Cheryl Dowd (00:03):

Welcome. I'm Cheryl Dowd, senior director for policy innovations for the State Authorization Network, SAN part of WCET. We're pleased to present the 2021 SANsational Award winning projects. Today, we will introduce the great work of our colleagues from Slippery Rock University.

Cheryl Dowd (00:19):

The SANsational Award is an annual award originally conceived in 2015 to recognize the outstanding work of SAN members to develop solutions and strategies to manage state and federal regulations for out-of-state activity compliance that serves to provide student protections. As one can understand, establishing processes and procedures to support compliance isn't a one size fits all task. Creativity and vision are important attributes for compliance staff to understand the problem, conceptualize tools or procedures to address the problem, and then obtain buy-in at the institution for cross institutional collaboration to implement processes and procedures to support compliance.

Cheryl Dowd (01:02):

Awards are determined through a process that includes self nomination of projects to a review committee, who evaluates and identifies the projects that should be awarded. The listing of award winners and descriptions of previous projects from previous years is provided on the SAN website for your review. We'd like to thank the awards committee for their good work and support throughout this process. And at this time I'd like to turn this to my colleague Rachael Stachowiak, director for interstate policy and compliance.

Rachael Stachowiak (01:32):

Thanks Cheryl. Today we are thrilled to award Slippery Rock University in the category of compliance innovation for the 2021 SANsational Awards. LisaMarie Weinzetl, who is the state authorization specialist at Slippery Rock University, understood the need to conceptualize and streamline a daunting task of collecting hundreds of student experiential learning activity, data information from dozens of professors across campus. As we've discussed in the previous 2021 SANsational board project presentations, we know that states maintain authority to oversee activities which occur within their borders and that's really a function to protect the interests and wellbeing of their citizens. And this oversight includes and extends to education. So since that state oversight extends to education and really the traditional state authorization approval, which is the authority to grant degrees and operate as a business as an institution, that's sort of the bedrock and where we start.

Rachael Stachowiak (02:38):

Additionally, there are other approvals that may exist. For example in order to train and conduct educational experiences for programs leading to a professional license for example. So depending on the type of activity there could be a state approval of a particular regulatory body within that state required as part of sort of the institution's ability to operate or offer a program to a student in that location. Thus knowing the location of the educational activities really serves as critical information for understanding applicable rules in a state, especially if an institution is offering online programs or experiential learning to students located outside of the primary state of domicile for that institution.

Rachael Stachowiak (03:25):

Slippery Rock is one of many institutions who benefit from participation in a reciprocal agreement that's called the State Authorization Reciprocity Agreements. This helps to streamline the process to maintain state approvals for purposes of distance education. One requirement for continued institutional participation in this is fulfilling an annual data reporting function or requirement. And this calls on institutions to provide data about the location and the classification of their academic program often called a CIP code to the nonprofit entity that's called NC-SARA, who supports the functions of that state authorization reciprocity agreement.

Rachael Stachowiak (04:07):

So to fulfill this data requirement and other reporting requirements and ultimately to make compliance with state authorization procedures as smooth as possible at any institution, it really takes the village. It calls upon many stakeholders at the institution to share information and work together to create systems, which work for that unique institution. Lisa tapped into key members at her institution to share information and conceive of a really smart and cost effective system to help manage compliance with this reporting requirement and ultimately to better support compliance with state oversight. So with that, Lisa, I'm going to turn it over to you to talk about how you brought order to chaos at Slippery Rock.

LisaMarie Weinzetl (04:53):

Thank you very much, Rachael. On behalf of Slippery Rock University we're very excited to accept this award and on behalf of the team that created the process I am very excited to present our process to you.

LisaMarie Weinzetl (05:05):

I wanted to start with this word cloud that is actually created using all the words that were pulled from our placements last semester. We do about four thousand placements a year and so this is just from fall semester from last year. Slippery Rock University was founded in 1889 and its member of the Pennsylvania State System of Higher Education. We're located one hour north of Pittsburgh and have an enrollment of over 8,400 students with 6,900 of them being undergrads and 1,500 graduate students. So we deal with both clinical rotations as well as regular internships for undergrads. We have 150 plus undergraduate majors and 40 graduate degrees and certificates.

