

Project Title: Advancing Student Mobility Through Data Mobility – A BC Focus

Project Goals and Objectives: The Project seeks to identify BC's post-secondary readiness for implementing trusted student data exchange that facilitates student transfer.

Goals: (i) identifying the current state and readiness for exchanging student data; and (ii) capturing expert advice at the local and system levels to facilitate creation of a national data exchange model that addresses identified business needs and builds on the expertise and efforts currently available within the province.

Research Questions:

1. What is the current state of data exchange capacity at BC post-secondary institutions and allied organizations with respect to sharing of student data at the individual record level?
2. What student data exchange business needs exist within BC post-secondary institutions and EducationPlannerBC that would be enhanced by national data exchange?
3. What expert advice do post-secondary registrarial leadership and allied organizations (i.e., BCCAT, BCRA, and EducationPlannerBC) have for advancing institutional capacities and change readiness for national data exchange that supports transfer?

Project Tie to BCCAT's Research Priorities: The project is directly aligned with BCCAT's goals for continuous improvement of specific transfer mechanisms with a focus on data exchange and extra-provincial mobility. It also aspires to provide preliminary research into data exchange supports needed for micro-credentialing that facilitate transfer (e.g., Blockchain, alternate forms of data capture). This BCCAT project submission was submitted with support from the University of Victoria through the Registrar, Nicole Greengoe and is currently being supported by Wendy Taylor, Interim Registrar. This institution's expertise in systems and transfer and the access to the broader registrarial community through BCRA will be essential as we seek to capture an evidence informed understanding of the BC context. Early consultation with BCRA registrars, many of whom are ARUCC members, suggests the need for more research of BC institutions' practices and complexities related to student data exchange and business needs to inform changes in this area. Furthermore, capturing expert advice from allied organizations such as EducationPlannerBC will be helpful to inform the research. Lastly, provincial and national organizations across Canada are endorsing the Groningen & Student Mobility Project focused on improving national student data exchange including BCCAT, BCRA, BC Colleges, BCAIU, SAAF, and others. Therefore, it is critical to capture expert insights and a deeper, research informed understanding of the BC context and diversity as these relate to student data exchange.

Larger Project Context: ARUCC is creating an innovative, trusted, national student data exchange network to facilitate transfer and mobility. As complement to this work, this new research project we are submitting to BCCAT seeks to conduct focused research to better understand the student data exchange capacities at BC post-secondary institutions. At the national level, this project serves broader student mobility goals such as those embedded in the MOU between the provincial Councils of Admissions/Articulation and Transfer, and in a recent

study by the University of Ottawa Centre for International Policy Studies and the Munk School of Global Affairs at the University of Toronto (see <http://goglobalcanada.ca/>). Internationally, this proposal aligns with the Lisbon Recognition Convention (<https://www.cicic.ca/1398/An-overview-of-the-Lisbon-Recognition-Convention/index.canada>) and the Groningen Network Organization (<http://www.groningendeclaration.org/>), each of which seeks to improve student transfer through data exchange and enhanced recognition of prior post-secondary studies.

Roles

- **Project Lead/Oversight for ARUCC:** Charmaine Hack on behalf of Association of Registrars of the Universities and Colleges of Ontario (ARUCC) – responsible for providing oversight leadership to the project and ensuring strong connections to the national project
- **Primary investigator:** Joanne Duklas, Duklas Cornerstone Consulting (see **Appendix A** for CV) – responsible for conducting research, consultation, and writing of the survey, communications, and the final report; also responsible for ensuring strong connections with BCCAT and the institutional partner
- **Institutional Partner Contact/Expert Advisor** – Wendy Taylor, Acting Registrar, University of Victoria (supported by other institutional experts from the University) – responsible for providing strategic advice and guidance throughout the life of the project, ensuring the research process and outcomes are centred and focused within the BC context and appropriately informed by the expertise available within the University - see **Appendix B** for the Letter of Support

Project contact details: Charmaine Hack, Registrar, Ryerson University, and Past-President, ARUCC; Joanne Duklas, Research and Consultant, Duklas Cornerstone Consulting joanne@duklascornerstone.ca, 905 703 7485

Methodology: The research study will be based on gathering of primary research of current practices and perspectives for data exchange in place within BC. To achieve this, the project will incorporate a variety of research approaches including the following:

- an online survey targeting registrarial and other relevant experts within BC post-secondary institutions;
- qualitative interviews with four post-secondary institutions within BC;
- a review of survey data and any materials provided by interviewees and survey respondents; and,
- a consultation session with each of BCCAT, BCRA, and a relevant contact at EducationPlannerBC.

