

THE TRANSFER EXPERIENCE

**A Handbook for Creating a More Equitable and
Successful Postsecondary System**



*Edited by John N. Gardner,
Michael J. Rosenberg, and Andrew K. Koch*

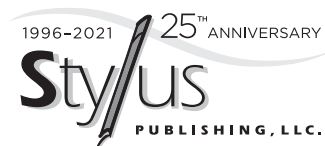
**Online Compendium: Case Studies and
Other Resources**

Copublished with



Gardner Institute

Brevard, North Carolina



STERLING, VIRGINIA



COPYRIGHT © 2021 BY STYLUS PUBLISHING, LLC.

Published by Stylus Publishing, LLC.
22883 Quicksilver Drive
Sterling, Virginia 20166-2019

All rights reserved. No part of this book may be reprinted or reproduced in any form or by any electronic, mechanical, or other means, now known or hereafter invented, including photocopying, recording, and information storage and retrieval, without permission in writing from the publisher.

Library of Congress Cataloging-in-Publication Data
The CIP for this text has been applied for.

13-digit ISBN: 978-1-62036-946-3 (cloth)
13-digit ISBN: 978-1-62036-947-0 (paperback)
13-digit ISBN: 978-1-62036-948-7 (library networkable e-edition)
13-digit ISBN: 978-1-62036-949-4 (consumer e-edition)

Printed in the United States of America

All first editions printed on acid-free paper
that meets the American National Standards Institute
Z39-48 Standard.

Bulk Purchases

Quantity discounts are available for use in workshops and
for staff development.
Call 1-800-232-0223

First Edition, 2021

CONTENTS

CASE 1: A CULTURE OF TRANSFER	
How Stella and Charles Guttman Community College Supports Transfer and Completion at 4-Year Institutions	1
<i>Danielle Insalaco-Egan</i>	
CASE 2: A QUEST FOR EQUITABLE TRANSFER	
Transfer Policies and Practices of the City University of New York	6
<i>Chet Jordan and Niesha Ziehmke</i>	
CASE 3: MAKING THE TRANSITION SEAMLESS	
Creating an Intentional Transfer Culture and Experience for Students Who Transfer From Perimeter College to Georgia State University–Atlanta	13
<i>Charles Fox</i>	
CASE 4: ADVANCING AN ORGANIZATIONAL FOCUS ON TRANSFER STUDENTS	
A Mission-Driven Approach at IUPUI	20
<i>Catherine Buyarski, Julie Landaw, Boyd Bradshaw, James Gladden, and Kathy E. Johnson</i>	
CASE 5: STUDENT SUCCESS FOR TRANSFER STUDENTS AT KEAN UNIVERSITY	25
<i>Deborah Skibitsky and Jonathan Mercantini</i>	
CASE 6: PARTNERSHIPS IN COLLEGE TRANSFER ACCESS AND SUCCESS	
North Carolina Independent Colleges and Universities and the North Carolina Community College System	30
<i>A. Hope Williams</i>	
CASE 7: TRANSFER IN A RURAL SETTING	
The University Center of the Mountains	34
<i>Deronda Collier Mobelini and G. Edward Hughes</i>	
CASE 8: INSTILLING TRANSFER PRIDE AT THE UNIVERSITY OF CALIFORNIA, LOS ANGELES	43
<i>Heather Adams</i>	
CASE 9: INTERSTATE PASSPORT	
Streamlining Student Transfer Across State Lines	49
<i>Patricia A. Shea</i>	
CASE 10: AMERICAN PUBLIC UNIVERSITY SYSTEM	
A “Military Friendly” Model for Student Transfer	56
<i>Wallace E. Boston, Vernon Smith, and Melissa Layne</i>	

CASE 11: THE TULSA COLLABORATIVE	
A Regional Approach to Improving Transfer and Bachelor's Degree Attainment	63
<i>Pamela K. Fly, Betsy Q. Griffin, Jennifer L. Ivie, Mary A. Millikin, Emily Tichenor</i>	
ADDENDUM A: PHI THETA KAPPA HONOR SOCIETY	
Ensuring Transfer Success and Career Readiness Among Today's College Students	70
<i>Erin Cogswell</i>	
ADDENDUM B: TAU SIGMA NATIONAL HONOR SOCIETY	
Recognizing and Promoting the Academic Excellence and Involvement of Transfer Students	74
<i>Lee Colquitt</i>	
ADDENDUM C: THE NATIONAL INSTITUTE FOR THE STUDY OF TRANSFER STUDENTS	76
<i>Janet Marling</i>	

Case I

A CULTURE OF TRANSFER

How Stella and Charles Guttman Community College Supports Transfer and Completion at 4-Year Institutions

Danielle Insalaco-Egan

Founded in 2011, Stella and Charles Guttman Community College is the newest community college campus of the City University of New York (CUNY), designed specifically to improve the retention and graduation rates of New York City students (Guttman Community College, 2020). Located in midtown Manhattan, its students hail from all five boroughs of New York City. Although a small campus (just under 1,000 students), Guttman's equity-driven, guided pathways model incorporates a constellation of high-impact practices at scale, and thus it offers a rich case study for institutions of any scope and type (Brown and Kurzweil, 2016).

Students begin at Guttman with a mandatory, 10-day Summer Bridge program that engages them with key facets of the first-year experience and helps them make connections with advisors and faculty. The common curriculum for all new students takes an interdisciplinary approach to studying cities, work, and the issues that undergird the two. Dedicated advisors, or student success advocates, provide continuity in and out of the classroom in the first year, and this practice continues into the second year through to graduation with major-based advisors, or career strategists. In the first year, the primary objectives in the advising relationship are developing one's sense of identity as a college student, ensuring a proper "fit" for the chosen major, or program of study, and understanding how to complete the degree. The program of study model at Guttman follows Bailey et al.'s (2015) suggestions for guided pathways—only six majors, few electives, and course sequencing—which allow the second-year advisors, the career strategists, to turn much of their attention away from degree completion advising and toward transfer planning.

This case study will provide evidence that Guttman achieves what Braxton et al. (2013) term *institutional integrity*—the alignment between a college's mission and the actions of its faculty and staff that yields a more socially integrated and retained student—through a focus on a transfer-going culture. Institutional integrity

at Guttman starts with the commitment of faculty, administrators, and staff to student learning and success in order to yield high graduation and transfer rates for a population that is often ineffectively served by higher education. The college has consistently seen an average fall-to-fall retention rate of first-time students of 70.6%, as well as an average 3-year graduation rate of 46% (Guttman Community College, 2020). To that end, it begins the conversation about transfer with students from the point of admission and reinforce and builds on a transfer message in and out of the classroom throughout the degree program. Guttman has established itself as an institution that sends its students to senior colleges, with an intentional transfer advising curriculum helping effect a transfer rate of its graduates of 80%—far above the 34% rate of community college student transfer nationwide (Guttman Center for College Effectiveness, 2018; Shapiro et al., 2017). Although the majority of students transfer to other CUNY institutions (76%), an increasing number of graduates move on to private colleges, such as Boston University and New York University, as well as state university systems such as in New York, Pennsylvania, and California.

In 2015, the college received data from the CUNY Office of Institutional Research and Assessment on how students fared once they transferred and noted that students' grade point averages decreased, also known as "transfer shock" (Hills, 1965). As a result, Guttman has been examining and enhancing students' preparation for transfer as well as their experience at their new college. One recent study about transfer within the CUNY system has concluded that a better alignment in both academic and sociocultural expectations between the community college and the point of transfer could result in greater successes for students in their early transfer semesters (Jordan, 2018). To help facilitate this, Guttman has developed strategic goals to ensure a sustained assessment of the student experience from a transfer lens (Table 1.1).

Faculty and staff initiated an "inquiry and action" group, Academic Preparation for Life after Guttman, that meets periodically to consider how Guttman's academic rigor and classroom practices are impacting student performance at 4-year institutions. This cross-functional workgroup is analyzing demographic and academic performance variables as well as data from alumni surveys. They intend to answer questions such as the following: How is Guttman's focus on group-based learning impacting students' success in lecture courses at senior colleges? And how does the

TABLE 1.1
Guttman's Strategic Goals Related to Transfer

<i>Programs of Study Initiatives</i>	<i>Academic Momentum Initiatives</i>	<i>Student Engagement Initiatives</i>
Strengthening curricular pathways to transfer	Promoting rapid credit accumulation	Providing tools and opportunities to help students explore transfer
Creating and reviewing articulation agreements	Developing and refining degree maps	Repeating and assessing newly created Transfer Bridge program

Guttman model's built-in support network impact the fostering of the independence required when transferring to a large senior college?

The college has also partnered with three other institutions within CUNY—Bronx Community College, Hostos Community College, and Lehman College—to form the Bronx Transfer Affinity Group, or BTAG (Lehman College, 2020). The group's overarching goals can be found in Table 1.2. While Guttman has already incorporated the transfer-going mind-set into its mission, it has committed to undertaking a full-scale assessment of its transfer practices using the *Transfer Playbook* rubric (Wyner et al., 2016). BTAG's activities include developing institutional articulations, enhancing transfer credit applicability, hosting a cross-campus summit to increase the knowledge base of advisors, and improving transfer orientation.

Alongside this initiative, Guttman's transfer advising curriculum has been scaffolded to promote greater learning about skills for transfer success over the students' time to degree. Transfer preparation activities are in place from the first year forward, including an annual transfer fair, that students attend with written, pre-planned questions, and an alumni transfer panel that includes graduates who are attending a variety of public and private schools. Career strategists, the advisors in the program of study, visit the first-year seminar to introduce the transfer advising curriculum, and invite first-year students to experience the transfer campus through on-site visits (for which students must prepare with an advisor in advance). Later, students can meet with admissions counselors at Community Days at Guttman. Advisors publish two guides for early and late in the transfer process: *Transfer Overview* and *Making Your Credits Count*. Through BTAG, Guttman now has an advisor-in-residence from Lehman College, who meets with dozens of prospective and admitted transfers each semester to help them plan or even register for their first semester at Lehman.

TABLE 1.2
Bronx Transfer Affinity Group Goals

Objective	Description
1. Create an institutional culture of transfer	Develop an institutional culture that embraces and nurtures transfer students by creating meaningful programs and processes to increase transfer success and academic preparation, building transfer awareness internally, and collaboratively via strategic partnerships.
2. Create a sense of belonging	Foster a campus environment that is inclusive of all students and creates a sense of belonging for transfer students via specialized services and supports and student communities.
3. Create a "graduation habit"	Cultivate a campus-wide focus on academic momentum and achievement that encourages timely completion of an associate degree before bachelor's degree as a key to a smooth transfer between institutions.

More recently, Guttman has embraced technology-mediated transfer advising. Through the campus student success platform, students receive “kudos” alerts during the transfer planning process (“Great job finishing your applications!” or “Congrats on getting into that school!”), and advisors help students keep track of college decisions. Career strategists are also using reflective pedagogy principles through activity modules they have created in the college’s ePortfolio platform. Students can complete the “My Application Plan” or “My College List” modules during advisor-led workshops or on their own and return to them to refine their thoughts during one-on-one meetings with their strategists.

Given the potential disparity between the high-touch experience at Guttman and students’ acclimation to a senior-year college culture, two additional innovations assist students with their transition. The college has created a virtual “transfer learning community” platform, the Guttman TLC, which allows students to build peer-to-peer relationships with students who have transferred from Guttman to senior colleges. Further, the college launched a Transfer Bridge program, which has similar objectives as Guttman’s precollege Summer Bridge. Transfer Bridge is staffed by transfer peer mentors, who design and facilitate workshops and touchpoints for Guttman graduates who are transferring to the CUNY school they themselves attend. The workshops, offered just prior to transfer, and touchpoints, which take place throughout the first two semesters at the 4-year college, provide help navigating academic and administrative matters, managing time, and getting involved on campus. According to the annual report of the program, post-Transfer Bridge surveys have confirmed that students are learning the importance of communication, self-advocacy, and making connections with other community college students (Guttman Community College Peer Mentoring Program, 2018).

The sustained and wide attention at Guttman Community College to the transfer experience of its graduates has ensured that transfer-going is a critical component of its culture and mission. In the coming years, the college will continue to study the effects of its academic and support model in a cycle of improvement in order to maximize its impact on students’ transfer success.

References

- Bailey, T. R., Smith Jaggars, S., & Jenkins, D. (2015). *Redesigning America’s community colleges: A clearer path to student success*. Harvard University Press.
- Braxton, J. M., Doyle, W. R., Hartley III, H. V., Hirschy, A. S., Jones, W. A., & McLendon, M. K. (2013). *Rethinking college student retention*. John Wiley & Sons.
- Brown, J., & Kurzweil, M. (2016). *Student success by design: CUNY’s Guttman Community College*. Ithaca S + R. <https://doi.org/10.18665/sr.276682>
- CUNY Office of Institutional Research. (2015). *System retention and graduation rates of full-time first-time freshmen in associate programs by year of entry*. City University of New York.
- Guttman Center for College Effectiveness. (2018). *Have a nice data*. <https://guttman-cuny.digication.com/idea/Presentations>
- Guttman Community College. (2020). *Fast facts*. <https://guttman.cuny.edu/about/fast-facts/>

- Guttman Community College Peer Mentoring Program. (2018). *Transfer peer mentors and the transfer bridge program annual report*. (Unpublished internal report). Guttman Community College.
- Hills, J. R. (1965). Transfer shock: The academic performance of the junior college transfer. *The Journal of Experimental Education*, 33(3), 201–215. <https://doi.org/10.1080/00220973.1965.11010875>
- Jordan, C. (2018). *Defining long-term student outcomes: The Guttman Community College model and its impact on transfer students*. Guttman Community College.
- Lehman College. (2020). *Bronx Transfer Affinity Group*. <http://www.lehman.edu/virtual-transfer-center/btag.php>.
- Shapiro, D., Dundar, A., Huie, F., Wakhungu, P. K., Yuan, X., Nathan, A., & Hwang, Y. (2017). *Tracking transfer: Measures of effectiveness in helping community college students to complete bachelor's degrees* (Signature Report No. 13). National Student Clearinghouse. <http://files.eric.ed.gov/fulltext/ED580214.pdf>
- Wyner, J., Deane, K., Jenkins, D., & Fink, J. (2016). *The transfer playbook: Essential practices for two- and four-year colleges*. Aspen Institute and the Community College Research Center.

Case 2

A QUEST FOR EQUITABLE TRANSFER

Transfer Policies and Practices of the City University of New York

Chet Jordan and Niesha Ziehmke

The City University of New York (CUNY) enrolls over 240,000 students in associate and bachelor's degree programs. Spread across the five boroughs of New York City, 19 colleges offer a range of degree programs that fuel the economy of the metropolitan area. Each fall, approximately 8,000 students transfer from one of the CUNY community colleges to a 4-year institution within the system, and scores more transfer from CUNY to an external college or university.

Since CUNY was chartered as a unified university system in 1961, there have been many efforts to streamline the transfer process to ensure that students who move from a community college to a 4-year institution are satisfactorily recognized for the credits they have received from the 2-year college. Not until 2013 did CUNY authorize a system-level overhaul of the general education curriculum and transfer process. When the Pathways Initiative was implemented that year, its central goal was to ensure that general education requirements completed at a community college were validated at one of the 4-year campuses, a process that, until 2013, was disjointed and resulted in incredible credit and financial aid erosion (Logue, 2017).

Since the implementation of the Pathways Initiative, adopted by the Board of Trustees of CUNY in 2011 and implemented in 2013, the transfer process is far less obstructed than in the past (CUNY, 2020). Currently, over 90% of CUNY undergraduate students are enrolled in Pathways courses. Through a combined set of initiatives aiming at academic momentum, including Pathways, the university saw an increase in associate degree completion prior to transfer—as well as a reduction in excess credits upon associate degree completion. By fall 2016, there was a 41.2% increase in the number of students transferring with an associate degree.

Additionally, New York State Education Law Section 6201 (2015) states:

The university [CUNY] must remain responsive to the needs of its urban setting and maintain its close articulation between senior and community college units. Where possible, governance and operation of senior and community colleges should be jointly conducted or conducted by similar procedures to maintain the university as an integrated system and to facilitate articulation between units. (Justia US Law, 2020, para. 2)

However, transfer students still face a range of obstacles that either discourage bachelor's-degree attainment entirely or slow progress en route. Because CUNY community college students are more likely to be people of color, low-income, and first generation to attend college, addressing the barriers in their path to degree attainment is critical.

In response to these current issues, CUNY faculty and administration are engaged in joint, multicampus efforts to study student transfer patterns and outcomes to improve equity in educational access and achievement by revising current policy and identifying practices to eliminate barriers in associate to bachelor's degree attainment. CUNY researchers are actively engaged in multiyear studies to advance the university's understanding of the transfer student population and to provide rigorous evaluation of current initiatives. Additionally, campuses are working with one another to develop more innovative articulation agreements to ensure that students are receiving both general education and degree credits to prevent attrition in the transfer process.

As representatives of Guttman Community College, the system's newest college built on a combined set of research-based practices aimed at improving community college completion for historically underserved student populations, we have been deeply involved in CUNY's transfer conversations. The Guttman perspective on transfer is explored in the chapter within this compendium by Danielle Insalaco-Egan. This case study, however, will highlight key research initiatives and reform efforts currently underway at CUNY as a whole. The purpose of this section is to underscore the potential for system-wide change that emerges from rigorous research, influencing policy discussions and transformative shifts in practice.

Transfer Opportunity Project

The Transfer Opportunity Project (TOP) launched in fall 2018 at CUNY. Under the leadership of former CUNY Executive Vice-Chancellor and University Provost Lexa Logue, a team of scholars from CUNY's Office of Institutional Research (OIRA) and the nationally acclaimed research organization MDRC embarked on a 4-year study to understand why over 80% of community college students hope to earn a bachelor's degree but fewer than one in five ultimately reach that goal within 6 years. The study "A Leaky Pipeline: Community College Students and Pathways to the Bachelor's Degree" was awarded \$1.4 million from the Institute of Education Sciences and will support a range of research activities across the university in the coming years.

One of the critical challenges CUNY faces as a unified university system is how to effectively aggregate student-level data from colleges that have widely different degree programs, course numbering systems, and programmatic requirements. A major initial task for TOP research staff will be to create a university-wide database that contains information on student transfer outcomes that is easily accessible and supported by real-time data. One of the central barriers students face in the transfer process at CUNY is the myriad ways in which community college courses are or are not equated to bachelor's degree credits. Although the university operates as a singular system, transfer credit evaluation has long been a piecemeal process that falls under the purview of individual academic departments (Logue, 2017). Since Pathways, the transfer of general education credits has been far more seamless, but substantial inconsistencies in degree-program credit evaluation remain across the system. The database created by TOP researchers will offer the university a comprehensive look at patterns of student credit transfer. Ideally, the data made available by this real-time system will generate revisions to policy that will reduce barriers to student transfer.

In partnership with MDRC researchers, TOP will investigate the experiences of those involved in on-the-ground transfer processes at the colleges. Six campuses have elected to participate in the TOP research initiative: Brooklyn College, Queens College, Lehman College, Guttman Community College, Bronx Community College, and Hostos Community College. Students and staff from each of these campuses will complete a survey designed to help TOP researchers understand the roles in which individuals play in supporting student transfer and how students themselves understand and experience the transfer process. The survey data will be supported by numerous focus group discussions that will draw on personal narratives of campus representatives.

