

RESPONDING IN THE MOMENT

Policies to Advance a Next-Generation Transfer System





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PREFACE

The coronavirus pandemic has introduced extraordinary challenges to college students and higher education institutions in the United States. While long-term enrollment and financial implications are still unknown, one thing is certain: The pandemic has increased student mobility and the attention to transfer students. Unprecedented numbers of students have changed direction and institutions, abandoning their original plans for fall 2020 enrollment, or choosing to transfer to another college for financial or other reasons. Colleges nationwide have been reexamining credit transfer policies to account for millions of courses graded as pass/fail. Moreover, many students enrolled in community colleges have less certainty about if and when they might transfer to a four-year college or university.

Community colleges and the transfer pathway have long offered a gateway to a bachelor's degree and the promise of economic mobility for millions of students, including disproportionately large numbers of students of color and those

from low-income households. In reality, the system fails far too many students. Only 13 percent of students who start at community college earn a bachelor's degree within six years, and white community college students are twice as likely as Black and Latinx students to do so. Similarly, only 16 percent of low-income students who start at a community college complete a bachelor's degree, compared to 34 percent of high-middle income and 43 percent of high-income students.

While disruptive in many ways, the current context offers an opportunity to advance transfer student success. This is especially important given the renewed national attention to racial justice, including a focus on systemic inequities within higher education. The current pandemic and subsequent economic fallout are disproportionately affecting Black, Latinx, Indigenous, and low-income student communities, the same students who have, for too long, endured unacceptable transfer outcomes.

In this brief and its companion, *Responding in the Moment: Practices to Advance a Next-Generation Transfer System*, transfer experts offer specific policy and practice recommendations that can be implemented today to advance transfer student success, both in the short-term and as part of a strategy to address structural barriers. Several immediate action steps leaders can employ include:

- **Change academic policies that stand in the way of transfer student success**

Coupled with the switch to online learning, current rates of student transfer offer an opportunity to make short-term changes to credit applicability policies that could be adopted for the long term. Policymakers at the state and institutional levels can use this opportunity to make several specific changes, including accepting and applying pass/fail credits to programs of study regardless of letter grade requirements as an equity consideration during the COVID-19 pandemic; terminating residency requirements for students close to graduation; and applying credits toward degrees for transfer students who do not complete the full set of courses established in transfer agreements.

- **Communicate clearly to students and their advisors**

During this time of increased student mobility and uncertainty, state higher education systems and institutions must improve communications to students who have transferred or who are considering transferring. Specifically, colleges and states should clearly and concisely document policy changes related to COVID-19 on existing websites and other platforms; implement student outreach campaigns through multiple communications channels; and communicate these policy changes to and hold trainings for advisors, faculty, and other professionals who support students.

- **Demonstrate that transfer remains a priority in the moment and in the long-term**

While the surge in student mobility may be temporary, it offers the opportunity to change the narrative about the importance of improving transfer student outcomes. Citing the presence of large numbers of transfer students, their current outcomes, and deep inequities among transfer students of color, campus and system leaders can advocate for change. Among the actions that can be taken are issuing a statement from state and postsecondary leaders prioritizing transfer as a core feature of state reform efforts during and after COVID-19; appointing a transfer commission and committee with a clear charge to make specific recommendations for improving transfer student success before the end of the current academic year; and mandating annual reports on transfer student outcomes.

Fixing the broken transfer pipeline requires both long and short-term strategy at the federal, state, system, and institutional levels. These briefs offer advice on where leaders can start and how they can continue to prioritize transfer. Enhancing transfer student outcomes requires both institutional leaders and policymakers to understand that current issues facing transfer students are not temporary, but rather, long-standing impediments to fulfilling goals around degree attainment, racial equity, and institutional sustainability. As these briefs make clear, actions taken today can help in the short-term while advancing long-needed transfer student success for years to come.



INTRODUCTION

The confluence of several factors, such as the global COVID-19 pandemic and calls for racial justice—as described in the preface—demand policies that facilitate credit applicability and transfer between two- and four-year institutions. A study completed by the U.S. Government Accountability Office found that students who start at two-year institutions and transfer to four-year institutions represent 37 percent of all transfers—the largest group of transfer students. Students who successfully transferred from a two-year to a four-year institution lost an average of 26 percent of their credits,¹ resulting in a high degree of inefficiency in credit applicability in the transfer path students are most likely to pursue.

