



# Supporting Transfer Student Success in Oregon:

Lessons from Oregon Community  
Colleges and Universities



# Table of Contents

<b>A Letter from the Director</b> . . . . .	3
<b>Executive Summary</b> . . . . .	4
<b>Section 1: Project Genesis</b> . . . . .	7
The Transfer Landscape in Oregon— Legislative Action and State Coordination . . . . .	8
Case Study Methodology . . . . .	11
<b>Section 2: Key Findings of the Case Studies</b> . . . . .	15
Features of a Strong Transfer Culture . . . . .	16
Elements of Clear Transfer Pathways . . . . .	22
Transfer-specific Student Supports . . . . .	25
<b>Section 3: Recommendations From the Case Studies</b> . . . . .	31
<b>Appendix A: Transfer Outcome Model Description</b> . . . . .	36
<b>Appendix B: Case Study Data Collection and Methods</b> . . . . .	37
<b>Appendix C: Sample Agenda for Convening</b> . . . . .	41
<b>Appendix D: Sample Advising Worksheet</b> . . . . .	42
<b>Appendix E: Sample Syllabus</b> . . . . .	44
<b>Appendix F: Online Resources</b> . . . . .	46

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**This report was primarily authored by Michelle Hodara of Education Northwest, with contributions from others on the project team.**

## **PROJECT TEAM**

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# Colleagues,

It is no secret that the transfer student experience is complex. For those who work directly with students and institutions, and for the students themselves, the challenges are felt every day. But while there are certainly barriers for transfer students, there are also positive actions being taken to increase their likelihood of success.

There is increased attention on transfer pathways at the state policy level, including investments to encourage collaboration among institutions and the development of information to aid students. In addition, colleges and universities across Oregon are investing in transfer-specific advising, data analysis, programming, and resources. There are good stories to tell in our state.

The Ford Family Foundation commissioned a collaborative research project to raise up examples of the positive role Oregon's higher education institutions can play in the state's transfer landscape. The goal of the research is to highlight policies and practices that could help contribute to strong transfer outcomes for Oregonians. As colleagues, partners, and champions for student success, we are excited to share the report with you.

The report is the result of both qualitative and quantitative research. Case studies at select community colleges and universities in Oregon were used to document commonly reported promising practices and effective strategies for supporting transfer students. The institutions for the case studies were selected based on several factors, including analysis of student-level data from the Higher Education Coordinating Commission and the Oregon Department of Education and The Ford Family Foundation's interest in better understanding the transfer student experience in rural settings. While only six institutions were included in the case studies, we know there are promising practices and outcomes happening at each of our colleges and universities. We hope that Oregon's public institutions both see themselves in the findings and learn about new practices, policies, and strategies that may provide opportunities to enhance their current work.

We at the Foundation look forward to collaborating with our policy and institutional partners to use the findings of this report as a catalyst for improvement in transfer student success. We recognize the complexity of the problem requires collaboration across institutions and sectors.

No one institution can succeed alone. By working together, Oregon can be an example of promising practices to support transfer student success.

*In partnership,*



*Denise M. Callahan  
Director of Postsecondary Success  
The Ford Family Foundation*

*November 2019*

# Executive Summary

*Oregon students often experience challenges while navigating the process of transferring between community college and a four-year institution. Recognizing these challenges, The Ford Family Foundation commissioned a collaborative research project to raise up examples of the positive role Oregon's higher education institutions can play in the state's transfer landscape. The goal of the research is to highlight policies and practices that could help contribute to strong transfer outcomes for Oregonians.*

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This research relied on case studies of community colleges and universities in Oregon to document what stakeholders commonly report are promising practices and effective strategies for supporting transfer students. The policies and practices found at the case study institutions are likely present at other institutions across the state; we hope that Oregon's public institutions see themselves in the findings and learn about new practices, policies, and strategies that may not be underway at their institutions.

## CASE STUDY METHODOLOGY

The project team considered multiple qualitative factors as well as the results of quantitative analysis to select the case study sites, ultimately selecting one pair of institutions that had a long-standing partnership and a large volume of transfer students, and two public universities and two community colleges with strong transfer outcomes (defined as better-than-expected bachelor's degree completion rates for all community college transfer students or for underrepresented minority transfer students). The team selected community colleges that serve rural areas of the state, because rural areas are of particular interest to the Foundation and this study sought to better understand the transfer student experience in rural settings. The Oregon Higher Education Coordinating Commission (HECC) and the Oregon Department of Education (ODE) provided data that informed the site selection process.

