Memorandum of Understanding (MOU)

Between Office of Academic Affairs
And
Enrollment Management & Student Affairs, University Studies, and Office of Information Technology

Reference: Digitizing the Process: Development of a digital Academic Requirements Committee Petition

I. Purpose

This MOU outlines partnership roles and responsibilities for implementation of the Provost Challenge project: Digitizing the Process: Development of a digital Academic Requirements Committee Petition

II. Project Description and Key Project Outcomes

Overview:
When a student needs to file a petition for any reason, physical limitations can make the process laborious and lengthy. ARC petitions are still managed via pen & paper. Students deliver these documents, by hand, to at least four different faculty members and a committee for review, each of whom are spread throughout the campus. In the end, a completed petition—approved or not—can take up to ten weeks, and results in considerable legwork by students as documents are shuffled back and forth between departments. If we could utilize online resources, by creating workflows and incorporating electronic signatures, not only would the petition processes become more sustainable, but it could reduce the overall time-frame by a significant margin. Digitizing this process would also enable us to rethink every aspect of our petitions, eliminate redundancies, create institutional memory, and work toward a paperless environment.

Key project outcomes (as agreed by Project Lead and Vice Provost):
1. Deployment of a fully functional digital ARC petition.
2. Train appropriate faculty and staff on use of digital ARC petition.
3. Increase efficiency of ARC petition process by reducing turnaround time (current turn-around time can be up to 10 weeks).

III. Funding
The project team will be funded up to $5,000 to achieve the outcomes established for this project.
Vice Provost for Academic Innovation in consultation with Provost and the appropriate dean may increase, reduce or terminate funding for this project.

IV. Funding Agreement Terms
The funding agreements in this document are contingent upon completion of the proposed project as describe above. Changes to the agreements, timetables or funding will be based on written agreement between the College/Department and Office of Academic Affairs designees. OAA will provide an index code that will be used for funding of this project. There will be no transfer of funds.
V. Resolution of Disagreements
In the event of a disagreement that cannot be resolved by the parties, resolution will be through agreement of Vice Provost for Academic Innovation and the Dean of the Department’s College or Director of the Unit.

WITNESS WHEREOF, the representatives have signed this Memorandum of Understanding on the ______ day of ______, 2013.

Randi Harris, Project Lead, OAA

Kareena Wait, Project Coordinator, OIT

Sukhwant Jhaj
Vice Provost for Academic Innovation and Student Success

Alan MacCormack, Chair, Academic Requirements Committee

Yves Labissiere, Interim Director, UNST

Cindy Baccar, Registrar, EMSA

Enclosures:
- Copy of reThink PSU: Provost Challenge project proposal
#107 Digitizing the Process: Development of a digital Academic
Requirements Committee (ARC) Petition

Last modified: February 20, 2013 - 10:57am

Project Lead

Randi Harris
Executive Assistant to the Dean of Undergraduate Studies
University Studies – Academic Affairs

Primary Collaborators

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Program Scheduler
Academic Affairs

Angela Garbarino
Assistant Director for Degree Requirements & Veterans Certification
Admissions, Records & Registration – Student Affairs

Alan MacCormack
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University Studies – Liberal Arts & Sciences

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Cody Rich
Office Specialist
University Studies – Academic Affairs

Anna Pittioni
Office Specialist II
Degree Certification Specialist

Challenge

Inspiration Challenge

Abstract/Summary

When a student needs to file a petition for any reason, physical limitations can make the process laborious and lengthy. ARC petitions are still managed via pen & paper. Students deliver these documents, by hand, to at least four different faculty members and a committee for review, each of whom are spread throughout the campus. In the end, a completed petition—approved or not—can take up to ten weeks, and results in considerable legwork by students as documents are shuffled back and forth between departments. If we could utilize online resources, by creating workflows and incorporating electronic signatures, not only would the petition processes become more sustainable, but it could reduce the overall time-frame by a significant margin. Digitizing this process would also enable us to rethink every aspect of our petitions, eliminate redundancies, create institutional memory, and work toward a paperless environment.

Introduction

As we develop more and more online tools to help us serve students, certain areas have grown faster than others. Nearly all of our services at PSU are online, but there are still a few aspects of student experience that have yet to make the digital leap. Among them is the process for filing Academic Requirements Committee petitions.

Students who find they are missing degree requirements often file ARC petitions to graduate. But in order to file these petitions, students must go about it using outmoded, unsustainable tools. Petitions are created on paper, are signed and reviewed by a number of different people, each in different parts of the campus. Students run between departments, tracking down signatures, timestamps and faculty recommendations, using physical documents that can be misplaced or lost in the process. If one part of the petition isn’t filled out, or if a certain member of faculty is out of the office, the process is put on hold, in some cases for an additional week or more.