As the data make clear, transfer has long been broken, and the burden of inefficient and ineffective transfer falls hardest on the shoulders of low-income students and Black, Latinx, and Indigenous students.² State leaders cannot allow the broken transfer system to continue to get in the way as students navigate these incredibly challenging times. Looking ahead, policy should be informed by a sound understanding of the root causes of inefficient and ineffective credit applicability.

While all states have policies in place to facilitate community college transfer, the fact that all states have weak transfer outcomes³ makes clear that those policies insufficiently address how community college credits are applied to programs of study and graduation requirements. Some policies, such as common course numbering, facilitate courses transferring

as unassigned elective credit. Others, such as credit equivalency agreements, may provide guarantees for general education credit and some pre-major courses, but don't cover all courses in all majors.⁴

There is sometimes an assumption that 2+2 admissions agreements—state and system policies that create a pathway for students to complete a bachelor's degree with two years at a community college and two years at a baccalaureate-granting college or university—suffice for building smooth transfer pathways. Even statewide or systemwide transfer pathways that recognize lower division general education and pre-major courses for all majors, however,⁵ have a persistent credit loss problem due to the fact that most students who transfer do not participate in or complete the 2+2 program pathways.⁶

The Tennessee Transfer Pathways (TTP)

The TTP, administered through the Tennessee Higher Education Commission, articulate clear program paths into programs of study. Students who complete a TTP earn an associate degree with 41 general education credits and 19 credit hours in their program of study at their transfer institution. Early results show students who participate and complete TTP associate degrees are more likely to earn a bachelor's degree, and that low-income students and students from minoritized communities are far more likely to earn a degree. Unfortunately, low participation in TTPs and low completion rates in TTPs prevent many students from reaping the benefits of the program.⁷

Existing policies rely too heavily on students having a clear program of study and transfer institution in mind when (or soon after) they enter community college. For example, 2+2 programs help students reach graduation efficiently and with minimal credit loss only when students know the exact 2+2 pathway they want to complete. Unfortunately, many students enter higher education unclear about their career goals and postsecondary plans, and transfer advising at community colleges does not always help them find clarity. As a result, many students either choose not to enter 2+2 programs or, if they do enter, do not complete them.⁸ The rigid structure of the 2+2 program is a tremendous asset for students who are fully committed to a specific program of study, but is problematic for students unclear about their academic goals.

An Education Northwest study on improving credit mobility that examined transfer policies in 10 states, interviewed state and institutional leaders, and engaged transfer students about their experiences, concluded that: “Existing policies do not address the common reasons students lose credit: student uncertainty and resource constrained advising.”⁹

With more bachelor’s-seeking students expected to shift their enrollment across institutions due to the pandemic, it’s important to ensure that problems of program applicability do not create barriers that prevent students from earning a degree. State and system policy leaders must adopt evidence-based solutions that not only mitigate the negative impact of COVID-19 on student transfer, but also work to eliminate the long-standing barriers that have traditionally prevented transfer students—particularly low-income students and historically minoritized students of color—from achieving on-time degree completion.

This brief outlines a set of principles to guide the development and implementation of evidence-based transfer solutions. Those principles guide the suggested immediate and long-term policy solutions that state and system leaders should consider in order to address the structural barriers to transfer and degree completion for community college students.

The following near-term recommendations are informed by interviews with national, state, system, and institutional leaders with expertise in transfer policy:

- 1. Equip students, families, and student support professionals with the essential information necessary to minimize the impact of COVID-19 on student transfer, credit loss, program applicability, and degree completion.**
- 2. Create a statewide organizational structure to address immediate transfer challenges caused by COVID-19.**
- 3. Accelerate the scaling of clear programmatic pathways with strong attention to teaching and learning.**
- 4. Build a data, financial, and technology infrastructure for transfer and applicability.**

This brief concludes by applying the principles to a call to action to accelerate a long-term commitment to, and action on, the systemic national transfer reform that was necessary before the pandemic and is all the more necessary now.