The methods will also include relying on registrarial colleagues at the University of Victoria as expert advisors to inform all aspects of the project (interview question development, project process and supporting communications, survey question development, consultation session process, and peer review of the final report).

The project will further benefit from the expert insights of the ARUCC Groningen & Student Mobility Steering Committee, a national committee with representative membership from ARUCC, the Pan-Canadian Consortium on Admissions and Transfer, the Canadian University Council of Chief Information Officers, and the Canadian Post-Secondary Electronic Exchange

Council User Group (CanPESC). Related to this, the project will be informed by the available research that has emerged from the national data exchange project led by ARUCC.

It is understood that the BCCAT Research Committee and BCCAT would also review the final report which may result in final revisions/edits. It is anticipated that the project will run from point of contract signing (likely in April 2018) to March/April 2019 with submission of a final report.

The above research approach is appropriate to ensure an evidence-informed understanding of the current state of student data exchange capacity in BC.

Deliverables/Outcomes:

Deliverable	Milestone Date
Project Launch	April 2018 (upon contract award and signing)
Consultation with Univ of Victoria; Establish supporting meeting schedule	Throughout project, particularly in the formative stages
Survey and Interview Guide Development (including questions and communications) – Including identifying appropriate distribution channel for survey and institutions to interview	Spring to summer 2018
Consultation Sessions with relevant allied organizations	Spring to fall 2018
Survey Launch	July 2018
Survey Closed	Mid-August 2018
Interviews Scheduled	Spring to Fall 2018
Interviews Finalized	December 2018/January 2019
Data Analytics Assessment	September 2018 through February 2019
Draft and Final Report Completion	March to April 2019
Project Close	April 2019

Communications Plan:

- **Project communications collateral:** to include survey notification, reminders, and closure messaging supported by an online survey with appropriately framed open and closed ended quantitative and qualitative questions; an interview guide for the individual institutional interviews; presentational material as needed for the sessions with allied organizations (all communications will be delivered in electronic format; no print materials are anticipated or needed)
- **Distribution channel for project communications:** Connecting with British Columbia Registrars' Association (BCRA) will be managed through Wendy Taylor, Acting Registrar, University of Victoria; distribution of the survey will be through the registrarial association listserv. The four institutional interviews will result from direct outreach by the primary investigator to the Registrars at each institution; the invite will include a request for registrars to invite relevant experts within their institutions to the interviews.
- **Timing:** the communications plan will roll out in alignment with the above project deliverables.

Appendix A: CV for Joanne Duklas, Primary Investigator

Biography

Through her firm, Joanne delivers expertise and research in the areas of student transfer, mobility, and success; policy development; registrarial service delivery; enrolment management; and data analysis and exchange. Her clients include post-secondary institutions, government, and allied organizations operating at the provincial, national, and international levels. Joanne brings unique knowledge of the Canadian postsecondary environment to her research projects and an unparalleled background in the strategic and operational workings of post-secondary institutions. She is an expert in higher education and system level, broad-band consultation and research.

Featured Samples of Joanne's Awards and Contributions

- Awarded honorary membership status in the Association of Registrars of the Universities and Colleges of Canada (ARUCC, 2013) in recognition of her significant volunteer and leadership service to the national student services post-secondary community
- Awarded honorary membership in the Ontario University Registrars' Association (OURA) in recognition of her significant service to the association
- Past member of the Program Committee for the international 2017 Post-Secondary Electronic Standards Council (PESC) Data Summit - PESC is an organization dedicated to developing international data exchange standards to support student mobility.
- Project Consulting Lead for the ARUCC Groningen & Student Mobility Project, a national data exchange project focused on bringing a national data exchange solution to Canada to advance student mobility (<http://arucc.ca/en/resources/task-force-groningen.html>).
- Volunteer for the Pilot Working Group of the Groningen Declaration Network, an international organization dedicated to advancing student mobility through trusted student data exchange (groningendeclaration.org).
- Project Consulting Lead, Primary Investigator, and primary author of the ARUCC PCCAT National Transcript and Transfer Guide, Canada's first national standards guide (<http://guide.pccat.arucc.ca/en/>).
- Sought after and invited speaker at numerous provincial, national, and international conferences on topics related to student mobility and transfer including as the keynote speaker at the 2017 ONCAT Student Pathways Conference; plenary panel presenter at the November 2017 international PESC Data Summit; and session speaker at the November 2017 British Columbia Council on Admissions and Transfer's Joint Annual Meeting.

