# **Leadership Academy for Student Success Module 3:** **Improving Transfer at Scale**

## Facilitation Guide

This guide provides an overview of the third module in the Leadership Academy for Student Success, originally led by the Success Center for Ohio Community Colleges. This curriculum is developed in partnership with the National Center for Inquiry and Improvement and the Aspen Institute College Excellence Program and draws from Aspen’s fellowship curriculum and additional modules developed for and by the OACC Leadership Academy.

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### *Thank you to the Ascendium Education Group, the ECMC Foundation, and The Kresge Foundation for their support of scaling the Leadership Academy for Student Success.*

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Introduction

## Curriculum Overview

The curriculum is based on findings from the [[Aspen Institute College Excellence Program](https://highered.aspeninstitute.org/)](https://highered.aspeninstitute.org/), with aligned small group discussion activities and prompts to deepen and apply learning. This version of the curriculum is designed to provide mid-level community college staff and faculty with an understanding of critical student success and change management concepts. The goal is to prepare them to advance to more senior-level positions at their institutions or to more effectively lead from their current role.

This curriculum is designed with 10 modules in a progressive sequence, though modules may be delivered individually for targeted learning. The full sequence is included at the end of this module as a reference.

This curriculum is designed to help meet the following overarching Module 3 goals:

* Articulate scaled strategies and practices to improve excellence in students’ transfer and bachelor’s attainment outcomes, including through effective partnerships with four-year colleges and universities
* Practice strategies to better understand the student experience

## Facilitation Overview

This guide includes module details with facilitation guidance and suggestions for pre-work. A customizable PowerPoint deck and Participant Toolkit are included, along with the *National Models of Community College Excellence* reference document. This module is designed for in-person delivery; however, it can be adapted for the virtual environment. General virtual facilitation guidance, as well as additional considerations to deepen the learning, are at the end of this document.

This module will take 3-4 hours to deliver. We recommend that you take time in advance to adapt the suggested agenda and make any necessary customizations to curricular materials to fit your context. Facilitators with experience or knowledge of the module content will deliver the curriculum with the greatest impact. Talking points are included throughout the PowerPoint deck, though we encourage facilitators to put these notes into their own words and bring an institutional perspective to the curriculum where possible.

# Suggested Pre-work

### Consider having your participants complete this work prior to your session:

* Read: [*The Transfer Playbook* 2.0](https://highered.aspeninstitute.org/media/952)*,* The Aspen Institute and Community College Research Center (2025)
* Complete the [Transfer Assessment Tool](https://highered.aspeninstitute.org/assessments/transfer-assessment-tool) for your institution by reflecting on current practice. Bring your completed assessment to the session.
  + *Note: This assessment tool is aligned to the original* Transfer Playbook*. A new assessment tool aligned to The Transfer Playbook 2.0 is forthcoming.*
* Read: *National Models of Community College Excellence*

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# Suggested Detailed Agenda

# Leadership Academy for Student Success

## Module 3

***Note****: This agenda provides the suggested structure and timing of the module. Adjust timing and add breaks as necessary for your delivery. Be aware that the referenced slide numbers and Participant Toolkit page numbers may change as you adapt materials for your context.*

