

Project ASSIST Strategic Plan

November 27, 1996

Mission Statement

Project ASSIST's mission is to facilitate the transfer of California community college students to California's public 4-year universities by providing an electronic system for academic planning which delivers accurate, timely and complete information.

Vision Statement

Project ASSIST will become an integrated, student-centered information system which includes degree requirement information and is maintained as the official, complete repository of California articulation. This system will provide: 1) ubiquitous on-line access, 2) an open system supporting access by other information systems, and 3) electronic interaction between students and institutions.

Primary Goals

(for the next 2-3 years)

- Goal 1: Secure broad-based commitment to and support of the mission and vision of Project ASSIST.
- Goal 2: Establish ASSIST as the official, statewide repository of articulation and transfer information for the state of California.
- Goal 3: Develop and implement procedures to ensure complete and comprehensive articulation and transfer information in ASSIST.
- Goal 4: Utilize the established Technical Advisory Committee process to implement the Technology Plan to promote universal access to logically centralized applications and data using an open architecture, web browser clients, and modern database management system technology.

Secondary Goals
(for the next 2-3 years)

Secondary Goal 1: Assure the availability of a statewide transcript analysis tool by December 1999

Secondary Goal 2: Increase the use of ASSIST by students and counselors.

Objectives for Primary Goals

Goal 1: *Secure broad-based commitment to and support of the mission and vision of Project ASSIST.*

- Objective 1: The ASSIST Board of Directors shall complete and adopt a strategic plan.
- Objective 2: The ASSIST Board of Directors shall communicate its adoption of the strategic plan to all campuses.
- Objective 3: CCC/CSU/UC shall issue a statement endorsing Project ASSIST.
- Objective 4: CCC/CSU/UC system-wide offices shall secure individual campus commitment 1) to the concept of ASSIST as the official repository of California articulation and statewide transfer information system; 2) to enter articulation by 4-year universities; and 3) to use ASSIST as an advising tool.
- Objective 5: CCC/CSU/UC shall work jointly to maintain adequate funding for the project.
- Objective 6: The ASSIST Board of Directors shall review and revise annually the goals and objectives for the Project as appropriate.
- Objective 7: The ASSIST Board of Directors shall clarify and standardize its meeting procedures.

Goal 2: *Establish ASSIST as the official, statewide repository of articulation and transfer information for the state of California.*

- Objective 1: Define the elements and policies of the “official, statewide repository of California articulation and transfer information.”
- Objective 2: Adopt the definition of the official, statewide repository of California articulation and transfer information.
- Objective 3: Obtain endorsement by each of the three public postsecondary segments.
- Objective 4: Update and inform all public higher education institutions and other relevant higher education agencies/groups of ASSIST’s plans to become the official repository of articulation and transfer information.

Goal 3: *Develop and implement procedures to ensure complete and comprehensive articulation and transfer information in ASSIST.*

- Objective 1: Identify procedures for implementation of a timely, on-going articulation update process.
- Objective 2: Ensure all campuses adhere to the procedures.
- Objective 3: Analyze the means to 1) reduce time from completion of articulation to the receipt of data at the ASSIST Coordination Site, 2) reduce time from receipt of data at the ASSIST Coordination Site to distribution to campuses, and 3) ensure timely access to data by campuses.
- Objective 4: Develop activities to encourage the universities to submit data as it is updated.
- Objective 5: Evaluate the relationship of emerging degree audit implementations to ASSIST to determine commonality for a positive relationship.
- Objective 6: Add data to the database from universities who are not entering their own data.
- Objective 7: Ensure complete submission and entry of all community college course list data.

Goal 4: *Utilize the established Technical Advisory Committee process to implement the Technology Plan to promote universal access to logically centralized applications and data using an open architecture, web browser clients, and modern database management system technology.*

- Objective 1: Adopt a specific database environment.
- Objective 2: Adopt and communicate a web browser as the client for future access to ASSIST.
- Objective 3: Convert/migrate ASSIST functionality to a new environment.
- Objective 4: Assess representative campus-based information systems for linkages with articulation data in ASSIST.

Objectives for Secondary Goals

Secondary

Goal 1: *Assure the availability of a statewide transcript analysis tool by December 1999*

Objective 1: Define the requirements for a statewide transcript analysis tool.

Objective 2: Evaluate existing systems against requirements for a statewide transcript analysis tool.

