TRANSFER-READY SYSTEMS

An Assessment and Action-Planning Toolkit

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June 2025

mdrc
BUILDING KNOWLEDGE
TO IMPROVE SOCIAL POLICY

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with
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OVERVIEW

Transfer students often face significant challenges when attempting to transfer their credits from one institution to another. The University of Texas (UT) System and MDRC developed and field-tested this toolkit to encourage a higher-education system that is more transfer-ready by facilitating the transfer process and including transfer students as a core part of the system's mission.

The activities within this toolkit were used to build and engage cross-functional teams at three universities (including faculty members, advisers, department chairs, enrollment staff members, and academic administrators) to identify gaps and opportunities for their institutions to become more transfer-ready. In addition, the Transfer-Ready Systems Assessment Framework can further assist administrators in this process.

The administrators leading efforts at their respective universities were members of the core research team and met regularly with the UT System Office. As a result of this initiative, each university designed and launched an evidence-driven solution to improve the transfer-readiness of their own institution's policies, procedures, and practices. In addition, the UT System Office identified transfer improvement strategies it could take, or advocate for, at the state level to be responsive to the needs of individual institutions and their students. This toolkit is for administrators, faculty members, and other staff members who want to:

- Develop plans to facilitate transfers between institutions with buy-in from key stakeholders
- Improve the efficiency of transfer credit evaluation and enrollment procedures
- Build, strengthen, or expand partnerships with the institutions that students transfer to or from
- Improve an institution's transfer-readiness culture

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ACKNOWLEDGMENTS

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The Authors

Introduction

Improving coordination between community colleges and bachelor's degree institutions has been an aspiration since the development of junior colleges in the 20th century.[1] There is a wealth of research on strategies to improve the effectiveness of the credit transfer process, but transfer students continue to face challenges in their pursuit of a degree. According to an analysis by the United States Government Accountability Office, 35 percent of all college students transferred from one institution to another at some point during their postsecondary journey, but 43 percent of the credits they earned before transferring were not accepted by their receiving institution.[2] The impact on students in terms of lost time and money, and the deferment or abandonment of educational plans is enormous.[3] Helping institutions become more transfer-ready entails making transfer students a priority in institutional strategies and actions.

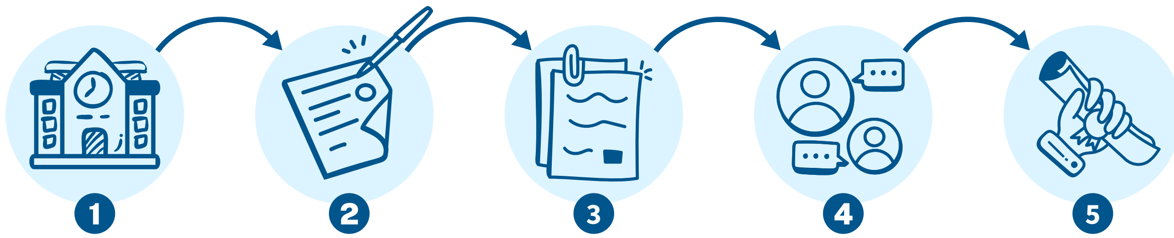
Fully addressing the barriers that students face when trying to transfer credits in higher education requires tackling multiple, interconnected challenges.[4] These challenges often involve various stakeholders across multiple institutions, all of whom are operating within a complex web of rules and priorities and with their own sets of tools to meet the needs of their institution and its constituents (see Figure 1). In addition, aligning curricula and academic pathways across institutions is an ongoing effort; academic disciplines and the careers they lead to evolve, as do student migration and enrollment patterns. The complexity and evolving nature of these challenges require ongoing and collaborative efforts.

This toolkit aims to support higher education administrators leading transfer improvement efforts in their departments, institutions, or systemwide. These efforts often involve a variety of stakeholders that otherwise operate in isolation, either because they have different functional roles or work for different institutions. Therefore, a primary purpose of the framework and the activities in this toolkit is to strengthen collaboration among these stakeholders through a self-assessment process with the goal of updating institutional practices to build a more transfer-ready system.[5]

1. Koos (1924).
2. U.S. Government Accountability Office (2017).
3. Public Agenda (2024).
4. For example, there are challenges to curricular alignment, administrative barriers to student data and course records management, and logistical and cultural barriers to providing academic planning and support to aid students in the transition between schools.
5. Weber and Khademian (2008).

Figure 1

Milestones in a Transfer Student's Journey



1 Earn College Credits

Take and pass college-level course(s).

2 Apply to Bachelor's Degree Program

Submit application for admission along with transcripts to prospective schools.

3 Enroll at Receiving Institution

Wait to receive transfer credit evaluation and provide additional course information (syllabi, coursework, and others) as requested.

4 Register for Courses

Accept admissions offer and meet with an adviser to discuss degree plan. Register for courses to take first semester post-transfer.

5 Complete Post-Transfer Requirements

Complete course requirements of chosen degree program and appeal credit evaluations as necessary.

CHALLENGES OR AREAS FOR IMPROVEMENT

Lack of information to compare the relative costs of different transfer destinations.

Long wait times for communication, updates, or action items related to transfer credit evaluation delay course registration.

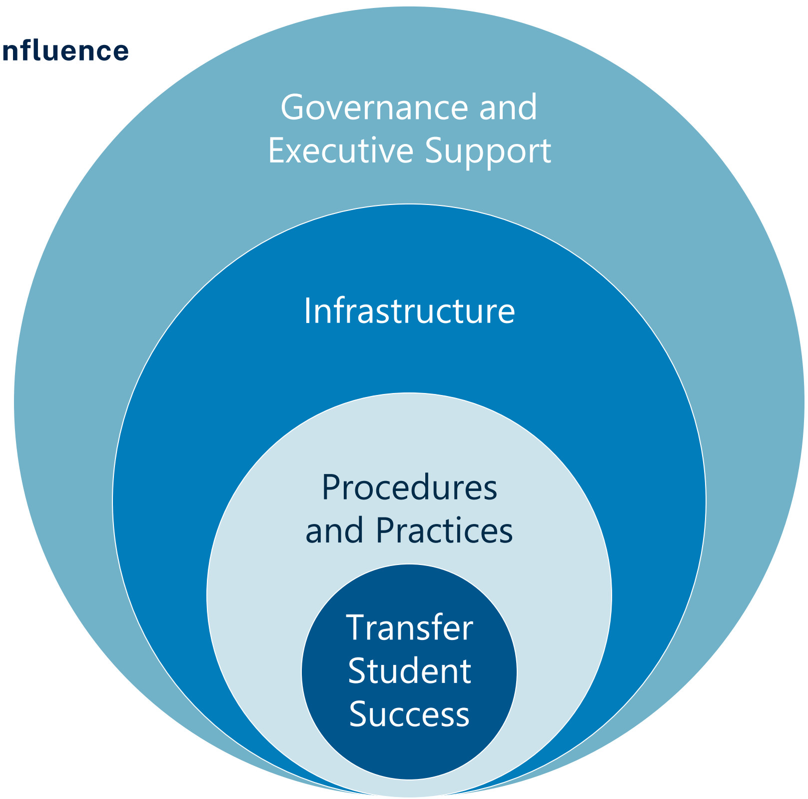
Suboptimal course schedules (e.g., missing prerequisites or excessive courseload), or needing to re-take courses or complete extra steps to enter a desired program.

