



## ARUCC PCCAT Transcript and Transfer Guide Working Group

### Terms of Reference

#### Purpose

- To provide operational oversight for the ARUCC PCCAT Transcript and Transfer Guide (i.e, “the Guide”).
- To identify and implement any changes or enhancements to the Guide.
- To monitor postsecondary trends and opportunities for the purpose of developing enhancements and changes to the Guide.
- To identify and suggest to executive committees of ARUCC and PCCAT related research projects as might emerge and be considered relevant for the Guide and to lead such research as might arise.
- To act as the primary body responsible for communicating with the membership about the Guide and to create collaborative engagement and dialogue around potential priorities for the Guide.
- To encourage ongoing usage of the Guide by the membership.

#### Governance

The Guide Working Group reports jointly to the ARUCC and PCCAT Executives. Regular reporting by the chair is required on the activities of the Working Group at the Executive meetings (expectation, normally two times per year per executive). The Guide Working Group has no financial approval authority or budget and must defer to the ARUCC and PCCAT Executives for approval regarding any expenditures. Any substantial changes to the Guide or approval to proceed with large scale research projects require the review and approval of the ARUCC and PCCAT Executives.

#### Principles

The following principles guide the work of the committee:

- Sustaining the core principles published in the Guide with priority given to advancing improvements and enhancements that support student mobility and data portability.

- Ensuring the Guide maintains a focus on anticipating existing and future needs for the membership.
- Ensuring the focus of any potential research in support of the Guide is of national interest and promotes evidence-based research directly related the Guide and to the registrarial profession, pathway development, data portability, student access and success at Canadian postsecondary institutions.

## Objectives

The objectives of Working Group are:

- To review any suggestions for change or addition to the Guide from the ARUCC or PCCAT membership, the executive teams, or other bodies as might arise in a given year and to operationalize any resulting changes.
  - Operational Need – Website and Database Maintenance: To facilitate maintenance of the Database, the Chair will ensure regular meetings and/or communication (as needed) via email and phone to ensure timely response to any necessary website or database changes requested by the membership. This may mean monthly meetings during particular seasons although this is not likely. Informal virtual communication to resolve enquiries from the community in a timely fashion are strongly encouraged.
- To formally update and consult with the ARUCC and PCCAT membership regarding the Guide format and content.
  - Consultation Opportunities: The Chair, with the support of members of the Working Group, is responsible for ensuring that consultation feedback sessions are held at the biennial ARUCC PCCAT conference and, if necessary, at the PCCAT annual conference. The purpose of these sessions would be to update the community on any interim changes and refinements to the Guide and to provide opportunities for systematized, roundtable consultations with the community regarding standards, transfer nomenclature, and national or international trends that might inform standards development and related research.
- To manage the process and develop a case for a large-scale review of the Guide every five years.
  - Such a case must be submitted for review and approval to the ARUCC and PCCAT executives.
- To respond to enquiries through the Working Group Chair that may arise from the community with respect to the Guide.
- To report back on the Guide bi-annually to the respective executive committees and annually to the membership of ARUCC and PCCAT (e.g., via the ARUCC newsletter, the PCCAT website, or at annual or biennial conferences).
- To consult with the ARUCC and PCCAT membership and allied organizations as the need arises with respect to enhancements or changes to standards or nomenclature through the respective national listservs.

- To develop and execute a yearly communications strategy for the Guide which should include providing updates regarding any changes, encouraging ongoing awareness and usage, overseeing the currency of the one-stop website and searchable databases, and maintaining the currency of the links to other resources.
- To identify and lead potential Guide research opportunities that are meaningful and relevant to the membership and directly related to the Guide.
- To consolidate current research studies, information, and findings in the Guide as might arise and as a means to improve transparency and access for the membership

## Membership

The membership of the Working Group consists of:

Chair

Vice-Chair

Secretary/Communications Officer

Database Officer

PESC representative

ARUCC Executive Rep

PCCAT Executive Rep

The committee will consist of a total of seven members. Effort should be made to encourage balanced representation from across Canada and to ensure appointment nominations are sought through the regional associations aligned with ARUCC and the PCCAT executive. Ideally, at least one member on the Working Group should be from one of Canada's provincial councils on articulation/admission and transfer.