Objective 3: Identify a preferred solution

Secondary

Goal 2: *Increase the use of ASSIST by students and counselors.*

Objective 1: Develop and implement marketing/public relations strategies to raise the awareness of ASSIST among students and counselors

Activities to Meet Primary Goal Objectives

Primary Goal 1

Secure broad-based commitment to and support of the mission and vision of Project ASSIST.

Objective 1: *The ASSIST Board of Directors shall complete and adopt a strategic plan.*

Activity 1: ACS staff will prepare a summary of the plan developed at the retreat for distribution and feedback by the ASSIST Board of Directors.

Who is Responsible: ACS staff

Timeline: September 17, 1996

Budget Implications: No direct costs

Activity 2: The ASSIST Board workgroup shall produce a draft of the strategic plan for distribution and adoption by the ASSIST Board of Directors.

Who is Responsible: ASSIST Board workgroup

Timeline: October 25, 1996

Budget Implications: No direct costs

Activity 3: The ASSIST Board of Directors will adopt the strategic plan.

Who is Responsible: The ASSIST Board of Directors

Timeline: November 18, 1996

Budget Implications: Implementation costs for approved plan activities.

Primary Goal 1

Secure broad-based commitment to and support of the mission and vision of Project ASSIST.

Objective 2: *The ASSIST Board of Directors shall communicate its adoption of the strategic plan to all campuses.*

Activity 1: The ASSIST Board of Directors shall issue a statement to all California Community College, California State University, and University of California campuses regarding the adoption of the strategic plan.

Who is Responsible: ASSIST Board of Directors

Timeline: December 31, 1996

Budget Implications: No direct costs beyond minimal costs for mailing

Primary Goal 1

Secure broad-based commitment to and support of the mission and vision of Project ASSIST.

Objective 3: *CCC/CSU/UC shall issue a statement endorsing Project ASSIST.*

Activity 1: CCC/CSU/UC shall issue a statement to their respective campuses endorsing Project ASSIST.

Who is Responsible: CCC/CSU/UC System-wide Offices

Timeline: January 15, 1997

Budget Implications: No direct costs beyond minimal costs for mailing

Primary Goal 1

Secure broad-based commitment to and support of the mission and vision of Project ASSIST.

Objective 4: *CCC/CSU/UC System-wide offices shall secure individual campus commitment 1) to the concept of ASSIST as the official, statewide repository of California articulation and transfer information; 2) to enter articulation by 4-year universities; and 3) to use ASSIST as an advising tool.*

Activity 1: Define community college “participation criteria.” CSU & UC participation criteria will be defined as a component of Primary Goal # 2.

Who is Responsible: ASSIST Board workgroup draft and ASSIST Board of Directors adopt CC participation criteria

Timeline: Complete by April 1997

Budget Implications: No direct costs beyond minimal meeting costs.

Activity 2: Send a letter from the ASSIST Board of Directors to all participants including: 1) an explanation of the participation criteria for each segment (CCC/CSU/UC); 2) request the names of staff who will be responsible for managing ASSIST at the campus; and 3) request the signature of the VP/AVP/AVC overseeing ASSIST as a statement of campus commitment to meeting participation criteria.

Who is Responsible: CCC/CSU/UC System-wide Offices and ASSIST Board of Directors

Timeline: April 1997

Budget Implications: No direct costs beyond minimal costs for the mailing.

Primary Goal 1
*Secure broad-based commitment to and support of the mission
and vision of Project ASSIST.*

Objective 5: *CCC/CSU/UC shall work jointly to maintain adequate funding for the project.*

Activity 1: The ACS staff shall prepare an analysis of budget needs for the Project based on the activities approved in the Strategic Plan. This analysis will include recommendations for: 1) immediate changes to 1996-97 funding priorities; 2) priorities for 1997-98 funds; and 3) ideas for possible new funding in 1998-99.

Who is Responsible: ACS staff

Timeline: Complete by February 1, 1997

Budget Implications: No direct costs

Activity 2: A Budget Change Proposal (BCP) may be drafted for submission as part of 1998 Intersegmental Budget Task Force.

Who is Responsible: ASSIST Board of Directors

Timeline: Present BCP at May 1997 ASSIST Board of Directors meeting; submit to the Intersegmental Budget Task Force.

Budget Implications: No direct costs

Primary Goal 1
*Secure broad-based commitment to and support of the mission
and vision of Project ASSIST.*

Objective 6: *The ASSIST Board of Directors shall review and revise annually the goals and objectives for the Project as appropriate.*

Activity 1: Annual review and revision of Project goals and objectives as stated in the Strategic Plan.