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| **Estimated Timing** | **Session Details and Facilitator Notes** | **Materials** |
| **10 minutes** | **Welcome and Overview**  Welcome (10 minutes)   * Welcome participants to the session * Review:   + Module learning goals   + Module overview   + Pre-work assignments | *Slides 1-4 Participant Toolkit p. 2* |
| **30 minutes** | **Framing the Module and Defining the Issue**  *Facilitation notes:*   * *Talking points for the presentation are provided in the notes section of the PowerPoint.* * *For the data slides, you may replace sample national data with state-specific data.*   Turn & Talk (5 minutes)  What is one new question or idea you had after completing the Transfer Assessment Tool?  Presentation (25 minutes)   * Twothirds of good jobs will favor bachelor’s degrees * Bachelor’s attainment varies by family income level. * Bachelor’s attainment varies by race/ethnicity. * Broken transfer negatively impacts millions of students. * Transfer outcomes have improved slightly but remain too low. * Transfer: Low outcomes, high disparities * Strong start fails to translate into timely completion * Transfer reform must support timely and affordable degree completion * Prior award completion is associated with stronger outcomes * Key takeaways: Why does improving transfer at scale matter? | *Slides 5-17 Participant Toolkit p. 3* |
| **35-40 minutes** | **Strategies for Improving Transfer Outcomes**  *Facilitation notes:*   * *Talking points for the presentation are provided in the notes section of the PowerPoint.* * *Multiple case study examples are presented. Select the case studies most relevant to your context.*   Introduction (5 minutes)  Aspen’s *Transfer Playbook 2.0* Strategies:   * Prioritize Transfer at the Executive Level to Achieve Sustainable Success at Scale * Align Program Pathways and High-Quality Instruction to Promote Timely Bachelor’s Completion within a Major * Tailor Transfer Advising and Nonacademic Supports to Foster Trust and Engagement   Presentation (30 minutes)   * **Strategy 1**: Prioritize Transfer at the Presidential Level to Achieve Sustainable Success at Scale ​   + Essential Practice 1: President-led, team-based, and well-resourced partnerships   + Essential Practice 2: End-to-end (re)design of the transfer student experience   + Transformational Transfer Models   + Essential Practice 3: Transfer student-centered systems and processes   + Case studies: Choose at least one to present, considering which case studies may be most relevant to your context:     - ADVANCE Partnership (large college, suburban)       * The ADVANCE program is a high-performing dual admission partnership between Northern Virginia Community College and George Mason.       * For more information, see:         + The ADVANCE [website](https://www.nvcc.edu/advance/)         + [*The Transfer Playbook 2.0*](https://highered.aspeninstitute.org/media/952), pp. 8-9, 12-15, 20, 22-23, 25     - Arizona Western College and Northern Arizona University-Yuma (co-located 2- and 4-year colleges in rural community)       * Despite co-located campuses since 1988, each institution remained organizationally separate       * Presidents and leadership teams met in person to create a shared "North Star" vision and devise a partnership structure       * Presidents set the “Big Hairy Audacious Goal” (BHAG): double the rate of earned baccalaureate degrees in La Paz and Yuma counties by 2035​       * For more information, see: [*The Transfer Playbook 2.0*](https://highered.aspeninstitute.org/media/952), pp. 7-8, 11-13, 18-19, 47-48 * **Strategy 2:** Align Program Pathways and High-Quality Instruction to Promote Timely Bachelor’s Completion within a Major   + Essential Practice 1: Clear four-year sequences that promote learning and major progression   + Essential Practice 2: Systematized translation of maps into tailored educational plans   + Essential Practice 3: Strengthened instruction, academic support, and curricular alignment​   + Case studies: Choose at least one to present, considering which case studies may be most relevant to your state context:     - ADVANCE Partnership (large college, suburban)       * Annual ADVANCE Academic Summit: Full day meeting with NOVA and George Mason leaders and faculty focused on curricular and instructional alignment       * For more information, see:         + The ADVANCE [website](https://www.nvcc.edu/advance/)         + [*The Transfer Playbook 2.0*](https://highered.aspeninstitute.org/media/952), pp. 35-36, 52-53     - Alamo Colleges: Northwest Vista College (Five-college district, urban)       * 2025 Aspen Prize finalist       * Since founding, NVC has been a pioneer among community colleges for embedding writing in the curriculum       * Student Success Fridays: Weekly cadence of interaction between writing center staff, advisors, and