Education, Certifications, and Roles

- Honours Bachelor of Arts, Sociology and Urban Studies – York University
- Master's in Business Administration – Schulich School of Business, York University
- Psychometric Certifications: Certified by Psychometrics Canada to deliver several psychometric assessments as part of her coaching practice including the Myers Briggs Step II; Certified by the US based CPP Inc. to deliver the California Psychological Instrument (CPI) 260, a comprehensive competency assessment instrument to support leadership development

- Sample of Former Roles: Assistant Vice President and Registrar, York University; President, Association of Registrars of the Universities and Colleges of Canada

Featured Research and Client List

British Columbia Council on Admissions and Transfer (BCCAT)

a/ International Credential Assessment Study (2017 to present)

- Primary Investigator researching the current practices and perspectives on scalable practices to support international transfer credit assessment for both admission and exchange

b/ EducationPlannerBC Policy Working Group (2016/2017)

- Supported the creation of a new BC application centre called “EducationPlannerBC” which will facilitate application processes centrally for all the publicly funded colleges and universities in BC - <https://www.educationplannerbc.ca/project>
- Lead consultant for the EducationPlannerBC Policy Working Group - Involved in research, policy writing, broad-based consultation and facilitation with all the public post-secondary institutions with a primary focus on the registrarial community

ONCAT

- ONCAT funded research project – Alternative Credentials Typology to support Student Success, Mobility, and Transfer (publication pending) – Project Lead, Primary Investigator, Lead Author
- ONCAT project – A Typology of New Program Approval Practices at Ontario Colleges and Universities (2014; http://www.oncat.ca/files_docs/content/pdf/en/oncat_research_reports/2014-39-Final-Report-New-Program-Governance-Protocols.pdf) – Project Lead, Primary Investigatory, Author

Association of Registrars of the Universities and Colleges of Canada (ARUCC; 2017 to present)

- ARUCC Groningen and Student Mobility Project focused on creating a trusted, national student data exchange network for Canadian post-secondary institutions and allied organizations
- Project Lead and Primary Investigator to support and lead the research, communications, and Canada-wide consultation on behalf of the ARUCC Groningen Steering Committee (<http://arucc.ca/en/resources/task-force-groningen.html>)

Alberta Council on Admissions and Transfer (ACAT) research funded study (2017 to May 2018)

- Research study exploring transfer student success in the Alberta system conducted in partnership with the University of Calgary and the Northern Alberta Institute of Technology
- Primary Investigator and Project Lead

Pan-Canadian Consortium on Admissions and Transfer (PCCAT) and the Association of Registrars of the Universities and Colleges of Canada Transcript and Transfer Standards initiative

- Created Canada’s first national standards guide – guide.pccat.arucc.ca
- Project to enhance the research, tools, and supports for registrarial and pathway developers and to establish common nomenclature and transcript standards through broad-based consultation and consensus building; included creation of Canada’s first national Transcript and Transfer Standards Guide offered in both English and French
- Project Lead, Primary Investigator and Lead Author of the final online guide and three supporting national research studies examining current practices, other jurisdictions, and best practice

Appendix B – Letter of Support from University of Victoria



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March 13, 2018

Anna Tikina
British Columbia Council on Admissions and Transfer (BCCAT)
Via email: atikina@bccat.org

Greetings Anna:

The University of Victoria welcomes the opportunity to provide a letter of support for the ARUCC project called Advancing Student Mobility through Data Mobility - a BC Focus.

This project seeks to identify current practices and expert advice from BC registrars and other experts regarding data exchange needs. It represents a complementary research study to the national ARUCC Groningen and Student Mobility Project. The BC project findings will provide insights to BC registrars and other postsecondary leaders, BCCAT and the ARUCC Groningen initiative which is focused on creating a national data exchange network for Canada.

The project role of the staff at the University of Victoria includes providing expert advice and guidance in the formative stages and throughout the project and conducting a review of the final report. This work will include contributing to survey development and other information gathering materials and guiding the project process and methodology. We will also assist the researchers with organizing input from the BCRA and encouraging broader system engagement from BC member institutions.

Thank you for supporting this project.

Sincerely,

A handwritten signature in black ink, appearing to read "Nicole Greengoe".

Nicole Greengoe
Registrar, University of Victoria

cc: Jim Dunsdon, Associate Vice President
Division of Student Affairs