Who is Responsible: The ASSIST Board workgroup will conduct an initial review of Project goals and objectives and will develop recommendations, for consideration and adoption by the ASSIST Board of Directors.

Timeline: The ASSIST Board workgroup will meet in September each year and develop recommendations for review by the ASSIST Board of Directors at its November meeting.

Budget Implications: No direct costs beyond minimal meeting expenses.

Activity 2: The ASSIST Board of Directors will schedule a retreat every two years to update and revise the Project's Strategic Plan.

Who is Responsible: ASSIST Board of Directors

Timeline: Next retreat to be scheduled for July 1998

Budget Implications: \$10,000

Primary Goal 1
*Secure broad-based commitment to and support of the mission
and vision of Project ASSIST.*

Objective 7: *The ASSIST Board of Directors shall clarify and standardize its meeting procedures.*

Activity 1: Refine ASSIST Board of Directors operating procedures as follows:

- 1) Continue to follow procedures as defined in the Project ASSIST Governance document.
- 2) Produce, review, and distribute meeting minutes within a specified time period soon after ASSIST Board of Directors meetings
- 3) Follow an issue/action format at meetings to keep better track of the status of specific issues and reflect this in meeting minutes
- 4) Establish a standing ASSIST Board workgroup, consisting of one representative from each segmental office and representatives from the ACS, to work on ASSIST Board of Directors issues between semi-annual Board meetings.

Who is Responsible: ASSIST Board of Directors

Timeline: November 18, 1996

Budget Implications: No direct costs.

Primary Goal 2

Establish ASSIST as the official, statewide repository of articulation and transfer information for the state of California.

Objective 1: *Define the elements and policies of the “official, statewide repository of California articulation and transfer information.*

Activity 1: Schedule a break-out session at the December 4, 1996 ASSIST User Group Meeting to collect information from users in the field about the type and extent of articulation and transfer information that should be contained in the “official, statewide repository”.

Who is Responsible: ACS staff, ASSIST Board workgroup.

Timeline: December, 1996

Budget Implications: No direct costs.

Activity 2: Establish an *ad hoc* committee consisting of the ASSIST Board workgroup, 3 articulation officers (one from each segment), and any other appropriate personnel to: a) review comments obtained at the User Group meeting; b) prepare a definition of the “official, statewide repository;” c) circulate this definition to articulation officers and others, as appropriate, for their comment; and d) present to the ASSIST Board of Directors for final approval.

Who is Responsible: ASSIST Board workgroup.

Timeline: Complete by March 1997

Budget Implications: Travel/meeting expenses for the ASSIST Board workgroup.

Primary Goal 2

Establish ASSIST as the official, statewide repository of articulation and transfer information for the state of California.

Objective 2: ***Adopt the definition of the official, statewide repository of California articulation and transfer information.***

Activity 1: Review and adopt the definition developed under Objective 1 of this Goal section.

Who is Responsible: ASSIST Board of Directors

Timeline: April 1997 via mail and conference call so that this item does not have to wait for the May 1997 ASSIST Board of Directors meeting.

Budget Implications: No direct costs

Primary Goal 2

Establish ASSIST as the official, statewide repository of articulation and transfer information for the state of California.

Objective 3: *Obtain endorsement by each of the three public postsecondary segments.*

Activity 1: ASSIST Board of Directors brings the issue to the attention of appropriate governing entities of each segment (CCC/CSU/UC) for their review and approval.

Who is Responsible: ASSIST Board of Directors segmental representatives

Timeline: Complete by July 1, 1997

Budget Implications: No direct costs

Primary Goal 2

Establish ASSIST as the official, statewide repository of articulation and transfer information for the state of California.

Objective 4: ***Update and inform all public higher education institutions and other relevant higher education agencies/groups of ASSIST's plans to become the official repository of articulation and transfer information.***

Activity 1: Identify relevant groups and agencies, in addition to all public high education institutions, and determine what method of communication would be most appropriate.

Who is Responsible: ASSIST Board workgroup

Timeline: Complete by December 1997

Budget Implications: No direct costs

Activity 2: Communicate with identified groups and agencies as appropriate.

Who is Responsible: To be determined based on which groups and agencies are involved.

Timeline: Complete by 1997

Budget Implications: No direct costs beyond minimal meetings and mailings.