"TRANSFER IS A TEAM SPORT"

This toolkit rests on the Transfer-Ready Systems Assessment Framework, which aims to help leaders identify who should be on a transfer team and how to direct their efforts. The Transfer-Ready Systems Assessment Framework presents 10 categories of "change levers" and examples of roles that can influence those categories. The framework includes self-assessment and action-planning tools for each category and is designed to enable the entire process recommended in this toolkit.

The framework organizes the 10 categories of essential transfer-ready practices into *three spheres of influence*: **governance and executive support, infrastructure,** and **procedures and practices** (see Figure 2).[6] Altogether, these factors shape the conditions for transfer students' experiences, outcomes, and success — which can be observed in the academic records of students, the stories they share, and their long-term education and career outcomes. The framework lists examples of relevant roles and titles at the state or system level as well as at the institutional level for each of these spheres of influence (see Transfer-Ready Systems Assessment Framework, Section 2).

Figure 2.
Spheres of Influence



Systems of **governance and executive support** affect transfer students and their interactions with higher education, and include policies and systems of leadership and accountability. These policies require some **infrastructure**, such as systems for establishing core curricula or sharing course information and student records. Stakeholders at the state and system level influence relatively more people when they shape policies or curricula for the entire state or system, but university administrators have more direct influence with stakeholders throughout their institution.

6. This sphere of influence schema is inspired by The Water of Systems Change framework by Kania, Kramer, and Senge (2020). "Spheres of influence" is a term used in leadership development to describe anything that can be affected but not directly controlled, see Ralph (2021).

Some stakeholders aim to influence change through institutionalized **procedures** that shape how transfer students experience higher education, or through direct **practices** to support students. Stakeholders operating at the institutional level (for example, administrators and staff members in enrollment, student affairs, or academic affairs offices) may be more likely to see themselves in this sphere of influence, but they have counterparts operating at the state, regional, or system level (for example, professional organizations or workgroups that distribute recommendations or best practices).

HOW TO USE THIS TOOLKIT

Given the complexity of academic and administrative coordination among all of the institutions and departments in a transfer ecosystem, problems and solutions cannot be tackled in isolation; supporting transfer students is a shared responsibility across systems and institutions. The guidance and materials included in this toolkit aim to engage a variety of stakeholders in a systematic assessment of their transfer ecosystems, in order to create together a strategy of program improvements to advance transfer student success. The toolkit is organized into four steps and is intended to help leaders and practitioners prepare their systems and institutions to support transfer students.

1. **Review Transfer-Ready Systems Assessment Framework:** Name **WHY** assessment and action are needed.

2. **Build a Transfer-Ready Team:** Identify **WHO** is needed to address which issue.

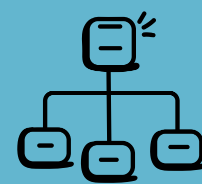
3. **Collect Evidence and Input:** Understand **HOW** current conditions contribute to transfer students' experiences and outcomes.

4. **From Aha-to-Action!** Identify **WHAT** can be done to improve conditions for students and other stakeholders involved in the transfer process.

Toolkit

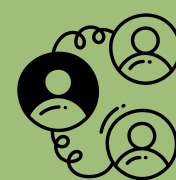
STEP 1: REVIEW FRAMEWORK

Review Transfer-Ready Systems Framework



STEP 2: BUILD TEAM

Bring Together a Transfer Ready Team



STEP 3: COLLECT INPUT

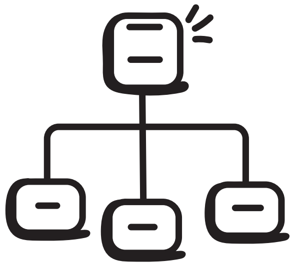
Collect Input and Evidence Using Self-Assessment Tools Provided

STEP 4: ENGAGE STAKEHOLDERS

From “Aha” to Action!

Engage stakeholders to interpret insights from self-assessment and identify leverage points

Review the Transfer-Ready Systems Assessment Framework



GOAL

Take a holistic view of the transfer system and the improvements that may be needed, and identify the stakeholders who will be important for those improvement efforts.

INSTRUCTIONS

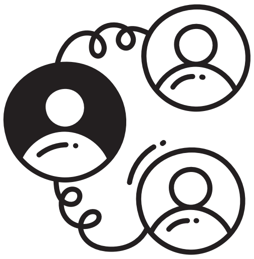
1. Download and review the Transfer-Ready Systems Assessment Framework
2. When reviewing the framework consider:
    - the sphere of influence with willing and available stakeholders
    - the category(ies) of transfer-ready practices where there is room for improvement
    - which stakeholders are key to assessing and acting in that category

TOOLS

The Transfer-Ready Systems Assessment Framework aims to show the complexity of the transfer ecosystem and the interdependencies among stakeholders in the college transfer process. Review Section 2 to take a holistic view of the transfer system change levers available to influence transfer student outcomes and experiences, and to identify where change is possible and where collaboration with other stakeholders might be important.

- **Tool A.** Transfer-Ready Systems Assessment Framework

Build Your Transfer-Ready Team



GOAL

Build a core team to help drive assessment and action-planning efforts.

INSTRUCTIONS

1. Identify a few colleagues to coordinate assessment and action-planning activities. The core team should represent a diversity of functional roles and operate in different spheres of influence.

2. The first task for this core team is to complete a self-assessment of their institution or higher education system using the Self-Assessment Tools in the Transfer-Ready Systems Assessment Framework. Identify one or more categories for which there is room for improvement, and where there are willing and available stakeholders with interest and authority to make improvements.

TOOLS

The Transfer-Ready Systems Assessment Framework includes self-assessment tools that invite users to review their adoption of transfer-ready practices. Each self-assessment tool outlines a set of practices that are recognized as critical to transfer student success and institutional effectiveness. Within each practice there are a series of questions for users of the framework to address as they work through the categories that are most relevant to their institutional roles, functions, contexts, and areas of responsibility.

- **Tool B.** **Transfer-Ready Systems Assessment Framework**, Self-Assessment Tools (Section 3)

Project Spotlight

To implement sustainable, system-level changes to the transfer process, the action learning research project at the University of Texas (UT) established two types of teams: the System Change Team and the Campus-Ready Team.

SYSTEM CHANGE TEAM

The System Office invited institutions to join the initiative, and two administrators from each participating university were selected to represent their institutions. The System Change Team met monthly to shape the direction of inquiry, plan for broader stakeholder engagement, and share insights emerging across campuses.

Coordinator: Associate vice chancellor for academic affairs

Team members: Administrators from the three participating universities, including a university registrar, assistant vice provost of academic planning, policy director of transfer pathways and articulation, vice provost for advising and academic success, associate provost for academic success, dean, and department chair.