faculty       * For more information, see:         + [*The 2025 Aspen Prize*](https://highered.aspeninstitute.org/media/956)*,* p. 19         + [*The Transfer Playbook 2.0*](https://highered.aspeninstitute.org/media/952), p. 38, 41 * **Strategy 3:** Tailor Transfer Advising and Nonacademic Supports to Foster Trust and Engagement   + Essential Practice 1: Early, sustained, and inevitable advising systems​   + Essential Practice 2: A trained, knowledgeable, and caring advising corps​   + Essential Practice 3: A transfer-specific approach to holistic success   + Case studies: Choose at least one to present, considering which case studies may be most relevant to your state context:     - Imperial Valley College (small college, rural setting, union context)       * 2023 Aspen Prize winner       * Low regional college-going and BA attainment rates       * IVC offers dual enrollment in 14 out of 15 K-12 districts in service area with advising from both IVC and high school staff       * For more information, see:         + [*The 2023 Aspen Prize*](https://highered.aspeninstitute.org/media/60), pp. 10-13         + [*The Transfer Playbook 2.0*](https://highered.aspeninstitute.org/media/952), p. 19, 33, 47     - Prince George’s Community College (suburban, 96% students of color)       * Located in the Washington, D.C. suburbs       * “Appreciative advising” model focuses on student strengths, developing a sense of belonging, and fostering academic self-efficacy       * For more information, see: [*The Transfer Playbook 2.0*](https://highered.aspeninstitute.org/media/952), pp. 38, 44, 50-51 | *Slides 18-35 Participant Toolkit pp. 4-6* |
| **10-15 minutes** | **Transfer—Models of Excellence**  *Facilitation notes:*   * *This may be a good place to implement a “Walk & Talk” where participants move and find a partner from another table. You may encourage participants to connect with a partner they haven’t yet connected with this session. If you have a time constraint, you may consider a “Turn & Talk” with a nearby partner.* * *Remind participants they read the Models of Excellence case studies as pre-work and for this activity, they’ll be focusing specifically on transfer practices.*   Independent Reflection (5 minutes)   * Instruct participants to review the transfer sections of the Models of Excellence case studies for Alamo Colleges District, Imperial Valley College, and Valencia College and then reflect on the questions in the Participant Toolkit on p. 7.   + How do elements of the framework we just discussed show up in these examples?   + How are these transfer case studies different from what you see in traditional transfer practices?   + What are you wondering?   Partner Discussion (5 minutes)   * Participants discuss their reflections with a partner. | *Slides 36-37 Participant Toolkit p. 7* |
| **40-50 minutes** | **Student Experience: College Website Deep Dive and Center for Community College Student Engagement (CCCSE Video Review)**  *Facilitation notes:*   * *Two activities make up this portion of the agenda. We recommend splitting them into two 20-minute sections. However, feel free to adjust the time, as needed, depending on participation and feedback.* * *You may encourage participants to take a brief stretch break when they have completed the website deep dive. If presenting virtually, you may ask participants to signal they have completed the activities by turning their camera back on or placing a thumbs-up emoji in the chat.* * *If relevant for your audience, participants may want to partner with a college colleague. If presenting virtually, you may want to pre-assign breakout rooms if participants are working with a partner from their college. Participants may also go off-camera and work individually.*   Activity: Website Deep Dive (20 minutes)  **Activity and Reflection (15 minutes)**   * First, using one of the [Student Persona Cards](https://www.dropbox.com/scl/fi/1smzronw8tfyfka9jg7ml/Student-Persona-Cards.pdf?rlkey=9q2hv3qvzm61m0ng5ror8b5fr&e=1&dl=0), imagine you are a student registering at your community college. Adopt the perspective of this student. * Next, take 20 minutes to complete a “website deep dive.” Following the instructions in your Participant Toolkit, go to your college’s website and try to find the information you need to select your community college courses and transfer to the four-year institution. Then, go to the four-year university’s website and try to confirm you are taking the right classes. * As you complete the activity, answer the questions in your Participant Toolkit. Questions are aligned with the *Transfer Playbook 2.0’s* three main strategies.   + **Prioritize Transfer at the Executive Level to Achieve Sustainable Success at Scale:** What classes will you need to take your first semester if you want to transfer into your program of interest at the four-year university?   + **Align Program Pathways and High-Quality Instruction to Promote Timely Bachelor’s Completion within a Major:** Is there a structured pathway—often reflected in a program map—to transfer to the four-year university and study your area of interest? How easy or difficult was it to find this information on the website? How many clicks did it take?   + **Tailor Transfer Advising & Nonacademic Supports to Foster Trust and Engagement:** What career options are available after you transfer and complete a degree? What do salaries look like for these career options? Is this information available on either website? How do you register and get started? Are the next steps clear? Is it clear whom you should talk to for more information?   **Group Discussion (5 minutes)**  What surprised you? How easy or difficult was it to find this information on the website? Why? To what degree is your institution truly prioritizing and promoting transfer?  Activity: Understanding the Student Experience (20 minutes)  **Student Experience Videos (5 minutes)**   * Play the two videos linked below about student experiences with transfer. Participants will hear more about the value of a transfer center, preventing transfer shock, and providing a sense of belonging.   + [*https://www.youtube.com/watch?v=Usi\_yLkAf7o*](https://www.youtube.com/watch?v=Usi_yLkAf7o)   + [*https://www.youtube.com/watch?v=r94fysrESgo*](https://www.youtube.com/watch?v=r94fysrESgo)   + *Facilitation note: We recommend playing the videos from separate browser tabs to avoid any issue with the embedded videos not playing properly from the slide deck. If presenting virtually, place the links in chat for participants to watch independently. Remind them to turn off their camera and put themselves on mute.*   **Group Discussion (15 minutes)**   * What resonated with you from the videos? * What is one thing you learned from the videos that prompts you to rethink how you approach transfer at your institution? * Based on that reflection, and the responses in your transfer assessment tool, what is one next step you might take (e.g., a conversation, reading, data review, etc.) to more fully explore this different way of thinking? | *Slides 38-48 Participant Toolkit pp. 8-10* |
| **45-60 minutes** | **Panel Discussion: Practitioner Perspectives on Improving Transfer**  *Planning considerations: There are no standardized curricular materials for the panel discussion. We recommend you invite some combination of two- and four-year transfer leaders to join the panel (such as director/dean of transfer, VP of student success/academic affairs, director of advising, etc.). We encourage moderators to share the Aspen* Transfer Playbook 2.0 *strategies with panelists ahead of time via email. We also recommend meeting either in person or via Zoom with panelists to address any questions they may have on the curriculum for this module and to develop a series of panel questions and responses. We recommend aligning question prompts to the key ideas in the* Transfer Playbook 2.0*. This will ensure alignment between panelists’ reflections and the curricular materials. Optional prompts are below. Customize the questions to align with panelists’ strengths and experiences.*   * *Why is seamless transfer and bachelor’s attainment so important for your students and community?* * *How have you removed barriers and streamlined pathways for students seeking to transfer?* * *What successful strategies has your college implemented for developing and prioritizing transfer partnerships with 2-/4-year institutions? How do you share data and resources? What have the results been for students?* * *What process does your college use to build and update transfer-specific program maps?* * *What resources do advisors at your college have to identify, support, and monitor the progress of transfer students?* * *What is one practice you’d like to see your college implement in the future to ensure seamless transfer and baccalaureate attainment?*   *We recommend limiting the panel discussion to 30-45 minutes. This will allow 10-15 minutes for participants’ questions.* | *Slide 49 Participant Toolkit p. 11* |
| **10-15 minutes** | **Module Closing: Debrief and Reflections** Independent Reflection (5 minutes)  Participants reflect:   * What are your takeaways from the module? * What questions do you have? * As a result of this learning and reflections from your transfer practice assessment, what might you:   + …keep doing?   + …stop doing?   + …start doing?   Walk & Talk (5 minutes)  Participants find a partner and discuss their reflections.  Group Debrief (5 minutes)  Allow a few participants to share closing reflections.   * What learning might you take back to your current role based on this module? * What might you share with others at your institution? | *Slides 50-53 Participant Toolkit p. 12* |