Overarching Principles for Developing Short- and Long-Term Reforms to Build a Next Generation Transfer and Applicability System

Improved credit transfer and applicability for students cannot solve the myriad issues facing the nation, but letting the broken system languish will only contribute to growing racial and income inequities. Consequently, short-term efforts to ensure that COVID-19 does not exacerbate existing inequities must be combined with a long-term commitment to implementing systemic reforms that address the structural barriers to successful transfer and degree completion.

With research indicating that current policies are insufficient for increasing degree attainment among transfer students,¹⁰ and emerging insights from institutions that have achieved significant improvements in student outcomes by constructing clear pathways and implementing comprehensive advising systems,¹¹ it's possible to envision a next generation transfer and applicability system. State and postsecondary system leaders have a critical role to play in guiding and supporting policy reform and structural change that can result in dramatic improvements in degree attainment and more equitable outcomes for transfer students. A review of the research on transfer and interviews with state, system, and institutional leaders reveals the following principles to guide short- and long-term reforms:

Principle 1

Achieving equitable transfer student outcomes requires a new definition of transfer that

centers racial equity. State policymakers and system leaders must proactively craft a new narrative on transfer that shifts the focus from achieving course equivalencies to building clear programmatic pathways that enhance student learning, maximize credit applicability, minimize credit loss, and facilitate timely completion of a bachelor's degree. Existing transfer and credit applicability policies must be examined through a racial equity lens to ensure that institutions are relentlessly focused on achieving equitable student outcomes that enable all students to achieve their educational and career goals. Further, to advance a cohesive student success agenda, state, system, and institutional leaders must integrate strategies to improve transfer and credit applicability with efforts to redesign developmental education, differentiate math pathways, improve advising, and implement guided pathways.

Principle 2

Achieving equitable transfer student outcomes requires proactively providing comprehensive information to students, families, and student support professionals. State policymakers and system leaders must proactively communicate comprehensive, relevant and up-to-date information about the transfer process, applicability of credits, transfer program options, and more to students and families through all appropriate and effective communication channels.



Principle 3

Achieving equitable transfer student outcomes requires building incentives for institutions and students to create and use policies and practices that value learning and minimize credit loss. State policymakers and system leaders must develop funding incentives that reward institutions for successful transfer and degree completion. They must also support institutions in engaging in and sustaining the ongoing collaboration required to build robust transfer partnerships—such as dual admission and concurrent enrollment agreements—that guarantee credits will be applied to a student’s program completion, provide seamless advising and other supports, and offer students predictable and affordable pricing. Encouraging institutions to implement policies and practices is not enough, however. Leaders must also ensure students are encouraged to opt into and complete transfer pathways by providing clear, easy-to-navigate financial incentives (e.g., scholarships) that guarantee timely bachelor’s degree completion at a predictable cost.

Principle 4

Achieving equitable transfer student outcomes requires an enduring infrastructure to drive continuous improvement. State policymakers and system leaders must establish a state-level infrastructure that provides regular and sustained attention and activity focused on improving transfer. For example, regularly convene postsecondary leaders, faculty, advisors, and others critical to the transfer process to continuously discuss and improve

transfer systems. In addition, support state or system level culturally responsive professional development for critical actors, such as faculty and student support professionals, to generate improved and equitable outcomes.

Principle 5

Achieving equitable transfer student outcomes requires transparent, publicly available data on student outcomes and credit loss. State policymakers and system leaders must develop a statewide data infrastructure that creates a comprehensive student-centered view of the transfer process. There should be a particular emphasis on the experiences of low-income students, first-generation, Black, Latinx, Indigenous students, and students from other minoritized communities.

Principle 6

Achieving equitable transfer student outcomes requires technology solutions that accelerate the transfer process and nimbly capture student learning. State policymakers and system leaders must explore long-term investment in technology-based solutions that can document changes to program requirements, resulting in accurate, transparent, and accelerated application of transfer credits to programs of study.

While not all-encompassing, these principles describe the unique role that state and system leaders can play as they guide policy change and structural reforms across higher education segments and institutions.