Primary Goal 3

Develop and implement procedures to ensure complete and comprehensive articulation and transfer information in ASSIST.

Objective 1: *Identify procedures for implementation of a timely, on-going articulation update process.*

Activity 1: Develop specific working procedures for maintaining and updating the ASSIST articulation repository. These procedures should be developed in accordance with the definition of “repository” established under Primary Goal 2, Objective 1, Activity 1. There may need to be separate procedures for the current Revelation-based environment and the new Web-based environment..

Who is Responsible: ASSIST Board workgroup, including 3 campus articulation officers (one from each segment) and any other personnel as appropriate as a part of the activities for defining the attributes of the articulation repository. Also include this information in the same review, consultation, and approval process.

Timeline: Complete by March 1997

Budget Implications: Travel/meeting expenses for the ASSIST Board workgroup and other staff.

Primary Goal 3

Develop and implement procedures to ensure complete and comprehensive articulation and transfer information in ASSIST.

Objective 2: *Ensure all campuses adhere to the procedures.*

Activity 1: Develop a monitoring process for reporting to segmental offices and the ASSIST Board of Directors how campuses are adhering to the related procedures and policies that are being established as part of this Strategic Plan. There may need to be different processes developed for the current Revelation-based environment and the new Web-based environment.

Who is Responsible: ASSIST Board workgroup will develop a draft proposal and consult with campus staff for review and comment. A final proposal will be submitted to the ASSIST Board of Directors for review and approval.

Timeline: Complete by July 1997

Budget Implications: No direct costs beyond minimal meetings and mailings.

Activity 2: Begin implementation of the above mentioned monitoring process.

Who is Responsible: To be established

Timeline: Fall 1997

Budget Implications: To be established

Primary Goal 3

Develop and implement procedures to ensure complete and comprehensive articulation and transfer information in ASSIST.

Objective 3: *Evaluate the relationship of emerging degree audit implementations to ASSIST to determine commonality for a positive relationship.*

Activity 1: Study representative degree audit implementations at UC, CSU, and CCC campuses and write a report outlining possibilities for integration. Include contact with consortium and MIS personnel as appropriate.

Who is Responsible: TAC & ACS staff

Timeline: June 1997

Budget Implications: Costs for researching campus degree audit implementations (travel, staffing, etc.)

Primary Goal 3
Develop and implement procedures to ensure complete and comprehensive data in ASSIST.

Objective 4: *Add data to the database from universities who are not entering their own data.*

Activity 1: CSU Chancellor's office to send a letter to non-participating CSU campuses requesting: 1) completion of a form indicating existing articulation to be entered into ASSIST; and 2) coordination with the ACS regarding submission of paper copies of articulation to be entered into ASSIST.

Who is Responsible: CSUCO

Timeline: October 31, 1996

Budget Implications: No direct costs

Activity 2: Data entry of CSU articulation by ACS staff

Who is Responsible: ACS

Timeline: Begin as soon as CSU campuses begin submitting paper copies of articulation. ACS will develop a data entry schedule and provide regular status updates to the Board.

Budget Implications: ACS staffing costs will vary depending upon the total amount of articulation to be entered/updated each year.

Primary Goal 3

Develop and implement procedures to ensure complete and comprehensive articulation and transfer information in ASSIST.

Objective 5: *Ensure complete submission and entry of all community college course list data.*

Activity 1: Evaluate the potential for use of CCCCCO MIS course list data in lieu of colleges submitting data directly to the ACS.

Who is Responsible: ACS & CCCCCO staff

Timeline: December 31, 1997

Budget Implications: No direct costs beyond minimal meeting costs.

Activity 2: Develop a process for inputting complete community college master course list data into ASSIST.

Who is Responsible: ACS staff or ASSIST Board workgroup depending upon results from Activity 1.

Timeline: March 1998

Budget Implications: No anticipated direct costs

Activity 3: Implement a process for inputting complete community college master course list data into ASSIST.

Who is Responsible: ACS

Timeline: June 1998

Budget Implications: To be determined based on process developed under Activity 2.

Primary Goal 4

Utilize the established Technical Advisory Committee process to implement the Technology Plan to promote universal access to logically centralized applications and data using an open architecture, web browser clients, and modern database management system technology.

Objective 1: *Adopt a specific database environment.*

Activity 1: Research, review and adopt a specific database environment.