Length of Term – All members of the Working Group shall serve for two-year terms and may be re-appointed but no member may serve for more than two consecutive terms in the same position. The Vice-chair should normally move into the Chair position to ensure leadership continuity.

Appointments – A call for interested individuals will be sent to the ARUCC and PCCAT listservs prior to June every two years or as needed when vacancies emerge. Potential names can be suggested by the Working Group members, ARUCC regional executives, or PCCAT or ARUCC members. The list will be compiled by the Chair of the Working Group and provided to the ARUCC and PCCAT Executives for final approval.

Note: As a point of particular emphasis when making appointments, the positions of Chair and Vice Chair should be held by individuals with senior level expertise in the registrarial or pathway practitioner and policy development areas. Senior staff within councils of articulation/admissions and transfer are also eligible for appointment to these positions.

## Roles and Responsibilities

The roles and responsibilities of each of the members of the Guide Working Group are noted below.

Chair – to lead working group and chair meetings; to be the primary representative for the Guide (or contact for external groups seeking changes to the Guide); to communicate to the membership about changes and updates to the Guide; to compile a potential appointee list for review and approval by the ARUCC and PCCAT Executives; and to be the spokesperson for the Working Group and Guide particularly at biennial ARUCC conferences and PCCAT annual conferences.

Secretary/Communications Officer – to produce action notes from each meeting; to compile the routine reports for ARUCC and PCCAT executives; to oversee and write the communication strategies for the Guide; to maintain the currency of the one-stop website including updating the content on the site and monitoring and fixing any broken website links; to be the primary link to the website designer (should additional design changes be necessary); and to support and implement other communication needs that may arise for the Guide.

Vice-Chair – to support the Chair as the need arises and to learn about the work of the committee in order to step into the role of Chair; to be responsible for compiling formal articles and reports for circulation to the membership regarding the Guide; and to support the Chair with communicating changes about the Guide to the membership. Should the Chair need to step aside, the Vice-Chair will assume the role of Chair.

Database Officer – to oversee and write the content for standards and nomenclature in the online searchable databases and to update the changes into the database as needed for the membership; to maintain the database and be the primary link to the database provider and the Treasurer of the ARUCC Executive Committee regarding financial matters related to the database provider; to support the Chair in operationalizing any changes that might be necessary for the Guide Database as a result of feedback from the membership. Note: any costs including translation and those related to the database provider are subject to approval and oversight by the ARUCC and PCCAT executives.

PESC representative – to ensure the electronic data standards of relevance are shared with the Guide Working Group members; to ensure any communication related to data standards initiatives are communicated regularly and as appropriate to the ARUCC and PCCAT Executives and membership; and to provide advice regarding any standards changes to the Guide.

ARUCC and PCCAT executive members - to provide a diversity of perspective to the Working Group particularly with regarding to discussing and debating any standards or nomenclature updates or changes to the Guide; to bring forward research needs from their respective members; to lead any specific research project(s) for the Guide as might arise; to report back to

the separate executives; and to provide expert advice to sustain the alignment of the Guide to the needs of the membership.

### **Meetings and Agendas**

A minimum of four meetings a year for the full group will be held, typically two in the fall and two in the winter or at the call of Chair. Interaction virtually to execute any changes to the website should occur at least monthly or as enquiries arrive to ensure timely response to the ARUCC and PCCAT communities. All meetings must be held virtually and should use the ARUCC teleconference line to control costs. In-person meetings will be restricted to occur around or during conferences to the extent possible with expenses the responsibility of each institution or allied organization unless otherwise preapproved by the ARUCC and PCCAT executives.

### **Review of Terms of Reference**

The Terms of Reference are to be reviewed biennially.