Fall Conference

September 15, 2023

Rachel Fernflores

Agenda

1. Curriculum update (courses, ADTs, ASCC, GEGB)

2. Curriculum compensation

3. Articulation agreements

4. Quarter-Semester Comparisons

5. CLOs-PLOs

6. 7.5 week modules

7. GE – Cal-GETC

8. Unit shortages

9. Space Time Committee

10. Student Transition Success Committee

11. Communication Committee

12. Consultants: Sia Partners, Huron, PM

13. Decisions (e.g., 2026-27 calendar)

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Curriculum Update

- Approximately 4000 courses

- Courses not found

- At least doubled the number of Associate Degrees for Transfer

- ASCC and GEGB are ready to start reviewing this fall

- Timeline: end of winter quarter 2025

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Curriculum Compensation

- 2022-23 Program Proposal Compensation

- Course Compensation: for College Curriculum Committee members, faculty – course proposals, department curriculum committee chairs, department curriculum committees

- GE and GEGB

- Faculty Service Payments

- College Curriculum Committee members – underway

- All others: paperwork in process

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Articulation Agreements

- As we approve curriculum we need to focus on articulation agreements

- One to one conversion: agreements hold

- Substantially revised: may need new agreements

- New courses: new agreements (Common Course Numbering System through Course Identification Numbering System -- C-ID numbers)

- Meetings and possibly office hour drop in times set up for fall

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Agenda Items 4 & 5

Quarter-Semester Comparisons. CLOs-PLOs

- Quarter-Semester Comparisons: internal interim documents comparing our quarter UG programs to our semester UG programs

- CLOs-PLOs-DLOs: Academic Programs and Planning deadline

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7.5 Week Modules

7.5 Week Workgroup

Benefits of 7.5 week modules:

- Capture the fast pace of quarter teaching
- Increased student choice in courses -- flexibility
- Balance of workload/cognitive load (fewer simultaneous courses)

7.5 Week Modules

Parameters

- Not just pedagogical: implementation/management issues

- Summer 5 week modules: manual labor

- Possible Impact: on staff, financial aid, census, add drop dates,

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7.5 Week Modules

Parameters

- Determine demand before asking for scheduling (Degree planner)
- No fractional units
- Courses can only be designed as either a 7.5 week course or a full semester course
- No compressed full term courses can be offered in the 7.5 week modules during fall or spring semester

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7.5 Week Modules

Parameters

- Unit cap of 1-2 units for 7.5 week courses (baccalaureate degrees)
- Unit cap of up to 3 units post-baccalaureate allowed if scheduled online or in department rooms
- Grade and degree posting will still occur at the end of the semester
- Final exams will occur on the last day of classes

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7.5 Week Modules

Parameters: 2nd 7.5 week module

- A first 7.5 week module in a semester cannot satisfy pre-requisites for other 7.5 week modules within the same semester
- Departments must fill both half-term sessions for in person courses (for both university scheduled and department scheduled rooms)
- No separate meeting pattern for 7.5 week modules

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7.5 Week Modules

Parameters: 2nd 7.5 week module

- Students cannot register in the same 7.5 week course twice in a single semester
- Second 7.5 week module will have their own add/drop period that may impact issues such as financial aid eligibility and enrolment reporting
- No new sections can be added to the 2nd 7.5 week session after the census date

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7.5 Week Modules

Compromise: 2nd 7.5 week module

Compromise on the classroom/lab space concern of empty spaces in 2nd 7.5 week module – pilot these sessions allowing only for the first 7.5 weeks of a full semester pending analysis of demand after a few years on semesters.

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7.5 Week Modules

Compromise & Parameters: 2nd 7.5 week module

- ~~A first 7.5 week module in a semester cannot satisfy pre-requisites for other 7.5 week modules within the same semester~~
- ~~Departments must fill both half-term sessions for in person courses (for both university scheduled and department scheduled rooms)~~
- ~~No separate meeting pattern for 7.5 week modules~~

7.5 Week Modules

Compromise and Parameters: 2nd 7.5 week module

- ~~Students cannot register in the same 7.5 week course twice in a single semester~~
- ~~Second 7.5 week module will have their own add/drop period that may impact issues such as financial aid eligibility and enrolment reporting~~
- ~~No new sections can be added to the 2nd 7.5 week session after the census date~~
-

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GE Caveats | ICAS Recommendations - Cal GETC