CAMPUS-READY TEAM

Coordinators gathered progressively larger groups of their colleagues at three points in this project. First, to come up with a set of topics to explore and identify who or what should be incorporated in assessment activities (Steps 1 and 2 in this toolkit). Next, to reflect on themes that emerged in assessment activities (Step 3 in this toolkit). Finally, to create, refine, or plan implementation of a solution (Step 4 in this toolkit).

Coordinators: Each Campus-Ready Team was led by administrators on the System Change Team.

Team members: For the initial meeting, leads at each campus gathered small teams of three to eight administrators at their university such as associate deans, directors of enrollment, directors of institutional research or analytics, and directors of advising. The second meeting involved the initial campus team and others who contributed to an assessment activity (including advisers, staff members, and faculty members). For the final meeting, coordinators invited anyone who would be important to the success of the solution they were developing (including university leaders and transfer partners).

Collect Evidence and Input

GOAL

Collect evidence on the conditions that shape transfer students' success and trends in transfer students' outcomes.

INSTRUCTIONS

1. Choose one or more of the tools below to bolster existing self-assessment and strategic planning efforts.

2. If teams do not have the time or resources to conduct the activities below, invite a broader group of stakeholders to complete the Self-Assessment Tools in the Transfer-Ready Systems Assessment Framework.

Tools are provided for three types of assessment activities:

- **Data analysis:** These tools allow you to assess trends in transfer student outcomes using publicly available data or administrative data (data collected in the normal course of administration). Using these tools might involve engaging the office of institutional research as well as the registrar's office, depending on data availability.

Project Spotlight

Using institutional administrative data, the University of Texas campus teams were able to identify variations in transfer student outcomes by major. Campus teams then collected qualitative data collection, engaging leaders and faculty members in those departments, to (1) understand the differences between the degree programs that might explain any variations and (2) contribute to the design of potential solutions.

- **Process analysis:** These tools allow you to map out transfer enrollment procedures, which can provide important clarity to staff members and faculty members about roles and processes outside their unit, eliminate redundancies, and ultimately decrease the time and effort required to complete a student's credit evaluation. Staff members from enrollment departments (such as admissions or the registrar), academic colleges (such as the dean, department chair, or program coordinator), or advising departments will be involved in this analysis.

- **Group Discussions:** These tools will help you gather and document the perspectives and experiences of faculty members, staff members, and transfer students. Focus group discussions are a useful method to: interpret findings from data and analyses and put them in context, check assumptions about users and their challenges, or collect feedback on a specific policy, process, or product.

TOOLS

- **Tool C. Transfer Student Success Data Assessment Guide**

The **Transfer Student Success Data Assessment Guide** is designed to assess current trends in outcomes among transfer students at the point of transfer, after transfer, and at graduation. This guide walks users through what data to collect to construct outcomes such as transfer credits received and applied toward a degree, semester-by-semester retention, and patterns of academic performance once a student has transferred. The guide also covers how to prepare the data for analysis, and provides suggestions of what analyses to run. A sample **Transfer Data Codebook** and dummy dataset is provided as an editable example.

- **Tool D. Process-Mapping Tools**

The process-mapping tools included in this toolkit aim to minimize the preparation and work needed for higher education institutions to review their own transfer enrollment procedures. The **Sample Transfer Enrollment Process Map** provides a detailed map of steps commonly observed in transfer enrollment processes as a starting point for institutions to reflect on and clarify their own procedures.[1] A discussion guide is included with suggestions of whom to talk to and which questions to ask in order to engage a broad group of stakeholders to review the accuracy of the map and identify areas for improvement.

- **Tool E. Focus Group Protocols**

This tool includes guidance for conducting focus groups with transfer students and faculty members that covers sampling and recruitment, language to make sure focus group members understand and consent to the process, and discussion prompts. Speaking to stakeholders directly helps to ensure that leaders are focused on the issues that matter most to transfer students, invites new perspectives in support of creative problem-solving, and can elicit vivid stories and examples to inspire action and change.

1. The map includes three lanes to visualize steps transfer students take independently, communications and services provided by the school to support them, and the back-end processes managed by staff and faculty members.

From “Aha” to Action

GOAL

Create, refine, or plan a solution to build momentum and buy-in among key stakeholders.

INSTRUCTIONS

1. Convene a broad group of stakeholders who will be important to the success of adopting the transfer-ready practices identified through the self-assessment activities in Step 2 and Step 3 of this toolkit.

2. Facilitate a meeting to reflect on insights from the self-assessment, identify leverage points, and collaboratively create strategies to improve transfer students’ outcomes and experiences.

3. Brainstorm, design, or collect feedback on solutions.

TOOLS

The Editable Sample Transfer Enrollment Process Map provides a detailed map of steps commonly observed in transfer enrollment processes. This process map is a visual tool that can be used in group settings to illustrate the transfer student experience and highlight practical areas of improvement. The editable template is provided online for administrators who wish to revise the map to reflect their institution’s circumstances.

- **Tool F.** **Editable Sample Transfer Enrollment Process Map**

Project Spotlight

Process maps are a powerful tool to engage a broader group of stakeholders and improve cross-functional coordination. At the University of Texas at Arlington, the process map was primarily developed by administrators from the Enrollment Services and Advising departments, as they were largely implementing the process. Through this process analysis, they identified that transfer-credit evaluations were taking an average of 16 weeks to complete. When the process map was shared with faculty members and academic leadership, the group identified that the time lag was largely due to subject matter experts being unavailable at peak times for transfer-credit evaluations (summer) and the group then collectively considered how to overcome this operational hurdle.

Project Spotlight

Every design will be unique to the team and context as demonstrated below by the solutions developed by each University of Texas (UT) Campus-Ready Team through the process of self-assessment, reflection, and action-planning presented in this toolkit.

University of Texas at Arlington (UTA)

As a university that accepts transfer students from dozens of sending institutions, UTA focused on information technology and professional development to strengthen and streamline internal transfer enrollment processes. The campus team convened colleagues from enrollment services and advising, as well as faculty members listed as reviewers for transfer-credit evaluations for a working meeting to strengthen cross-functional alignment and coordination in transfer-credit evaluations. The group reviewed findings from the process-mapping activities and refined a shared set of expectations and standard operating procedures for working together to improve the efficiency of transfer-credit evaluations.

University of Texas at Tyler (UTT)

UTT focused on curriculum and academic pathways along with its three core transfer partners to strengthen the culture of collaboration and trust between the institution and its partner community colleges. UTT hosted Transfer Summits with each partner institution where provosts, deans, chairs, and program coordinators gathered to share and reflect on data on the success of the respective community college students at UTT. These conversations also enabled each group to revisit its transfer guides for each academic pathway and discuss when to take courses and the most salient content needed to succeed in subsequent courses.

University of Texas at El Paso (UTEP)

The UTEP design session focused on establishing an Engineering Academy between the engineering departments at UTEP and its partner El Paso Community College (EPCC). The EPCC | UTEP Engineering Academy is not a standard 2+2 articulation agreement or transfer pathway, but a holistic program accomplished through the partnership of these two institutions. Graduates of the program will earn their associate's degree at EPCC and bachelor's degree at UTEP in civil, industrial, materials, electrical or mechanical engineering. Through the collaborative efforts of administrators, faculty members, and staff members at EPCC and UTEP, Engineering Academy students will concurrently enroll at both institutions and have access to comprehensive support focused on their academic and professional development throughout the program.