Critical to these discussions will be responses to a transfer process map designed by TOP research staff. The process map attempts to locate the major components of transfer, including initial advising sessions, paying commitment deposits, and credit evaluation. Responses to the process map will help the TOP team locate "leaks" in the transfer pipeline or areas where students often remove themselves from the process prior to enrolling in a baccalaureate degree program. As the study proceeds, researchers will continuously inform university administration of key findings that could influence how policy is revised to improve transfer student outcomes and reduce the inequities in the current transfer systems and processes.

Growing Transfer in the Humanities

In January 2019, Lexa Logue, University Dean Colin Chellman, and Guttman Community College Assistant Professor Chet Jordan were awarded a \$550,000 grant from the Andrew W. Mellon Foundation to study transfer students in the humanities disciplines. Unlike many STEM programs, humanities pathways from the community college to baccalaureate majors are less clear and often are not supported in the same way. In conjunction with TOP, Growing Transfer in the Humanities

(GROWTH) is poised to examine a subset of the transfer population at CUNY. This 3-year study was designed to begin at Guttman Community College and expand to two additional community colleges (Bronx Community College and Hostos Community College) in the second year.

In fall 2015, 2.8 million students nationally, or 40% of community college students in the United States, took a humanities course. In comparison to other disciplinary categories, the student-to-faculty ratio is far higher in the humanities (Jaschik, 2019). At CUNY, approximately 33% of community college students major in liberal arts and sciences. This major, which includes a wide range of general education courses, represents the largest community college major at the university in terms of enrollment. In turn, community colleges do not ordinarily have discrete humanities degree programs. Community college students who are interested in majoring in a humanities program often do so only when they transfer to a 4-year college. The purpose of GROWTH is to understand how student interest in the humanities is formed and what pathways they take as they prepare to transfer into a 4-year program.

In the first year of the project, GROWTH researchers will disseminate a survey to Guttman Community College students. The survey will probe the ways in which students determine their educational pathways and their knowledge of available degree programs in the humanities disciplines. In addition to the survey, GROWTH staff will organize student focus groups at Guttman Community College to explore the dynamic ways in which advising, coursework, social and family influences, and previous academic background inform decisions students make regarding their major course of study.

The second year of the project will replicate the methods used in the first year. By expanding to two additional community colleges, GROWTH researchers will be able to accentuate patterns that emerged in the first year at Guttman Community College. One of the critical components of GROWTH will be to identify areas in which policy can be restructured to offer additional support for students who intend to major in humanities disciplines and, in turn, remove obstacles that linger in the pathway to the bachelor's degree. In so doing, GROWTH will be active in distributing key findings to university stakeholders throughout the research process and will be responsive in its analyses to shifts in transfer-related procedures and practices.

Transfer Affinity Groups

Beginning in 2017, CUNY began a comprehensive academic momentum initiative with aligned outcomes across all campuses. As the momentum conversation evolved among campus provosts and CUNY's central office, some campuses naturally began to consider the role of transfer. These conversations eventually led to the formation of transfer affinity groups grounded by geographic location. The first was the Bronx Transfer Affinity Group (BTAG) composed of Bronx Community College, Hostos Community College, Guttman Community College, and Lehman College. BTAG

worked from national research on best practices for transfer success outlined in the *Transfer Playbook* (Wyner et al., 2016) to develop the following goals:

1. Create an institutional culture of transfer: Develop an institutional culture that embraces and nurtures transfer students by creating meaningful programs and processes to increase transfer success and academic preparation, building transfer awareness internally and collaboratively via strategic partnerships.
2. Create a sense of belonging: Foster a campus environment that is inclusive of all students and creates a sense of belonging for transfer students via specialized services.
3. Create a graduation habit: Cultivate a campus-wide focus on academic momentum and achievement that encourages timely completion of an associate degree before bachelor's degree as a key to a smooth transfer between institutions.

In the 18-month project period, BTAG broke the work up into two categories. One category focused on advisement and direct student support, and the second focused on credit transfer systems and processes. Two groups overseeing these key categories developed action items aimed at achieving the overarching goals. Through monthly meetings and coordinated communication efforts, BTAG accomplished significant alignment regarding how and where to offer critical transfer-focused advisement support and how to build a sense of transfer student belonging for any students extending their educational pathway to Lehman College.

BTAG created guaranteed admissions agreements between all the community colleges and Lehman College. These agreements offer students who were initially denied admission to Lehman guaranteed admission if they graduate with an associate degree. Additionally, all the community colleges now have blanket or comprehensive articulation agreements that identify many degree paths from the community college to Lehman that can be achieved within 2 years after transfer with an associate degree without accruing excess credits. These blanket articulation agreements relieve the colleges of the need to develop program-to-program articulations for each degree path to ensure fair evaluation of transfer credits. The blanket agreements can also remain in place while allowing for on-time updates for curriculum changes without forcing an entirely new agreement to be negotiated and approved. Working in concert with one another, the guaranteed admission agreements and blanket articulation agreements greatly improve the ability for students at these higher education institutions to have seamless transfer experiences.

BTAG held a Transfer Summit on March 22, 2019, to ensure cross-campus communication of the BTAG accomplishments and recommended actions for all the professionals that need to work together to make these coordinated efforts possible. Critical staff from advising and financial aid were informed of best practices for aligned advisement regarding transfer to Lehman College. Lexa Logue was invited to be the plenary speaker at the event, indicating the combined momentum of her research and campus efforts calling for increased system focus on improving transfer

outcomes. An additional marker of this momentum is the expansion of the Transfer Affinity Group effort to Queens to form QTAG.

University-Wide Data Exchange

From the first BTAG meeting, members of the campus teams agreed on the need for access to transfer data from all sides of the transfer equation. To this point, CUNY data sources offered only limited cross-campus data access, which left each campus with a partial picture of transfer outcomes. The BTAG group worked with CUNY Central to engage Logue's team and CUNY's Office of Institutional Research—who were extracting big-picture transfer data in their grant work—to build a set of transfer dashboards in the campus analytics system Tableau with comprehensive transfer outcome data. These dashboards filled a significant need in the overall efforts to improve transfer across the system by offering information to help inform each community college of how their students do as they transfer to particular campuses. This information will help guide our students to 4-year colleges that will best serve them. Additionally, the transfer data dashboards offer system-wide accountability that can drive policies to support greater equity in the transfer experience overall.

Recommendations

CUNY's focus on transfer underscores its commitment to providing an accessible and equitable education for the citizens of the city of New York. The goals of the initiatives mentioned in this case study offer initial support for the following recommendations:

1. Develop and sustain multicampus partnerships dedicated to building transfer bridges.
2. Maintain robust and accessible system-wide databases on transfer students.
3. Employ a “split screen” strategy to work for incremental change while advocating for system-wide equity in transfer practices (Kolderie, 2015).

References

- City University of New York. (2020). *Pathways*. <https://www.cuny.edu/about/administration/offices/undergraduate-studies/pathways/>
- Jaschik, S. (2019, March 11). The humanities at community colleges. *Inside Higher Ed*. <https://www.insidehighered.com/news/2019/03/11/study-documents-extent-humanities-instruction-community-colleges>
- Justia US Law. (2020). *2015 New York laws*. <https://law.justia.com/codes/new-york/2015/edn/title-7/article-125/6201/>
- Kolderie, T. (2015). *Split screen strategy: How to turn education into a self-improving system*. Beaver's Pond Press.

- Logue, A. (2017). *Pathways to reform: Credits and conflict at The City University of New York*. Princeton University Press.
- Wyner, J., Deane, K. C., Jenkins, D., & Fink, J. (2016). *The transfer playbook: Essential practices for two- and four-year colleges*. Aspen Institute and Community College Research Center. <https://ccrc.tc.columbia.edu/media/k2/attachments/transfer-playbook-essential-practices.pdf>

Case 3

MAKING THE TRANSITION SEAMLESS

Creating an Intentional Transfer Culture and Experience for
Students Who Transfer From Perimeter College to Georgia
State University–Atlanta

Charles Fox

With over 50,000 total students and 27,000 undergraduates, Georgia State University (GSU) is the largest university in the state and the fifth largest in the nation. Located in downtown Atlanta, GSU has 11 distinct colleges, institutes, and schools. From the Andrew Young School of Public Policy to the Institute for Biomedical Studies, from J. Mack Robinson School of Business to the College of Arts and Sciences, GSU offers more than 250 majors, minors, and pathways of academic study. One of the newest additions to this mix of colleges is Perimeter College.

Students may pursue an associate degree at one of the five Perimeter College campuses, or they may attend the main campus in Atlanta for bachelor's, master's, and doctoral degrees. On the Atlanta campus, there are approximately 23,000 students pursuing a bachelor's degree and over 7,000 graduate and law school students. GSU is one of four Research I (R1) institutions in the University System of Georgia (USG). Additionally, as the only national public university to eliminate the achievement gap between African American, Hispanic, first-generation and Pell-eligible student graduation rates, GSU has become a national model for its commitment to undergraduate education and student success.

Over the past few years, GSU reinvented itself again, transformed through its consolidation with Georgia Perimeter College (GPC). The Board of Regents for USG is the governing authority of public higher education throughout the state. The USG is composed of two research facilities and 26 institutions of higher education, including four research universities, four comprehensive universities, nine state universities, and nine state colleges. However, the current system is quite different than it was less than 10 years ago. In November of 2011, the Board of Regents adopted

“Six Principles for Consolidation” to more effectively enable student success across the state. As articulated on the USG website, these principles are:

- Increase opportunities to raise education attainment levels.** Enhancing opportunities for students to raise their education attainment levels will be a goal.
- Improve accessibility, regional identity, and compatibility.** Geographic proximity, transportation corridors, student backgrounds, ensuring as much as possible a cultural fit, and other factors which strengthen the qualitative aspects of campus offerings will be considered.
- Avoid duplication of academic programs while optimizing access to instruction.** Consideration will be given to demand for degrees, program overlaps and duplications, and optimal institutional enrollment characteristics sufficient to offer and support the needed array of services.
- Create significant potential for economies of scale and scope.** Consideration will be given to the potential for achieving cost efficiency in service delivery, degree offerings, and enrollment.
- Enhance regional economic development.** Consideration will be given to consolidations with the potential to improve economic development through enhanced degree programs, community partnerships, and improved student completion.
- Streamline administrative services while maintaining or improving service level and quality.** Potential for administrative efficiencies and savings which yield more effective service will be considered. In addition, functional consolidations on a regional basis will be analyzed. (University System of Georgia, 2011, para. 3)

In January 2015, the Board of Regents announced its plan to consolidate GSU with Georgia Perimeter College, an associate degree-granting institution located in the Atlanta metro area. One year later, the Board of Regents voted its final approval for the creation of Perimeter College at GSU, a new college in a new university.

Perimeter College (PC), an associate degree-granting college with over 18,000 students, is the largest college within GSU. Before consolidation, GPC was a 50-year-old independent college founded by the Dekalb Board of Education as Dekalb College—an open-access community college in Dekalb County, Georgia. PC first began offering classes on its Clarkston campus in 1964, but, over time, expanded to five campuses—three within Dekalb County, one in Fulton County, and another in Newton County—as well as a large online campus. The Board of Regents renamed the college Georgia Perimeter College in 1997 (well before the recent consolidation) to better reflect the location of its campuses and its ease of access for students living in the greater Atlanta area. By 2015, GPC was the largest associate degree-granting institution in Georgia. However, among students, parents, and high school counselors, GPC was known as the best place to start for students who were more interested in transferring to a baccalaureate institution than obtaining an associate degree. Although it is difficult to accurately determine the number of students who transferred out of GPC, comparative data of transfer applications from other institutions (e.g., GSU, University of Georgia, Georgia Tech, as well as the regional universities

and state colleges) indicate a high number of applicants started their academic career at GPC. Prior to consolidation, roughly half of the students who entered GPC as first-year students transferred to 4-year programs before graduating. Furthermore, the largest percentage of those transfers were to GSU, which is also in Atlanta. Since consolidation, students no longer transfer from GPC to GSU—now, they *transition from PC to downtown*.

Providing a seamless transition from PC to the downtown campus has been a primary objective for the administration since the consolidation was announced. Though we are currently in our third year of this effort as of this writing, we have uncovered and addressed some obstacles for students that have made the transition difficult. This case study provides an overview of what we have done to date, and shares some promising outcomes associated with these actions.

Perimeter College at GSU continues its mission as a teaching institution, providing transferable coursework for the first 2 years of study. However, since consolidation, fewer students start their academic career at PC with the intent of transferring to other colleges or universities within the USG other than GSU or to private colleges, or out-of-state institutions. That does not mean there are fewer students at PC than before consolidation; instead, more students now enter Perimeter College as first-years or as transfers with the intent of eventually transitioning downtown to GSU. This result stems from a pair of factors produced by the consolidation. First, a two-tier admission policy—one for students who will begin in the baccalaureate program at the downtown campus, and another for those starting in the associate degree program at one of the Perimeter College campuses; and second, PC students have access to the high-impact strategies such as organizing entering students into learning cohorts around meta-majors (e.g., social science) or career pathways (e.g., history), which have transformed downtown's retention and graduation rates (GSU, 2018).

Students who apply to GSU must indicate if they will enter as first-year students in either the baccalaureate (Atlanta campus) program or the associate degree (PC campuses) program. The baccalaureate admission criteria are more stringent, tuition and fees are higher, and the acceptance rate is lower. However, students denied admission to the Atlanta campus may be admitted to Perimeter College. Comparing the fall admission data from 2014 to 2018, the percentage of first-year students who were accepted ranged from 53% to 58%; whereas the rate of student enrollment for those who applied remained between 21% and 26% for the baccalaureate program. (All specific GSU admission and enrollment data cited in this section of the case study can be found in GSU's IPORT, a web-based application that allows access to reports from the University Data Warehouse on enrollment, admissions, grades, etc.) For Perimeter College during the same period, acceptance/application ranged from 58% to 68%, while the enrollment/application percentages were between 29% and 34%. One noticeable data point, though, saw a wide swing: the raw number of first-year students who were denied admission to the Atlanta campus. Denials went from 1,262 in fall 2016, to 4,316 in fall 2017, and then dropped down markedly to only

205 in fall 2018 (GSU, 2020). Many students were confused by the application and mistakenly applied for the baccalaureate degree (on downtown campus) rather than the associate degree (on the PC campus). Although this anomaly occurred in part because of needed changes in the wording on the application form, it highlights the difference in admission standards between the Atlanta campus and PC. Now, instead of being denied admission to the baccalaureate degree, students who do not meet the Atlanta campus criteria are automatically considered for admission into Perimeter College at GSU. Students may still be further denied admission to PC, but those numbers are relatively few. Overall, since consolidation first-year student applications have increased over 60% for the Atlanta campus as students understand that even if they don't meet the admission requirements for downtown, they can begin their academic career at GSU on one of the Perimeter College campuses.

First-year students are admitted to either the Atlanta campus or a PC campus, but not both. Because of the differences in admission standards and in the tuition and fee structures between the two degree levels, students are precluded from moving freely from Perimeter to downtown. Although there are very few exceptions, students admitted to the downtown campus must take all their courses downtown, and associate degree students can only take their courses on a Perimeter College campus. Atlanta students, however, may take summer courses at one of the PC campuses at the reduced Perimeter College rate.

Perimeter College students may choose from one of the five suburban campuses—Alpharetta, Clarkston, Decatur, Dunwoody, or Newton—or they may take their classes online. Each campus has its own distinct student demographics, and though many students take classes on multiple campuses, most stay rooted on one campus throughout their academic career. Moving between PC campuses does not require any paperwork; however, moving from PC to GSU Atlanta requires students to request a change in status. A student who initiates this internal transfer from Perimeter to downtown is designated as a “PC transition” student. Comparably, students who move from downtown to PC are considered “GSU transition” students. Perimeter College transition students must apply for and meet the transition criteria before they may take classes on the downtown campus.

Students may transfer into one of the PC campuses or the downtown campus, depending on the applicants' previous academic achievements. Over the past 2 years, the numbers of transfer student applications and acceptances to PC and to downtown have been relatively equal. For example, in spring 2018, there were 2,593 students who applied and 1,402 accepted as transfer students to PC, while there were 2,290 student applications and 1,295 acceptances to the downtown campus. However, the number of transfer students accepted to the Atlanta campus has decreased over the past 3 years as the number of transfer applicants to PC has increased. The cause for the shift is likely the result of students being more prudent “shoppers,” as attending class on a PC campus is considerably cheaper. Before consolidation, transfer students to the Atlanta campus accounted for roughly 30% of new applications. Since consolidation that number has dropped to about 20%. However, with the new designation

of PC transition students, the total number of students moving to the downtown campus has moved upward slightly. In other words, the difference in the number of students who transferred into GSU pre- and post-consolidation is accounted for by the increase in transition students before and after. Furthermore, the baccalaureate graduation rates for both transfer and transition students are nearly equal. In spring 2018, just over 50% of the students who transferred to GSU from another institution persisted to graduate with a bachelor's degree, whereas the rate of bachelor's graduation for PC transition students was 48%.

A key motivating factor for students to transition from PC to downtown before having completed their associate degree is the opportunity to complete this degree on the Atlanta campus. Students who have earned 30 hours with a 2.0 GPA may transition to the Atlanta campus to begin working toward their bachelor's degree. Each year since consolidation, about 2,000 PC students have transitioned to the downtown campus. Once a student has earned the required number of hours for an associate degree, they may apply for graduation through Perimeter College. The Office of Student Success has been tracking transition students and notifies the PC transition students when they have successfully completed the requisite hours. This has been especially helpful for students who transition downtown but, for whatever reason, don't complete the baccalaureate. Now, instead of losing those college credits, they can move forward with a completed associate degree. Moreover, the awarding of an associate degree to transition students has significantly increased retention and graduation rates for PC.

Comparing transfer applications, acceptances, and enrollment rates before consolidation to the same rates of the combined transfer and transition totals afterwards, there is an uptick in total numbers, although the percentages remain stable. Furthermore, the number of transfer student applications into PC has increased each year since consolidation, which could be attributed to incoming students' perception that the transition from PC to the Atlanta campus is easy.

As mentioned earlier, creating a seamless transition for PC students transferring to GSU Atlanta has been a primary objective for the administration since the consolidation of the two previously autonomous institutions was announced. The first students who transitioned from PC to the downtown campus were the first to benefit from the university's high-impact strategies, such as the use of data analytics for advising, supplemental instruction, and adaptive learning technologies. Although the designation of *transfer student* and *transition student* may differ, students who transition from the 2-year, associate degree-granting Perimeter College at GSU to the 4-year, baccalaureate program of GSU Atlanta face many of the same issues that students who transfer from a community college to a large research university face.

The issue that surprises most PC transition students is the "sticker shock," considering tuition and fees for a full-time, in-state student cost about \$5,000 more each semester at the downtown campus than on a PC campus. Tuition and fees are not the only things that are more expensive, everything downtown is more expensive—the

food, parking, and living space. For many PC transition students, the additional costs are unexpected and often difficult to pay. Administrators and staff from the Office of Student Success have been sensitive to this issue and have sought to ease the sticker shock with a variety of high-impact strategies. One strategy that has helped ease the additional financial stress associated with transitioning is the Panther Retention Grants. Since its inception in 2011, over 11,000 GSU and PC students have persisted because of Panther Retention Grants, which provides “micro-grants to students at the fee drop each semester to help cover modest financial shortfalls impacting the students’ ability to pay tuition and fees, thus preventing students from stopping/dropping out” (GSU, 2018, p. 10). Other strategies, such as Keep HOPE Alive (KHA) and the SunTrust Student Financial Management Center (SFMC), have not only helped students successfully remain in school despite financial pressures but also provided financial management training that students will carry with them beyond graduation.