Applying the Principles to Guide Immediate Response

While some reforms require considerable time and sustained resources to achieve, states and systems can set others in motion immediately to respond to the current transfer challenges that have emerged during the pandemic. The following recommendations address immediate challenges during COVID-19 and initiate systemic reforms to transfer and program applicability that are aligned with the above principles for long-term reform.

Recommendation 1. Equip students, families, and student support professionals with the essential information necessary to minimize the impact of COVID-19 on student transfer, credit loss, program applicability, and degree completion

As students consider their enrollment options and potentially adjust plans because of the pandemic, it's essential that states and systems provide clear guidance to students, families, and advisors to reduce the likelihood that degree progress will be disrupted.¹² With evidence suggesting that the lack of information about transfer and credit applicability can lead to credit loss and unsuccessful transfer,¹³ it's important that state and system leaders overcommunicate to students as they navigate their postsecondary experience during the pandemic.

As a first step, state and system leaders should clearly document and communicate any COVID-19-related changes to academic policies and practices—such as changes to admission requirements, placement processes, or grading

options—to postsecondary institution leaders, student support professionals, students, and families.

In addition, states and systems should work with institutions to encourage students to take specific steps that will increase their likelihood of transferring and earning a postsecondary credential on time. For example, a growing body of evidence demonstrates the positive impact of students, in their first year of enrollment, selecting a program path, completing program-aligned gateway math and English courses, enrolling in 30 credits, and completing courses in their program path.¹⁴

To help entering community college students reach these milestones and be well-positioned for successful transfer, states and systems should encourage students to take the following steps upon enrollment:

- Meet with an advisor to discuss academic interests and career goals to make an informed decision about a program of study and identify a preferred transfer institution within the first year
- If undecided, identify a “meta-major” or a cluster of disciplines of interest to help choose a program of study by the end of the first year
- Participate in the most appropriate 2+2 or other credit equivalency arrangement to maximize the likelihood that credits will be applied to their intended program of study at their transfer institution
- Use available resources, such as degree maps and advising appointments, to develop a first-

year course schedule that includes gateway math and English, as well as recommended pre-major and general education requirements aligned to the chosen program of study or meta-major

- Whenever possible, plan to complete 30 credits in the first academic year, either by taking 15 credits per semester or staying continuously enrolled through winter and summer sessions
- Pay special attention to institutional policies related to course withdrawal and grading options—including pass/fail—and seek advisement to understand implications for admission and credit applicability at the intended transfer institution.

States and systems should implement a systemwide student outreach campaign coupled with a professional development strategy for advisors, faculty, and other professionals who support students. The outreach campaign should include a statewide online transfer resource that provides essential information and evidence-based recommendations to support successful transfer and degree completion. In addition, states and systems should reinforce recommendations to students and provide real-time updates by proactively and regularly communicating with students, families, and student support professionals through social media, email, chat bots, and text messaging.

In recognition of the important role that advisors and faculty play, states and systems can host online professional development workshops to share culturally responsive practices to support students during COVID-19 and beyond. Guidance should be designed to help students identify their academic and career goals, choose a program path, enroll in coursework on their program path, and navigate the transfer process.

Creating targeted and action-oriented communication mechanisms for students and staff can be sustained and improved upon over time as an essential element of a next-generation transfer system. States and systems should evaluate the effectiveness of these strategies so they can be adapted and scaled.

Recommendation 2. Create a statewide organizational structure to address immediate transfer challenges caused by COVID-19

State and system leaders should use their convening power to fully engage institutions in collaborative efforts to improve transfer in both the short and long term. Through strong facilitation, states can help institutions navigate challenges to transfer caused by the pandemic, interrogate transfer policies through a racial equity lens, identify weaknesses in transfer agreements, forge new agreements among institutions, review existing data on transfer outcomes, and engage in more systemic discussions focused on improving transfer and program applicability. Establishing a statewide transfer commission and relevant working groups to examine both immediate and long-term challenges to transfer through an equity lens can establish an organizational structure to facilitate systemic reform.

This organizational structure should not be limited to negotiating or reviewing credit and course equivalencies. The structure should focus on statewide or systemwide solutions to transfer that extend beyond discussions of credit applicability to a focus on building comprehensive support systems to facilitate transfer and degree completion. Once established, the statewide structure should consider the following strategies.