TOOL C

Transfer Student Success Data Assessment Guide

ENSURING TRANSFER STUDENT SUCCESS THROUGH DATA

Use this assessment guide to get a baseline understanding of transfer student success under current conditions in the institution or system. This guide will provide details on what data to collect, how to prepare the data for analysis, which analyses to run, and which subgroups to look at.

This section should be approached by or with the assistance of the institutional research office or department. It may also be helpful to collaborate with the registrar's office or other offices that may have data on course applicability and degree planning.

IDENTIFY THE DATA

To answer the questions in this section, institutions must have access to administrative data on transfer student outcomes, including but not limited to, student transcript (course-level) records, student degree records, and student majors and demographic information.[1] This table provides examples of some of the information that an institution may want to collect for the purposes of this assessment. Transcript data can be used to aggregate the average number of credits at the student level. However, such data can also be used at the course level to answer course-related questions.

Student-Level Data

Variable	Purpose
Student identifier	Linking datasets
Transfer student indicator	Identify transfer versus non-transfer students
Gender	Subgroup analysis
Age	Subgroup analysis
Race/ethnicity	Subgroup analysis
Pell eligibility and receipt	Subgroup analysis
First-generation status	Subgroup analysis
Major at time of application	
First-semester major	Analysis by major or program of study
Current or most recent major	
Sending institution	
Entry term of transfer	Reference

1. Data on which credits are applied to a degree are not readily available in all institutions' administrative records, and instead are often only kept in student-level advising records or in degree-planning software. Compiling data on degree applicability should be made a priority and institutions should begin consolidating and centralizing such data to the extent possible.

Course-Level Data (Transfer Coursework)

Variable	Purpose
Student identifier	Linking datasets
Academic year	Reference
Academic term	Reference
Course name	
Course subject	Course-type analysis
Course number	
Course division (upper or lower)	Course-type analysis
Course type (core, elective, or major)	Course-type analysis
Credit hours	Outcome
Grade earned	Outcome
Earned credit	Outcome
Rejection reason	Outcome
Applied to degree at time of transfer	Outcome
Applied to degree at time of graduation	Outcome

Course-Level Data (Post-Transfer Coursework)

Variable	Purpose
Student identifier	Linking datasets
Academic year	Reference
Academic term	Reference
Course name	
Course subject	Course-type analysis
Course number	
Course division (upper or lower)	Course-type analysis
Course type (core, elective, or major)	Course-type analysis
Credit hours	Outcome
Grade earned	Outcome

Degree-Level Data

Variable	Purpose
Student identifier	Linking datasets
Academic year	Reference
Academic term	Reference
Degree type or level	Outcome
Major	Analysis by major or program of study
Credits earned	Outcome
GPA	Outcome

PREPARE THE DATA FOR ANALYSIS

Once each data type is prepared, users will need to clean and merge each file (course-level files and degree-level files) with the student-level file. If using course-level and degree-level files, aggregate the records by student to calculate student outcomes, such as those in the table below.

Please refer to the sample data file and variable codebook to see examples of some of the variables listed below.

Transfer Coursework	Post-Transfer Coursework	Degrees
Total number of credits earned at sending institution	Enrolled (by semester)	Cumulative degrees earned (by semester)
Total number of transfer credits earned at receiving institution	Cumulative GPA (by semester)	GPA at graduation
Total number of transfer credits applied toward degree at receiving institution at time of transfer	Total number of credits earned at receiving institution	Total number of credits earned at graduation
Total number of transfer credits applied toward degree at receiving institution at time of graduation	Total number of transfer credits earned + total number of credits earned at receiving institution	
Proportion of transfer credits earned (out of total number of credits sent from sending institution)		
Transfer GPA		

ANALYZE THE DATA

Once the data have been prepared for analysis, create the following table to prompt a conversation about transfer student success and identify target areas for improvement.[2] Use the data prepared from this section to fill in the table below and discuss the following questions.

2. Transfer outcomes of interest are not limited to the variables or time periods included in the table. Other outcomes of interest might be graduation GPA or cumulative GPA by each semester after transfer, among others.

Outcome	Transfer Students	Non-Transfer Students	Difference
Credit transfer			
Average number of credits sent from sending institution		NA	NA
Average number of transfer credits earned at receiving institution		NA	NA
Average percentage of transfer credits earned or credits sent		NA	NA
Credit applicability			
Average number of transfer credits applied toward degree at transfer		NA	NA
Average number of transfer credits applied toward degree at graduation		NA	NA
Enrollment (%)			
Semester 1 (semester 5 for non-transfer students)			
Semester 2 (semester 6 for non-transfer students)			
Semester 3 (semester 7 for non-transfer students)			
Semester 4 (semester 8 for non-transfer students)			
Semester 5 (semester 9 for non-transfer students)			
Semester 6 (semester 10 for non-transfer students)			
Cumulative graduation rate (%)			
Semester 1 (semester 5 for non-transfer students)			
Semester 2 (semester 6 for non-transfer students)			
Semester 3 (semester 7 for non-transfer students)			
Semester 4 (semester 8 for non-transfer students)			
Semester 5 (semester 9 for non-transfer students)			
Semester 6 (semester 10 for non-transfer students)			
Average number of credits earned at graduation			

THE BIG PICTURE

With the table above complete, the next step is to take a broad look at transfer student outcomes at the institution.

- Is any of this data surprising?
- How well are transfer students doing compared with non-transfer students?
- Is there a concern for the overall transfer population?

BREAKOUT ANALYSES

After looking at aggregate transfer outcomes at the institution, disaggregate these outcomes by student characteristics, program of study, or course type. Replace “transfer students” and “non-transfer students” in the table above with subgroups of students, such as “students under 24 years old” and “students 25 years old and older.” Subgroups should be assessed with the same set of outcomes as transfer and non-transfer students.

Outcome	Students Under 24 Years Old	Students 25 Years Old and Older	Difference
Credit transfer			
Average number of credits sent from sending institution			
Average number of transfer credits earned at receiving institution			
Average percentage of transfer credits earned or credits sent			
Credit applicability			
Average number of transfer credits applied toward degree at transfer			
Average number of transfer credits applied toward degree at graduation			
Average number of credits earned at graduation			

With these analyses in hand, consider:

Are some groups of students faring worse after transferring than others? If there are meaningful differences between the transfer outcomes by subgroups, it may be important to further investigate the cause of these differences.

Do students in some programs appear to transfer fewer credits or graduate less often than those in other programs? Many faculty members and administrators acknowledge that transferring into some programs can be more difficult than others. Having the data to show how these differences affect students may provide some reasoning for the creation of different transfer guidelines. Since student majors and programs of study may change several times throughout a student’s academic career, consider comparing outcomes by students’ declared majors at the time of their transfer applications, during their first semester at the receiving institution, or by major or program at graduation.