LisaMarie Weinzetl (05:50):

Our challenge was how do we get quality information and timely information on the experiences that we do, while minimizing the time that was involved on behalf of faculty. Faculty has a lot to do and giving them administrative tasks is not one of their favorite things to do, so how could we make that better for them?

LisaMarie Weinzetl (06:11):

Our initial effort, and this is a version from 2019, was a spreadsheet that was sent to everybody. They had to fill out the information and then they would send it back to us. We would cross-check it with class rosters, and it became time consuming on both parts. And then you added this CIP code and people were like, "Where do I find that? How do I know that?" It became confusing, so we were starting to look at things and then COVID struck.

LisaMarie Weinzetl (06:41):

What we found out was that we could use our resources in house and come up with a system that was easy for everybody involved and allowed us to get quality information, limited the amount of time that faculty had to put in, and we could also use it for other things. So what you see in here now is actually the spreadsheet from this summer, excuse me from this winter session, for one of our faculty members. This is what gets sent out. The redacted areas are names, but you can see it lists their program, what college they're in, are they an undergraduate, graduate, a section number. And then we ask is it required, the name of the site, the city, state. We provide the CIP code based on what's in banner. And then because we are dealing with remote onsite situations we ask questions about that. So with this form faculty and staff, excuse me, faculty only need to provide a site, a city, a state, and if it's remote or not remote.

LisaMarie Weinzetl (07:40):

How we did it. It was a total team effort. At the time that I was working on this, I was part of the Institutional Research Group so we really tapped into them. Dean Lindy worked with me on the initial spreadsheet. He's since retired. Kevin McCarthy came in. He worked with the new spreadsheet and made sure that he updated it and made sure that we're pulling the correct information.

LisaMarie Weinzetl (08:02):

Julie Cogley, who's also part of that team and is a friend of mine, is very determined when it comes to learning new things and has mad computer skills. She's the one that actually found the macro that we used. She taught herself how to use it and then she taught me how to use it. She created the directions that you're going to see throughout this presentation.

LisaMarie Weinzetl (08:22):

When you do this, you need two reports. You need the report that has all the student information and then you need the report that is used for mail merge. And this again we'll go into this a little more later on, but the blue area is something that you need to manually add from the report.

LisaMarie Weinzetl (08:42):

So with the first one, the faculty excel workbook. When you run this report, we get a workbook that has many faculty members supervising internships, clinicals, anything like that that falls into we call them experiential learning activities. We'll have a tab, so you see like one through eight that's everybody's tab down there for each professor that's in this workbook. What we need to do is divide this one workbook into individual ones without running individual reports. A tip here is if you are going to print them out, we have moved beyond printing them out and collecting them as a printed piece of paper. You want to format them all here, and it's really easy to format all your spreadsheets at the same time.

LisaMarie Weinzetl (09:25):

Once you get this you're going to want to open one of the spreadsheets in there, and you're going to hit Alt +F11. That's going to bring up this. It's called a VBA, and it's a Microsoft Visual Basic Application. You'll get this grayed out box in there. The next thing that you'll want to do is you're going to add this formula into that gray box. This is what it looks like. And then you're going to press F5. What you'll see doing there is it will sort of spin through everything. You can actually like see it cycling through dividing everything.

LisaMarie Weinzetl (10:04):

So after you hit the F5, everything will be divided into individual files in one folder. You want to make sure that there's nothing else in that folder, because it'll become confusing when you're trying to do the mail merge. I go back and add everything in after I complete the mail merge and hit send and everything goes out. As you can see, everything here is named after what was on the tab. This will tie in back to the mail merge and this will be the actual attachments to the mail merge.

LisaMarie Weinzetl (10:34):

The second spreadsheet you need is the merge spreadsheet, and as we talked about that blue column needs to be added manually. Everything else is pre-populated. For our purposes I pulled out faculty names and IDs, but you can see what the chart looks like when we add that final merge path column.

LisaMarie Weinzetl (10:56):

To add merge path column I just go now by just call it the merge column, but you want to make sure you do it exactly as it's listed here. You want to make sure you have the equals, and the quote marks, and all the ampersands and everything. The way it's broken out is the yellow highlighted area is going to be the actual file location. Blue will be the column in the spreadsheet that we were just on that has an ID number that you're going to match up and then the XLS, PDF, XLXS, whatever is the document that you're using right there. Then you just hit enter, and if you're used to using excel spreadsheets and copying cells down you just do the same thing. You know you copy, you hit the little corner, and pull it all down. Once you get all that, make sure you save everything. And then you're just sort of going to put this aside until you're ready to actually do the mail merge.