The case studies included interviews with 52 college staff (administrators, advisors, financial aid staff, and faculty), three focus groups with 21 community college transfer students at each of the universities, and a document analysis of each institution's website and transfer resources.

## KEY THEMES AND FINDINGS FROM THE CASE STUDIES

The case studies found that, overall, stakeholders have a deep commitment to student success and that the student transfer experience is increasing as a priority among the studied community colleges and universities. The main findings can be summarized as follows:

- Case study institutions strove to implement the following features that they believed contributed to a strong transfer culture: **data use, advising systems, and clear transfer pathways**
- Stakeholders reported the following conditions support clear transfer pathways: **communication and collaboration between faculty members, investments in technology related to credit transfer and degree audit, and pressures to grow degree programs and improve student outcomes**
- Key transfer-specific supports provided across the colleges include **personalized advising, transfer-specific programming and spaces, clear online tools to support self-advising, and flexible financial aid and scholarship processes**

## Priorities for Continuing to Support Transfer Student Success

*Although the case studies focused on what is working and what can be replicated across the state to support transfer students, many challenges surfaced. A statewide focus on the following priorities will help ensure increasing rates of success for Oregon's growing transfer student population:*



**Investing in credit transfer and degree-audit technology tools which are useful to registrars, advisors, and students**



**Investing in more supports for transfer students**  
(i.e., advisors, training, transfer-specific financial aid and programming)



**Developing and maintaining partnerships across the state to maintain existing transfer agreements that are working, develop new agreements, and strengthen the state transfer agreements**



**Leveraging Oregon's longitudinal data system to help stakeholders better understand how to support successful transfer outcomes and develop plans for scaling successful efforts**

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The Ford Family Foundation hopes policymakers and institutions will use the findings of this report as a catalyst for improvement, with a particular focus on creative solutions that can be implemented by institutions located in and serving rural populations. Developing a state research agenda about transfer students, built in collaboration with public and private researchers, could be valuable as a roadmap for partnership in understanding and improving the experience of Oregon transfer students.

This report will inform the Foundation's next steps in this work, including the possibility of bringing together community college and four-year partners, particularly from rural regions, to discuss the findings and explore potential partnerships to strengthen the system for students. The Foundation believes that working together across institutions and regions, Oregon can be home to a rich array of promising and positive practices for transfer student success.



# SECTION 1

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## PROJECT GENESIS

*For 25 years, The Ford Family Foundation has supported students in achieving their dream of a college education. These programs, from the outset, have included scholarship dollars as well as wraparound services, engaging an increasingly diverse group of students over time. Ford Family scholarship recipients, all of whom come from low-income, traditionally underserved backgrounds, have helped The Foundation continuously learn and improve its work. One persistent challenge the Foundation encounters is the complexity often associated with navigating the process of transferring between community college and a four-year institution. The Foundation's desire to better understand the transfer landscape in Oregon and how it affects students has increased over the years – the greater the knowledge, the more questions arise.*

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The student transfer experience is receiving increased attention at the state and national levels. Nearly 50 percent of students who complete bachelor's degrees at four-year institutions have previously attended a community college.<sup>1</sup> Many transfer students never complete a degree, for reasons ranging from the financial impacts of lost credits to a lack of supportive resources to successfully manage the transition.<sup>2</sup> With the ever-rising cost of higher education and Oregon's ambitious 40-40-20 goal, the conversation about the community college student transfer experience needs to remain at the forefront. Community colleges are lower cost and often closer to home, often providing first-generation and low-income students easier access to higher education than universities that are more costly and sometimes less convenient.<sup>3</sup> Among 2012 two-year college entrants nationally, 48 percent were students of color and 20 percent were 24 years or older (compared to 40 and 9 percent of four-year college students, respectively).<sup>4</sup> Currently, 24 percent of Oregon community college students are students of color and 53 percent are older than 25.<sup>5</sup> In addition, Oregon Promise encourages a new cohort

of graduating high school seniors to enter the state's community colleges annually. We collectively owe it to the students of our state to ensure available paths lead to likely success in meeting educational attainment goals.

