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<td>Advising and Student</td>
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<td>Educational Planning</td>
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<tr>
<td>modules</td>
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<td>Functionality (needs</td>
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<tr>
<td>definition)</td>
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<td>Deployment strategies –</td>
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<td>students, advisors etc.</td>
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<td>Catalog years</td>
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<td>Cost of support $</td>
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<td>IS Involvement</td>
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<td></td>
<td>Provide comparison</td>
<td>or make recommendation</td>
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</tbody>
</table>

Get from our sponsor: boundaries, EC support, resources (money, travel, snacks, etc...), feedback, and reality check.

10/3/06

Roles on Improvement Project Teams

Project teams usually have, at a minimum, a team leader and team members. Many project teams add the roles of team sponsor and team facilitator. These additional roles should be considered only if they add value to a particular project. Often roles are combined, and care needs to be taken when a team leader is also a fully participating team member or also serves as the meeting/process facilitator.

Included here are role descriptions from more than one source. Each role can be condensed/adapted to suit a particular project.

<p>| Leader       | The team leader’s role is to keep the team moving forward through a process to an outcome. |</p>
<table>
<thead>
<tr>
<th><strong>Team member</strong></th>
<th>Team members carry out the charge given to them, serving as representatives of their work areas and constituent groups as well as of the institution as a whole.</th>
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<tbody>
<tr>
<td><strong>Sponsor</strong></td>
<td>The sponsor is a member of the organizational leadership who serves as an advocate or champion for process improvement and ensures that the team’s work is an effective use of resources - time, personnel, and funds.</td>
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<tr>
<td><strong>Facilitator</strong></td>
<td>The facilitator works with the team to guide them through the improvement process while maintaining a neutral position regarding the team’s specific recommendations.</td>
</tr>
</tbody>
</table>

**Leader**

The team leader’s role is to keep the team moving forward through a process to an outcome.

- Should be familiar with the process and its stakeholders
- Plays a key role in selecting the other members of the team
- Coordinates team logistics
- Plans and evaluates team meetings with the team facilitator
- Maintains communications and a working relationship with the sponsor, keeping the sponsor informed of progress and problems that do or could adversely impact team efforts
- Keeps the team focused on the big picture and the purpose of the project
- Fosters enthusiasm and teamwork
- Ensures all the ideas and concerns of the team are fully represented in any meetings
- Keeps official records of team activities
- Provides feedback on the outcome and qualifies why team ideas and concerns were not fully implemented

**Members**

Team members carry out the charge given to them, serving as representatives of their work areas and constituent groups as well as of the institution as a whole.

- Own the charter and work within team limits
- Use data and facts to improve the process
- Coordinate with other MCC teams to ensure implementation is for the overall benefit of MCC
- Ensure that team results best serve the customer and do not adversely affect groups without their consent
• Solve problems the team is capable of and responsible for
• Use CQI techniques in carrying out their role
• Conduct continuous follow-up after implementation in the belief that the charter is not fully fulfilled until the results are implemented and measured
• Notify the sponsor through the team leader if the charter needs to be clarified and/or modified
• Work in concert with others on the team, each fostering teamwork by her/his own behavior

### Sponsor

The sponsor is a member of the organizational leadership who serves as an advocate or champion for process improvement and ensures that the team’s work is an effective use of resources - time, personnel, and funds.

• Identifies team members (often with the team leader)
• Provides coaching, counseling, support, and encouragement to the team
• Works with the team to ensure the charter is understood and the team accepts ownership of it and negotiates/approves changes in the charter
• Helps define constraints to the team’s work
• Helps ensure team has resources and time to accomplish the complete task
• Ensures that if the team stays within the charter, uses data and facts, and coordinates intended implementation with those impacted, its work will be supported
• Ensures a work environment that encourages the team members to complete their task and removes constraints where possible
• Avoids micro-management
• Shares the accountability for successful completion of the task with the team
• Communicates regularly with the team leader
• Signs off at each step of the process or provides the team with additional guidance to reach sign off
• Reviews and helps implement solutions from the team, assisting in securing resources to implement recommendations
• Recognizes the team’s accomplishments

### Facilitator

The facilitator works with the team to guide them through the improvement process while maintaining a neutral position regarding the team’s specific recommendations.

• Has expertise in the CQI process and tools
• Is not a team member but a person outside the group who serves as a process guide
• Helps connect the work of the team to the organization's overall CQI effort
• Consults with the team leader in planning team meetings and activities and evaluating team meetings
• Coaches the team in use of the improvement model and appropriate analytical tools
• Facilitates productive group dynamics
• Brings in outside advisers as necessary
• Serves as a neutral third party to maintain the team’s focus
• May facilitate every meeting or share facilitation with the team leader

*Much of this information is from the Office of Planning and Institutional Assessment, The Pennsylvania State University. Penn State has been involved in continuous improvement from the 1980’s and has done a great job of sustaining and documenting the initiative.*