Who is Responsible: ACS, TAC, ASSIST Board of Directors

Timeline: November 18, 1996

Budget Implications: Initial purchase of database software and annual maintenance fees.

Primary Goal 4

Utilize the established Technical Advisory Committee process to implement the Technology Plan to promote universal access to logically centralized applications and data using an open architecture, web browser clients, and modern database management system technology.

Objective 2: *Adopt and communicate a web browser as the client for future access to ASSIST.*

Activity 1: Research, review and adopt a specific browser, or class of browsers, for use by customers.

Who is Responsible: ACS, TAC, ASSIST Board of Directors

Timeline: November 18, 1996

Budget Implications: No direct costs.

Activity 2: Communicate related information to campuses.

Who is Responsible: ACS & TAC

Timeline: February 1997

Budget Implications: No direct costs beyond minimal mailing costs. However, there will be costs to some institutions for raising the minimum level of technology for accessing and using ASSIST from the current level.

Primary Goal 4

Utilize the established Technical Advisory Committee process to implement the Technology Plan to promote universal access to logically centralized applications and data using an open architecture, web browser clients, and modern database management system technology.

Objective 3: *Convert/migrate ASSIST functionality to new environment.*

Activity 1: Follow the ASSIST Software Development Framework process in converting all existing, approved ASSIST functionality and data to the new environment.

Who is Responsible: ACS, TAC, ASSIST Board of Directors

Timeline: December 31, 1998

Evaluation: The ASSIST Software Development Framework requires specific evaluation components for any project.

Budget Implications: ACS staff to develop and carry-out plans.

Primary Goal 4

Utilize the established Technical Advisory Committee process to implement the Technology Plan to promote universal access to logically centralized applications and data using an open architecture, web browser clients, and modern database management system technology.

Objective 4: *Assess representative campus-based information systems for linkages with articulation data in ASSIST.*

Activity 1: Identify and study representative campus-based information systems for linkages with ASSIST information in the new environment. Produce a report for the ASSIST Board of Directors on the results of this study.

Who is Responsible: ACS & TAC

Timeline: Complete by December 1998

Budget Implications: Costs for studying campus systems (travel, staffing, etc.)

Activities to Meet Objectives for Secondary Goals

Secondary Goal 1

Assure the availability of a statewide transcript analysis tool by December 1999.

Objective 1: *Define the requirements for a statewide transcript analysis tool.*

Activity 1: ACS convene a task force of key campus technical and student services representatives to identify the requirements for a transcript analysis tool. Include consultation with MIS groups and college technology consortia.

Who is Responsible: ACS staff & Task Force

Timeline: Convene Task Force in February 1997. Estimate 3 to 4 meetings. Conclude deliberations by May 1, 1997.

Budget Implications: Costs for conducting activities of the Task Force.

Activity 2: Develop a task force report for the ASSIST Board of Directors.

Who is Responsible: ACS & Task Force

Timeline: Complete in time for the May 1997 ASSIST Board of Directors meeting

Budget Implications: No direct costs beyond staffing required to develop materials.

Secondary Goal 1

Assure the availability of a statewide transcript analysis tool by December 1999.

Objective 2: *Evaluate existing systems against requirements for a statewide transcript analysis tool.*

Activity 1: Identify and study representative systems and provide an evaluation report to the ASSIST Board of Directors.

Who is Responsible: TAC and key campus/system representatives

Timeline: Complete by November 1997 in time for the November 1997 ASSIST Board of Directors meeting

Budget Implications: Costs for TAC personnel to conduct studies of systems.

Secondary Goal 1

Assure the availability of a statewide transcript analysis tool by December 1999.

Objective 3: *Identify a preferred solution*

Activity 1: Identify a preferred solution based on TAC evaluation information.

Who is Responsible: ASSIST Board of Directors

Timeline: November 1997

Budget Implications: No direct costs.

Secondary Goal 2

Increase the use of ASSIST by students and counselors.

Objective 1: *Develop and implement marketing/public relations strategies to raise the awareness of ASSIST among student and counselors.*

Activity 1: Develop a marketing/public relations strategy to raise the awareness of ASSIST among students and counselors.

Who is Responsible: ASSIST Board workgroup with additional campus representation.

Timeline: January 1998

Budget Implications: Meeting costs for campus representatives.

Activity 2: Implement the marketing/public relations strategy developed in Activity 1.

Who is Responsible: To be determined.

Timeline: Begin in Spring 1998

Budget Implications: To be determined.