The first order of business for a new statewide transfer commission should be a joint statement from state, system, and postsecondary leaders announcing that supporting students through transfer is a core priority during (and after) the pandemic. The statement should include immediate steps institutions are committed to implementing that will enable more seamless transfer and applicability during the pandemic. For example, the Texas Transfer Alliance issued a call to action, calling upon all Texas institutions to directly engage the issue of transfer as part of their COVID-19 response planning.



As we look to the recovery from COVID-19, the members of the Texas Transfer Alliance feel confident of one thing: we can expect more Texas students to transfer across our institutions—in multiple directions, within and across the 2- and 4-year sectors—than ever before.¹⁵

—Statewide call to action to leaders of Texas institutions with recommendations for immediate effort.

Next, states, systems and institutions should apply any credits recognized within 2+2 arrangements, regardless of whether students complete the full set of courses in the agreement before transferring. Because many 2+2 agreements require students to fully complete 2+2 programs to receive the guarantee that credits earned while enrolled in the program apply to a degree, students who don't complete the 2+2 programs may lose credits that would otherwise transfer. Applying relevant credits earned as part of a 2+2 program, even when students don't complete all of the community college courses, removes an unnecessary barrier to transfer.

In recognition of higher student mobility, states, systems and institutions should waive residency requirements that require students to complete a certain number of credits at an institution in order to graduate from that institution. During the pandemic, students who are close to graduation should have the option of completing applicable credits at an institution closer to home. Residency requirements that would prevent the transfer of credits in these circumstances should be relaxed to allow students to complete their program of study despite taking their remaining credits at a different institution.

States can issue guidance directing institutions to identify a minimum of 10 community college courses that will transfer and apply to the 10 programs with the highest enrollment among transfer students. Ensuring that four-year institutions apply program credits to high enrollment programs can provide an immediate benefit to students who choose to enroll at

community colleges for the short-term. In addition, states and systems should offer guidance to institutions by recommending practices and policies to apply pass/fail credits to programs of study, even if a program requires courses to be taken for a letter grade. Because of the rapid shift to online learning in spring 2020, many institutions allowed students to take courses pass/fail. As a result, many community college students may have taken the pass/fail option for courses that require a letter grade at their transfer institution. If four-year institutions did not provide clear guidance to community colleges or their students about enforcing grade requirements, many students may bear the burden of ineffective communication between institutions. Virginia four-year institutions, for example, agreed to accept pass/fail credits as an equity consideration to prevent community college transfer students from being penalized.¹⁶ Allowing pass/fail grades to apply to programs of study alleviates an additional barrier to credit applicability resulting from the pandemic.

Finally, states and institutions should explore how to repurpose existing technology to facilitate the credit transfer process. Reverse transfer systems, systemwide degree auditing databases, and technology supports for returning adults with some college credits may be easily and affordably adapted to improve the review of transfer credit.



All Minnesota State institutions must accept spring 2020 grades of "P," "S," or "CR" in undergraduate transfer. This includes counting those courses toward major requirements, as well as toward graduation requirements and any other purposes that impact a student's academic standing or progression.¹⁷

—Minnesota State System policy

Recommendation 3. Accelerate the scaling of clear programmatic pathways with strong attention to teaching and learning

States and systems should revise existing transfer agreements to ensure that statewide credit equivalencies and/or 2+2 programs result in clear programmatic pathways. While these agreements are not a panacea, states like Florida have found that they can lead to robust transfer partnerships among institutions, resulting in comprehensive supports and advising that enable students to successfully transfer and complete degrees.¹⁸



While [Florida’s] statewide 2+2 articulation policies set the foundation for statewide transfer, it is the strong partnerships between specific institutions that ensure its continued success. Over time, many of these partnerships, such as DirectConnect to [University of Central Florida], FUSE at the University of South Florida, and Connect4Success at Florida International University have evolved to provide clear program pathways, campus supports and other resources that extend beyond the scope of the 2+2 agreements.¹⁹

—Florida College Access Network

Transfer agreements should be designed in a manner consistent with available research that is sensitive to how and when students make decisions on a program of study. The Transfer Playbook developed by the Aspen Institute and the Community College Research Center provides clear guidance on how to align transfer agreements with the well-documented research on designing effective program pathways.²⁰ States that align their transfer agreements to these best practices can increase student participation in these programs and increase credit applicability.