- English Composition (1 course, 3 units)

- Critical Thinking (1 course, 3 units)

- Oral Communication (1 course, 3 units)

- Mathematical Concepts and Quantitative Reasoning (1 course, 3 units)

- Arts and Humanities (2 courses, 6 units)

- Social and Behavioral Sciences (2 courses, 6 units)

- Physical Science (1 course, 3 units)

- Biological Science (1 course, 3 units)

- Laboratory (1 unit)

- Ethnic Studies (1 course, 3 units)

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Unit Shortages

Converting Quarter units to Semesters and vice versa:

- Convert quarter credits to semester credits: Divide quarter units by 1.5. Convert semester units to quarter units: Multiply semester units by 1.5.

- 4 quarter units are really 2.67 semester units

- Can end up with a deficit

- Distinction: between degree requirements and units

- Waiver

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Space and Time Semester University Committee

Charge
• Identify the metrics, data and tools needed to develop recommendations on how space and time are managed at Cal Poly.
• Develop scheduling patterns for courses, labs and activities while on semesters. Consider course demand (including as it is affected by the graduation initiative), enrollment trends, potential increase in admissions over the next several years, weekly contact hour requirements, and any other relevant data.
• Make recommendations on the use of campus spaces and time at Cal Poly.
• As recommendations are developed consult broadly.

Space and Time Semester University Committee

Membership:
- Academic Senate Chair (or designee)
- ASI President (or designee)
- Instruction Committee Chair (or designee)
- Instruction committee members
- Faculty at large member (department scheduler)
- Associate Dean from each college
- Registrar or Designee
- Associate Registrar University Scheduling
- Associate Vice Provost University Advising (or designee)
- Associate Director for Space Optimization
- Director of Semester Conversion
- Faculty Fellow, Semester Conversion
- ASI Director
- Assistant Director Student Clubs and Organizations

Student Transition Success University Committee

Background:

• Thousands of students at Cal Poly will transition to semesters in fall 2026 or graduate shortly before. These students will need advising help to either complete their degrees prior to the first semester or to transition to semesters.

Student Transition Success University Committee

- **Charge:**

- Identify the metrics, data and tools needed to prepare students for graduating before the first semester or for the transition to semesters.

- Develop strategies designed to ensure students who can graduate before the first semester can do so. Develop strategies for students who could complete their degree requirements soon into the first year on semesters. Develop strategies to ensure all other students can successfully transition to semesters or complete degree requirements beforehand.

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Student Transition Success University Committee

Charge continued:

• Identify and plan for courses (including milestone courses) and advising for the students who:
1. Can graduate before the first semester.
2. Can complete their degree requirements at the end of the first semester.
3. Can complete their degree requirements at the end of the second semester.
4. Support all remaining students who will transition to semesters.

Student Transition Success University Committee

Membership:

- Derek Gragson, Interim Associate Vice Provost for Academic Innovations and Programs (or designee)
- Joe Borzellino, Associate Vice President for Strategic Enrollment Management (or designee)
- Cem Sunata, Registrar
- Alison Robinson, Associate Vice President and Deputy Chief Information Officer or designee
- Tom Gutierrez, Academic Senate Chair (or designee)
- Gracie Babatola, ASI President (or designee)
- Associate Deans (one from each college)

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Student Transition Success University Committee

Membership:

• David Valadez, Executive Director for University Budget and Fiscal Planning
• Joy Pedersen, Dean of Students
• Jamie Patton, Assistant Vice President for Student Affairs, Diversity and Inclusion
• Debi Hill, Associate Vice President for Student Affairs
• Beth Merritt Miller, Assistant Vice Provost University Advising
• Rachel Fernflores, Director of Semester Conversion
• Aaron Keen, Faculty Fellow, Semester Conversion

Q2S Communication Committee

Charge:

Develop and circulate plan for expansion of awareness and guidance for adoption

Membership:

University Communications and Marketing Representation

Deans from each college have nominated someone

Advising

Academic Affairs

Strategic Enrollment Management

Student Affairs

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Consultants: Sia Partners

Contracted with Sia from February 1 – May 31, 2023

Their deliverables:

1. Develop a Transition Program Plan that encompasses all audience groups, processes and technology and comprises a non-academic project plan

2. A Communications Plan and Change Strategy to identify, engage and inform all stakeholder groups affected by the forthcoming transition

3. Alignment with the academic project plan

4. A Transition Office to manage changing scope and risks throughout the transition planning, go-live and post transition adoption

5.