With these issues in mind, The Ford Family Foundation commissioned a collaborative research project to raise up examples of the positive role Oregon's higher education institutions can play in the state's transfer landscape. The goal of the research is to highlight policies and practices that may lead to strong transfer outcomes for Oregon community college students. The Ford Family Foundation hopes policymakers and institutions will use the findings of this report as a catalyst for improvement, with a particular focus on creative solutions that can be implemented by institutions located in and serving rural populations. The intent is that this report leads to generative discussion and opportunities for partnerships across the state. The Foundation believes that working together across institutions and regions, Oregon can be home to a rich array of promising and positive practices for transfer student success.

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<sup>1</sup> NSC Research Center (2017). The role of two-year public institutions in bachelor's attainment. Retrieved from <https://nscresearchcenter.org/wp-content/uploads/SnapshotReport26.pdf>

<sup>2</sup> Hodara, M., Martinez-Wenzl, M., Stevens, D., & Mazzeo, C. (2017). Exploring credit mobility and major-specific pathways: A policy analysis and student perspective on community college to university transfer. *Community College Review*, 45(4), 331-349.

<sup>3</sup> Cohen, A. M., Brawer, F. B., & Kisker, C. B. (2014). *The American community college* (6th ed.). San Francisco, CA: Jossey-Bass.

<sup>4</sup> Nationally, two-year colleges also have larger populations of students who receive Pell (52 percent at two-year colleges compared to 43 percent at four-year colleges) and students who have parents with no postsecondary education experience (39 percent at two-year colleges compared to 23 percent at four-year colleges). All data are drawn from Beginning Postsecondary Students (BPS) Longitudinal Study 2012/14, conducted by the National Center for Education Statistics at the U.S. Department of Education, using QuickStats (<https://nces.ed.gov/datalab/index.aspx>).

<sup>5</sup> See <https://www.oregon.gov/highered/research/Documents/Snapshots/CC-Snapshot.pdf>

# The Transfer Landscape in Oregon: Legislative Action and State Coordination

Oregon high school graduates who begin their postsecondary education at a local community college and transfer to a four-year institution forge a diverse set of pathways between institutions and to degree completion (see Figure 1). Historically, about 80 percent of this group has stayed in state, transferring to a four-year institution in Oregon. Overall, the students depicted in the figure<sup>6</sup> attended 608 different four-year institutions spread across all 50 states, the District of Columbia, Puerto Rico, and the U.S. Virgin Islands. About 45 percent earned a bachelor's degree within six years of matriculating at their first community college, with a range of 18 to 49 percent across community colleges.

The broader population of transfer students in Oregon (students of all ages) take approximately 125 different pathways from the state's community colleges to public universities. Among pathways with at least 50 students, six-year bachelor's degree completion rates range from 33 to 72 percent.<sup>7</sup> This set of pathways and outcomes provides Oregon institutions and policymakers with a wide range of possible experiences to streamline and barriers to address.

In 2011, the Oregon Legislature passed the Transfer Student Bill of Rights and Responsibilities (HB 3521), calling for the Joint Boards of Education to develop standards for how students could apply community college credits to baccalaureate degrees at state institutions of higher education. Soon after, the Higher Education Coordinating Commission (HECC) was formed and assumed responsibility for developing and implementing these standards.

In 2017, HB 2998 directed the HECC and Oregon's community colleges and public universities to improve transfer pathways. HECC became responsible for convening institutions to develop common foundational curricula and for reporting on progress to the Legislature.<sup>8</sup> A particular concern at the time was that transfer tools available to students were not serving them well, since transfer students were graduating with more excess credits than students who were in a four-year institution the entire time.<sup>9</sup> A HECC-convened workgroup representing community colleges and four-year institutions met regularly and produced a report on progress in January 2018.<sup>10</sup>

The workgroup report described two proposed foundational curricula that can transfer seamlessly (one general; one STEM), defined "lost academic credit," and defined the criteria for unified statewide transfer agreements (USTAs). A key idea in the report is that these processes are time intensive and require continued funding to bring the necessary groups together to craft foundational curricula and build discipline-specific USTAs.