PC transition students have also reported experiencing a culture shock when moving from a smaller rural campus (i.e., Newton), a campus set in an affluent neighborhood (i.e., Dunwoody), or a campus located in the most ethnically diverse city in the United States (i.e., Clarkston) to the downtown campus. As a campus in the heart of a major international city, students at GSU Atlanta must make several adjustments beyond added financial pressures. Students downtown must navigate blocks of city traffic as they go from one high-rise classroom building to another. Many PC students, especially those coming from the “far flung” campuses of Alpharetta and Newton, find it difficult to locate affordable housing convenient to public transportation. The Atlanta campus is an urban campus, and some PC transition students have said they feel overwhelmed by the din and frenzy of city life. The shock of moving from an affordable college campus in a suburban area to a large, expensive, urban R1 institution has resulted in students either returning to PC to complete an associate degree or transferring to another baccalaureate program elsewhere.

To address these concerns, as well as to simplify the logistical difficulties of transitioning, a committee of administrators from admissions, enrollment services, student success, and academic leaders are implementing a formalized process that better prepares PC students for the transition to the downtown campus. Identifying potential transition students in a timely manner is the critical factor. Instead of waiting until the students have already transitioned, student success staff have begun offering multiple information sessions each month on the PC campuses to discuss and prepare students for the impending changes and their transfer to GSU Atlanta.

The biggest impact of consolidation on Perimeter College students is access to the high-impact strategies and opportunities for success, for which GSU continues to be recognized. As PC students gain access to these innovative high-impact strategies for advising, Perimeter College’s first-to-second year retention rates have “increased from 58% in 2014 to 70% in 2018” (GSU, 2018, pp. 6–7), and its 3-year graduation rates have doubled from 7% to 14% over the same period. These strategies, as administered

by an institution that acknowledges the moral imperative of higher education in the 21st century, have already reshaped the culture of Perimeter College.

The application of innovative data analysis in the areas of advising and retention has enabled GSU students—including those at Perimeter College—to achieve greater academic success. University-wide initiatives, such as requiring students to register in cohort classes grouped by meta-majors, innovative loan programs for students in need, using predictive analytics to determine the likelihood of success in sequential courses, and advising interventions that prevent students from taking classes outside their pathway of study, have resulted in improved graduation rates for students from traditionally underrepresented groups. These innovations have not only increased student achievement but also contributed to GSU students graduating more quickly and with less student debt.

References

- Georgia State University. (2018). *2018 report: Georgia State University: Complete College Georgia*. 2018 report. <https://success.gsu.edu/download/2018-status-report-georgia-state-university-complete-college-georgia/?wpdmdl=6472128&ind=1536948724169>
- Georgia State University. (2020). *IPOINT*. <https://oie.gsu.edu/decision-support-services-dss/ipoint/>
- University System of Georgia. (2011, November 8). *Regents approve principles of consolidation of institutions* [Press Release]. https://www.usg.edu/news/release/regents_approve_principles_for_consolidation_of_institutions

Case 4

ADVANCING AN ORGANIZATIONAL FOCUS ON TRANSFER STUDENTS

A Mission-Driven Approach at IUPUI

*Catherine Buyarski, Julie Landaw, Boyd Bradshaw, James Gladden, and
Kathy E. Johnson*

As Indiana's premier public urban research university, IUPUI offers more than 350 undergraduate, graduate, and professional programs from both Indiana University and Purdue University at our campus in Indianapolis, the state capital. Our unique partnership and urban location require that we are committed to students who begin their college journey in any number of ways, including transfer. Nearly 30,000 students are enrolled at IUPUI, including just over 21,000 undergraduates. In fall 2017, 35% of new students came to us following enrollment at another college or university (Graunke, 2017). Transfer students at IUPUI are more racially and ethnically diverse than their traditional first-year student compatriots. Most transfer students (54%) previously attended a 2-year institution, with 21% having earned an associate degree prior to enrollment at IUPUI. Most transfer students are traditional-aged with 74% being 24 years old or younger and entering IUPUI with between 31 and 59 credit hours (sophomore standing).

IUPUI has a strong commitment to the enrollment and success of transfer students. In 2016, IUPUI participated in the Gardner Institute Foundations of Excellence Transfer Focus process. As part of this campus-wide project focusing on the recruitment and retention of transfer students, IUPUI developed a mission statement on transfer students that articulates our pledge to providing support to transfer students throughout their time at IUPUI, with special attention to engagement and support services.

As an urban research institution, IUPUI is deeply committed to the educational success of all students. As part of this commitment, students who transfer to IUPUI

will experience coordinated, holistic, and developmentally appropriate support as they transition into and through the university.

As they pursue their degrees, they will be intentionally connected to high-quality curricular and cocurricular learning experiences and provided continuous access to support services. Their student experiences will be based on a theoretical framework that supports the unique needs of transfer students. These experiences will enhance their academic and social integration and commitment to attaining academic and career goals. (IUPUI Transfer Central, n.d. paras. 3–4)

As a first step in enacting this mission, IUPUI focused on transfer credit evaluation. Based on a thorough mapping and analysis of how transfer credit is reviewed and articulated, additional transfer credit analysts were hired, and campus-wide training conducted on the credit articulation process. A workflow system was developed to assist both advisors and students in tracking credit going through the review process. These efforts reduced articulation time, in most cases, from 4 weeks to 2 days. In addition to significant improvements in credit transfer articulations, IUPUI provides degree maps for all majors and is a partner with associate degree providers through Indiana's Transfer Single Articulation Pathways (TSAP) for high-enrolling degrees. TSAP degrees transfer as a block of credit to any public 4-year institution, ensuring a student enters IUPUI with junior standing and a maximum of 60 remaining credits. TSAP degrees are unique in that their learning competencies and outcomes were drafted by faculty representing all public 2- and 4-year institutions in Indiana. Specific transfer support and retention programs have been implemented for TSAP transfer students. For example, TSAP students in IUPUI's Electrical Engineering Technology and Mechanical Engineering Technology programs participate in a TSAP bridge course before they begin at IUPUI. The course is taught by engineering faculty and includes content intended to help students prepare for the transition to IUPUI.

With transfer credit articulation facilitated by the Office of Admissions in collaboration with degree programs, IUPUI also established two offices that focus solely on providing support to transfer students—the Passport Office and the Office of Transfer Student Services. Because over half of transfer students at IUPUI have previously enrolled at a local community college, the Passport Office was developed in 1990 to coordinate credit articulation and the transfer process between academic programs at IUPUI and the Indianapolis campus of Ivy Tech Community College. As the name implies, Passport facilitates travel for Ivy Tech Community College students to IUPUI as well as vice versa. Jointly funded by both IUPUI and the community college, Passport's mission is to ensure coordination, collaboration, and partnerships between the two institutions in regard to the transfer of credits, financial aid, student services, needs assessment, and programming that helps to support transfer student preparation, transition, and overall success.

While Passport assists students from the community college in preparing for and entering IUPUI, the Office of Transfer Student Services focuses on assisting enrolled transfer students with their transition to IUPUI and persistence to graduation. We

aim to fully integrate transfer students into the campus by providing programming designed to increase their sense of “Jaguar Pride,” helping them meet other transfer students, and encouraging them to participate in student groups and campus events. The Office of Transfer Student Services monitors student success through a set of customizable reports available on the institutional research website that enables real-time monitoring of enrollment, retention, and graduation data for transfer students. While data can be accessed by all employees, the reports are used most often by campus administrators to assist with planning course offerings and course content as well as budgeting. Advisors and administrators can access data on student success as well as credit transfer, including the most transferred-in courses, as well as the courses with high levels of transfer enrollment at the school and department levels. With the advent of a statewide transferable general education core in 2013, there have been significant enrollment declines at 4-year institutions for courses that frequently are taken by high school students for dual credit or at 2-year institutions. Thus, the availability of these reports has been invaluable in helping schools to predict these enrollment shifts and to deploy their instructional resources more effectively. A campus-wide Council on Transfer Students meets regularly to address both challenges and opportunities associated with transfer student enrollment and success.

IUPUI’s efforts to support student transition intentionally include many points of connection to the campus. “Finish Friday” programs communicate our goal of having students finish their degrees at IUPUI and allow prospective and admitted transfer students to participate in a campus visit including a meeting with a representative in the academic program. Once admitted, students are invited to join an online social media community just for transfer students. This community begins the process of building community and connections among transfer students as well as providing key information on the transfer process.

Admitted transfer students must participate in a three-step Transition Orientation Experience with completion of each step being enforced using registration holds. The initial step is attending “Transfer Tuesday,” a webinar offered multiple times each Tuesday for most weeks throughout the year. Students receive an overview of the credit articulation process including how to read their credit transfer report as well as how to prepare for and talk with academic departments about any credit that has not yet been articulated to degree requirements (typically because the institution and/or the course is not yet in our database). The next step is an online pre-orientation module introducing students to academic requirements, planning, and policies; student life; student services; and campus technology. The online program verifies student participation by keeping advanced modules locked until previous material is covered and summary quizzes are completed. Overall, the online program provides necessary information prior to an on-campus visit thereby allowing for a more interactive campus orientation experience. The required on-campus, one-day orientation program is designed specifically for transfer, veteran, and adult students. By offering a focused orientation program, the language, culture, and approach to orientation is

customized to the needs of these student populations. In addition, participants can connect with students with similar backgrounds.

After attending orientation, transfer students attend an advising appointment on a later date. Separating advising from orientation has helped give students time to process academic information received at orientation while also enabling a longer (60–90 minutes) advising appointment, in contrast to the 30-minute sessions that were previously scheduled during orientation. Students coming from a distance are accommodated through phone or video sessions. During the fall term, transfer events, including a t-shirt swap and welcome reception, are included in the campus-wide Weeks of Welcome programming. For the past several years, a transfer seminar course was piloted for business majors. In fall 2018, two additional sections were offered focusing on students entering IUPUI with fewer than 40 credits as institutional data indicates that such students are less likely to persist than students transferring with higher numbers of credits.

After the first year of implementing the multi-step transition process, there was a 4% increase in the first-year retention of transfer students. This success is likely connected to three key components. First, we now have a campus-wide cultural and structural commitment to transfer student success. The mission statement on transfer students, devoted staff resources, a campus-wide committee, and data infrastructure ensure that supporting transfer students is a campus-wide endeavor. Second, in order to serve the diverse needs of transfer students, transition programs make strong use of technology through social media, webinars, online programming, and virtual advising appointments. Third, the transition of transfer students is not left to chance. IUPUI utilizes two registration holds throughout the process. These holds are placed on students' records at the point of admission and prevent transfer students from registering for courses until they complete the Transfer Tuesday webinar, on-campus orientation, and attend their orientation academic advising appointment. By not leaving the transition from one campus to another to chance, transfer students are provided with the information, connections, and experiences needed for a successful campus experience.

IUPUI continues to focus on improving the transfer student experience. Continuous assessment through an entering student survey, needs assessment, program evaluations during the fall semester, and the National Survey of Student Engagement indicates that while we have made progress, there remains work to be done to ensure the success of our transfer students. Future plans include expansion of the number of sections of the transfer seminar with identified sections for specific majors and working to ensure transfer students participate in engaged learning and high-impact practices at the same rate as beginning students. In addition, we are examining the current organizational structure with an eye toward creating a common front door for all transfer students. From credit articulation to campus engagement, IUPUI is dedicated to ensuring transfer students reach their educational goals.

References

- Graunke, S. S. (2017). *Understanding our transfer students* [PowerPoint slides]. https://irds.iupui.edu/_documents/students/transfer-students/2017%20Understanding%20Our%20Transfer%20Students.pdf
- IUPUI Transfer Central (n.d.). *Improving the transfer student experience—philosophy statement*. <https://transfer.iupui.edu/about/foundations.html>

Case 5

STUDENT SUCCESS FOR TRANSFER STUDENTS AT KEAN UNIVERSITY

Deborah Skibitsky and Jonathan Mercantini

Kean University, located in Union, New Jersey, is a majority-minority comprehensive public university. Most Kean students are the first in their family to attend college and are first- or second-generation immigrants. Kean markets itself as affordable, diverse, and effective.

Kean has become a premier destination for transfer students by instituting several programs, aimed at meeting students where they are, to help transfer students succeed. Kean was named to the Phi Theta Kappa Honor Roll for the third straight year. This prestigious designation is awarded to schools that provide outstanding service to transfer students and members of the Phi Theta Kappa Honor Society (see Addendum A for more information on Phi Theta Kappa).

In 2008, New Jersey passed a law that created a Statewide Comprehensive Transfer Agreement, more commonly known as the Lampitt Law. This law mandated the full transfer of associate of arts (AA) and associate of science (AS) degrees from New Jersey community colleges as long as the student enrolled in a coordinating major in a 4-year New Jersey state institution. As a result of the Lampitt Law, students have an easier time transferring to 4-year New Jersey state universities as juniors with approximately 60–64 credits. This law was designed to ease the transfer process and encourage students to complete their AA degree at a lower-cost county college and then transfer. This approach is consistent with that identified by Theodore Robert Young (2017), associate provost for faculty affairs at Art Center College of Design, who stated, “the core function [of community colleges] as the academic foundation for university bound students is paramount to the professional futures of the majority of post-secondary students in the United States” (p. 95).

Currently, Kean University will accept up to 66 transfer credits as long as those credits can be used to fulfill the various course requirements, including free electives. This helps to address financial concerns of transfer students who worry they are

taking courses that will not be counted toward their baccalaureate degree, leading to a delay in their graduation date and increasing their cost of completing their degree.

This case will briefly describe a variety of strategies Kean has used to facilitate success with transfer students, most notably an aggressive effort to reach students where they live and are already pursuing their education.

Kean-Ocean and Kean Skylands: A Unique Approach to Transfer

One especially innovative way in which Kean's approach to helping transfer students attain their goals is by creating degree completion programs in underserved communities where convenient 4-year degree options didn't exist. As demographic changes point to declining enrollments, moving aggressively into underserved areas provides important opportunities for schools like Kean to sustain enrollment levels (Grawe, 2018). Kean is the only 4-year institution in one of the state's fastest growing counties, Ocean County. Through a now more-than-10-year partnership with Ocean County College (OCC), Kean gives those students the opportunity to continue their education and receive their baccalaureate degree on the same campus where they earned their associate degree. Kean and OCC share a new building, enabling Kean students to take all of their classes in a single location. This approach makes finishing the degree achievable for students who would otherwise be unable to make the 1-hour, one way commute from Ocean County to Union. Kean-Ocean has been enormously successful, both in terms of expanding educational opportunities for residents of Ocean County and by being profitable for the university as a whole.

These lessons are now being applied at Kean Skylands, a new campus in the far northwest of the state also underserved by 4-year institutions. This new campus serves students from three counties in New Jersey—Sussex, Warren, and Morris. At the Skylands campus, Kean has restored a former monastic retreat house and has constructed buildings and other necessary facilities to create a mini-campus, again about an hour's drive from the Union campus. By offering courses and degree completion programs in these underserved parts of the state, students there have the ability to complete a BA at a place convenient to them while still receiving a world-class educational experience.

Transfer Success at Kean's Union Campus

Kean faculty, staff, and administrators listened to transfer students and have addressed many of the areas in which they have felt that they were at a disadvantage compared to their peers who began their collegiate education at Kean. In his report, "Transfer as Academic Gauntlet: The Student Perspective," Stephen J. Handel noted that students coming from a 2-year college struggle with the admissions process, often have to make a decision before knowing how many credits will transfer, and can have

difficulty getting acclimated to a new campus (Handel, 2013b). Kean has addressed these challenges through a variety of strategies aimed at answering student questions and concerns and by being an active and visible presence at county colleges and in the surrounding communities.

With research showing that a majority of the students at 2-year institutions desire to transfer to a 4-year institution, meeting those students at the start of their undergraduate careers helps promote Kean and make certain that students are on the right path to achieve their personal educational goals (Handel, 2013a). At other county colleges that serve as feeder schools, Kean is a regular presence on their campus. Information sessions at these schools with Kean faculty and admissions counselors provide students with a 360-degree view of the programs offered at the university. Kean partners with and sponsors special academic programs at the community colleges, such as Essex County College's Business Week, Passaic County College's STEM Day, Middlesex County College's Education Day, and many more. Additionally, the Office of Admissions attends transfer fairs, Phi Theta Kappa events, and holds instant decision events on the community college campuses throughout each semester. As one county college staff person stated, "Kean has a very strong presence on our campus" (C. Roman, personal communication, October 2018).

Additionally, Kean has sought out potential students by creating partnerships with several of New Jersey's community colleges in the form of joint admissions agreements. These agreements provide a 4-year plan for students who start at the community college so they can maximize the amount of credits transferring into their bachelor's degree program. Kean University works closely with partner community colleges to ensure that all program objectives are met to offer a seamless transition from the 2-year to 4-year institution. In most articulated degree programs, 100% of the credits from the 2-year degree apply to the 4-year degree. To support the smooth transition into Kean, the transfer office provides enrollment services and supplemental advising on several community college campuses. This eliminated several of the questions and concerns that transfer students have had in the past. A senior at Kean stated, "I transferred with an associate degree from Raritan Community College in New Jersey and I had a great experience. All the credits that I took at the community college were transferred to Kean University" (name withheld by request, personal communication, October 2018).

All new transfer students are invited to and required to attend a Transfer Orientation before their first semester begins. Kean offers a "One Stop" location in a central area which consists of the following services: financial aid, student accounting, residential services, commuter services, scholarship information, advisement, and registration assistance to students that need any of these services.

During Kean's required August 2018 Transfer Orientation, students selected between five breakout sessions that focused on many of the services listed in the previous paragraph. The most popular session, however, was "Getting Involved at Kean." This reinforces the notion that transfer students are eager to find opportunities to become part of their new academic community, dispelling the myth that they

do not want to be engaged like non-transfers. Getting students connected beyond the classroom positively correlates with student success and retention whether they are native or transfer students. As Vincent Tinto noted, involvement is perhaps the most important condition for student retention and success. He stated, “The more students are academically and socially engaged . . . the more likely they will stay and graduate from college” (Tinto, 2012, p. 64).

Starting with the 2015 fall semester, all students that transfer to Kean with 30 or more credits have been required to complete a one-credit Transfer Transition to Kean course (GE 3000). This transfer course is taught by full-time faculty and assisted by transfer instructional mentors (TIMs)—current students, most of whom were themselves transfer students at Kean. This approach applies the successful model of dedicated “transition to college” courses (Tinto, 2012) to the specific needs of transfer students, who have some similar needs (such as locating key offices like financial aid) but not necessarily all of the same concerns as first-year students.

The Transfer Transition course focuses on three areas: advising, research, and careers. The writing component of the course was increased in response to assessment data that showed writing skills were below our target goals. By emphasizing research and writing in the Transfer Transitions course, our faculty aim to give students a stronger foundation in advanced, college-level writing. Throughout the course the new transfer students have mandatory meetings with their academic advisors twice a semester: their Transfer Transition instructor for advisement once, and their transfer instructional mentor at least once. This course also emphasizes research and writing to expose the students to the library and the many academic support resources on campus. In addition, they receive information on internships and other experiences that are available to them.