We have a unique opportunity to dramatically change the way we approach these petitions, where we can streamline the process for students and faculty, while simultaneously making petitions sustainable through moving the process to an online environment.
Rather than moving a physical document from office to office, we can store the document digitally, where the appropriate faculty and students can check its progress instantly. Rather than waiting for someone to sign off on a document—which has to be done in-person, in their office, when the document arrives—they can access the file electronically, and add their comments at any time, and from any computer with secure internet access. If one component is not filled out, web tools allow us to report this to any person involved at any time, rather than waiting for the physical paperwork to arrive on their desk.

By reducing the turnaround time for petitions, we not only make the process faster and sustainable, but we allow students to move toward graduation in a more timely and less frustrating fashion. With paper petitions, the process could take an entire term. For a student in their senior year, waiting a full term to find out if they can graduate or if they need to take additional classes can further delay and discourage the student. By implementing efficient digital tools that already exist, we can improve our relationships with students dramatically.

Impact/Significance

Developing a digital process for the ARC petition will be of benefit to PSU students and PSU departments and administration. The goal is to create a more efficient process to ensure the timely graduation of students who are petitioning degree requirements. The digital process will also allow for faster internal processing, and gathering of supporting information for committee review of the submitted petitions. A comprehensive digital petition system will offer us a number of very useful features: progress tracking, instant delivery to approvers and the committee, secure electronic signatures, and detailed history & documentation. All of this will benefit PSU tremendously.

On average, the Academic Requirements Committee processes and reviews 450 petitions per year. A substantial portion of these concern University Studies requirements. The students who submit an ARC petition for their degree requirements will receive a more timely decision through online processing. This will enable them to make registration decisions that affect their ability graduate on time. Currently, the process takes roughly ten weeks for a student’s petition to be reviewed and for them to receive a decision. This proposal and the effect of its proposed online efficiencies would reduce the review time greatly.

Most ARC petitions require the review of at least four people prior to being submitted to the committee for review. By developing an online process that imports information from Banner, several steps can be eliminated in the process, making it much more efficient. The ability for approvers to review the petitions online and utilize an electronic signature will decrease the amount of processing time. Digital tracking of where petitions are in the process will eliminate the need for someone from Degree Requirements to manually track down where petitions are, physically. Students can easily follow up on the progress of a petition so they can make registration decisions, too.

There are further implications of moving the ARC petition process online, including the possibility of moving all Degree Requirement petitions online (Scholastic Standards Committee petition, Deadline Appeals Board petition, etc.). With the move towards sustainability and for PSU to go “paperless,” moving these petitions online is a natural progression. Process changes such as these are innovative and aim to improve both the student and faculty experience at PSU, as well as provide the ability for timely graduation.

Approach and Strategy

Streamlining the Academic Requirements Committee petition to an online form will require the collaboration of several departments at Portland State. A workgroup will need to be established with members from Admissions, Registration, and Records (ARR), the Academic Requirements Committee (ARC), University Studies (UNST), and the Office of Information and Technology (OIT).

The workgroup will accomplish the following:

1. Develop maps of all the possible paths of the ARC petition including all of the possible departments, faculty, and staff members who will need to approve different sections of the petition.

2. Determine what information will need to be imported from Banner or other external data sources, for Academic Requirements Committee review.

3. Evaluate the various technology platforms available on campus for creating a digital document management workflow with digital signage capability and pick the one best suited to the petition process requirements.

4. Work with OIT to develop the secure online petition form and to establish standard CAS login to work as an electronic signature for the student and all other approvers. Work with OIT to implement the electronic workflow and digital signature within the chosen platform

- Create a method for uploading and attaching letters of support, a student DARS, and other documents related to the decision process.
- Ensure system maintains documents and records in a retrievable format for internal tracking, future referencing, and auditing purposes.

5. Develop an assessment plan for continuous process improvement.

Once the workgroup has accomplished these tasks, and the process is working smoothly, we will be ready to go live.

Milestones
<table>
<thead>
<tr>
<th>To be Completed By:</th>
<th>Milestone</th>
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<tbody>
<tr>
<td>July 2013</td>
<td>1. Maps developed of all the possible pathways of the ARC petition</td>
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<tr>
<td>August 2013</td>
<td>2. Determination of information needed to be imported from Banner or other external data sources</td>
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<tr>
<td>March 2014</td>
<td>4. Work with OIT to develop the secure online petition form and to establish standard Odin login to work as an electronic signature for the student and all other approvers. Work with OIT to implement the electronic workflow and digital signature within the chosen platform</td>
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<tr>
<td>April 2014</td>
<td>5. Method created for uploading and attaching letters of support, a student DARS, and other documents related to the decision process.</td>
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<tr>
<td>April 2014</td>
<td>6. Ensure system maintains documents and records in a retrievable format for internal tracking, future referencing, and auditing purposes.</td>
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<tr>
<td>June 2014</td>
<td>8. Assessment plan developed for continuous process improvement.</td>
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**Benefits**

The short-term benefits of implementing this proposal are increased efficiency of ARC petition process and higher level of student satisfaction with process. The overall time needed to complete a petition would be greatly reduced, as they would not need to be sent by mail, or hand delivered to the person awaiting a signature.