Suggested Subgroups

Student Characteristic	Program of Study	Course Type
Gender	College or campus	Department or course subject
Race and ethnicity	Program of study	Course division (upper or lower)
Age (24 years old and under, 25 years old and older)	Major	Degree satisfaction (core, major, or elective)
Socioeconomic status or Pell grant recipient		
First-generation status		

By Course Type

As with majors, some courses may have stricter guidelines around credit transfer than others. This may be due to departmental requirements or degree satisfaction. Fill in the table adapted for a course-level analysis below with data about transfer coursework by course type, such as by department or course subject (for example, math, nursing, or business); course division (upper or lower); or degree satisfaction (core, elective, or major).

Looking at the breakdown by course type will require disaggregating transfer data at the course level, rather than the student level. It can be important to observe and compare differences in transfer outcomes by course factors in addition to student factors. This can help identify if there are any types of courses that are creating barriers to transfer student success.

Outcome	Type A	Type B	Type C
Percentage of transfer coursework that earns transfer credit			
Percentage of transfer coursework applied toward a degree at the time of transfer			
Percentage of transfer coursework applied toward a degree at the time of graduation			

FINAL NOTES

The analysis above can help assess the status of transfer student success at a given institution. However, it is important to keep some things in mind:

- Be aware of factors that may affect subgroup analyses. For example, if a large proportion of the transfer student class is in the nursing program, and females tend to overwhelmingly be in the nursing program, trends in the nursing program may spillover to trends with females. In a case like this, the major or program should be taken into consideration when assessing outcomes by gender.

- When looking at outcomes related to graduation, such as the credits applied toward a degree at the time of graduation or graduation GPA, be careful to limit the sample size to only transfer students who have graduated to prevent a misleading deflation of this average.

- Similarly, take into consideration the time that has elapsed for each cohort of students. For example, if reviewing three-year post-transfer graduation rates, make sure to remove students who transferred to the institution more recently from the sample to prevent a misleading deflation of graduation rates.

Not all institutions will collect and preserve transfer records in the same manner. As mentioned, course applicability may not yet be easy to obtain for a large sample of students. Similarly, some institutions may not retain records for courses that students were unable to transfer to their institution, or these records may be set to null values, such as zero or not applicable (NA) credit hours. This may be important to keep in mind when calculating percentages in these analyses.

Next Steps

- Share these analyses with a broader group of stakeholders to reflect on and examine the findings of this data assessment.

- When identifying who, when, and how decisions are made throughout the transfer-credit evaluation process, consider which students are being impacted by these decisions and how.

TOOL D

Transfer Enrollment Process
Mapping Tools

THE VALUE OF PROCESS MAPPING

Process maps are a visual tool to help institutions take a holistic look at their procedures — from start to finish — and identify opportunities for improvement. Process mapping encourages groups to work collaboratively to clarify or refine procedures and operating systems. For example, process mapping can highlight the number of individuals involved in the process, the complexity of the actions these individuals are responsible for, and the bottlenecks staff members and students may face in completing the process.

Transfer enrollment is a process that involves several stakeholders and is foundational to transfer students' experiences and outcomes at any institution. Mapping out transfer enrollment procedures can provide important clarity to staff members and faculty about roles and processes outside their unit, can help eliminate redundancies, and can ultimately decrease the time and effort required to complete a student's credit evaluation.

HOW TO USE PROCESS MAPPING TOOLS

The process-mapping tools included in this toolkit aim to minimize the preparation and work needed for a higher education institution to review its own transfer enrollment procedures. Typically, process-mapping guidance is generalized and prompts users to list all the activities involved, identifying the sequence of activities, and figuring out how to visualize these workflows before sharing with stakeholders. The process-mapping tools cover these steps and provide a detailed, transfer-specific map and editable templates.

Start by viewing **The Sample Transfer Enrollment Process Map** to ensure the information is relevant to your institution. Users with access to Microsoft Visio can directly revise the map to reflect their institution using the Editable Transfer Enrollment Process Map.

☐ **The Sample Transfer Enrollment Process Map** visualizes steps commonly observed in transfer enrollment processes based on in-depth research conducted at nine institutions across two very different higher education systems.[1]

Next, share the Sample Transfer Enrollment Map with stakeholders so that they may review it for accuracy and identify areas for improvement. Ideally, this will be done in a group setting but it can also be accomplished asynchronously by distributing a digital version and asking stakeholders to comment on the section of the map they are responsible for. To distribute hard

1. The Sample Transfer Enrollment Process Map is informed by in-depth research conducted with three institutions in the University of Texas as part of the Ascendium Credit Transfer and Faculty Review research project, and six City University of New York (CUNY) institutions as part of the Transfer Opportunity Project. The Transfer Opportunity Project is a four-year study funded by the federal Department of Education's Institute of Education Sciences and was conducted in partnership with the CUNY Office of Institutional Research and Assessment and MDRC.

copies of the map, print copies of pages 3 to 6 of the Sample Transfer Enrollment Process Map. (The full process map on page 2 spans several standard 8” X 11” pages when printed.)

☐ The **Transfer Enrollment Procedures Discussion Guide** on the following page outlines who to talk to and which questions to reflect on for each stage of the transfer student journey from the point of recruitment and admissions to completion of the first semester of courses.

TRANSFER ENROLLMENT PROCEDURES DISCUSSION GUIDE

This guide outlines who to talk to and which questions to ask to map out the transfer enrollment process. It is organized into the four phases represented in the Sample Transfer Enrollment Process Map: pre-admissions, application and admissions, transfer credit evaluations, and advising and registration. For each phase make note of key operational information such as the actor(s) involved, action(s) taken, communication flows, workflow(s), and timing considerations.

INSTITUTION/SYSTEM NAME:	
ESTIMATED TIMING AND LENGTH of the Transfer Enrollment Process:	*(ex. 3-5 months, April-August, etc.)*

1. Pre-admissions

Ask admissions staff members, advisers, prospective transfer students, and other individuals involved in this phase what steps make up the pre-admissions phase (such as outreach, recruitment, or early advising). Summarize what is learned in the table below.

Questions to Consider:

- How are students identified as prospective transfer students?
- What factors do students consider before deciding to apply as transfer students? How and from where do students learn about their options for transfer and degree pathways?
- What information is provided to prospective transfer students? How and when is information provided?
- What resources or systems are available to potential transfer students before applying?
- Are prospective transfer students able to see which credits will be accepted before applying?
- Are prospective transfer students able to see how accepted credits will apply to their degree plan before applying?

Who is involved?	What steps are taken by this actor during the pre-admissions phase?
Admissions staff members	
Students	
[Enter other actors not listed above]	
[Enter other actors not listed above]	

2. Application and Admissions

Ask admissions staff members, students, the registrar's office, and other individuals involved in this phase what steps make up the application and admissions phase. Summarize what is learned in the table below.

Questions to Consider:

- What steps do prospective transfer students need to take to complete the application process?
- How are prospective transfer students given information about the application and admissions process?
  - How are deadlines and fees communicated to prospective transfer students?
  - When is important information about the application and admissions process shared with prospective transfer students?
  - Who is responsible for communicating with prospective transfer students about the application and admissions process?
- Are there online systems that students must register with to apply and track their applications?
- How do students submit their transcripts?
  - Do students need to manually input transcript data or can transcripts be uploaded and automatically processed?