Institutions should prioritize the development of programmatic pathways that are aligned with current workforce needs. Many students, particularly adults displaced by the pandemic, will enroll in postsecondary education for career training. Institutions should make every effort to design pathways that lead to degrees in high-demand professions. States and systems should facilitate engagement between employers and institutional leaders to identify the highest priority professions and the skills that are most in demand, and then design clear programmatic pathways aligned to those skills and professions.

Clear programmatic pathways should always be designed with student learning in mind. Pathways should not be designed simply as a credit equivalency exercise, but to encourage two-year and four-year institutions to design and deliver culturally responsive academic experiences that emphasize learning and success in a program of study. Learning experiences that recognize, respect, and integrate different cultural experiences create the relevance to student’s lived experiences that is essential to supporting student success.²¹ In addition, pathways should incorporate high-impact practices—such as undergraduate research, work-based learning, global learning, and service learning—at the community college.²² Including these practices enriches the academic experience of students and creates seamless high-quality learning experiences throughout a student’s program path.

Once pathways are built, institutions should default enroll all new entering community college students into an articulated transfer pathway. Institutions should proactively assess the academic goals and plans for transfer for all new entering students and enroll them in a transfer arrangement that best suits their situation. Students who have clarity about their academic goals should be enrolled in 2+2 arrangements aligned to their program goals. Students who are undecided about their program and/or transfer institution should be enrolled in courses that meet general education requirements at state institutions. Default

placement of students into a state transfer arrangement, with an opt-out option, could result in more students having their credits applied to their transfer institution.

State financial aid policies should create incentives for students to fully engage in transfer pathways. Incentives may include scholarships targeting transfer students, tuition freezes for students who enter into transfer pathways, or additional supports for textbooks and transportation expenses, as is done through the City University of New York's Accelerated Study in Associate Programs.²³ In addition, transfer students should be given equitable access to financial aid (transfer students are not always eligible for all of the aid offered to native students), and bureaucratic burdens should be removed so that aid moves easily with students. For example, Vermont announced auto-renewal for state aid applications to reduce the paperwork burden for returning students during COVID-19. States should ensure students don't have to re-apply for aid if they move institutions.

States should implement policies within four-year institutions that ensure community college students have equitable access to well-designed pathways that overcome barriers students encounter throughout the transfer process. Four-year institutions may need to adapt institutional policies and practices that may unintentionally impede the progress of transfer students. For example, high demand course sections should reserve seats for incoming transfer students who can't enroll during earlier registration periods for continuing students. Once enrolled, institutions might give continuing transfer students priority registration so that they can enroll in the courses they need for graduation while being able to accommodate other demands on their schedules. Investing in and developing clear programmatic pathways is a long-term endeavor. However, considerable progress can be made in the short-term that helps both two- and four-year institutions as they absorb a greater number of bachelor's-seeking students.

Six Actions States and Systems Can Take Right Now:

- 1.** Develop a communications strategy to ensure students, families, and student support professionals have the critical information necessary to navigate the transfer process.
- 2.** Issue a public statement prioritizing successful transfer and credit applicability during the pandemic and beyond.
- 3.** Agree to apply relevant credits taken as part of a state or system transfer agreement and relax other policies, such as residency requirements or pass/fail grade requirements, that impede the applicability of credit.
- 4.** Require community colleges and four-year institutions to identify a set of 10 courses for the top 10 programs into which students typically transfer that will be accepted and applied to programs for spring 2020-summer 2021.
- 5.** Enact auto-renewal for state financial aid applications and ensure students don't have to re-apply if they move institutions to reduce the paperwork burden for returning students during COVID-19.
- 6.** Explore technology systems already in place that could support automated evaluation of credit during the COVID-19 response period (e.g., systems for reverse transfer, degree audit, or for helping adults with some college but no degree to return and complete credentials).

Recommendation 4. Build a data, financial, and technology infrastructure for transfer and applicability

In addition to addressing the immediate challenges to transfer and credit applicability posed by COVID-19 and building strong transfer pathways, states and systems should start to build a next-generation data, financial, and technology infrastructure to make transfer effective, efficient, and equitable.