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Consultants: Huron

Contracted with Huron from February – May, 2023

Deliverables:

Fit-gap assessment of all Peoplesoft conversion needs, local modifications to our systems, and modified reports

Identify dependencies

Detailed project and resourcing plan

Risk mitigation plan

Impact of other projects (e.g., CHRS, X25)

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Fit Gap Analysis Document (sample)
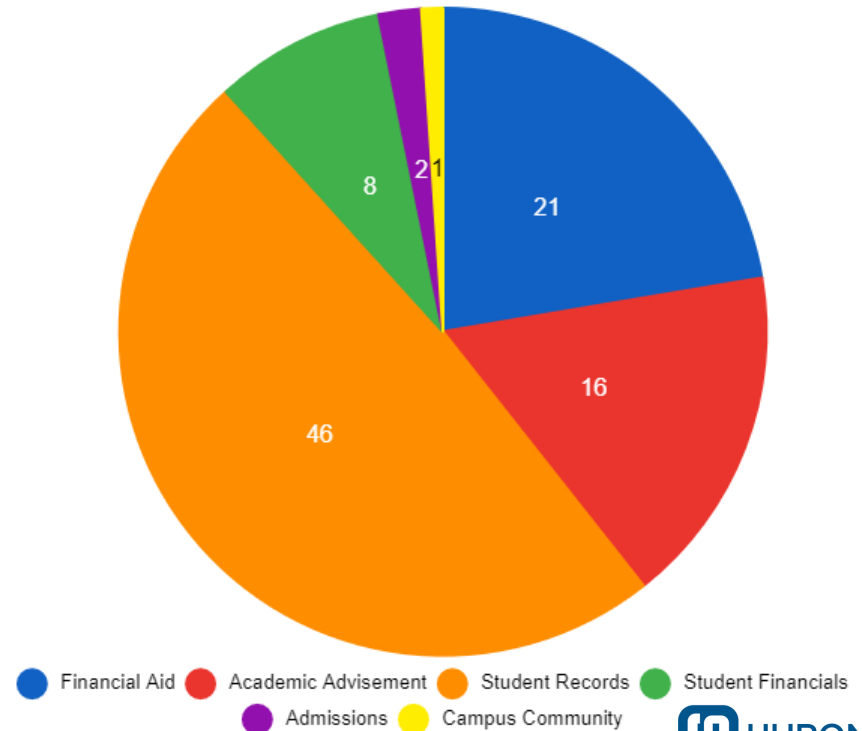
Student Records

- The project is dependent upon the concurrent Curriculum Review (program and courses). The approval and build of programs and courses will lead to a rolling curriculum implementation. Any deviation from that project timeline will have significant impact on the Quarter to Semester Conversion project. Course mapping and approval statuses should be shared with the Q/S project team in a timely manner.

- The Office of the Registrar will begin formulating the Fall 2026 Term & Calendar structures and begin that path of approval.

- Staff should continue their analysis of queries, the message catalog, central office and departmental communications, class notes, and custom and delivered reports during this pre-implementation period.

- Use this time to formulate a communication structure. Build on the internal communication mechanisms established for the Curriculum Review.

- There are testing dependencies on the results of student degree audit status. Establish a standard implementation process to perform over and over as new curriculum is approved.

List of Functional Requirements

As part of the assessment, a list of all Functional requirements was made, detailing the necessary changes, as well as suggestions for enhancement.

The graph to the right illustrates the number and proportion of **needed changes** identified in this Fit Gap assessment from the functional perspective.

Functional Needed Changes by Department

Legend:
- Financial Aid
- Academic Advisement
- Student Records
- Student Financials
- Admissions
- Campus Community

Values shown on chart: 21, 16, 46, 8, 2, 1

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HURON

Consultants: Huron

New contract with Huron: August 21, 2023 – September, 2026

Q2S Conversion Experience:

      Ohio State University system

      CSU Bakersfield

      CSU LA

      CSU Pomona

      CSU East Bay

      CSU San Bernardino

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About Huron

Formed in 2002
With approximately 200 professionals

HURON
Publicly traded on the Nasdaq since 2004

Global Footprint and Client Base

2022 Revenue

- Commercial 21%
- Healthcare 47%
- Education 32%
- **$1.1B**

Energy & Utilities | Higher Ed | Financial | Healthcare | Manufacturing | Public
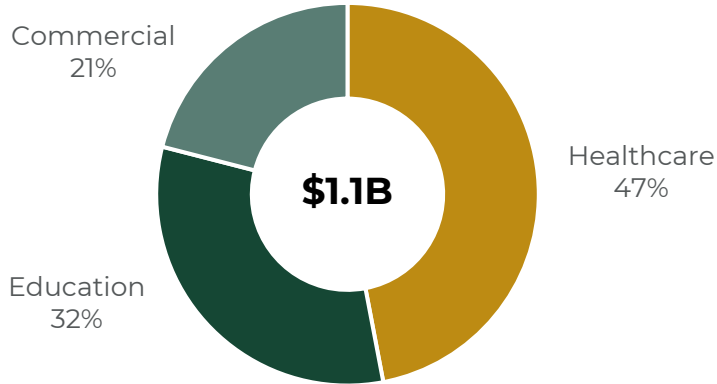
Best Management Consulting 2018-2022 Forbes

Best Firms to Work For 2011-2022 Consulting Magazine
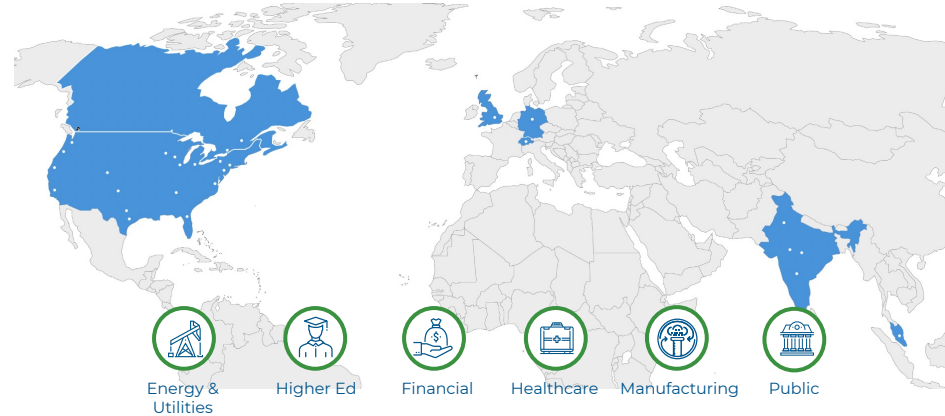
1,900+ clients served in 2022

6,000+ global employees

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LEARN BY DOING

Huron Team

Huron Consulting Team

Laura Zimmermann
Engagement Director

Susan Garland
Program Manager

Greg Kyle
Program Manager

Marcos Veloz
Project Manager

Chris Lewis
Technical Project Manager

Sanjeev Chitkara
Technical Lead

Mindy Engle
Student Records Functional Lead

Jessica Owens
Academic Advising Functional Lead

Sheva Guy
Change Management Lead

David Thompson
Student Records Analyst

Satyendra Kumar Tiwari
Project Coordinator

Kevin Adams-Owens
SF Functional Lead

Tim Krug
Financial Aid Functional Lead

Matt Robinson
Admission/Campus Community Functional Lead

Project Team Structure

Dr. Cynthia Jackson-Elmoore
Provost

Rachel Fernflores
Functional Project Sponsor

Alison Robinson
Technical Project Sponsor

Laura Zimmermann
Huron Executive Sponsor

Greg Kyle
Huron Project Director

Rachel Fernflores
Acting Q2S Functional Project Manager

TBD
Q2S Technical Project Manager

Marcos Veloz
Huron Functional Project Manager

Chris Lewis
Huron Technical Project Manager

Melissa Furlong
Admissions

Brian Spolarch
Q2S Technical Lead

Matt Robinson
Admissions / Campus Community

Sanjeev Chitkara
Q2S Technical Lead

Cem Sunata
Registrar

Mindy Engle
Student Records

Beth Merritt Miller
Advising

Jessica Owens
Academic Advising

Gerrie L. Hatten
Financial Aid

Tim Krug
Financial Aid

Marc Benadiba
Student Financials

Kevin Adams-Cole
Student Financials

Rachel Fernflores
Change Management

Sheva Guy
Change Management

Quarters to Semesters Project

- Owned by Academic Stakeholders
- Enabled by Technology
- For Students

Consultants: Huron

Example of on boarding Huron - 4 cloned environments (database instances):

- Development

- Testing

- Staging

- Everything else

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Consultants: Huron

Plan: 4 Go Live stages:

- **Go-Live 1** will focus on Academic Structure and Course Curriculum which are foundational for later project activities. Development for this phase of the project will include the course conversion guide, course conversion utility, and data loading tools.