- What steps do admissions staff members need to take to successfully process a transfer student's application?
- Which steps are manual in the admissions process? Which steps are automated?

Who is involved?	What steps are taken by this actor during the application and admissions phase?
Admissions staff members	
Students	
Registrar's office staff members	
[Enter other actors not listed above]	

3. Transfer Credit Evaluations

Ask the registrar's office, faculty members, department chairs, and other individuals involved in this phase what steps make up the transfer credit evaluation phase. Summarize what is learned in the table below.

Questions to Consider:

- Who or what initiates a student's transfer credit evaluation?
- Is the transfer credit evaluation process automated? At which points is the process automated? How is technology used to automate or streamline the process?
- Describe the process for accepting or rejecting transfer credits.
    - Who or what decides whether transfer credits can be accepted? Do the decision criteria differ based on the characteristics of the course (for example, course level or discipline) or the evaluator (for example, the registrar's office or a faculty member)?
    - What happens after courses are rejected?
- How are students notified that the process for evaluating their transfer credits has begun? How and when are students notified when the process is completed?

- What communication flows exist between faculty members and administrative staff members (such as in the registrar's and advising offices)?
- Are there systems or technologies that help facilitate communication?
- How long is a single credit evaluation expected to take?
- What is the workflow for evaluating courses with existing articulation agreements?
- What is the workflow for evaluating courses without existing course articulation agreements?
    - Where are transfer credit evaluation decisions documented? Are different decisions documented in different places?
    - How does this process differ for upper and lower-level courses?
    - How does this process differ for military credits and other credits taken in nonacademic settings?
    - Do decisions about whether a transfer course is accepted apply only for the individual student or do the decisions create a precedent for future students who want to transfer in the same course?
- What is the process whereby students may appeal a transfer credit decision?
- Who or what decides how accepted transfer credits are applied to a student's degree plan? Do the decision criteria differ based on the characteristics of the course (for example, course level or discipline) or the evaluator (for example, the registrar's office or a faculty member)?
    - What information needs to be collected to make course applicability decisions?
- Which courses typically do not have an existing course articulation and therefore require manual evaluation?
- Describe any other institutional credit transfer policies.

Who is involved?	What steps are taken by this actor during the transfer credit evaluation phase?
Registrar's office staff members	
Full-time faculty members	
Academic advisers	
[Enter other actors not listed above]	

4. Advising and Registration

Ask advisers, faculty members, students, and other individuals involved in this phase what steps transfer students must take to register for courses. Summarize what is learned in the table below.

Questions to Consider:

- At what point are advisers connected with students or vice versa?
- At what point are advisers made aware of a student's transfer credit evaluation? Are advisers able to make changes to or appeal evaluation decisions?
- What happens to credits that are not applied toward a student's degree requirements?
- How do advisers work with students to identify the courses they will need for their upcoming semester? What happens if the courses students need are unavailable?
- When do transfer students typically register for courses? Do students register on their own, during their advising appointment, or at some other time?
- When and how do transfer students declare their major or degree program? Are there situations where transfer students switch out of their intended major? How does this change affect the registration process?

Who is involved?	What steps are taken by this actor during the advising and registration phase?
Advisers	
Full-time faculty members	
Students	
[Enter other actors not listed above]	

TOOL E

Focus Group Protocols

A NOTE ON SAMPLING AND RECRUITMENT

Focus groups are a research method that use a facilitator to pose questions and topics to a group for discussion, and interaction between participants is encouraged. A focus group should ideally involve five to eight purposefully selected participants. Because of the number of people involved and the fact that members typically build on each other's responses, insights into the common understanding of a particular community can be derived by conducting just a few focus groups.[1]

The unique value of focus groups extends beyond efficiency to their ability to reveal social dynamics and processes. These sessions can create supportive environments for participants with shared identities or other important similarities to share experiences and diverse perspectives, though this requires careful attention to power dynamics. Effective facilitation balances structure with flexibility while maintaining an awareness of how the facilitator influences the group's interactions. It is essential to remember that the intent of a focus group is not to generalize information but to explain particular trends or occurrences in detail.[2] Therefore, researchers must make strategic decisions about participant composition based on research objectives when designing focus groups. For example, the focus group protocols below are organized according to how many credit hours students have accumulated to illuminate challenges and opportunities for improvement at different stages in the transfer student process.[3] In contrast, if the goal is to identify challenges and opportunities for specific degree programs, focus groups can be organized by academic discipline instead of credit accumulation.

Regardless of composition strategy, thoughtful recruitment and facilitation are essential to ensure that participants are actively engaged in the discussion and that their diverse perspectives are represented. For more information on identifying who to invite to a focus group and how to encourage participation, see the following guidance from SAGE Publications: https://www.sagepub.com/sites/default/files/upm-binaries/24056_Chapter4.pdf.

THE IMPORTANCE OF INFORMED CONSENT

Whether or not a focus group discussion is being convened for the purposes of formal research, it will be important to explain how the information that participants share will be used. The process of informed consent must meet the following criteria:

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1. Meta-analyses find that, if the study population is relatively homogenous, three to six focus groups can capture the most important themes. See Guest, Namey, and McKenna (2016).
2. Creswell and Poth (2016); Esposito and Evans-Winters (2021).
3. The focus group protocols published here are adapted from the protocols used in the Transfer Opportunity Project, a four-year study conducted in partnership with the City University of New York and MDRC, funded by the federal Department of Education's Institute of Education Sciences. https://www.cuny.edu/about/administration/offices/oira/policy/a2b/top/.

INFORMATION: Provide information that empowers people to decide whether they wish to participate in the discussion.

COMPREHENSION: Ensure that potential participants understand the information being presented. The manner and context in which information is conveyed is as important as the information itself.

VOLUNTARINESS: Ensure that participants can provide consent without coercion or undue influence. An agreement to participate in research constitutes a valid consent only if voluntarily given.

The following are points to describe and commit to upholding before beginning a focus group discussion.

Voluntary	Taking part in the focus group is completely voluntary. Deciding not to participate will not affect [your grades or eligibility for any financial aid or educational programs] or [your status of employment].
	You can end your participation in the focus group at any point and you can decline to respond to questions that you do not want to answer.
Risks and Benefits	There are no direct benefits to you of taking part in this focus group. You may learn important information about the transfer process and feel proud that you're involved in a project that could help improve future students' experiences with transfer services in [campus/system].
	The risks for taking part in the focus group are [description of possible risks].[4]
Confidentiality and Privacy	We will make every effort to keep the information you share with us confidential. For example, if we ever quote you in reports or materials we produce for this project neither your name nor any identifying details will be included.
	Since this is a group setting, we cannot guarantee the confidentiality of what you share. We ask each focus group participant to respect the comments of others and to not share anything that is said outside of this group.
	There is always some risk that your information will be viewed by those not authorized to view it, though we take great care to ensure this does not happen.

4. In discussing the risks, consider the questions being asked, how the information will be used, and who will have access to the information and their relationship to participants.