Conclusion

Taken as a whole, these efforts demonstrate an institutional commitment to transfer student success. In contrast with one study where transfer students reported feeling like a freshman again as they struggled with a larger and often more impersonal campus atmosphere than they experienced at their community college (Townsend, 2008), Kean University is geared toward supporting transfer students. As one recent Kean student remarked,

As a transfer student, you feel there is no proper guidance in transferring from institutions. However, Kean University and its faculty made my transition pleasant and joyful. I can't believe 2 years flew by. I look forward to graduating in May from an institution that molded me academically into a better student. I can't wait to continue furthering my education at the master's level here at Kean. (N. Velasco, personal communication, October 2018)

This student graduated in May 2019 with her bachelor's in psychology.

From constructing branch campuses in local communities to early contact with potential transfers where they have started their undergraduate careers and requiring a one-credit transitions course, Kean has implemented a number of strategies to make the transfer experience as smooth as possible.

References

- Grawe, N. D. (2018). *Demographics and the demand for higher education*. Johns Hopkins University Press.
- Handel, S. J. (2013a). *Recurring trends and persistent themes: A brief history of transfer: A report for the initiative on transfer policy and practice*. College Board. <https://secure-media.collegeboard.org/digitalServices/pdf/advocacy/policycenter/recurring-trends-persistent-themes-history-transfer-brief.pdf>
- Handel, S. J. (2013b). *Transfer as academic gauntlet: The student perspective: A report for the initiative on transfer policy and practice*. College Board. <https://secure-media.collegeboard.org/digitalServices/pdf/advocacy/policycenter/transfer-academic-gauntlet-student-perspective-report.pdf>
- Tinto, V. (2012). *Completing college: Rethinking institutional action*. University of Chicago Press.
- Townsend, B. K. (2008). Feeling like a freshman again: The transfer student transition. In B. O. Barefoot (Ed.), *The first year and beyond: Rethinking the challenge of collegiate transition* (New Directions for Higher Education, no. 144, pp. 69–77.) Wiley. <https://doi.org/10.1002/he.327>
- Young, T. R. (2017). The role of community colleges in liberal arts education. In M. A. Fitzpatrick and E. A. Say (Eds.), *From the desk of the dean: The history and future of arts and sciences education* (pp. 84–96). University of South Carolina Press.

Case 6

PARTNERSHIPS IN COLLEGE TRANSFER ACCESS AND SUCCESS

North Carolina Independent Colleges and
Universities and the North Carolina Community
College System

A. Hope Williams

North Carolina's 36 independent (private, nonprofit) colleges and universities are located across the state and range from liberal arts colleges to comprehensive and research universities. They also vary in size and focus with five historically Black institutions; three colleges for women; and one 2-year college, Louisburg College. Most of the 4-year independent colleges and universities have long-standing relationships for student transfer with Louisburg and with their local community colleges, including formal bilateral college transfer agreements. These agreements were designed to enable a student's associate degree to meet the requirements of the first 2 years at the senior institution, ensuring the student would receive third-year status upon transfer. Such agreements were a major step forward from evaluating each individual student's transcript on a course-by-course basis to determine which courses would transfer for credit to the 4-year institutions.

Many North Carolina Independent Colleges and Universities (NCICU) campuses still have bilateral agreements in place with the community colleges in closest proximity. These agreements work for programs of study that may be offered by a limited number of 4-year institutions, such as the agri-education program at the University of Mount Olive. Discipline-specific programs that do not yet have statewide agreements, such as criminal justice, continue to operate well for students attending the local community colleges but are likely to become less relevant as the number of statewide discipline-specific agreements increases.

Beginning in the 1990s, statewide comprehensive articulation agreements began to streamline the community college transfer process in several states, including North

Carolina. These agreements provide students with a specific framework and options for courses that will ensure completers will be able to transfer to the 4-year institution as a junior. These agreements, such as the Independent Comprehensive Articulation Agreement (ICAA) between NCICU and the North Carolina Community College System (NCCCS), and between NCICU and Louisburg, have made the transfer process more efficient for students as well as for 2-year and 4-year institutions.

College transfer students at Louisburg and at community colleges generally begin their studies with the goal of transferring to a baccalaureate institution. Under the ICAA, students who complete their associate degree may transfer as juniors to any of the 30 signatory NCICU senior colleges and universities located across the state, ensuring a smooth transition for students regardless of the location of the 2-year institution. Examples include students who have transferred from Carteret Community College and Cape Fear Community College on the coast of North Carolina to western North Carolina 4-year colleges such as Warren Wilson College, almost 400 miles away.

The comprehensive nature of transfer agreements such as the ICAA is becoming even more significant as the number of students transferring to 4-year institutions from community colleges across the state continues to increase. In 2017–2018, for example, 216 community college students from 34 of the state's 58 community colleges transferred to Campbell University, compared to 106 students from 25 community colleges in 2007–2008. The number of community college transfers to North Carolina Wesleyan College tripled during the same period, growing to 151 transfers from 22 community colleges in 2017–2018, compared to 50 transfers from 12 community colleges in 2007–2008.

The first ICAA in North Carolina was developed between NCICU and NCCCS in 2008, following a more general agreement from the late 1990s. The ICAA was revised in 2015 and strengthened by the inclusion of a course titled College Transfer Success, which requires students to contact at least two 4-year institutions to learn what prerequisites are required for the student's desired major. Since the 2015 revisions and the additional focus on the practical side of transfer, transfers from community colleges to NCICU campuses have increased by an average of 240 students per year.

While taking courses from the array included in the comprehensive agreement will assure the acceptance of the courses for transfer, it is still critical for the students to take the prerequisite courses for the discipline in which they plan to major. Otherwise the student may not graduate in a timely manner and may take more elective courses than they need to have, both of which add time and expense to the transfer student's cost of education.

To provide additional guidance to students about which courses will transfer and will meet the requirements for prerequisites for their major, NCICU and the NCCCS have begun developing several discipline-specific articulation agreements. The first such agreement was the RN to BSN (registered nurse to bachelor of science in nursing), which was signed in early 2018. Discipline-specific agreements in fine arts/visual arts, as well as in music and in theater, were signed on February 28, 2019.

NCICU's work in articulation with the state's community college system has been recognized by the Council of Independent Colleges (CIC) and the Teagle Foundation through a grant from Teagle to CIC for a pilot program with NCICU and NCCCS. This grant was also approved in February 2019 with the goal of developing pathways to encourage transfer students to seek degrees in liberal arts disciplines, in this case, in psychology and sociology. Faculty teams from 13 NCICU 4-year campuses will work with faculty teams from Louisburg College and 12 community colleges to develop these agreements.

One of the strengths of the grant is its inclusion of components on advising and on financial aid. Most 2-year college transfer students in North Carolina are first-generation college students who need substantial academic support in advising. Sixty percent of North Carolina's community college students are Pell Grant-eligible, and these transfer students also need support in developing an understanding of the state, federal, and institutional financial aid processes and their availability at NCICU campuses. At the same time, NCICU campuses will be discussing their approaches to financial aid for transfer students to determine if there are ways to be more supportive of and responsive to these students.

There are two additional projects NCICU has sought in order to expand assistance to transfer students, and both projects have been funded by grants through CIC. The first is the North Carolina College Completion Portal. In addition to college transfers who have an associate degree, many students transfer after completing limited coursework or just prior to completing an associate degree. The North Carolina College Completion Portal will allow students to explore transfer options to 4-year colleges independently online and at their convenience. Use of the portal will provide campus-specific information to help students identify relevant, transferable courses for the major they are considering. Students will also be able to explore how their courses would transfer for the majors they would like to pursue. Although determinations will not be final until students confirm their plans with the 4-year college, the portal will allow 2-year students to identify important, preliminary information as they research their options for transfer.

The second project is just beginning and will provide an opportunity for students who transfer to 4-year institutions without an associate degree to receive their 2-year degree through "reverse transfer." The associate degree will be awarded once the student has met the remaining associate degree requirements after transferring to the NCICU 4-year institution. The transfer of credits back to the community college will reward the student for reaching the goal of an associate degree and will count toward the graduation rates of the 2-year college. The awarding of the associate degree will also provide incentive to students to stay on track for the baccalaureate degree since they will know they are already halfway there.

One of the reasons for the success of NCICU campuses with community college transfer students is the coordination of these projects and agreements by NCICU on behalf of the private higher education sector in partnership with the NCCCS state office. This partnership, coupled with the commitment of the 30 participating

independent 4-year colleges and universities, Louisburg, and the 58 community colleges, has led to the expansion of the number of options designed to meet transfer students' needs. Examples of options include off-campus programs in a variety of locations across the state, among which are community college campuses and military bases, and an increasing array of online programs. Whether on a main campus or off-site, classes are offered in person, fully online, and as hybrid programs. Programs are available during the day, at night, on weekends, during traditional semesters, and "mini-semester" of two courses during the first half and two during the second half of the semester, as well as in cohorts of adult students in the same degree program who attend classes as a group year-round.

From the earliest bilateral transfer agreements to the development of the ICAA and the more recent discipline-specific agreements, NCICU and North Carolina's independent colleges and universities have continued to increase their commitment to the success of their transfer students. NCICU is also committed to continuing to provide leadership and advocacy for the ICAA and to add new discipline-specific agreements at a statewide level. This includes maintaining a focus on advising and on financial aid as well as the development of more support services such as the North Carolina College Completion Portal and "Reverse Transfer" options. NCICU's goal is for this multifaceted approach of options and support to lead to increased success for our transfer students in achieving their dream of a baccalaureate degree.

References

- North Carolina Independent Colleges and Universities. (2018). *The RN to BSN articulation agreement*. <https://ncicu.org/wp-content/uploads/2018/11/RN-to-BSN-Agreement-with-Signatures.pdf>
- North Carolina Independent Colleges and Universities. (2015). *The independent comprehensive articulation agreement (ICAA)*. https://ncicu.org/who-we-are/publications/icaa_30-campuses_updated-10-22-19/

Case 7

TRANSFER IN A RURAL SETTING

The University Center of the Mountains

Deronda Collier Mobelini and G. Edward Hughes

Founded in 1968, Hazard Community and Technical College (HCTC) experienced dramatic growth in the 1990s primarily due to significant education reform in P–16 public education in Kentucky. Included in the reform efforts was a dramatic restructuring of postsecondary education that merged community colleges and technical schools, making them the primary access portals to higher education for Kentuckians. In response to these changes, HCTC opened three additional campuses in the region and began to emphasize transfer programs and partnerships with baccalaureate-granting institutions. Advisor feedback, general institutional student surveys, and community need surveys revealed an increasing interest in transfer programs that would lead to a bachelor's degree. Key changes to Kentucky's postsecondary education reform in 1997 included greater emphasis on producing bachelor's degrees. The 2000 U.S. Census reported that only 8.6% of the adults in HCTC's service area had a bachelor's degree compared to 17.1% in Kentucky and 24.4% in the nation (United States Census Bureau, 2000). This marked the region as one with the lowest percentage of adults with bachelor's degrees (CHMURA, 2005/2006) in the Commonwealth. The residents of this area were facing a rapidly changing future with limited educational skills with which to embrace the changes.

The Challenge

Historically, most HCTC transfer students were traditional-aged students. Students faced common barriers to transfer for rural students, including financial and geographic access. Students mostly matriculated to one of three public universities serving the region: Morehead State University (MSU), Eastern Kentucky University (EKU), and the University of Kentucky (UK), all located approximately 2 hours from Hazard. Fewer students transferred to the region's private colleges, which required

similar distances, were generally more expensive, and lacked transfer student support services. Most transfer students found the prospect of earning a bachelor's degree virtually impossible unless they left the area. For many, leaving was not an option. For older, place-bound HCTC graduates, the distances and time required to commute to and from a public university were too great a barrier to a 4-year or graduate degree. For traditional and nontraditional students, the shift from a smaller rural high school or community college setting to a large 4-year campus was intimidating. Specialized support aimed at easing a transfer student's transition to a senior institution, including counseling and advising, were inadequate at best. Personnel at the community colleges and senior institutions perceived the transfer as a distinct action—a simple “handoff” that moved all responsibility for the student from the community college to the senior institution. The idea that the community college transfer-bound student is already in the transition process or that the student would have different questions and need different types of support or coping skills prior to their transfer transition was, until relatively recently, not a focus of many 2-year or 4-year institutions (Chickering & Schlossberg, 2002; Schlossberg, 2008).

A Solution: The University Center of the Mountains

From these conditions, the concept of the University Center of the Mountains (UCM) partnership was conceived to provide improved access to higher education for Kentuckians living in the central Appalachian region of Kentucky. Early discussions with the two regional universities, MSU and EKU, led to several distance learning efforts aimed at offering several classes at Hazard's facilities. The modest goal was to allow opportunities for place-bound students to begin their junior year or pick up a graduate class at HCTC and avoid the loss of study time and the cost of travel associated with the drive to the university campus. In the late 1990s, Sullivan University agreed to provide a bachelor's degree in business at the Lees College Campus of HCTC. Sullivan committed to a cohort model using primarily on campus teachers augmented by distance learning. MSU soon began offering a more robust set of classes via a distance learning center on the new Knott County Campus of HCTC.

Several challenges prevented the establishment of complete degrees offered on a consistent basis. Class enrollments and sequencing proved to be major issues. For instance, the first class in a program sequence would be filled. Over the next three to four semesters, “life circumstances” would intervene. Students would miss a class, get behind, or stop out a semester and would have to wait a year for the class to repeat. Class enrollments would dwindle and by the fourth semester, enrollment might be less than one-third capacity. Often the enrollment would be too low and the course would be canceled. Students were frustrated by what they perceived as a lack of commitment on the part of the delivering institutions.

These early, uncoordinated efforts became the focus of a discussion among the presidents of HCTC, MSU, EKU, KCTCS, and the president of the Kentucky Council on Postsecondary Education in the early 2000s. In principle, the partner

schools agreed to implement a university center concept with HCTC as the host site. Local and regional leadership stepped forward to assist HCTC and the other partners with funding to renovate space and implement the new center (Mobelini & Back, 2015). Opening its doors in 2005, the UCM's three originating 4-year partners offered 15 bachelor's degrees and a master's degree, serving 356 students in the first year. The partners' select bachelor's and graduate degree programs were offered on the HCTC "Highway 15 South" Campus through traditional in-seat, Interactive Television (ITV), or online class delivery. Through the UCM, HCTC provided a coordinator, office/meeting space for the 4-year partners' advisors and faculty, and classroom space. The 4-year partners provided distance learning equipment, faculty resources, and access to library resources to support the upper-division classes. A variety of student support services for transfer students, such as financial aid, would be coordinated through formal agreements and revenues generated would support the students and UCM operations. Most importantly, the partner institutions would provide coordinated programs of study that would lead to bachelor's degrees. Today the UCM boasts 11 partners and features 49 bachelor's, 43 master's, and 7 doctoral degree programs. The current UCM list of college/university partners includes ECU, Embry Riddle Aeronautical University-Fort Campbell, HCTC, KCTCS, KSU, Lindsey Wilson College, Midway University, MSU, Northern Kentucky University, Sullivan University College of Pharmacy, University of the Cumberlands, and the University of Kentucky Center of Excellence in Rural Health. The first UCM programs included degrees in nursing, criminal justice, education, business, and human services and counseling with a focus on bachelor's degree options. These original program options continue today.

Moving Into the 21st Century

Today, the UCM's ability to serve its rural community stems from the following critical elements: (a) the ability to respond to changes in how higher education is delivered to students, including the need for student support; (b) the ability to engage community college faculty with UCM 4-year faculty and staff; and (c) the ability to expand on the original mission of the center.

Changes in Delivery and Student Support

Fifteen years ago, UCM partners primarily offered ITV classes in UCM classrooms on the HCTC campus, complemented by a handful of traditional in-seat programs. Today, the number of ITV classes has decreased by over 50%, replaced with fully online bachelor's and graduate degree programs. As the use of Web-based education from UCM partners has increased in quality and quantity, the need for on-site student support services has also increased. Students need assistance with admissions, scholarship and financial aid application processes, and transfer advising. This is especially true for UCM students who come from families where no one

holds an associate or baccalaureate degree. UCM students may arrive with some technology skills, yet many are unfamiliar with how best to navigate institutional processes and information platforms. Many students report feelings of discomfort or feeling like a fish out of water (Bourdieu, 1987). Transfer-bound students who lack personal or familial experience with college often also lack cultural capital—the cultural knowledge, skills, norms, and linguistic facilities acquired through family and community and which differ among members of various minority and ethnic groups as well as different social classes and subcultures (Bourdieu, 1977). Cultural capital allows students to view a clear picture of the rules of academia and understand the steps they must take to move forward (Bourdieu, 1986; Kuh, 1999; Tinto, 1993). They will ask, “Everything is online, so when do I talk to a person? Who will help me? What do I do next?” Failing to receive timely answers, many students simply give up. By focusing on how a student arrives at its doorstep, the UCM partners’ representatives work together to provide customized support for students as they navigate their new transfer terrain. We have found that UCM students feel comfortable on the HCTC campus, and this helps them seek a path to a bachelor’s degree. Because of work, family obligations, or financial challenges, many older students are unable to leave the area, even for a few semesters. Others are simply not interested in leaving home because of strong ties to family and place (Hlinka et al., 2015). The UCM provides a comfortable and convenient option that allows students to continue their post-associate degree education without leaving home.

While UCM partner institutions have provided on-site services to UCM students, Kentucky 4-year colleges and universities have become more aware of the growing numbers of transfer students whose unique needs are not the same as the entering first-year student. New resources that did not exist 10 to 15 years ago include the development of main campus offices that focus on transfer student needs with staff who specialize in transfer advising—transfer student, specific college/university orientations, and improved websites that provide transfer equivalency information and 2-year to 4-year curriculum maps. As these changes in delivery and support continue to develop, UCM staff continue working collaboratively with the partners to increase transfer-bound student awareness and use of these resources.

Engaging Community College Faculty With UCM Partners’ Faculty/Staff

Community college faculty have a powerful influence on their students. They introduce students to the postsecondary environment, they encourage students to consider transfer, and they introduce students to career and educational pathways and the rigor required by baccalaureate and graduate degree programs. Because student-faculty relationships and student engagement have a positive influence on students’ college experiences (Brazzell & Reisser, 1999), having community college faculty supporting efforts like the UCM is important. Kay McClenney’s now-ubiquitous saying, “Students don’t do optional,” holds true. We have found that faculty who

actively support transfer education and encourage students to participate in UCM activities influence students' decisions to continue their education beyond HCTC. Simple actions by faculty members, such as regularly announcing upcoming UCM activities in classes and sending email reminders, offering extra credit to students to attend an event, or bringing a class to an event, seem to work best. This has not been by accident. The UCM staff have increased this type of faculty support and collaboration among community college and 4-year faculty/staff by inviting them to share their expertise as presenters for UCM-sponsored events such as PRAXIS Exam Prep workshops or by serving as mock interview committee members for students preparing to apply to selective admissions bachelor's and graduate programs. Engaging HCTC faculty in UCM events brings them into the physical space of the UCM, increasing faculty awareness and understanding of the value of UCM activities and offerings. In addition, opportunities for networking and professional collaboration evolve naturally out of UCM-sponsored events that bring colleagues from multiple institutions together where they can talk and begin to address student issues. HCTC faculty often identify these opportunities as meaningful ways to meet required community and institutional service performance evaluation criteria for KCTCS. These intentional UCM activities have resulted in greater numbers of HCTC faculty who more readily direct their students and advisees to the transfer services provided by the UCM. These efforts are reflected in the increase in student enrollment as reported by the UCM partners. From its lowest enrollment of 84 students in fall 2013, UCM student enrollment had gradually increased to 169 by fall 2016 and 237 for spring 2017; the implementation of new transfer events and the participation/support of HCTC faculty within the last 4 years correlates with the increase in UCM student enrollment.