In the 2019 session, SB 730 was introduced to give HECC policy authority and permanent staff to build on HB 2998 and implement the workgroup's recommendations. It also called for a standing inter-institutional transfer committee to serve as an advisory body to the HECC and institutions when variances arise, and the development of a communications and database system (a "transfer portal") intended as a tool for students and advisors.<sup>11</sup>

<sup>6</sup> First-time Oregon community college students with first enrollment between 2005-06 and 2011-12

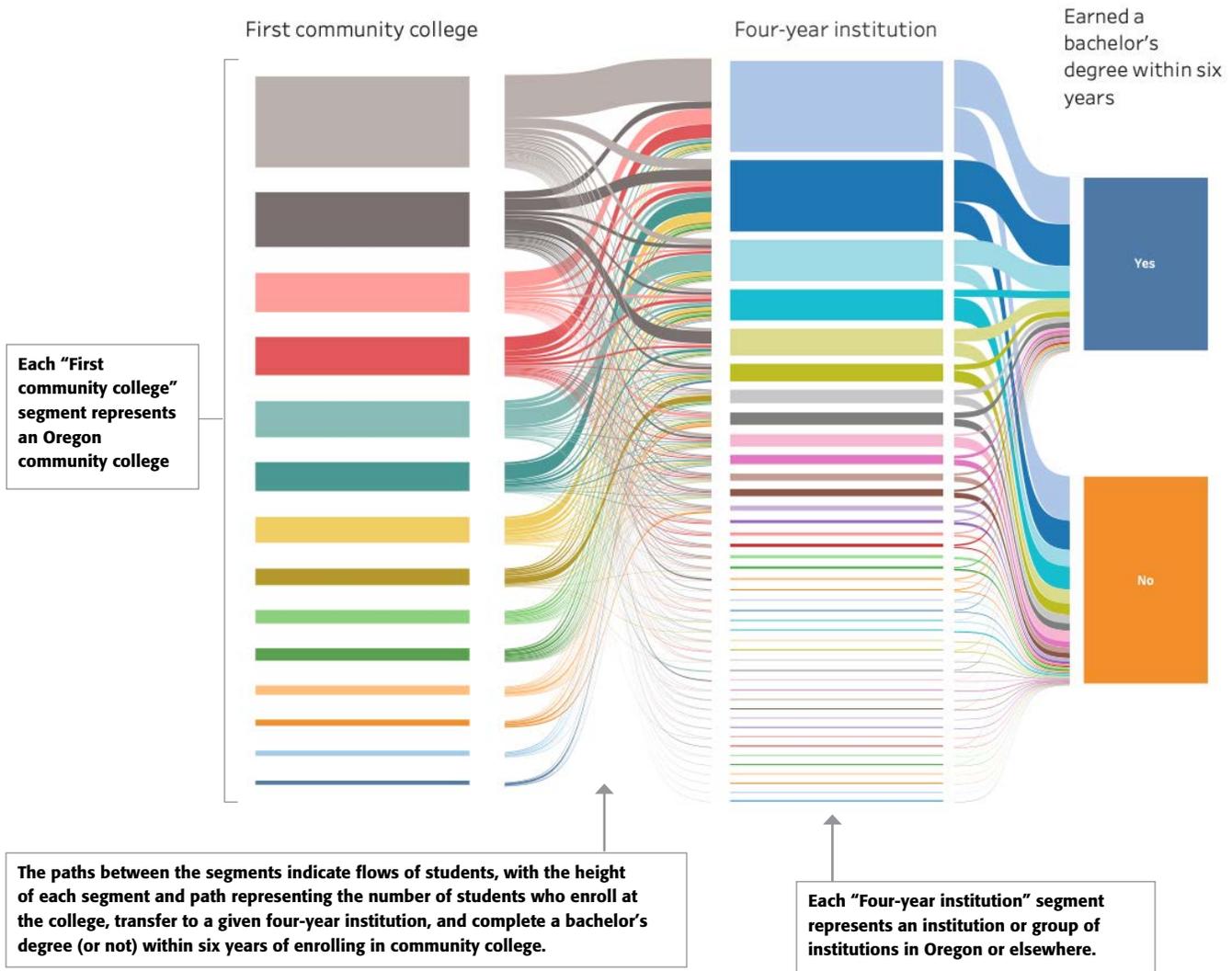
<sup>7</sup> ECONorthwest analysis of HECC data (first community college enrollment during 2007-08 through 2010-11).

