



Project Management Office Case Study CollegeSource Transfer Technology Implementation

August 2020

Project: UW System Administration (UWSA) and the Wisconsin Technical College System (WTCS) made it easier for students to plan credit transfers in Wisconsin by launching a new online credit transfer tool on July 1, 2020. The new tool, called Transferology, replaced UW System's aging home-grown transfer information system to maintain course equivalencies and search for credit transfer matches. The project also included the College of Menominee Nation, and the Lac Courte Oreilles Ojibwa Community College.

Challenge: UWSA's Transfer Information System (TIS) developed in 1989 lacked the comprehensive functionality required to continue to fulfill present and future transfer information management requirements.

PMO Services Provided: The Project Management Office led a team from the UW System campuses and the technical colleges and vendor consultants to convert all course data from their databases into Transferology and launch the new online tool.

- Executed the decommissioning of the old transfer information system and the adoption of the new system by UW System campuses
- Deployed the crossover of UWSA's Transfer Wisconsin website and each UW System and technical college's credit transfer web page to incorporate new links to the Transferology tool
- Organized an administrator community of practice network to ensure on-going sustainability of the work
- Coordinated change management communication and adoption tactics to make institutions aware and knowledgeable of the new technology

Project Goals: The desired outcome was to ensure accurate and comprehensive information about transferring credit at any step in a student's academic career by meeting the following goals:

- Improve transfer friendliness by replacing the TIS Credit Transfer Wizards with CollegeSource TES/Transferology solutions
- Provide an integrated system for staff to evaluate and promote transfer credit with readily available reports, minimal maintenance, and increased workflow capability to enhance the effectiveness of student advisors
- Increase transfer equivalencies to introduce more diverse options and expand the success of matches for students interested in transfer between and within UW System and WTCS institutions, and the Tribal Colleges

Project Results

The project successfully deployed CollegeSource's cloud-based transfer system to replace UWSA's dated in-house architecture, meeting all project goals with zero business disruption. UW System now has a modern transfer application that is cost effective and efficient to maintain. The project implementation approach ensured the transfer information included a consistent data set that satisfied the Wisconsin Universal Credit Transfer Agreement and included tribal college coursework.

A key attribute of the project's success was the Project Management Office's ability to bring groups together—from vendors to administration, IT, communication staff, to senior leaders. This built a coalition to sustain acceleration, complete work on schedule and celebrate success.

Project Deliverables

- Project charter
- Deployment roadmap
- Board of Regents presentation
- Decommission plan
- Campus team leadership
- Weekly Vendor/WTCS status meetings
- Work in progress and completion reports
- Sponsor monthly status reports
- Community of Practice creation
- Talking points and messaging
- Two project sponsor communications to campus leaders
- Updated [Transfer Wisconsin](#) website with links to Transferology
- UWSA/WTCS co-branded Transferology login page
- Joint UWSA/WTCS [news release](#) and social media to announcing launch
- Campus Communication Action Plan assistance
- [Transferology promo video](#)