The long-term benefits of implementing this proposal is a greater student experience at Portland State University. This will also hopefully serve as an exemplar of moving student service processes to a digital format.

By integrating this digital process we also offer more efficient access to students who are filing a petition. For anyone who attends night classes, works exclusively online, or has other limitations with regards to their time, this will allow them to complete the petition without having to be on campus during business hours.

The Office Staff in University Studies, as well as in Degree Requirements who process these petitions, and the 17 FRINQ, SINQ, Cluster and Capstone coordinators who review and sign them, would have a huge benefit from a process such as this. The scope of the petition process also extends to the 55 Academic Advisers who assist students with petitions. In the 2011-2012 Academic Year, there were over 207 student petitions filed, many of which took several weeks to complete and process. A digital system like this would cut that time down for all of them, and would improve student and staff experience at PSU tremendously.

**Consequences**

If this proposal is not implemented, the ARC process will continue to lack efficiency, and students, faculty, and staff will continue to spend unnecessary time on the processing of the petitions, and possibly delay graduation of some students. The paper records alone take up a large amount of space, and are impractical when needing to review an older petition when wanting to reference a precedent.

**Needs Assessment**

Download [link](http://www.rethink.pdx.edu/sites/default/files/Needs%20Assessment%20Digitizing%20the%20Process.docx)

**Inspiration Challenge Only**

This proposal supports PSU’s portfolio of student success initiatives as it contributes towards ensuring timely graduation of students, as well improving the student experience through improved efficiency of procedures. It also allows for the inclusion of more students who previously had no access to the petition process. The proposal aligns with the following initiatives:

- Improve Existing Academic Policies, Procedures, Practices, and Services
- Improve Communication with Students

**Media**
Tags
21st Century Student, Degree Completion, Process Change, Student Success, Undergraduate.

Comments

Jacob Sherman — December 20, 2012 - 9:47am

I really like this idea. As a former student, I once had to petition the ARC and the wait to see if a) my petition would get approved and I could move forward with my educational plan, or b) stop, reassess, and develop a new plan was very daunting. It sounds like this proposal has developed a conceptual solution to the purgatory-like petition process; one which not only benefits students, but which also frees-up precious faculty and staff time as well.

Robert Mercer — January 3, 2013 - 1:03pm

This makes great sense. It's something we've talked about for years. It seems an important piece of degree completion and accurate advising.

Becky Sanchez — January 3, 2013 - 2:16pm

Excellent idea and definitely fills a need.

Becky Sanchez — January 3, 2013 - 2:16pm

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Karen Lickteig — January 16, 2013 - 4:48pm

Thank you so much for this proposal! As a student, I simply don't understand why this isn't already done. I recently had to submit a petition to have a cluster course transfer from a previous university, and I had to wait several weeks before hearing the decision. Despite submitting it well in advance of the beginning of the following term, I did not hear about the decision (which affected the next term's course selections) until the first week of that term. I was told that it was being held up as the required signatures had not been gotten, because the professors had not physically been in to vote. In the digital age, I am stunned that this is still done not-online and I applaud you for your efforts!
I always wondered why this had not already been done! It would definitely make it easier for a student to keep track on how much more sections/signatures need to be filled out in order for it to get reviewed formally. Also, this would eliminate any chance of the petition getting lost or damaged in the process, since it goes to so many different people and offices. This would speed up the process as well, which is nice for students who are wanting to graduate in the upcoming term. Great job!

### News
- Portland State University professor invents zero-gravity coffee cup
- The Oregonian: Merkley proposes federal money to boost Oregon's 'pay it forward' plan for student loans
- Sustainable Business Oregon: New 'combo changer' hits Oregon, foreshadows EV power showdown

[go to news](#)

### Events
- **Tuesday, Aug 13**
  - Annual EMPS Rooftop Networking Party
- **Wednesday, Aug 14**
  - Free MATLAB & Simulink Seminar
  - Sounds of Summer Concert Series in SfMa

[go to events](#)

[Profile](#)
- Nicholas Robbins
  - Pre Med Biology - LSAMP
  - Student Action Team