HCTC is held accountable for increasing the number of transfer students as part of the systems' strategic plan to increase transfers by 1% per year. HCTC exceeded its 2016–2017 target by 6.1%. Of its associate degree completers, 40.7% enroll at a 4-year institution (HCTC, 2019). Since its inception, well over 1,300 students have earned bachelor's and/or advanced degrees through the UCM partners. Despite a struggling rural economy and declining population with some of the country's poorest counties in its service area, HCTC continues to provide uniquely valuable transfer services to its students through the UCM.

Expanding the Mission/Expanding the Pathways for the Future

The importance of collaboration extends beyond creating smooth transfer pathways between associate degree and bachelor's degree programs. Increased interest in and demand for dual credit offerings in the high school, as well as developing associate in applied science (AAS) to bachelor's degree pathways, have created the need to expand coordinated transfer advising efforts. For example, the number of students aged 17 or younger taking community college courses in this country increased 13% from 1995 to 2015 (Fink et al., 2017), and the dual enrollment population continues to grow.

Therefore, transfer advising in the high schools is becoming increasingly important. Keeping high school students who will eventually become college-level transfer students on track to a bachelor's degree by avoiding the loss of credit hours earned is imperative. To address this need, UCM events have expanded to include high school students as well as current community college students.

The UCM staff and partners also continue to explore ways to expand the traditional AA/AS transfer pathway dialogue to include AAS degrees often considered "terminal" degrees because they were not designed for transfer. Today's AAS students do not see their education as "terminal," nor do an increasing number of employers. Many AAS students, especially those with health-care credentials, desire transfer pathway options. The UCM's founding partners, ECU and MSU, offer 2+2 RN to BSN transfer pathways. UCM partner Lindsey Wilson College provides a bachelor's in human services for students with an AAS in human services, and ECU's bachelor's degree is now aligned with HCTC's criminal justice associate in applied science degree program. These transfer pathways are models that open up options for UCM students. Similar transfer pathways for the AAS to the BA/BS in other technical disciplines are currently under consideration.

Finally, in response to regional workforce needs, especially in health care, the UCM increased efforts to support students interested in biomedical careers. Newer UCM graduate partners include the University of Kentucky's Center of Excellence in Rural Health (CERH), offering a doctorate in physical therapy and a bachelor's degree in medical laboratory sciences in Hazard, and Sullivan University's College of Pharmacy (SUCoP) in Louisville. Students can complete all required coursework through HCTC and transfer from HCTC directly to SUCoP. Curriculum maps clearly define the HCTC classes students should take prior to applying to these programs. These curriculum maps are shared with high school seniors, their high school counselors, and HCTC students during the annual regional Academic Health Care Career Planning Conference sponsored by the UCM each fall. Various UCM partners' medical professions are represented along with those focusing on mental/social health. The conference introduces students to the variety of options in health care that are open to them using the community college as a stepping stone. Interview skills workshops with mock interview experiences provide further support to transfer bound students.

Lessons Learned

For community college students who are place bound, financially challenged, and unfamiliar with today's postsecondary landscape, models like the UCM often provide the only opportunity to acquire a bachelor's or an advanced degree. Some of the most impactful lessons learned from the UCM's efforts are as follows:

- UCM is continually addressing immediate student needs by identifying gaps in services provided to students, followed by providing activities/events that

fill the gap such as health career–focused pathway conferences or Praxis Prep workshops for education bound transfer students. These are value-added resources for students in addition to the standard admissions, advising and classroom/tutoring support a university center/transfer center provides.

- UCM tries to recognize and use partners' human resources, especially at a time of declining financial resources. Drawing upon faculty and staff from both 4-year and 2-year partners to serve as presenters and event volunteers allows the UCM to expand and sustain its services in a cost-effective manner. Engaging the community college faculty on the same campus as the UCM is critical because faculty influence and direct students to resources such as the UCM. Collaboration among community college and 4-year employees further enhances communication and the ability of community college faculty to better advise their transfer bound students.
- The need is urgent to develop new programs and partnerships that provide rural students with as many academic/career options as possible by thinking beyond serving the currently enrolled community college/UCM student to future HCTC/UCM students (i.e., those coming up through the public schools) and to graduate school options for HCTC/UCM students. Career pathways are becoming more fluid, providing students with greater opportunities, and rural students need to be made aware of those opportunities.
- Finally, as the thesis of this handbook argues, UCM partners must view the transfer of students as a coordinated *process* that starts at the beginning of the student's career at the community college and continues in a holistic, student-centered manner through the completion of both associate and advanced degrees. Connecting transfer-bound community college students to their 4-year institutions early in students' academic careers is a recognized best practice that supports students' transfer success. The UCM's ability to provide this service and more stems directly from the true collaboration among UCM partners.

The UCM is a cost-effective model that improves access to and success in completion of advanced degrees for place-bound students. This impactful paradigm has been and continues to be an impactful model of what rural community colleges and senior institutions can accomplish through coordinated and persistent outreach, strategic planning that looks to the future needs of those it serves, and the ability to embrace change (Council on Postsecondary Education, 2013). In addition, this model is replicable. In fall 2019, the University Center of Southern Kentucky, a parallel effort headquartered in Somerset, opened to broaden baccalaureate opportunities for students in the southern region of the Commonwealth—a region which faces similar educational challenges.

In January 1995, the Kentucky Appalachian Task Force released a report describing a future for the region and outlining specific recommendations for Governor Jones and the Kentucky Appalachian Commission. Entitled *Communities of Hope*, the task force chair, Ronald D. Eller (1995), summarized the report with this statement:

If none of the recommendations are implemented, many eastern Kentucky residents will do fine in the years ahead. But for many others the journey to economic security, family stability, adequate health care and educational opportunities will remain incomplete. In the new world of technology and global markets, these distressed communities and populations are still at risk of being left behind, and the region as a whole, including its successful residents, will not achieve its full potential. (p. 3)

The UCM has been an unqualified success by many standard measures. Perhaps the UCM's greatest impact lies in the expanded educational opportunities and realistic choices it affords residents as they seek economic security, family stability, adequate health care, and lives that reach their full potential.

References

- Bourdieu, P. (1977). Cultural reproduction and social reproduction. In J. Karabel & A. H. Halsey (Eds.), *Power and ideology of education* (pp. 487–511). Oxford University Press.
- Bourdieu, P. (1986). The forms of capital. In J. G. Richardson (Ed.), *Handbook of theory and research in the sociology of education* (pp. 241–228). Greenwood Press.
- Bourdieu, P. (1987). What makes a social class? On the theoretical and practical existence of groups. *Berkeley Journal of Sociology*, 32, 1–17.
- Brazzell, J. C., & Reisser, L. (1999). Creating inclusive communities. In G. S. Blimling & E. J. Whitt (Eds.), *Good practice in student affairs: Principles to foster student learning* (pp. 157–177). Jossey-Bass.
- Chickering, A. W., & Schlossberg, N. K. (2002). *Getting the most out of college* (2nd ed.). Prentice Hall.
- CHMURA Economics & Analytics (2005/2006). *Projecting demand for degree programs at The University Center of the Mountains report*. Kentucky. Author.
- Council on Postsecondary Education. (2013). *Final recommendations of the Rural Access Work Group*. <http://cpe.ky.gov/NR/rdonlyres/FA324724-E46C-B6F4-EDB8DB748A77/0/RAWGFinalReport61813.pdf>
- Eller, R. D. (1995). *Communities of Hope: Preparing for the future in Appalachian Kentucky*. Kentucky Appalachian Task Force.
- Fink, J., Jenkins, D., & Yanagirua, T. (2017). *What happens to students who take community college "dual enrollment" courses in high school?* Community College Research Center Teachers College, Columbia University.
- Hazard Community and Technical College. (2019). *Institutional research office report*. Author. https://hazard.kctcs.edu/about/offices_and_departments/institutional_effectiveness/institutional_research/other_data.aspx
- Hlinka, K. R., Mobelini, D. C., & Giltner, T. (2015). Tensions impacting student success in a rural community college. *Journal of Research in Rural Education*, 30(5), 1–16.
- Kuh, G. D. (1999). Setting the bar high to promote student learning. In G. S. Blimling & E. J. Whitt (Eds.), *Good practice in student affairs: Principles to foster student learning* (pp. 67–90). Jossey-Bass.
- Mobelini, D.C., & Back, R. (2015). University Center of the Mountains: Paving the way for transfer student success. *KCTCS transfer monograph: Beyond the glass*. KCTCS.

- Schlossberg, N. K. (2008). *Overwhelmed: Coping with life's ups and downs* (2nd ed.). Evans.
- Tinto, V. (1993). *Leaving college: Rethinking the causes and cures of student attrition*. University of Chicago Press.
- United States Census Bureau. (2000). *Home page*. <http://data.census.gov/>

Case 8

INSTILLING TRANSFER PRIDE AT THE UNIVERSITY OF CALIFORNIA, LOS ANGELES

Heather Adams

At the University of California, Los Angeles (UCLA), being a transfer student is celebrated and even worn as a badge of honor. Walking across campus, it is hard to miss transfer students scrambling to classes wearing “I (heart) UCLA transfer” t-shirts, tote bags, or sporting an “I (heart) UCLA transfer” laptop sticker. They often talk proudly about their transfer identity and the experiences that go along with it. Transfer pride is no accident—it is the result of deliberate and consistent institutional intent via ardent and visible support and through campus advocacy—that transfer students and the institutions they attend *should* take great pride in their accomplishments, their work, and their experiences prior to transfer, during both their higher education journey and beyond.

Notably, UCLA—a highly selective, elite, research university and member of the University of California System and the Association of American Universities—has a well-resourced Transfer Student Center. The university enrolls roughly 3,200 incoming transfer students each fall term, making up about 35% of the incoming undergraduate student population, and 92% of UCLA transfers come from 100 different California Community Colleges (data drawn from UCLA Chancellor’s Office of Data Analytics [CODA] in July 2019). The transfer student population at UCLA is very diverse: 52% are students of color, 41.3% are first-generation college students, roughly 17% are over 25 years of age, and 15% are international students (CODA, 2019). The overarching goal of the Transfer Student Center is to empower students to own the life skills and expertise that led them to transfer and not simply be absorbed into the new environment as if their past identities, efforts, and accomplishments no longer matter. Likewise, we seek to ensure that the university and its practices and policies are transfer friendly, meaning that the institution is working out of this same framework, cultivating a sense of pride in the transfer identity. Indeed, “transfer pride” has become a mantra at UCLA. It has instilled a sense of mattering and belonging among transfer students, as well as leading to a collaborative and invigorating institutional commitment to transfer issues on campus.

What Is Transfer Identity? What Is Transfer Pride?

Transfer identity is the idea that the transfer journey unites all transfer students in a collective experience—one that takes diligence, skill, and resilience. Transfer students are incredibly diverse and each has a unique story, yet they share transfer as a mutual experience and goal. Shared experiences can build pride and empowerment as well as cultivate community and a sense of belonging and mattering—elements that are imperative to academic and personal success.

“Transfer pride” enables students to mobilize their own assets, values, and contributions to the institution and helps them develop momentum and growth as a community. Research literature on transfer and post-traditional student best practices recommends that institutions commit to and build transfer-friendly ecosystems that welcome and support transfer students based on their unique set of experiences (Herrera & Jain, 2013). Celebrating the transfer experience as a campus community helps to develop a sense of belonging and inclusion throughout the transfer process and can impact student development and a personal sense of pride in the transfer identity (Jain et al., 2017). The unity felt when transfers connect with one another as valued members of the campus community helps to combat stigma, imposter syndrome, or any deficit view that transfer students might encounter; it allows them to embrace and own their college experience (Jain et al., 2017). Transfer pride and connection to a community provide students with opportunity, ways to engage, and confidence to assert personal agency, which in turn fosters engagement, retention, degree completion, and ultimately campus allegiance and support after graduation.

How Can Transfer Pride Be Cultivated?

The commitment to and cultivation of transfer pride needs to happen at both the institutional and individual student level. UCLA has taken this on in a range of ways. At the institutional level, it has meant a commitment to transfer-specific resources, inclusion and celebration of transfer identity, and consistent advocacy that includes the transfer student voice. At the individual level, it has meant ensuring that transfer students have opportunities for engagement, leadership, and connection.

Cultivating Institutional Transfer Pride

Integrating a sense of community and transfer inclusiveness takes time and a steady institutional commitment to building a welcoming and receptive ecosystem. This is not an overnight process; UCLA has been working at it for decades. But there are explicit, distinct action steps a university can take to ensure movement toward this goal.

Institutional and fiscal commitment to transfer-specific programs. Fiscal and institutional resources must explicitly support transfer-specific programs, centers, spaces, point people, scholarships, events, housing, transportation needs, websites, and social media. Schools must build support systems for transfer recruitment and admissions

outreach to community colleges as well as for the creation and support of post-transfer resources. When this happens, transfer students and the campus see that transfer students matter beyond their simple enrollment numbers. This institutional mattering sets the foundation for transfer pride.

UCLA has strong programs that start early. These include bridge programs for prospective community college transfers, intentional relationships with local community colleges, and a transfer-receptive admissions outreach. Meaningful, specific supports for students post-transfer are also imperative. UCLA has both a Transfer Student Center and an Engineering Transfer Center that serve students as they transition. UCLA also has a variety of transfer-specific programs under student and academic affairs, a transfer-specific living–learning community that is part of residential life, transfer-specific mentor programs, and more. The impact of these types of programs on transfer students and their perceptions of the school’s commitment to celebrating their strengths and narratives should not be underestimated.

Attaching the word “transfer” to an initiative is not enough. Institutions have an imperative to ask: Is this resource, workshop, or program specifically and appropriately designed for this community? Has thought been put into the developmental, educational, and engagement needs that are unique to this diverse community—a community that includes families, veterans, commuters, post-traditional students, working students, first-generation college students, and many others?

The UCLA Transfer Student Center works with diverse college academic counseling units, the Career Center, Counseling and Psychological Services, faculty, and other on- and off-campus entities to create programming that speaks to the varied interests and life experiences transfer students bring to the table. This helps advisors, faculty, and campus departments provide individualized support—based on real information rather than assumptions—that meets students where they are. Again, this demonstrates that the university is taking into consideration the unique transferable skills and assets that transfer students bring, and how their journey may differ from that of students arriving directly from high school.

Naming and celebrating. Labels can be isolating and exclusive, but if used with intention and thoughtfulness, they can also create awareness, celebration, and positive self-view. In keeping with this idea, UCLA celebrates Transfer Pride Week and Transfer Awareness Days. The university also offers transfer awareness trainings, information sessions, and other transfer- and post-traditional student-centric activities. All these efforts are designed to highlight who transfers are and what they bring to the table.

Transfer Pride Week is an annual (and sometimes quarterly) campus-wide event. It was designed in 2012 by a committee of staff and student advocates to fight stigma and bias surrounding the transfer experience and highlight and celebrate all things transfer. The planning committee collaborates with students to come up with innovative ways to celebrate the transfer experience. Numerous campus entities host events, activities, and social media initiatives to highlight transfer identities and journeys, post-traditional student experiences, literature and research on transfers, and transfer

resources. Staff and faculty who were transfer students or who are known transfer champions are also highlighted and celebrated.

Transfer awareness trainings help staff, faculty, and students learn about transfer students and their transitions to UCLA. Participants learn about the unique experience and how to contribute to a transfer-friendly environment. They may learn how transfer pride and awareness can be built in the classroom and in campus offices. For instance, faculty and staff are encouraged to share their own transfer experiences or have something in their offices indicating they are transfer friendly. (Those who complete the UCLA trainings receive stickers and t-shirts that help accomplish the latter goal.) In the classroom or during a meeting, simply asking students if they have transferred can also help transfers feel welcome and at ease.

Notably, UCLA Chancellor Gene Block was a transfer student. When he mentions this piece of his history in his speeches, transfer students cheer. Transfer students often mention how meaningful it was for them that a faculty or staff members brought up the transfer experience or indicate in a conversation that they understood what being a transfer student might mean in relation to the college experience overall. Interactions such as these help to alleviate students' fears that they might be punished or judged for this experience; it helps them own the uniqueness and know that they are seen, heard, and thought of.

Consistent transfer advocacy. Building a sense of transfer pride takes time and consistency of message. Structures must be installed to support the culture change necessary to instill and sustain transfer awareness and pride. UCLA has a Transfer Success Team that consists of staff from over 30 campus departments and schools, including faculty, numerous department directors, and the assistant vice provost for academic partnerships. This team shares information; identifies issues affecting transfers; and, most importantly, works with student leaders to advocate for continued transfer-friendly policies, practices, and changes. It can't just be students or one campus employee who monitors and addresses transfer student issues; it needs to be the responsibility of the entire university. A formal group of administrators tasked with working together to address transfer-specific challenges on campus can facilitate work toward a transfer-friendly climate. Of course, this effort needs to include student input and advocacy.

Cultivating Individual Transfer Pride

Transfer student leadership and engagement opportunities. You can't build transfer community, awareness, and pride without the transfer student voice. Helping transfer students learn about leadership positions, student government seats, mentoring positions, on-campus jobs, research positions, student group opportunities, and other ways to get engaged is an important step toward instilling transfer pride. This can happen in a variety of ways: creating transfer-specific mentorship programs, including transfer-specific and transfer-friendly student organizations (like Phi Theta Kappa and Tau Sigma National Honor Societies for

2- and 4-year transfer students, respectively—see Addenda A and B), involving students in advocacy and resource building, creating transfer-specific social media platforms and communities, or encouraging departments to hire transfers. All these efforts help transfer students to get involved and encourage them to have a voice on campus. This, in turn, helps build a transfer student community and instills transfer pride.

UCLA takes on this task in multiple ways. There are roughly 20 transfer-specific student organizations, such as the STEM Transfer Community, Black Bruin Transfer Success, Transfer Prelaw Society, Nontraditional Students Network for students over 25 years old, the transfer co-ed fraternity Chi Alpha Psi, and many more transfer-friendly organizations that actively recruit transfer students. These groups and other transfer-student leaders make up the Transfer Leadership Coalition, a student collective that meets four times each quarter to share information and advocate in collaboration with the Transfer Success Team. These students help inform daily policy and practice at UCLA. Students also advocated for a transfer-specific representative on the student government council so that transfers—who make up one third of UCLA's undergraduate community—would have a voice in large-scale campus decision-making. Together, these entities guide UCLA in the creation of an increasingly transfer-friendly institution; they also inspire the transfer student community to continue to engage and connect. This type of engagement has a way of generating loyalty among transfer alumni, who can be integral in sustaining transfer pride after graduation and beyond.