Solving the problem of program applicability relies on the collection and review of qualitative and quantitative data on the experiences of students who seek to transfer. States, systems, and institutions should collect basic metrics on the progress and success of students who declare their intention to transfer and earn a bachelor's degree, and issue regular reports illustrating institutional progress on critical metrics that predict successful transfer and degree completion. Data on whether students transfer, if they participated in 2+2 or other transfer programs, whether they completed the program, time until transfer, credits earned before transfer, credits applied to degree requirements after transfer, whether students graduate with a bachelor's degree, total credits to degree, and time to degree should be regularly reviewed within each institution and between institutions.²⁴

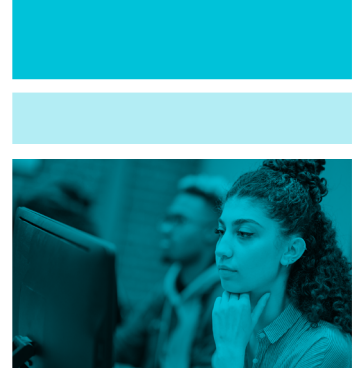
Reports should be designed to shed light on outcomes for students who move between particular institutions, and should provide state or national comparative data allowing institutions to benchmark their performance. Public reporting of data on transfer student outcomes and credit loss creates greater transparency to students, families, and policymakers on the impact of transfer. Furthermore, sophisticated data can allow policymakers to refine outcome-based funding models or other funding mechanisms to drive improved outcomes.

Data must be disaggregated by race/ethnicity, Pell eligibility, gender, first-generation college status, and age (among other relevant demographics). Despite some evidence that ineffective credit applicability policies most significantly impede progress for low-income students, Black, Latinx, Indigenous students, and those from other minoritized communities, there is little data revealing the extent of the impact and its possible causes.²⁵ Without more detailed data on the experiences of students from minoritized communities, it's difficult to devise policies and solutions to address inequities built into the system. Disaggregating and reporting data is an essential step to developing both immediate and long-term solutions to the challenge of program applicability.

Ultimately, states should engage and capture the voices of students, advisors, and others involved in transfer to gain a ground-level view of the transfer experience in order to discover further barriers. Focus groups, surveys, and process mapping can all be deployed to develop a clearer picture of the impact of transfer policies on students.

State, system, and institutional leaders should explore ways to financially invest in a new system of transfer and program applicability. Policy and institutional leaders can reexamine funding formulas to provide powerful financial incentives that encourage greater collaboration on transfer and applicability by rewarding both community colleges and four-year institutions for successful transfer and degree completion for transfer students.

Incentives that reward both the two-year and four-year institution for successful transfer and degree completion can result in unique partnerships that break down barriers to successful completion. For example, funding incentives might result in the development of alternative pathways for students, such as dual-admission and concurrent enrollment. These programs allow students to take courses at both two-year and four-year institutions, provide enrollment benefits from both institutions to



support student engagement (e.g., admission to sporting events), and guarantee that courses taken within identified pathways will transfer and apply to completion of a degree. With the shift to more online instruction, these programs may have even more relevance. To ensure the pathway to a baccalaureate is affordable for students, partners can also offer pricing guarantees.

Finally, states and systems should consider long-term investments in technology-based solutions that facilitate more objective and efficient evaluation of credits. More efficient and effective credit applicability can be cultivated by encouraging institutions to generate electronic transcripts that can be easily shared between institutions, to compile a central database of credit requirements across institutions for automated transcript audits, and to develop student-friendly online resources that allow students to evaluate the applicability of credit. The City University of New York²⁶ and Arizona State University²⁷ are building systems with many of these elements with the expectation that they will result in more transparency and efficiency in transfer practices. While sophisticated technology systems involve a considerable investment of time and money, they can generate efficiencies that create greater access to course applicability information and relieve bureaucratic burdens placed on advising staff, allowing them to spend more and higher-quality time with students.

These recommendations allow postsecondary leaders to focus on the immediate and urgent priorities of serving transfer students during a time of radical uncertainty, while also building an infrastructure to create long-term systemic change to transfer and applicability that can achieve improved and equitable outcomes for all students.