LisaMarie Weinzetl (11:50):

So to do the merge, this is where you actually create your document that's going to go. When I do it, I sort of put a picture and explain to everything. This is what you need to do here. You need to do this. You need to do that. I also always put a date so that we get it back in time. Right now we sent out everything was due on Friday, last Friday for winter session. I probably have half that aren't, so when I'm done here we'll be reaching out to those folks and saying we need this information because otherwise it'll be February when I'm getting spring semester information and getting this information.

LisaMarie Weinzetl (12:23):

Also, at this time when I do it and this is really the mail merge wizard type of thing it walks you through everything. When we get to recipients, what I typically do is to test it out. I change a couple of the email addresses to my addresses or friends' addresses, just so that we can run it and make sure it's good. The one thing you want to do is make sure you uncheck everybody else, so they don't get it in your test run and then make sure when you're done to put their addresses back in for the people that you tested on.

LisaMarie Weinzetl (12:56):

So then you're going to want to add the attachments, and these are screenshots from my computer and my ribbons. You see there's a merge tool one and then when you click on merge tool you click on merge with attachments. Now you're probably saying, but I don't have merged tools on my ribbon. So we actually found this, Julie found this online. There's several other ones. We use Doug Robbins, but there's a multitude that you can pick. This is the process for setting it up and getting it on your computer. We did this once, and I never have to do this again. It makes it real easy to use.

LisaMarie Weinzetl (13:32):

So after you've done all your merge and you hit continue, you've picked your recipients and everything, this is going to pop up. What you want to do is on number one you're going to pick from that line that lists everything merge path, because that's what we're merging based on. Number two you want to have email message as our merge destination field. Number three you want to pick and select email. Number four you want to put the subject of what it is. And then you're going to hit continue. What happens is you'll see it spinning through, and you may have to depending on your security systems and firewalls have to quote unquote approve or okay each one. It's not a process. A little popup message hits, and you just click it and it takes a couple seconds. Sometimes it'll say do you want to be okay for one to three minutes and anything processed through there will go through there.

LisaMarie Weinzetl (14:25):

And then you just sort of sit, and I liken it to the top of the rollercoaster when you're up at the top. And then you're waiting and you hit send. You hope it goes through and then you start seeing everything come in, send, and you're like okay. And then I test a couple to make sure that it truly did go to everybody that it was meant to go to.

LisaMarie Weinzetl (14:43):

So now you send everything out and hopefully people are sending it back to you within the deadlines. Then you get all this information back. So what do you do with it for your SARA data reporting? What we do is we collect everything and put it in, save it electronically. I save everybody by their last name, because I know their last names where I don't know people's banner ID numbers. If I need to go back and ask questions, it's much easier this way.

LisaMarie Weinzetl (15:11):

Save the files individually and then we save them also on one master spreadsheet. This is actually stuff from fall semester that I just picked that shows everything here. We do it for the whole academic year. When it comes time for data reporting, I go and I pull it based on calendar year. We go through create one big spreadsheet that has everything. I pull out Pennsylvania schools, because we're located in Pennsylvania, for our reporting.

LisaMarie Weinzetl (15:40):

And then my friends at IR set me up with a pivot table, so we actually just use this pivot table and this is the breakout of what you need. You need the state and the CIP codes and the values that count. You hit and does this little thing and then you get this. So right there is everything that I need to go and do the SARA data reporting. I know that there's one student in this year that was a 31 in Arizona, four that were 51 and one that was 52. And then I just go and enter that on my form, pull out the numbers from IPEDS for the distance loaners for that form. And my reporting is done.

Rachael Stachowiak (16:24):

Bravo Lisa. Thank you so much for sharing about this project and congratulations to you, Slippery Rock and your colleagues Julie and Kevin for all their good work. This is such a helpful project, and I know it'll provide a great example for other institutions looking to streamline their processes and gather information more effectively with so many different constituents on their campus participating in these sort of processes. So thank you. Congratulations again. I want to remind folks that you can go online and view the additional 2021 SANsational Award-winning projects on our website listed here on this slide. Thanks everyone. Take care.

LisaMarie Weinzetl (17:07):

Thank you.