After providing this information you must

☐ **Check comprehension:** “Does anyone have any questions?” [Pause and answer questions]

☐ **Check voluntariness:** “Do you agree to participate in this focus group?” [Pause]

FOCUS GROUP PROTOCOLS

Before beginning, moderators should provide the following guidelines for the discussion.

- **No right or wrong answers:** You are the experts in your own experience and perspectives, and that is exactly what we want to hear.
- **Honesty:** We ask that you answer the questions as honestly and completely as you can.
- **Time:** We are very interested in hearing your perspectives. We have a lot of questions to get through and so at times we may need to ask you to hold a thought for the end so that we can move things along or hear someone else’s perspective.

The following is a guide for discussion topics. Specific question order and wording will depend on the flow of the conversation. After a question is asked, focus group facilitators may use the following probes to elicit greater detail, provide clarification, or move the conversation along if one participant is dominating:

- Can you provide an example of that from the past year?
- Is there anyone else in the group who would like to elaborate on this idea?
- We really appreciate these thoughtful responses. We have some other issues that we’d like to discuss with the group now and so we will come back to this [question/issue] at the end if we have time.

Questions for Focus Groups with Students

Protocol 1: Prospective Transfer Students Enrolled at Community College (1 to 30 credits)

During our conversation today, I will first ask about your experiences at [campus], particularly those related to planning which courses to take and your understanding of how those credits will transfer and apply toward a bachelor’s degree. We will then discuss challenges you have faced and what you think could be done to address those challenges.

1. Let’s start by going around the room and each saying our first name, major or degree program at [current college], and the names of any colleges you have attended previously.

2. Did anyone start college intending to eventually transfer?
    a. Probe: Have your transfer plans changed at all since you started? Why?

Now I'd like to hear about how students at [college] register for classes and plan for earning a degree.

3. Please describe the process of registering for classes as incoming first-year students when you first started at [college]. What information did you receive from [college] about the process? How did you receive advising services and how did you register for classes?
    a. Probe: In your first advising session, did you talk about the transfer process with your adviser? What information did you receive?
    b. Probe: What kinds of questions do you usually have? What advice do you receive?
    c. Probe: What advice would you give to a new student about registering for classes?
4. Has anyone explained which classes you are required to take to earn your associate's degree?
    a. Probe: What questions do you have about these requirements?
    b. Probe: What is difficult about figuring out which classes you have to take?
5. What is your understanding about how the credits you take at [college] will transfer to another [college/university/institution] if you choose to attend one?
    a. Probe: What is your understanding of how the general education courses you take will transfer?
    b. Probe: What is your understanding of how the degree-specific courses you take will transfer?
    c. Probe: What questions or concerns do you have about credit transfers?

Now let's talk about the process of applying to and transferring to a bachelor's degree program.

6. How many credits should students accumulate before they start the transfer application process?
    a. Probe: What is your understanding of what you need to do to be eligible to apply to transfer?
    b. Probe: Should students complete their associate's degree before transferring? Why or why not?

7. Who would you talk to, or where would you go, if you have questions about transferring?

    a. Probe: Who or what else do you see as a resource for information and guidance about transferring?

    b. Probe: Do you feel that there is sufficient advising available?

8. Raise your hand if you know what schools you want to apply to transfer to.

    a. Probe: What made you decide on these schools?

    b. Probe: Did anyone help guide your decision?

9. To what extent do you feel prepared to start the process of transferring to another institution?

    a. Probe: What concerns do you have?

    b. Probe: What are you looking forward to?

    c. Probe: What do you know now about transferring that you wish you had known when you first started?

10. Please describe the general school or campus culture and climate at [campus].

    a. Probe: To what extent do you feel a sense of community or belonging to the students and staff members at [campus]? Please give an example.

    b. Probe: To what extent do you feel like your desire to transfer is or is not supported by faculty members and staff members at [campus]?

11. There is a lot of information that students need to know about things related to successful transfers such as registering for classes, financial aid, and special events.

    a. Probe: How does the college generally communicate with you (text messages, emails, banners, announcements)?

    b. Probe: What could be improved about how the college communicates with students?

We are getting close to the end here. In closing, let's talk about your recommendations for improving the transfer process.

12. What do you know now about the transfer process that you wish you had known when you first started? What advice do you have for future students?

13. Thinking about your experiences and the experiences of your peers who have transferred, if you could change anything about the support systems, information, and rules related to planning for and preparing to transfer, what would it be and why?

14. What else would you like to tell me? What questions do you have for me?

Those are all the questions we have for you today. We want to thank you for sharing your time and insights with us.

Protocol 2: Students Preparing to Transfer (over 30 credits)

During our conversation today, I will first ask about your experiences at [campus], particularly those related to planning for graduation and transfer. We will then discuss facilitators and challenges you have faced and what you think can be done to address those challenges.

1. Let's begin by going around the room and each saying our first name, major or degree program at [current college] and the names of any colleges you have attended previously.

2. Did you start college intending to eventually transfer?

    a. Probe: Have your transfer plans changed at all since you started? Why?

I'd like to hear about how students at [college] register for classes and plan for earning a degree.

3. Has anyone explained which classes you are required to take to earn your associate's degree?

    a. Probe: What questions do you have about these requirements?

    b. Probe: What is difficult about figuring out which classes you have to take?

4. What is your understanding about how the credits you take here at [college] will transfer to another [college/university/institution] if you choose to attend one?

    a. Probe: What is your understanding of how the general education courses you take will transfer?

    b. Probe: What is your understanding of how the degree-specific courses you take will transfer?

    c. Probe: What questions or concerns do you have about credit transfers?

5. To what extent do you feel like transferring is part of the culture at [campus]?

    a. Probe: To what extent do you feel that your plans to transfer are or are not encouraged by faculty members and advisers at [campus]?

    b. Probe: What could be improved about how the college communicates with students about how the intention to transfer affects your academic plans and choices here (such as, choice of major and courses you take)?

Now let's talk about the process of applying to and transferring to a bachelor's degree program.

6. Who would you talk to, or where would you go, if you have questions about transferring?

    a. Probe: Who or what else do you see as a resource for information and guidance about transferring?

7. What is your understanding of what you need to do to be able to apply to transfer?

    a. Probe: How many credits should students accumulate before they start the transfer application process?

    b. Probe: Should students complete their associate's degree before transferring? Why or why not?

8. Raise your hand if you know what schools you want to apply to transfer to.

    a. Probe: What made you decide on these schools?

    b. Probe: Did anyone help guide your decision?

9. Is there anyone here today that has already completed a transfer application?

    a. Probe: How did you know it was time to complete an application?

    b. Probe: Did anyone help you? Who and how?

    c. Probe: Where are you currently in the process?

10. How do you feel about transferring to a four-year college/university/institution?

11. What are you most looking forward to?

12. What are you worried about?

We are getting close to the end here. In closing, let's talk about your recommendations for improving the transfer process.

13. What do you know now about the transfer process that you wish you had known when you first started? What advice do you have for future students?

14. Thinking about your experiences and the experiences of your peers who have transferred, if you could change anything about the support, information, and rules related to transferring, what would it be and why?