Transfer student mentorship. With over 7,300 transfer students at UCLA, it is difficult for administrators and faculty to connect with each student. UCLA developed a program of about 100 mentors who support 400 to 500 incoming transfer students. The goals of the program are to share knowledge, build community, and foster student agency. Mentors take an active leadership role at the Transfer Student Center and significantly influence the strategy and direction of programming and partnerships. Mentors and mentees are encouraged to be voices in the community, share feedback, and support each other in the transfer process as well as remain mentors in the community after graduation.

Transfer-specific media platforms and communities. Do not underestimate the power of creative media in cultivating a sense of pride and place for transfers! Media outlets specific to transfer students are a terrific low-cost way to foster community and awareness on campus. Transfer-specific social media groups (on Instagram, Facebook, Twitter, etc.), student blogs, podcasts, and YouTube channels—and even related hashtags—can have a major impact on community awareness and on combating transfer stigma. UCLA's transfer student Facebook group, for example, has 18,700 current, former, and new transfers who support each other and answer each other's questions. Student-generated content and initiatives on social media not only rally transfer pride but also generate far-reaching awareness. Indeed, these platforms can support a national sense of transfer pride as students come together as a larger community.

Conclusion

As the introduction of this volume states, transfer is more than an experience or a system of articulation agreements and pathways. Transfer is a collective identity that all transfer students share, an identity that can be celebrated and developed on college and university campuses. Transfer students add significant talent, knowledge, and enrichment to higher education, and transfer pride reflects a recognition of the work, time, effort, and life journey required to take this path. Instilling this pride can begin with a few simple action steps guided by an institutional commitment to recognizing and celebrating transfer student success.

References

- Herrera, A., & Jain, D. (2013). Building a transfer-receptive culture at four-year institutions. In Jillian L. Kinzie (Ed.), *Collegiate transfer: Navigating the new normal* (New Directions for Higher Education, no. 162, pp. 51–59). Wiley. <https://onlinelibrary.wiley.com/doi/abs/10.1002/he.20056>
- Jain, D., Lucero, I., Bernal, S., Herrera, A., & Solorzano, D. (2017). Developing transfer pride: An exploration of critical race pedagogy and the summer transfer enrichment program. *Community College Review*, 45(3), 171–189.
- UCLA Chancellor's Office of Data Analytics. (2019). *Campus statistics*. <https://www.apb.ucla.edu/campus-statistics/overview>

Case 9

INTERSTATE PASSPORT

Streamlining Student Transfer Across State Lines

Patricia A. Shea

In 2010, chief academic leaders at the 2-year institutions in the Western Interstate Commission for Higher Education (WICHE) region—composed of 15 Western U.S. states and the U.S. Pacific territories—came together to create the concept of the Interstate Passport in response to student loss of credits when transferring. They wanted a more meaningful currency for transfer—one that would focus on what a student knew and could do, rather than on course-by-course articulation matching course titles, numbers, and descriptions. Working with their colleagues—the provosts at the 4-year institutions in the WICHE region over a period of many months, these academic leaders developed the concept for Interstate Passport. Together, they determined the program should focus on lower-division general education, which is a commonality among most institutions and the emphasis of most students during the first 2 years of their postsecondary experience. In addition, they called for the program to be student centered and faculty driven, to respect institutional autonomy, and to incorporate quality assurance measures.

What Is Interstate Passport?

Interstate Passport is a national program that facilitates block transfer of lower-division general education attainment among 2-year and 4-year institutions participating in the Interstate Passport network. The program is based on an agreed-upon set of 63 Passport Learning Outcomes (PLOs). Faculty at member institutions map their own institution's general education learning outcomes to the PLOs to ensure that they are congruent and cover the same range of learning. They also identify a menu of courses—very often matching their own required general education curriculum—by which students can achieve the learning outcomes to “earn a Passport.” Students who do so and then transfer to other member institutions have their learning recognized as meeting all lower-division general education requirements at the receiving institutions.

The PLOs were collaboratively developed over several years by nine teams of faculty from 2- and 4-year institutions in seven WICHE states (California, Hawaii, North Dakota, Oregon, South Dakota, Utah, and Wyoming). The knowledge and skill areas were inspired by the LEAP essential learning outcomes, developed by the Association of American Colleges & Universities, and by WICHE research on general education requirements in the region. The nine areas are oral communication, written communication, quantitative literacy, creative expression, natural sciences, human cultures, human society and the individual, critical thinking, and teamwork and value systems. The work to date has been generously funded by public and private foundation grants from the Bill & Melinda Gates Foundation, Carnegie Corporation of New York, Lumina Foundation, and the U.S. Department of Education via a First in the World grant.

Why Is Interstate Passport Important?

According to a recent study by the National Student Clearinghouse (NSC; Shapiro et al., 2018), 38% of students transfer at least once. Of that population, 27.2% cross state lines. Although many states have worked to improve the transfer pathways within their states, few are problem-free and those solutions do not help the thousands of students each year who must relocate to another state for a job, a specific degree program, are in the military or a member of a military family, or for many other reasons.

Unfortunately, only 58% of transfer students can bring all or almost all their credits with them, and when students lose credits, they are less likely to complete a degree (Attewell & Monaghan, 2015). Losing credits is particularly difficult for low-income and first-generation students and students of color who disproportionately enroll in 2-year schools and must transfer to earn a 4-year degree. Indeed, according to the National Center for Public Policy and Higher Education (2011), 44% of low-income students attend community colleges as their first college, compared with only 15% of high-income students. Similarly, 38% of students whose parents are not college graduates enroll initially in community colleges compared with 20% of students whose parents were college graduates. Nationally, 50% of Hispanic students and 31% of African American students begin at community colleges compared with 28% of White students.

For students who can barely afford to take courses the first time, repeating them or taking additional lower-division general education courses can make earning a degree extremely difficult if not impossible. For example, active military personnel and their families are well known for frequent transfers across state lines, and the resulting loss of credit can delay military advancement and hinder their preparation for civilian life. Thus, the goal of the Interstate Passport program is to streamline the transfer process, especially for students crossing state lines, in order to save them time and money by avoiding the unnecessary repetition of learning already achieved.

How Does Interstate Passport Work?

The PLOs serve as the new currency for transfer, a bridge connecting general education requirements from one network member institution to another. Member institutions do not adopt the PLOs but rather map them against their own learning outcomes to ensure that they are congruent and cover the same range of learning. Faculty also construct their institution's Passport Block, a menu of courses by which a student can achieve these learning outcomes and earn a Passport. The block may be identical to an institution's general education program or may be a subset or an expansion of it depending in most cases on the extent of the campus' prior work on learning outcomes.

Passport Blocks vary, but each covers all required outcomes in some form. It has been striking to observe how much commonality exists in what faculties believe should be the outcomes of general education as well as their creativity in the range of courses and content by which students achieve the outcomes. Although smaller institutions have fewer course offerings, general education learning expectations tend to be consistent, generally within a 30- to 38-semester-credit framework. Since member institutions agree not to review each course within a Passport, students know in advance of transfer that they will have met the general education requirements at the receiving institution even if the courses and the number of credits earned are different. The exceptions: Interstate Passport does not guarantee coverage of prerequisites for majors, exempt students from religion-related courses at faith-based institutions, or provide exclusions from legislature-mandated courses such as state history or civics required for graduation.

The Interstate Passport program contains several measures to help ensure quality. The first is the essential role of faculty in development of the PLOs. Second, students must earn a minimum grade of C or its equivalent in every general education course taken to earn a Passport. Third, each institution agrees to track the academic progress of students who transfer in with a Passport for at least two terms after transfer by sending data at the end of each term to the NSC. Annually, the NSC compiles and sorts the data and sends an individualized report to each member institution about the academic progress of its former students for use in continuous improvement efforts. NSC also sends an aggregate report to WICHE for use by the Passport Review Board, the network's policymaking body, in evaluating the overall effectiveness of the Interstate Passport program.

At the conclusion of Interstate Passport's first 3 years of operations, in June 2019, more than 38,800 students had earned Passports and were beginning to transfer. At the time of this writing, 60 institutions in 17 states are Interstate Passport Network members; 29 institutions are 2-year schools, including the Community College of the Air Force, and 31 are 4-year institutions. Many other institutions and states are in the pipeline. A current list of members can be found at the end of the chapter.

How Can Institutions Join the Interstate Passport Network?

All regionally accredited, nonprofit, public and private institutions—both 2-year and 4-year—are eligible to join the network. To participate, institutions must sign a memorandum of understanding for a 5-year renewable term whereby they agree

- that their institution's general education learning outcomes are congruent with and cover the same range of learning as the PLOs;
- to construct a Passport Block—a menu of lower-division general education courses by which a student can earn a Passport—and award Passports to students who earn them;
- to participate in the Academic Progress Tracking service through the NSC.

Prospective member institutions can visit <http://interstatepassport.wiche.edu/membership/> to find information and helpful resources for these steps.

What's Ahead?

As more students earn and transfer with a passport over the next few years, we'll be learning just how effective this mega-articulation agreement is in streamlining the transfer process and aiding students to stay on their pathway to graduation. By fall 2021, we anticipate having sufficient academic progress tracking data to analyze performance details of transfer students across nine dimensions: race/ethnicity, gender, age, low income (Pell eligibility as a proxy for low income), active military/veteran, GPA earned before transfer, credits earned before transfer, first-generation student, and degree level (associate versus bachelor's). This analysis will allow member institutions to assess how well different populations performed post-transfer and enable them to develop strategies specifically designed to close achievement gaps across the various dimensions.

As traditional college-aged enrollments continue to decline, there is increased interest in attracting transfer students at institutions across the country. This is especially true in states with significant enrollment declines that look to out-of-state students to maintain the financial viability of some of their programs. Internally, most states also have a renewed emphasis on promoting successful transfer from 2-year to 4-year institutions. Interstate Passport can provide a basis for efficient general education transfer in multiple directions that supports institutional autonomy and does not require standardization of coursework across institutions; between public institutions; and between public and private, nonprofit institutions.

But beyond just attracting transfer students, students need to succeed academically. Interstate Passport provides a collaborative framework whereby transfer students have a coherent and high-quality learning experience that prepares them to advance in their studies and avoid the unnecessary repetition of learning already achieved. They benefit and so do the institutions.

References

- Attewell, P., and Monaghan, D. B. (2015). The community college route to the bachelor's degree. *Educational Evaluation and Policy Analysis*, 37(1). 70–91. <https://doi.org/10.3102/0162373714521865>
- The National Center for Public Policy and Higher Education. (2011, June). *Policy alert: Affordability and transfer: Critical to increasing baccalaureate degree completion*. Author. https://www.highereducation.org/reports/pa_at/PolicyAlert_06-2011.pdf
- Shapiro, D., Dunder, A., Huie, F., Wakhungu, P. K., Bhimdiwali, A., Nathan, A., & Youngsik, H. (2018). *Transfer and mobility: A national view of student movement in postsecondary institutions, fall 2011 cohort* (Signature Report No. 15). National Student Clearinghouse Research Center.

APPENDIX 9A

Interstate Passport Network

Members as of July 2020—Current list at <http://interstatepassport.wiche.edu/institute/>

ALABAMA

Air University/Community College of
the Air Force

ALASKA

University of Alaska Anchorage
University of Alaska Fairbanks
University of Alaska Southeast

ARKANSAS

University of Arkansas Community
College at Batesville

CALIFORNIA

Cerritos College
College of the Siskiyous
East Los Angeles College
Los Angeles City College
Los Angeles Harbor College
Los Angeles Mission College
Los Angeles Pierce College
Los Angeles Southwest College
Los Angeles Trade-Tech College
Los Angeles Valley College
West Los Angeles College

COLORADO

Adams State University
Western Colorado University

HAWAII

Chaminade University
Hawai'i Community College
Honolulu Community College
Kapi'olani Community College

Kaua'i Community College

Leeward Community College
University of Hawai'i at Hilo
University of Hawai'i at Mānoa
University of Hawai'i Maui College
University of Hawai'i – West O'ahu
Windward Community College

IDAHO

College of Eastern Idaho
North Idaho College

ILLINOIS

The Chicago School of Professional
Psychology

MINNESOTA

Concordia University, St. Paul

NEVADA

Nevada State College
Truckee Meadows Community College
University of Nevada Reno

NEW MEXICO

New Mexico State University

NORTH DAKOTA

Lake Region State College
North Dakota State College of Science
University of North Dakota

OREGON

Blue Mountain Community College
Western Oregon University

SOUTH DAKOTA

Black Hills State University
Dakota State University
Northern State University
South Dakota School of Mines &
Technology
South Dakota State University
University of South Dakota

UTAH

Dixie State University
Salt Lake Community College
Snow College

Southern Utah University
The University of Utah
Utah State University
Utah Valley University
Weber State University

WASHINGTON

Washington State University

WYOMING

Casper College
Laramie County Community College
University of Wyoming

Case 10

AMERICAN PUBLIC UNIVERSITY SYSTEM

A “Military Friendly” Model for Student Transfer

Wallace E. Boston, Vernon Smith, and Melissa Layne

Choosing to be a member of the U.S. Armed Services is more than taking on a job; it is a decision that fundamentally impacts every facet of one’s life. While offering individuals tremendous opportunities, service in the military also presents challenges that do not have civilian equivalents or amplifies issues that all individuals and families experience.

A classic example of such challenges comes in the form of relocation and deployments. Individuals typically accept assignments to different military bases during their career, as well as deployments to active combat or support status; a situation that has magnified since September 11, 2001, with the continued U.S. presence in the Middle East (Military.com, 2019). Similarly, lengthy field exercises and service training are common for all military personnel, regardless of the branch in which they serve.

As a result of being restationed over their careers, military students often attend four or more colleges, accruing credits whenever and wherever they can on an opportunistic basis. In contrast, approximately 10% of all college students attended more than one institution within the 2014–2015 academic year, and 37% transferred to another institution within a 6-year period, according to the National Student Clearinghouse Research Center (Shapiro et al., 2018). Though well-intentioned, state-level policies have complicated the issue further. Specifically, to accommodate and provide opportunities for members of the military, 32 states and college systems have policies in place allowing veterans and active duty service members to waive the residency requirement and receive in-state tuition immediately upon enrollment (Lauterbach, 2019). While certainly providing significant cost savings, service members end up enrolling at numerous institutions over the course of their academic career, with their enrollments paralleling their station assignments. Further, while a military student may have a specific degree in mind, degree requirements might differ among institutions, resulting in potential extraneous credits at the institution from which they graduate.

When Department of Defense (DOD) policy is accounted for, the situation becomes even more problematic. Specifically, most branches of the military cap the number of courses that a student may take at *six per year*. Even if a student were inclined to take more courses, the demands of military life often make this unrealistic. The average number of courses per student per year is about three. Viewed through the lens of a typical 120-credit bachelor's degree sequence, a service member's transcript is likely to contain credit from numerous institutions stretched over a long period of time. Many institutions' transfer policies may render a service member's progress toward a degree problematic.

Those who have completed their service and have been honorably discharged hold veteran status. The Servicemen's Readjustment Act of 1944, also known as the GI Bill, provided a range of benefits for returning World War II veterans (commonly referred to as *GIs* for *general infantry*). Passed by the 78th United States Congress and signed into law by President Franklin D. Roosevelt in 1944, the original GI Bill expired in 1956 but was extended in new forms several times after 1956, helping nearly 10.5 million more veterans after the Korean and Vietnam wars. In 2008, the U.S. Congress passed a version known as the Post-9/11 GI Bill, and more recently, the Forever GI Bill expanded benefits for veterans. Thus, the term *GI Bill* is still used to refer to programs created to assist U.S. military veterans, the bulk of whom are using or will use this benefit through the Post-9/11 or Forever GI Bills (U.S. DOD, 2019).

Among other benefits, veterans received dedicated payments of tuition and living expenses to attend high school, college, or vocational school. In 1984, the GI Bill was revamped to liberalize benefits and provide more targeted funding. The Post-9/11 Veterans Educational Assistance Act of 2008 further expanded benefits, providing veterans with funding for the full cost of any public college in their state (U.S. DOD, 2019).

American Public University System: One Institution's Journey to Serve Military Students

American Public University System (APUS) enrolled its first students in 1993. In keeping with its origins, APUS's mission is to provide high-quality higher education with an emphasis on educating the nation's military and public service communities by offering *respected, relevant, accessible, affordable, and student-focused* online programs that prepare students for service and leadership in a diverse, global society.

Originally, the institution offered a single master's program in military studies via a modified correspondence format. In January 1996, the institution offered its first bachelor's degree programs and, in January 2000, offered its first associate degree. Over time, the institution's size and scope have grown significantly, and, in January 2017, it launched doctoral degrees in global security and strategic intelligence. During this time, APUS created two separate universities, American Military University and American Public University, with the former dedicated entirely to

serving the needs of the military and public service communities. The journey to move from that first program to a system providing comprehensive degree offerings across a broad set of disciplines and serving multiple sectors has been a long one.

In 1998, APUS began converting its curriculum from correspondence courses to online instruction, and by the end of 2000, all courses in all degree programs at APUS were fully online (Boston & Ice, 2011). In the decade that followed, APUS experienced exponential growth and the enrollment of almost 90,000 students. However, with this dramatic growth came enormous challenges in providing highly scalable services that would ensure student success. Though an increasing number of civilian students began taking APUS courses, military students continued to be the vast majority.

Since 1993, APUS has consistently collected data on its military student population to support ongoing research initiatives that have driven overall, continuous quality improvement. APUS researchers have identified common predictors that link student success with student characteristics, prior learning experiences, transfer credits, and environmental settings. Accordingly, attrition management plans for military and military-affiliated students have been developed to better understand and hopefully address any issues before they arise. These approaches have improved retention through analysis and appropriate placement of military students, collaboration efforts among administrative departments, learner advice and management, and curriculum integration.

Operationalizing Strategic Aligned Processes and Procedures

APUS has created online degree programs that offer an academic pathway for many of today's military service members and veterans. Eighty-seven percent of active duty personnel pursue their education online. A 2016 census reported 66% of military veterans had taken online courses at some point during their academic pursuits (Student Veterans of America, 2016). In a 2011–2012 U.S. Department of Education brief, Radford et al. (2016) reported that 41% of graduate military students (i.e., active duty and military veterans) took all their courses online. The fully online curriculum is designed for active-duty personnel and veterans who struggle to establish a work-school-family balance, among other commitments. For veterans, the flexible schedules are conducive to a smooth transition from military to civilian life. Furthermore, APUS provides many services and resources, including access to counselors, advisors, and support in career planning.

To be genuinely successful in serving military students, optimizing the amount of credits that they can apply toward a degree is imperative. An extension of optimized credit application recognizes military experience for credit. Skills military personnel acquired while performing their duties should apply alongside those learned in a classroom. APUS uses the Joint Services Transcript (2019) to convert military experience into civilian college credit. This instrument provides documented evidence to colleges and universities of professional military education, training, and occupation experiences.

Additionally, APUS recognizes the issues military students have with transferring credit and offers a comprehensive review of all previous academic, military, civilian, and public education and training for potential credit toward degree and certificate programs for each student. With appropriate guidance from the university's academic personnel, the Transfer Credit Department enforces policies and standards created and based on higher education best practices, accreditation guidelines, and the institution's unique military student transfer population. Effort is made to optimize and maximize the amount of credit from previous learning while maintaining academic integrity.