Applying the Principles to Guide a Long-Term Vision for Transfer

Experts consulted for this brief agree that policymakers should take these important steps right now to support students as they navigate the pandemic. However, many emphasize that the existing transfer system will never produce equitable outcomes without a deeper investigation into what the ecosystem for valuing student learning should look like in the long-term. Indeed, several stakeholders suggest that what is currently referred to as the “two- to four-year transfer pathway” wasn’t designed to be efficient or equitable. Transfer practices and processes, where they exist, are workarounds designed to create conduits between community colleges and universities and often leave students to navigate on their own with little to no support. Because it was developed as a workaround rather than an intentional, integrated strategy, the transfer system is now producing inequitable outcomes that stem logically from its design—or lack thereof.

Thus, the key, long-term question is: What will it take to build an integrated national transfer system that delivers equitable educational and career outcomes for low-income, Black, Latinx and Indigenous students and workers as they learn after high school in a variety of formats, venues, and environments?

There are several important stakeholders in the field well-poised to take-up this question, including the Tackling Transfer Policy Advisory Board, T3 Innovation Network, Credential Engine and the Western Interstate Commission for Higher Education’s Interstate Passport. To advance the Call to Action, the principles outlined in this publication offer a roadmap for key questions partners such as these can tackle as part of a national body of work.

GUIDING QUESTIONS FOR BUILDING A NEXT GENERATION TRANSFER SYSTEM

Principle 1

Achieving equitable transfer student outcomes requires a new definition of transfer that centers racial equity. What would it look like to build a system that:

- a.** Delivers education and career outcomes that are equitable by race and income?
- b.** Enables students to navigate multiple entry points, such as K-12, careers, online learning, and diverse higher learning providers?
- c.** Assumes as a starting point that student learning in those venues is valuable?
- d.** Maximizes applicability of credit?

Principle 2

Achieving equitable transfer student outcomes requires proactively providing comprehensive information to students, families, and student support professionals. How can students receive easily navigable, up-to-date information that weaves together their various learning experiences?

Principle 3

Achieving equitable transfer student outcomes requires building incentives for institutions and students to create and use policies and practices that value learning and minimize credit loss. What would it look like for students to complete on time with predictable and affordable costs? What would it look like for institutions to be rewarded for valuing diverse learning experiences and accelerating student completion?

Principle 4

Achieving equitable transfer student outcomes requires an enduring infrastructure to drive continuous improvement. Which stakeholders—such as faculty, K-12 representatives, students, accreditors, and employers—need to be engaged to build the next generation system?

Principle 5

Achieving equitable transfer student outcomes requires transparent, publicly available data on student outcomes and credit loss. What would a national system look like to shine a light on key performance indicators related to equitable student outcomes and credit loss, disaggregated by key student characteristics including race, ethnicity, income, first-generation status, and age?

Principle 6

Achieving equitable transfer student outcomes requires technology solutions that accelerate the transfer process and nimbly capture student learning. How can technology facilitate more objective and efficient evaluation of learning and provide students with easily navigable learning records with value in the labor market?



CONCLUSION

Building a Next Generation Transfer and Applicability System

With a renewed and urgent moral obligation to ensure postsecondary education is an engine of racial and economic equity, it's critical that postsecondary policymakers and institutional leaders engage in the fundamental redesign of policies and practices to fulfill that obligation. For too long, transfer and program applicability policies and practices have asked students to bear the burden of the misalignment of policies and practices between community colleges and four-year institutions. This misalignment has caused a disproportionate percentage of students from historically minoritized communities to lose credit for learning, and consequently, invest more time and money into their postsecondary education. For many, the additional burden has resulted in either deferring or ending the pursuit of their academic goals.

The cumulative effect of these policies has contributed to inequities in our postsecondary institutions. At the very minimum, state and system leaders should commit to holding students harmless for the inefficiencies built into their systems that impede degree progress. By shifting the objective of transfer and applicability policies and practices from merely articulating credit and course equivalency to facilitating student learning and degree completion, postsecondary leaders can focus on building two-year to four-year transfer pathways that are vehicles for equitable educational and economic opportunities.

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