15. What else would you like to tell me? What questions do you have for me?

Those are all the questions we have for you today. We want to thank you for sharing your time and insights with us.

Protocol 3: Transfer Students at a Receiving Institution (60 credits or more)

During our conversation today, I will ask about your experience at [campus], particularly your experience here as a transfer student, and your reflections on what was challenging or could have improved your experience.

1. Let's start by going around the room and each saying your first name, major at [current college] and the names of the colleges you have attended previously.

2. When [semester/year] did you first begin at [college]?

3. What's your major, and about how many semesters/credits do you have to complete until you can graduate?

Now I'd like to hear about your experience applying to and enrolling at [campus].

4. Please describe the process you went through to apply and enroll at [campus].

    a. Probe: What made you decide to apply and enroll at [campus]?

    b. Probe: How did you know that you had received an admissions offer?

    c. Probe: What did you need to do to commit to [campus]?

5. There is a lot of information that incoming transfer students need to know when they first enroll. What was your communication with [campus] like before and after you committed to attending?

    a. Probe: Did you attend a transfer orientation session? Why or why not?

    b. Probe: What information did you receive at the orientation session?

    c. Probe: Do you think the information you received at the orientation session made a difference in your experience as a transfer student here at [college name]?

    d. Probe: What could be improved about how the college communicates with new transfer students?

6. Please describe the process of having credits you earned at previous institutions evaluated for transfer to [campus]. How does the credit transfer process work?

    a. Probe: How long did it take to get all of your credits evaluated?

    b. Probe: Did you need to have faculty members review any of your credits? If so, please describe that process.

7. Please describe how credits that you earned at community college transferred to [college].

    a. Probe: Did any credits transfer that you did not think would transfer? Did any credits not transfer that you expected would transfer?

    b. Probe: How did the credits you took toward your major at previous institutions transfer here? How about general education credits?

    c. Probe: Did you have any questions or concerns with how your credits were evaluated and transferred?

        i. [IF YES] How were these addressed?

8. Is there anything else about your experience with transfer credit evaluation you'd like to share?

    a. Probe: Is there anything about the transfer credit evaluation process at [campus] that you think could be improved?

Now I'd like to hear more about your experiences and the supports available for degree planning and course registration.

9. Please describe the advising and services you received when you initially enrolled at [campus]. Is this advising any different from the advising you received at your community college?

    a. Probe: How did you know to visit/schedule an appointment with an adviser?

    b. Probe: What occurred in this initial advising appointment?

10. Please describe the process of declaring a major at [campus].
    a. Probe: How did you decide what major or program to enroll in? Did anyone help guide your decision?
    b. Probe: Have you officially declared your major? What did you have to do to declare your major? [Note: elicit a response from someone in each major represented in the group.]
11. Please describe the process of registering for classes in your first semester at [campus].
    a. Probe: How did you know which classes to register for?
    b. Probe: How was the process of registering for classes similar to or different than the process at community college?
    c. Probe: What challenges did you face when registering for classes in the first semester? How did you address these challenges?
    d. Probe: What advice would you have for incoming transfer students from community colleges about registering for classes?
12. How would you describe your transition to this school as a transfer student?
    a. Probe: Did you have any academic challenges?
    b. Probe: Did you have any social challenges?
    c. Probe: To what extent do you feel a sense of community or belonging to the students and staff members at [campus]? Please provide an example.
    d. Probe: How does the campus culture here compare to the community college you went to?

We are getting close to the end here. In closing, let's talk about your recommendations for improving the transfer process.

13. Across all the steps you have gone through, what are the things that you feel have helped you make progress? What are the things that you feel have made it more challenging?
    a. Probe: Why?
    b. Probe: Please provide an example.
14. What do you know now about the transfer process that you wish you had known when you first started? What advice do you have for future students?

15. Thinking about your experiences and the experiences of your peers who have transferred, if you could change anything about the support, information, and rules related to transfer, what would it be and why?

16. What else would you like to tell me? What questions do you have for me?

Those are all the questions we have for you today. We want to thank you for sharing your time and insights with us.

Questions for Faculty Members

Before we start talking about the transfer process, I'd like to learn a little bit more about your role.

1. Can you describe your position and role here at [institution]?

2. How long have you been in this role?

3. What part of your responsibilities as a faculty member are related to policy, processes, or decision-making with respect to transfer students?

4. What interactions do you have with other faculty members in your departments regarding transfer?

Now I'd like to hear more about the context of each of your academic departments.

5. How are articulation agreements developed and used in your department?

6. What is your department's relationship with other two-year and four-year institutions regarding articulation and transfer?

7. Are there processes or requirements specific to your department regarding the review of transfer courses? If so, please describe that process.

8. What factors are most often considered when accepting or rejecting courses?

    a. What factors are considered when making decisions about course applicability or how a credit can be applied?

    b. Who makes the final determination to accept or reject an appeal?

9. What information or data are important for you to make decisions about course applicability?

    a. What are the challenges with accessing, maintaining, or assessing the quality of this data or information?

I'd like to shift from procedures to transfer student success.

10. How do you interact with or support transfer students in your role?

11. What transfer policies or strategies could support more equitable transfer student success?

    a. Are there any policies or practices you might identify that impede more equitable transfer student success?

12. How do your interactions with transfer students compare with students that started at the school as freshmen?

    a. Does the advice or guidance you offer to transfer students differ from what you provide to students enrolled at the campus as freshmen?

Before we wrap up, I'd like to hear what you think about campus and state policies that influence transfer.

13. What is your understanding of campus policies regarding accepting transfer course credits?

14. What is your understanding of the [coordinating or governing board] role in policies regarding the transfer of credits?

In closing, let's talk about your recommendations for improving the transfer process.

15. If you could make any changes to the transfer course articulation processes, policies, or data, what would they be and why?

16. Are there any questions that we did not ask about the transfer process that we should have?

Those are all the questions we have for you today. We want to thank you for sharing your time and insights with us.

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ABOUT MDRC

MDRC, a nonprofit, nonpartisan social and education policy research organization, is committed to finding solutions to some of the most difficult problems facing the nation. We aim to reduce poverty and bolster economic mobility; improve early child development, public education, and pathways from high school to college completion and careers; and reduce inequities in the criminal justice system. Our partners include public agencies and school systems, nonprofit and community-based organizations, private philanthropies, and others who are creating opportunity for individuals, families, and communities.

Founded in 1974, MDRC builds and applies evidence about changes in policy and practice that can improve the well-being of people who are economically disadvantaged. In service of this goal, we work alongside our programmatic partners and the people they serve to identify and design more effective and equitable approaches. We work with them to strengthen the impact of those approaches. And we work with them to evaluate policies or practices using the highest research standards. Our staff members have an unusual combination of research and organizational experience, with expertise in the latest qualitative and quantitative research methods, data science, behavioral science, culturally responsive practices, and collaborative design and program improvement processes. To disseminate what we learn, we actively engage with policymakers, practitioners, public and private funders, and others to apply the best evidence available to the decisions they are making.

MDRC works in almost every state and all the nation's largest cities, with offices in New York City; Oakland, California; and Washington, DC.