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Consultants: Huron

Plan: 4 Go Live stages:

- **Go Live 2** will focus on the creation of the semester-based curriculum, setup of course equivalencies, updates to existing Cal Poly Campus Solutions modifications, and refactors of the Highpoint and other 3rd party solution integrations. In addition, configuration changes will be executed in support of Program/Plan maintenance, Transfer Credit processing, Enrollment, and Reporting. Work will also be initiated in Financial Aid and Student Financials modules in preparation for Go-Lives 3 and 4.

Consultants: Huron

Plan: 4 Go Live stages:

- **Go-Live 3** will include the completion of the student conversion from quarters to semester and all Baseline (CSU and PSFT) Customizations. Student Records configuration to support Fall 2025 enrollment and supporting business processes will be tested and pushed into production. Financial Aid configuration will be designed to support the award packages for 2026-2027. This includes budgeting, item types, disbursement plans, and packaging equations.

Consultants: Huron

Plan: 4 Go Live stages:

- **Go-Live 4** will address the Student Financials module, including student accounts processing, tuition calculation, account adjustments, and refunds.
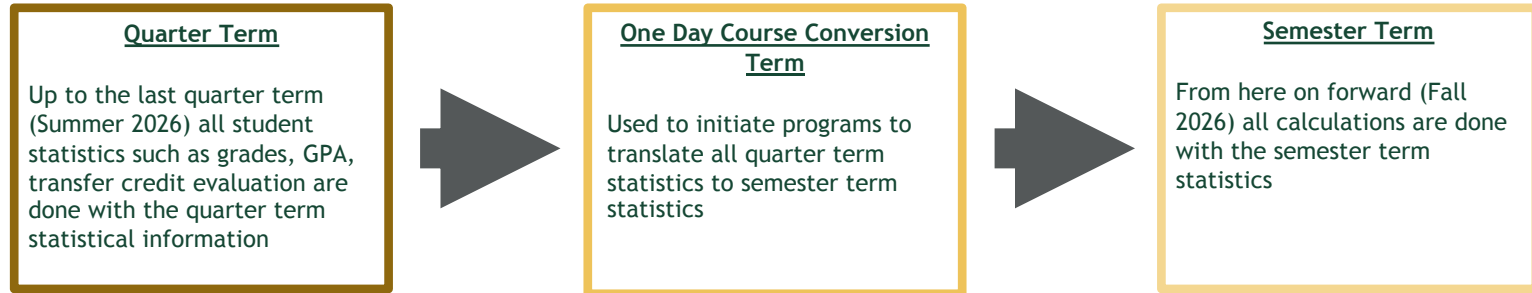
Conversion Strategy/Approach

Create a 1-day term that sits between the last quarter term and the first semester term

Contains all the converted statistics needed for semester processing.

Used to initiate programs to translate term statistics from quarter to semester.

Stays hidden from processes that don't need it.

Historical work in prior quarter terms gets recalculated and updated in the 1-day conversion term.

Quarter Term	One Day Course Conversion Term	Semester Term
Up to the last quarter term (Summer 2026) all student statistics such as grades, GPA, transfer credit evaluation are done with the quarter term statistical information	Used to initiate programs to translate all quarter term statistics to semester term statistics	From here on forward (Fall 2026) all calculations are done with the semester term statistics

System Modification Assessment

Technical Team

- Recommend technical approach to transition Cal Poly from quarter-based institution to semester-based
  - Create a one-day conversion term that sits between the last quarter term and the first semester term
  - All students will be converted into the conversion term calculating their quarter-based units to semester-based using a conversion factor of .66667

- Identify all configuration tables and technical objects requiring modification to support semester-based curriculum
  - Review all PeopleSoft, CMS, Cal Poly local and data warehouse objects

  Recommend phased go-live consisting of three milestones
  - Curriculum
  - Advisement
  - Quarter to Semester transition

Total Number of Modifications Impacted:
97
PSFT Impacts:
38
CMS Impacts:
17
Cal Poly Impacts:
42

Decisions

Examples:

- 2026-27 Calendar

- Term typically offered

- Space and time

- Bridge and cap

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Questions?

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