# Techniques for Virtual Facilitation

While originally built for in-person delivery, all our module materials are designed for easy translation to a virtual environment. If you are facilitating this module virtually, it will be helpful to keep the following tips in mind:

* It may save time to create breakout groups randomly. However, if you would like to create specific breakout groups for activities, we recommend you do so ahead of time, so the rooms are ready to deploy immediately after you give instructions.
* Facilitation options for group discussions include sending participants into random Zoom breakout rooms in partners or trios, or facilitating a whole group discussion using a virtual whiteboard, such as Mural, using the chat feature, or using the raise hand feature.
* For virtual delivery, we recommend you omit Walk & Talks/Turn & Talks or turn them into group discussions.

# Considerations for Additional Learning

Leadership Academy modules were originally situated within a larger session with further opportunities for customization. While not included in the open access materials package, consider including some of the following presentations or activities to enrich your facilitation of this module.

## State Transfer and Articulation Overview

Consider offering additional session time to ground participants in your state/institution transfer context. You may want to ask a strong transfer partner to join the presentation. Consider what key ideas and/or data could be useful for your audience to have in mind throughout the module.

## Activity: Analyzing State Transfer Data

This activity allows participants to practice analyzing transfer data for their region. Using transfer data that is already available to you/the colleges in your state, develop a data report for participants to explore. You may use data from the state- and/or college-specific report where available. Once you have identified data sources, please create questions that align with the metrics participants will investigate. Questions may include:

* What percentage of students transfer to a four-year institution within four years of entry? What percentage of students complete a bachelor's degree within six years of entry?
* Who are the college’s biggest transfer partners?
* Of students who transfer, what percentage complete a degree at the college prior to transfer?
* What strengths and gaps in transfer success can you identify (consider both overall outcomes and outcomes for lower-income students and students of color)?
* Are the college’s transfer outcomes consistent with what administrators, staff, and faculty believe to be the facts? In what ways?
* Do you regularly evaluate transfer outcomes? If not, how might you begin to regularly integrate transfer data into your work?
* What information do you still need for your specific college and its students to assess the effectiveness of your transfer programs? What other data might you want to collect (i.e., trends over time) to determine which transfer partnerships are the most promising?

We suggest providing time for participants to explore the data reports independently, discuss the questions as a small group, and debrief as a whole group.

Leadership Academy Module Sequence

This curriculum is designed with 10 modules in a progressive sequence, though modules may be delivered individually for targeted learning. While these modules may be delivered as stand-alone learning sessions, we recommend referencing the sequenced curriculum below and considering if there is any content from other modules that may support your participants’ learning.

If delivering Module 3 (Improving Transfer at Scale) as a stand-alone module, we recommend reviewing Module 1 (Defining Student Success) and Module 9 (Leading Strategic External Partnerships) to consider what additional content from those modules might support your participants’ learning.

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| **Excellence in Student Success at Scale** | | |
| **Session 1: The Essential Roles of Leadership in Student Success** | **Session 2: Keeping Students’ End Goals in Mind** | **Session 3: The Student Experience** |
| Module 1: Defining Student Success | Module 2: Improving Labor Market Outcomes  Module 3: Improving Transfer at Scale | Module 4: Improving Teaching and Learning  Module 5: Aligning Completion Strategies to Post-Graduation Success |
| **Transformational Leadership to Advance Student Success** | | |
| **Session 4: Transformational Leadership for Student Success** | **Session 5: Institutional Capacities to Advance Reform** | **Session 6: Strategic External Partnerships and the Leadership Journey** |
| Module 6: Leadership Qualities for Student Success | Module 7: Leading Finance Strategically to Advance Reforms  Module 8: Leading Strong Teams for Transformational Change | Module 9: Leading Highly Effective Strategic External Partnerships  Module 10: Scaling and Improving Dual Enrollment |