Similarly, APUS adopted liberal policies toward accepting other workplace experiences that have been formalized into credits through organizations such as the American Council on Education (ACE). ACE's College Credit Recommendation Service (CREDIT)

was established as a sister program in 1974 to connect workplace learning with colleges and universities by helping students gain access to academic credit for formal training taken outside traditional degree programs. With over 35,000 programs reviewed, CREDIT has been the national leader in the evaluation process for education and training obtained outside the classroom, including courses, exams, apprenticeships, and other types of nontraditional forms of training. (ACE, 2019, para. 6)

An extension of CREDIT is found in APUS's Prior Learning Assessment for Academic Credit (PLA) policies. PLA allows the granting of college credit for competencies and knowledge acquired while serving in the military but not explicitly granted through ACE or other transfer protocols. (See also Silberman & Rojas, chapter 7 in the print volume.) This program allows students to compile a portfolio demonstrating their knowledge of a topic that is then reviewed and a recommendation for credit given. Notably, the Council for Adult and Experiential Learning (CAEL) has found that "a student that is able to receive prior learning credits is *two and a half times* more likely to graduate than a student who doesn't have PLA credits" (Coons & Ernst, 2018, para. 2, emphasis in original).

APUS also aligns the pathway toward a degree with numerous programs with military occupational specialties (MOSs). This process ensures maximum compatibility between military service and degree requirements. Many professions realize how valuable veterans are given their experience with communication, medicine or information technology, and teamwork and leadership skills as well as their ability to multi-task and work under pressure—all of which are desired traits for any profession. Through close MOS alignment, employers gain even more certainty in hiring veterans as it is easy to understand what skills they are likely to possess.

The existing literature on military students indicates that institutional support systems for military and military-affiliated students, such as offering customized services, constitute a "military-friendly" context. Specifically, military and military-affiliated students indicate the following factors contribute to their academic success:

- Military-friendly policies and procedures
- Balance among school, work, and family
- Maturity gained from real-world experiences (Ford & Vignare, 2015)

Military-friendly campuses are designed to be sensitive to and understanding of student veterans' needs. Practical examples of this include flexible admissions policies for a more transfer-friendly experience and monthly course starts, which allow flexibility in scheduling around military life.

Place-based strategies create these kinds of military-friendly partnerships where community partners, colleges, businesses, nonprofits, and others work collectively to build a healthy system of support and make a meaningful impact for veterans returning to school and work. A place-based strategy for veteran students could involve greater outreach and information to veterans on different types of college programs, clear financial and GI Bill information, access to pathways and careers through job training or apprenticeships, as well as the policies mentioned previously. The goal of these strategies is to bring multiple community resources together to ensure U.S. veterans are earning valuable credentials and degrees to succeed in civilian life. Continuous communication with other entities such as GoArmyEd Counselors, Military Schoolhouses, the Community College of the Air Force, and general community college partners are examples of different functions of this group.

Despite challenges veterans have in transitioning from military life to campus life, some studies indicate they do well once enrolled, perhaps even better than traditional students. Not surprisingly, much of the current research suggests military and military-affiliated students adapt and persist in college by drawing upon deeply engrained military traits and tendencies, including self-discipline, mission-first focus, reliance on fellow military and military-affiliated students, high level of maturity, self-directedness, sense of responsibility, teamwork, and global interests and perspectives (Bishop, 2018; Lang et al., 2013).

The results of a study conducted by Lang and Powers (2011) reflect this acceptance of challenges and subsequent persistence in college. According to the report, veteran students average 24.5 credits per year, which indicates they are on the trajectory to graduate in 5 years, or 4 years with transfer credits from prior learning or military experience. The report states that the average veteran student enters a postsecondary institution with 28 transfer credits. Student veterans, when given support services at their colleges, earn better grades and show higher retention than their peers. The study also finds the persistence rate, the rate at which students return between their first and second year of college, is much higher than previously thought among veteran students.

Ongoing Challenges

Military student demographics continue to change and require all institutions that work with military students to continually modify and/or expand curricula and services. The examples described previously present an appropriate starting point for thinking strategically about both near and long-term horizons. The consistent use of data-driven decision-making must remain at the fore and be supplemented with new technologies such as artificial intelligence and cognitive analytics.

Critical alignment between military occupations and emerging careers is also considered imperative. There must be continual evaluation of specialized MOSs (categories of specific military jobs) and their relationship to emerging job requirements. Institutions must remain abreast of emerging technologies such as virtual and augmented reality and how these immersive technologies are integrated into careers, as well as how training with such technologies will impact the curriculum. From a military learner's perspective, the recognition of these technologies and the ways they are used in the military positions a military student-serving institution to remain relevant. Any of the previous factors may require additional course development and/or degree programs. Likewise, these events may boost the potential for maximizing credits transferred and the use of emerging technologies such as Blockchain that are used to affect such processes.

Other critical issues that impact increasingly large numbers of active duty military and veterans alike are post-traumatic stress disorder (PTSD) and traumatic brain injuries (U.S. Department of Veteran Affairs, 2019). There are special needs that these populations represent and which must be accounted for in the design and delivery of instruction and services. Also, the increasing number of women in the military creates an imperative to examine the provisioning of outreach and support services from an equity perspective. Despite making up only 10% to 12% of military personnel, women make up 27% of veterans enrolled in postsecondary education (National Center for Veterans Analysis and Statistics, 2017).

Providing these services requires continually redefining what it means to be "military-friendly" by understanding the complex interactions among military culture, learning sciences, emerging technologies, executive decision-making, a rapidly changing society, and expectations for careers that do not yet exist. Given the incalculable value of their service to the nation, the military and veteran student population deserve and must receive high-quality, relevant education.

References

- American Council on Education. (2019). *About learning evaluation*. <https://www.acenet.edu/Programs-Services/Pages/Credit-Transcripts/About-Learning-Evaluation.aspx>
- Bishop, G. I. (2018). *Military social perspectives in an online learning environment* [Doctoral dissertation, Trident University International]. ProQuest Dissertations and Theses Global. <https://search.proquest.com/openview/8bf3d3ee0d9f90f8a1f858af46fffb4f/1?pq-origsite=gscholar&cbl=18750&diss=y>
- Boston, W. E., & Ice, P. (2011). Assessing retention in online learning: An administrative perspective. *Online Journal of Distance Learning Administration*, 14(2), 1–11. <https://pdfs.semanticscholar.org/4792/9ec7645a315542a1148c772bc855e3661e4d.pdf>
- Coons, C., & Ernst, J. (2018). *Military for Learning Act of 2018*. <https://www.coons.senate.gov/imo/media/doc/Military%20Learning%20for%20Credit%20Act%20-%20One%20Pager.pdf>
- Ford, K., & Vignare, K. (2015). The evolving military learner population: A review of the literature. *Online Learning*, 19(1), 7–30. <https://files.eric.ed.gov/fulltext/EJ1061492.pdf>

- Joint Services Transcript. (2019). *Home page*. <https://jst.doded.mil/jst/>
- Lang, W., Harriett, B. D., & Cadet, M. (2013). *Completing the mission II: A study of veteran students' progress toward degree attainment in the post 9/11 era*. Pat Tillman Foundation, Operation College Promise, & Got Your 6. http://www.ccmountainwest.org/sites/default/files/completing_mission_ii.pdf
- Lang, W., & Powers, J. T. (2011). *Completing the mission: A pilot study of veteran students' progress toward degree attainment in the post 9/11 era*. Pat Tillman Foundation and Operation College Promise. https://campussuite-storage.s3.amazonaws.com/prod/1280306/3a32f069-629b-11e7-99ef-124f7febbf4a/1691062/a707e4e2-024d-11e8-9a5f-12b1bc591c20/file/completing_mission_i-Nov2011.pdf
- Lauterbach, C. (2019). *New law helps active-duty and former military personnel who live within commuting distance pay in-state tuition rates*. WJBC. <http://www.wjbc.com/2019/09/04/new-law-helps-active-duty-and-former-military-personnel-who-live-within-commuting-distance-pay-in-state-tuition-rates/>
- Military.com. (2019). *Joining the military: Know what you are committing to*. <https://www.military.com/join-armed-forces/making-commitment.html>
- National Center for Veterans Analysis and Statistics. (2017, February). *Women veterans report: The past, present, and future of women veterans*. Department of Veterans Affairs, National Center for Veterans Analysis and Statistics. https://www.va.gov/vetdata/docs/Special-Reports/Women_Veterans_2015_Final.pdf
- Radford, A. W., Bentz, A., Dekker, R., & Paslov, J. (2016, August). *After the Post-9/11 GI Bill: A profile of military service members and veterans enrolled in undergraduate and graduate education* (NCES 2016-435). Institute of Education Sciences, U.S. Department of Education. <https://nces.ed.gov/pubs2016/2016435.pdf>
- Shapiro, D., Dundar, A., Huie, F., Wakhungu, P. K., Bhimdiwali, A., Nathan, A., & Hwang, Y. (2018). *Transfer and mobility: A national view of student movement in postsecondary institutions, fall 2011 cohort* (Signature Report No. 15). National Student Clearinghouse Research Center. <https://nscresearchcenter.org/signaturereport15/>
- Student Veterans of America. (2016). *Results from the 2016 SVA census survey: Student veteran general breakdowns*. <https://studentveterans.org/images/pdf/2016-SVA-Census-Survey-Student-Veteran-General-Breakdowns-120716.pdf>
- U.S. Department of Defense. (2019, January 9). *75 years of the GI Bill: How transformative it's been*. <https://www.defense.gov/Explore/Features/story/Article/1727086/75-years-of-the-gi-bill-how-transformative-its-been/>
- U.S. Department of Veteran Affairs. (2019). *What is PTSD?* <https://www.ptsd.va.gov/understand/what/index.asp>

Case II

THE TULSA COLLABORATIVE

A Regional Approach to Improving Transfer and Bachelor's Degree Attainment

Pamela K. Fly, Betsy Q. Griffin, Jennifer L. Ivie, Mary A. Millikin, and Emily Tichenor

Tulsa Community College (TCC) provides the first 2 years of public higher education for a majority of students in the Tulsa region. The nationally recognized TCC *Tulsa Achieves* program provides 100% tuition and fees for qualifying students and has given more than 21,000 Tulsa County students a path to a 2-year degree or workforce certificate (Tulsa Community College, 2019, 2020b).

In fall 2018, nearly 60% of the 16,475 students enrolled at TCC were majoring in a transfer-related program (Tulsa Community College, 2020a). However, for many students intending to complete a bachelor's degree, the act of transferring has proven a major stumbling block on the road to success. Negotiating the transfer of credits, financial aid, and scholarships and finding their place in a new university community can be overwhelming to these students.

To address these challenges and to promote a stronger higher education network in the Tulsa Transfer Project was launched in spring 2018. TCC and six universities (five public and one private, including one historically Black university, two branch campuses of state flagship universities, and two regional comprehensives), with the support of the Charles and Lynn Schusterman Family Foundation, began a 2-year guided Foundations of Excellence project on improving college transfer coordinated by the nonprofit John N. Gardner Institute for Excellence in Undergraduate Education. The goals of this unique partnership between TCC, Langston University, Rogers State University, Northeastern State University, Oklahoma State University-Tulsa, University of Oklahoma-Tulsa, and the University of Tulsa are to advance student learning, increase baccalaureate degree completion, and decrease inequitable achievement gaps by providing seamless and supported university transfer pathways for students with minimal loss of credit.

Successful completion of bachelor's degrees for students transferring from community colleges is a nationwide concern. Of students who started higher education at a U.S. community college in 2010, only 13.3% completed a bachelor's degree

within 6 years (Shapiro et al., 2017). On average, students lose 13 credit hours upon transferring from a 2-year to a 4-year institution, the equivalent of one semester of coursework, representing a significant investment of money and time (Giani, 2019). Losing this number of credit hours makes a difference in time to graduation, access to financial aid, and ability to access certain programs. Tulsa County's bachelor's degree attainment rate is just below the national average, but large disparities exist in attainment based on race and ethnicity.

Institutional Planning and Improvement Process

The Foundations of Excellence Transfer Focus process provided the framework for each participating institution to complete a comprehensive self-study about its transfer populations and their experiences and then develop a transfer improvement plan based on that self-study. While each institution approached the work somewhat differently in terms of size of the task force, organizational structure, and timelines, all recruited individuals from various units across each institution to respond to performance indicators contained in the nine Foundational Dimensions, which are the aspirational standards of excellence for institutional attainment contained within the Foundations of Excellence framework (Gardner Institute, 2018). In all, the self-study process engaged more than 228 administrators, faculty, staff, and students across the participating institutions.

The self-study process involved data and evidence collection through formal surveys of students and faculty and staff, as well as a review of each institution's current communications, transition practices, and outcomes for transfer student populations. Institutions were asked to look at data in ways they may not have done before—through the lens of transfer students. Task force members reviewed, discussed, and identified gaps where their institution was functioning against the Dimension descriptions and subcomponents. From those discussions came recommendations for improving transfer student experiences and the institutional supports that facilitate successful degree completion. Those recommendations became action plans for subsequent years.

The combined institutional action plans resulted in 123 recommendations for improving transfer. Analysis of the action plans found several themes shared by all the institutions. These include

- developing a transfer philosophy to guide institutional action and policies,
- increasing assessment of transfer students and the sharing of data within and across institutions,
- changing the organization structure to better serve transfer students, and
- increasing support for transfer students.

Additional high-priority themes included updating and increasing articulation agreements, improving transfer advising, continuing collaboration with partner institutions, and improving faculty engagement with transfer students.

These cross-institutional themes have resulted in changes at each institution and in concert with the larger collaborative project. For example, seeing gaps in how the unique needs of transfer students are addressed and sometimes unmet, several institutions re-configured transfer offices, hired new staff to serve in existing offices, or rethought intake and advising processes in light of lessons learned from the self-study data and evidence. Improving communications was a theme that ran across the priorities of several institutions, and everything from web page content to emails sent became a focal point for improvement. Keeping information current and relevant to transfer students remains a priority as the participating institutions continue to work together to smooth pathways for students. Institutions are working out processes for sharing student admission lists to support reverse transfer opportunities and updating articulation agreements with a more standardized look so that no matter the institution students attend after their associate degrees at TCC, the information is presented in a similar manner.

Collaborative Focus on Improving Regional Transfer

In addition to the separate work, the institutions came together in multiple venues to improve the entire process of transfer in the Tulsa area. The project began with a large meeting hosted by Tulsa Community College to which each institution sent representatives including staff, administrators, and faculty, working on the different Dimensions of the Foundations of Excellence (FoE) process. At this first meeting, cross-institutional groups learned about the entire FoE process and discussed ways the institutions could improve as a collaborative.

Additional meetings were convened including project leadership from each institution. During these meetings, institutions shared their findings and plans. Additionally, they discussed what they could do collaboratively to improve student success. In the first year, the project leadership agreed upon some joint initiatives for 2019. These included

1. creating a regional transfer philosophy statement and core values;
2. creating a dynamic list of transfer FAQs that would live on a collaborative website;
3. creating an annual Transfer Report that would outline progress in the project, performance indicators with data demonstrating success of the efforts; and
4. launching the first annual Tulsa Transfer Week in conjunction with National Transfer Student Week.

Subcommittees were created for each of the initiatives. Each subcommittee included members from all participating institutions. Additionally, project leaders for each institution met regularly to continue the work, provide updates on institutional work, and refine goals as needed.

A subcommittee developed a working draft of a regional transfer philosophy statement and some initial core value statements. The drafts were brought to a large

group meeting of teams from each institution. One feature that most teams felt was missing was a focus on equitable outcomes. Thus, language was added to the philosophy and value statements highlighting the importance of equity. The draft philosophy statement was published in the first annual regional transfer report.

A second subcommittee, primarily composed of advisors and other student-facing staff from each institution, developed a list of over 40 frequently asked questions (FAQs) related to transfer in the Tulsa area. Each question was answered by every applicable institution. Ultimately, the goal is for these FAQs to live in a chat bot on a regional transfer website. The subcommittee hoped that a prospective student could select a potential transfer destination and receive an institutionally specific answer to their question. Eventually, more questions and answers would be developed and added to the database.

A third subcommittee, consisting of a representative of institutional research or campus leadership for each institution, developed an outline for the initial annual regional transfer report. The initial report covered the what and why of the transfer project, descriptions of each participating institution's progress and their primary institutional goals, and baseline data to measure progress toward improving transfer outcomes in the region. Baseline data included the number of first-time entering students at Tulsa Community College who transferred within 3 years to participating 4-year receiving institutions, number of TCC graduates who transferred within 3 years, number of fall enrollments at receiving institutions that transferred in from TCC, and number of most recent academic year bachelor's degree earners from each participating 4-year institution who transferred from TCC. These baseline metrics will be used annually as part of the project evaluation. The members of the collaborative continue to discuss additional measures of progress.

The fourth subcommittee focused on developing Tulsa's first transfer week. The Tulsa Regional Transfer Week was designed to coincide with the National Institute for the Study of Transfer Students (NISTS) annual National Transfer Week in October. The Tulsa Transfer Regional Transfer Week focused on helping TCC students learn more about the institutions and their opportunities for transfer. The event-filled week included scheduled tours of Tulsa campuses and provided busses for students from TCC to the partner institutions. Meetings were scheduled on TCC's campuses where students could ask questions of advisors, financial aid counselors, and others from the partner institutions. The most successful event was the student organizations' fair where each partner institution sent student representatives from various student groups. This event gave TCC students information about opportunities for involvement once they transfer. Finally, the subcommittee secured a proclamation from the Tulsa mayor declaring that week officially Tulsa Regional Transfer Week.

An additional piece of the transfer week was recognition of Tulsa Transfer Champions. Multiple people were nominated from various institutions as well as from community partners. Although the original event that was going to be held

during Transfer Week to honor these champions was canceled due to scheduling conflicts, each institution recognized their nominees in their own way.

Current Initiatives and Next Steps

The collective work of the collaborative has created new opportunities for a cross-institutional partnership between Tulsa Community College and the six participating Tulsa-area universities. Their common purpose allows these institutions to create a synergistic process for sharing students and streamlining pathways to student success.

One initiative in the planning stage is the development of a dynamic, interactive, common website that aligns 4-year participating university degree plans with 2-year TCC associate degree plans. This system will allow entering TCC students to identify a bachelor's degree of interest, select a Tulsa-area university that offers the degree of choice, and align it with all coursework taken at TCC from Day 1. Every course needed for the 4-year degree will be clearly identified with each course to be completed at TCC linked and aligned. This process will anchor the collaborative approach to degree completion and meet the goal to significantly reduce the number of lost transfer credit hours. Additionally, this degree plan alignment creates greater opportunities for intentional general education mapping, building a unified vision for shared pedagogy, and ultimately facilitating student engagement through high-impact practices (HIPs).

Another initiative under discussion is a transfer symposium similar to that implemented by IUPUI (see Case 4 in this compendium). This day-long symposium would bring together institutions of higher education to discuss transfer student success initiatives in the Tulsa area. Research, assessed institutional initiatives, trends, and challenges, as well as facilitated dialogue, can provide exciting opportunities for faculty and staff to participate in professional development events dedicated to transfer policies, HIPs, and “lived experiences” of transfer students.

In April 2020, Tulsa-area higher education institution presidents and community leaders met to formalize the creation of a task force to explore establishing a sustaining structure to enhance higher education opportunities in the Tulsa region. To this end, these seven presidents dedicated their commitment and resources to the greater good of northeast Oklahoma. The work of the institutions to develop a sustaining structure is supported by the Charles and Lynn Schusterman Family Foundation, the John N. Gardner Institute for Excellence in Undergraduate Education, the City of Tulsa, the Tulsa Regional Chamber of Commerce, Tulsa Community Foundation, Impact Tulsa, and the Oklahoma State Regents for Higher Education.

Four active subcommittees have been established in support of the formalized Collaborative. These subcommittees are Mission and Purposes; Governance and Finance; Student Experience; and Data, Programs, and Workforce. Each of the

subcommittees is charged with making recommendations for the operation of a sustaining structure. The presidents particularly wanted student needs and priorities to be addressed by the formalized structure.

Considerations for Building a Regional Transfer Collaboration

Several factors seem to be essential to making the collaboration among these seven institutions successful and potentially sustainable. The first and foremost among these factors is student success as the ultimate goal for these institutions and their leaders. In the case of transfer, this goal may mean referring the student to a partner institution that has programs more suited to the student's aspirations. Achievement of this goal will require a level of organizational magnanimity that emanates from commitment to a common purpose at all levels of the institutions.

The second factor is institutional and project leadership. The Tulsa Transfer Project has been strongly supported by the institutions' presidents from its initiation to their creation of the Presidents' Task Force for Advancing Higher Education Opportunities for the Greater Tulsa Region. The other component of leadership is project leaders from each institution who have the respect and positional authority to lead a process of institutional change. These project leaders exemplify the commitment to student success that allows them to work effectively within and across institutions.

The third factor is the broad support of community partners. In terms of the Tulsa Transfer Project, the ongoing support of a local foundation, the Charles and Lynn Schusterman Family Foundation, and its senior program officer have provided financial and advisory support, respectively, and encouragement to progress. There are also other important community partners including the mayor of Tulsa, G.T. Bynum; the Tulsa Regional Chamber of Commerce; Impact Tulsa; and the Tulsa Community Foundation. The Oklahoma State Regents for Higher Education has been interested in and supportive of the progress of the Tulsa Transfer Project from its beginning and is represented on the Presidents' Task Force. Institutions and community partners working together for the common good have produced benefits that can persist with commitment.

References

- Gardner Institute. (2018). *Foundations of Excellence Foundational Dimensions*. <https://www.jngi.org/foundations-of-excellence/#foe-fd>
- Giani, M. S. (2019). The correlates of credit loss: How demographics, pre-transfer academics, and institutions relate to the loss of credits for vertical transfer students. *Research in Higher Education*, 60(8), 1113–1141. <https://doi.org/10.1007/s11162-019-09548-w>
- Shapiro, D., Dundar, A. ., Huie, F., Wakhungu, P. K. ., Yuan, X., Nathan, A., & Hwang, Y. (2017). *Tracking transfer: Measures of effectiveness in helping community college students to complete bachelor's degrees* (Signature Report No. 13). National Student Clearinghouse Research Center.

- Tulsa Community College (2019, July). *Tulsa achieves scorecard: Cohort years 2007–2017*. TCC Institutional Research and Assessment. <http://ira.tulsacc.edu/sites/default/files/u16/TAScorecardfor2007-2017.pdf>
- Tulsa Community College (2020a). *TCC Foundations of Excellence final report and action plan*. TCC Institutional Research and Assessment. https://gallery.mailchimp.com/845d0dfa37af92c9be90721bb/files/d043a834-9aa9-4334-b83e-cd3a4fdec2df/TCC_Transfer_Report_2019_Final.pdf
- Tulsa Community College (2020b). *Tulsa achieves cohort report update*. TCC Institutional Research and Assessment. Unpublished data.

Addendum A

PHI THETA KAPPA HONOR SOCIETY

Ensuring Transfer Success and Career Readiness Among Today's College Students

Erin Cogswell

Phi Theta Kappa Honor Society (PTK) is one of the largest and most prestigious honor societies in higher education, and it is for students of 2-year institutions and academic programs. PTK has inducted more than 3.5 million members into chapters on 1,285 college campuses across the United States and on 60 campuses internationally.

PTK members are among the nation's hardest workers and highest achievers—91% of them earn an associate degree and/or transfer and continue their education. They even outperform their nonmember peers with similar grade point averages. Many of them are nontraditional students—the average age of a member is 28—and 54% of them receive some form of federal financial aid.

Recognizing the academic achievement of college students is only one part of PTK's mission; the society also provides opportunities for students to grow as scholars and leaders through curricula designed to strengthen soft skills, develop leadership, encourage critical thinking, and prepare them to enter the workforce, as well as through a variety of scholarships to help students complete their degrees at every level.

This two-fold mission and the opportunities that come with membership set PTK apart from other honor societies. A focus on student success was built in from the beginning and continues today, as the organization works to ensure college students fulfill their highest potential at every step of their educational journey.

Phi Theta Kappa's History

PTK traces its roots to Kappa Phi Omicron, an honorary group chartered by six women in 1910 at Stephens College in Missouri. As other similar groups were

established, students and college presidents from eight Missouri junior colleges came together in 1918 to organize one new honor society with a common mission. They chose the name “Phi Theta Kappa” and modeled it after the prestigious Phi Beta Kappa.

In 1929, the American Association of Junior Colleges (now the American Association of Community Colleges) recognized PTK as the official national honor society for junior colleges—and today it remains the only honor society to have received that designation. The distinction transformed PTK into an honor society focused on not only academic recognition but also the enrichment and growth of its members. Membership would now be awarded to students beginning with their freshman year.

Today, PTK’s international headquarters is in Jackson, Mississippi, where staff develop programming and resources for members and offer support to chapters. It is a nonprofit 501(c)(3) organization.

Membership is extended by invitation only. In general, students must complete 12 hours of coursework and achieve a minimum 3.5 GPA. In addition to full-time students, part-time, international, certificate-seeking, and dually enrolled high school students are also eligible for membership. All students must pay a one-time membership fee, and they can access the full range of benefits for life.

PTK’s first international chapter was established in 1991 in Canada, and it now has a presence in 11 sovereign nations. In 2017, the Phi Theta Kappa Board of Directors unanimously voted to extend membership to those incarcerated or on probation and seeking an education, which has resulted in a growing number of students in prisons across the country receiving a second chance at a bright future.

Benefits, Programs, and Events

The benefits and opportunities of PTK membership are extensive. Many students join because of access to scholarships. Through partnerships with more than 1,000 4-year colleges and universities, more than \$46 million in transfer scholarships is available exclusively to PTK members.

The organization also offers nearly \$2 million in scholarships through its foundation for students to complete an associate, bachelor’s, or master’s degree. There are workforce-specific opportunities that help cover the cost of certification exam fees, such as for nursing students, funded by Hurst Review; and pharmacy technician students, funded by Walgreens; as well as scholarships for career-bound students in general, funded by The Coca-Cola Foundation.

PTK also promotes information for another \$48 million in non-PTK scholarships for its members, including, for example, \$2.1 million awarded annually through the Jack Kent Cooke Foundation. Since 2012, 85% of those receiving the foundation’s prestigious Undergraduate Transfer Scholarship have been PTK members.

Beyond financial aid, PTK’s programs help members develop their full potential as leaders inside the classroom, on campus, and in the workforce. A custom professional development curriculum focuses on soft skills and helps students learn to

communicate effectively, boost critical thinking and research skills, build emotional intelligence, increase cultural awareness, and get organized and set goals.

College students often need assistance navigating the workforce. An exclusive new employment training program shows PTK members how to chart a career path; develop a résumé, build a digital footprint, network, ace an interview, and negotiate a salary.

PTK's honors program, Honors in Action, lets members use what they're learning in the classroom to research and solve real-world challenges. Through the program, they work with their local chapter to identify and research an issue on their campus or in their larger community. Next, they turn that research into a plan of action by creating a project or an event that meets a specific need. Along the way, members set themselves apart as a leader on campus; learn how to think critically and reflectively; learn how to work with a team; and collaborate with college and community leaders—all key skills today's employers want to see.

The honors projects are eligible for national publication in *Civic Scholar: Phi Theta Kappa Journal of Undergraduate Research*, the first journal of its kind to feature substantive research and community engagement of community college students. *Civic Scholar* is funded by the Jack Kent Cooke Foundation.

PTK also offers multiple ways for students to connect with other members from around the world. Chapters from the same state or geographic region host fall and spring conferences, and PTK headquarters hosts two international events each year: PTK Catalyst and Honors Institute.

PTK Catalyst is the society's annual convention, held each April. Approximately 4,000 students, their chapter advisors, college administrators and faculty, and organizational partners come together for 3 days of programming. Attendees hear from acclaimed speakers, receive further educational and professional development, are celebrated on a national stage, and are inspired to reach their full potential. Included in this is a national college and workforce fair, where admissions professionals and recruiters can talk with high-achieving students face-to-face.

Honors Institute is a week-long conference held each June on a 4-year college campus. It brings 500 students and advisors together in a more intimate setting to focus on the society's honors program, hear from inspirational speakers, collaborate in small group discussions, and gain additional leadership development.

Transfer Student Support

Approximately 74% of PTK members will transfer to a 4-year college—compared to 26% of community college students overall—and they'll find more success than their peers. This is a direct result of programming designed to increase student engagement with college faculty and staff and other students, as well as online tools like PTK Connect, sponsored by the Michael and Susan Dell Foundation.

PTK Connect is a comprehensive online database of transfer scholarships and career-planning tools for PTK members. Students can discover transfer-friendly

institutions, search for career paths, and, of course, find financial aid. Colleges subscribing to PTK Connect set up profiles where they can tout their transfer benefits and identify recruits who have shown an interest in them through searches on the platform. College recruiters have access to email, phone numbers, and mailing addresses to fully engage students across all channels.

PTK uses the data from the PTK Connect institutional profiles to give colleges a “transfer-friendliness” score and publish its annual Transfer Honor Roll, where the top 4-year colleges and universities are identified by their scores as doing the most to support transfer success. These colleges receive recognition, an award, a seal for their website, and outreach materials.

Strong partnerships and firm articulation agreements between 2- and 4-year institutions are essential ingredients to successful transfer. But in reality, the transfer process is much more complex; a significant amount of the preparation to transfer is the responsibility of the student. This has led to a need for organizations like PTK—“connector” organizations—to step in and help students navigate the transfer process and find their best-fit college while balancing affordability and access.

In addition to PTK Connect, PTK has developed an online curriculum for its members that helps them successfully transfer. Members learn how to understand financial aid and student loans; create a personal transfer timeline; increase their chance at getting into a selective college; make the most of their campus visits; submit a strong transfer application; and create a scholarship resume.

Partnering With Phi Theta Kappa

There are multiple ways 4-year colleges and universities can partner with PTK to support and recruit transfer students. Institutions can get to know their local chapters through community colleges with whom partnerships or articulation agreements are in place or by searching PTK’s chapter database (<http://ptk.org/chapterdirectory>).

Establishing a transfer scholarship exclusively for PTK members ensures an open door to some of the brightest and hardest-working students in the country. Some colleges only require that a student be a PTK member; others designate scholarships for various levels of engagement in the society, such as holding leadership positions at the chapter, regional, or international level. PTK alerts its members to each new transfer scholarship in a variety of ways, putting it directly in front of the college’s desired audience.

Colleges can also recruit members face-to-face at the Senior College Transfer Fair during PTK Catalyst, the annual convention, in April each year. Convention sponsorships are available as well.

Partnering with PTK to recruit transfer students can help institutions diversify their student bodies, build their honors programs, and bring more exceptional students to its campus. For more information, visit ptkconnect.org, call 866-286-8453, or email collegerelations@ptk.org.

Addendum B

TAU SIGMA NATIONAL HONOR SOCIETY

Recognizing and Promoting the Academic Excellence and
Involvement of Transfer Students

Lee Colquitt

Tau Sigma National Honor Society (Tau Sigma) is a 501(c)(3) organization that was founded at Auburn University in 1999 with the mission to recognize and promote the academic excellence and involvement of transfer students. Since 1999, Tau Sigma has established chapters at over 200 4-year colleges and universities in 44 different states and has inducted over 100,000 members. The Tau Sigma national office is located in Auburn, Alabama.

Tau Sigma was initially created as an organization to help Auburn University better serve its transfer population. In 1999, Auburn had an increasing number of transfer students enrolling in the university who were underrecognized and underserved. Tau Sigma was formed so that Auburn would have an identified group of high-achieving transfer students who were committed to improving the academic experience for all of Auburn's transfer students.

After a couple of years of success, we began thinking that since Tau Sigma had been helpful at Auburn, then perhaps it would be helpful at other schools as well. We conducted some research on who was doing work in the first-year and transfer experience areas and identified John N. Gardner as someone who was a pioneer in this space. We contacted him and discussed what an honor society for transfer students might look like and whether there might be a need for one. He was very encouraging and kind, and he offered some very helpful advice.

After visiting with Gardner, we submitted a proposal to present the idea at a Students in Transition meeting in Pittsburgh. There were about a dozen or so people at the presentation, and, after the presentation, a few individuals expressed some interest in establishing a chapter at their schools. At that point, we formed a non-profit corporation and began the Tau Sigma National Honor Society.

Today, Tau Sigma serves a diverse group of colleges and universities, each having its own student demographic and unique set of transfer student challenges. The target college or university is a 4-year institution that has an incoming transfer population of at least 300 students each year. A Tau Sigma chapter provides a college or university with a mechanism to encourage and recognize strong academic achievement among their transfer population. In addition, a chapter provides the institution with a group of high-achieving, motivated transfer student leaders who can develop ideas as to how to better serve transfers and the assistance needed to execute these ideas.

To be eligible for membership in Tau Sigma, a student must transfer into a 4-year college or university with at least 1 year's worth of academic credits (as defined by the chapter's college or university). Then, during the first term in which the student is full time at the college or university to which they transfer, they must either earn a 3.5 GPA on a 4.0 scale or be in the top 20% of all transfers during that term.

In addition to the benefits that a Tau Sigma chapter provides the college or university, a chapter also provides benefits to its members. First, Tau Sigma provides its members formal recognition for high academic achievement. Second, it provides opportunities for its members to assume a leadership position and early involvement in an organization that serves the university and others through philanthropic endeavors. For many transfers, it is difficult to obtain a leadership position in campus organizations after joining the institution much later than the students who enrolled immediately out of high school. Third, it provides its members an opportunity to very quickly connect socially with a group of students that shares a common experience.

Tau Sigma also provides its members opportunities to earn a scholarship and participate in an annual leadership conference. Tau Sigma's scholarship efforts began rather modestly in 2004, with nine students submitting applications for scholarships. Four scholarships were awarded for a total of \$2,500. In 2019, we had 101 applicants, and we awarded 59 scholarships for a total of \$100,000. In 2011, we held our first Tau Sigma Leadership Conference in Washington DC. We have since held eight more in Washington, Orlando, Chicago, and San Antonio. At the conference, members enjoy hearing a guest speaker, sharing their successes and ideas with other chapters, networking with other members, and visiting a world-class city.

Visit www.tausigmanhs.org to find out more about Tau Sigma. In addition to the extensive amount of information about Tau Sigma on our website, there is also a "Frequently Asked Questions (FAQ)" link under the "About Us" drop-down box. To establish a chapter, click the "Prospective University Advisor/Admin" drop-down box, click "Preliminary Charter Information Form," print off the form, fill it out, and send it to the email address at the bottom of the form. Also, if you would like to contact us directly by phone or email, there is contact information provided on our website.

Addendum C

THE NATIONAL INSTITUTE FOR THE STUDY OF TRANSFER STUDENTS

Janet Marling

Along with the editors and contributors of *The Transfer Experience*, the National Institute for the Study of Transfer Students (NISTS) is on a mission to challenge the status quo and make transfer less difficult for the over a million transfer students attending colleges and universities across the United States.

Transfer is a vital mechanism for closing the racial and income equity gaps in higher education. We look to you—higher education practitioners, researchers, faculty, and administrators—to eliminate the institutional barriers that make the transfer experience unnecessarily complex. It's an imperative and one we are prepared to engage in with you.

Our Foundation

NISTS envisions a world where every higher education professional and institution provides a holistic and inclusive transfer student experience. To achieve this vision, we empower practitioners, faculty, and administrators to be transfer champions—agents, connectors, and advocates—who challenge the status quo to improve the transfer student experience.

The trifecta of education, research, and advocacy form our organizational values. At our core we value the power of *education* to build the empathy, knowledge, and skills needed to confidently influence change and drive improvements to the transfer student experience. We develop and curate professional development resources and training opportunities for practitioners, faculty, and administrators at 2- and 4-year institutions. We've hosted an annual conference for nearly 20 years, and you can explore archives from the last three conferences on our website.

We value the necessity of using *research* and evidence from a variety of sources to inspire our work and inform solutions around the complexities and challenges of

transfer. We are committed to translating research into practical, actionable insights that professionals can use, grounding our professional development offerings in this research. Additionally, we've set a strategic transfer agenda by analyzing the current research, identifying gaps, and conducting or commissioning research to fill those gaps.

We value the critical role of *advocacy* in ensuring today's mobile learners, who possess unique backgrounds, needs, and identities, have access to the opportunities and resources they need to achieve their academic goals.

Guided by these values, NISTS is committed to ensuring that our stakeholders can confidently and competently execute their work on behalf of transfer students. Specifically, we are committed to providing credible and timely professional development that is

1. relevant, practical, and culturally responsive,
2. easy to find and use, and
3. designed to maximize learning and implementation in a variety of contexts.

We are committed to engaging in a systems approach to problem-solving that

1. brings together varied expertise,
2. is grounded in true collaboration and equal investment, and
3. results in intentional outcomes-driven partnerships.

We are committed to helping practitioners, faculty, and administrators

1. acknowledge and celebrate transfer students' diversity, experiences, and capabilities;
2. leverage their roles to mitigate the complexities inherent to the transfer transition; and
3. create and propel students through a holistic and an inclusive transfer experience.

Our Beginning

NISTS was founded in 2002 by Bonita C. Jacobs in response to the lack of professional development opportunities and research literature focused specifically on transfer students. In 2003, NISTS held its inaugural conference at the University of North Texas with over 300 attendees from over 30 higher education institutions and 32 states. In July of 2011, Jacobs became the first female president of the University of North Georgia (UNG), then North Georgia College and State University. The following year, NISTS relocated to UNG's Dahlonega campus, where we reside today.

Our Events and What to Explore

While the annual conference has been our signature event, NISTS has expanded its portfolio to include National Transfer Student Week, held nationally the third week in October, and the Transfer Student Ambassador Program. NISTS also presents the annual Bonita C. Jacobs Transfer Champion Award, the Barbara K. Townsend Dissertation Award, and a research grant award.

We invite you to visit our website (www.nists.org) to explore the following resources:

- Conference archives
- Recent transfer research
- Guide to gathering transfer student data
- National transfer data
- Transfer communication audit
- Transfer resources by unit/area
- Guide to developing a transfer-friendly website
- Advocacy toolkit (anticipated 2021)

Creating meaningful change for our students requires continuously thinking about how we can adapt and evolve; tapping into new ideas, influences, knowledge, and inspiration from multiple and perhaps seemingly unrelated sources to create solutions that make all the difference for our students. We look forward to supporting you in this important work!