<sup>8</sup> See [www.oregon.gov/highered/policy-collaboration/Documents/Transfer-Credit/2998/OTC%20Implementation%20Guide.pdf](http://www.oregon.gov/highered/policy-collaboration/Documents/Transfer-Credit/2998/OTC%20Implementation%20Guide.pdf)

<sup>9</sup> House Bill 2998 (2017): Post-Secondary Student Transfer. House Bill 2998 (2017): Postsecondary student transfer. See [www.oregon.gov/highered/research/Documents/Reports/HB-2998-2017-Report.pdf](http://www.oregon.gov/highered/research/Documents/Reports/HB-2998-2017-Report.pdf)

<sup>10</sup> Ibid.

**Figure 1:** Pathways of transfer students through postsecondary education for first-time Oregon community college students who graduated from Oregon high schools (first enrollment between 2005-06 and 2011-12)



Pathways with fewer than ten students have been combined by community college for display purposes. Three of Oregon's 17 community colleges were not independently accredited as of the end of the analysis period for first-time enrollees and are combined with the college through which they were accredited.

Source: ECONorthwest analysis of Oregon Department of Education (ODE) and National Student Clearinghouse (NSC) data

SB 730 moved from the Senate Committee on Education to the Joint Committee on Ways and Means but that committee took no action and the legislation did not move forward. Explanations given for this lack of action include the fiscal impact (\$1.8M in the biennium) and the nature of the policy changes described in the bill.<sup>12</sup>

HECC has nevertheless continued to work in this area, rebranding the foundational curricula as Core Transfer Maps and developing Major Transfer Maps (previously USTAs) for biology, English literature, business, and education majors.<sup>13</sup> These and other transfer tools are now known as the Oregon Transfer Compass. HECC has a new full-time position in the agency to help manage the ongoing work, and these issues will likely be raised again in upcoming sessions.

Finally, the 2019 Legislative Session completed the sunset of the Chief Education Office and moved the State Longitudinal Data System (SLDS) and its staff to the HECC.<sup>14</sup> An Education Pathway Report will soon be released for initial testing by state agency researchers and institutional research staff in colleges and universities. The SLDS houses data similar to those used for this study and could potentially produce a single, consistent version of transfer data for all Oregon stakeholders. Access for external research purposes as well as publicly available reports and dashboards are planned for the future.<sup>15</sup>

**In sum, a number of recent legislative actions have focused on the transfer experience in Oregon and legislative activity in this area will likely continue. The findings in this report highlight ways higher education institutions and policymakers in Oregon can continue to help shape and streamline students' experiences as they transfer from two-year to four-year institutions.**

<sup>11</sup> In the bill, "electronic system." See <https://olis.leg.state.or.us/liz/2019R1/Downloads/MeasureDocument/SB730/A-Engrossed>. See also <https://olis.leg.state.or.us/liz/2019R1/Downloads/CommitteeMeetingDocument/159052>

<sup>12</sup> Demars, Zack. "State Leaders Consider Pathways for Transfer Students." Daily Emerald, 8 Apr. 2019, [www.dailyemerald.com/news/state-leaders-consider-pathways-for-transfer-students/article\\_7ea4f456-599d-11e9-ac6e-5327e150bb77.html](http://www.dailyemerald.com/news/state-leaders-consider-pathways-for-transfer-students/article_7ea4f456-599d-11e9-ac6e-5327e150bb77.html)

<sup>13</sup> See [www.oregon.gov/highered/plan-pay-for-college/Pages/transfer.aspx](http://www.oregon.gov/highered/plan-pay-for-college/Pages/transfer.aspx)

<sup>14</sup> See [www.oregon.gov/highered/research/Pages/SLDS.aspx](http://www.oregon.gov/highered/research/Pages/SLDS.aspx)

<sup>15</sup> See [www.oregon.gov/cedo/SLDS/Pages/Researcher-resources.aspx](http://www.oregon.gov/cedo/SLDS/Pages/Researcher-resources.aspx)

# Case Study Methodology

## SITE SELECTION

This research relied on case studies of community colleges and universities in Oregon to document what stakeholders commonly reported are promising practices and effective strategies for supporting transfer students. The project team was interested in studying the student transfer experience at a variety of Oregon institutions and considered qualitative factors as well as the results of quantitative analysis to select case study sites.

The following factors guided the team's decision-making process:

- **Geographic location and size of institution**
- **Nature of the pathways between two-year and four-year institutions** (e.g., history of articulation agreements; volume of transfer students)
- **Actual and predicted six-year bachelor's degree completion rates for all transfer students and for underrepresented minority transfer students**
- **Number and share of students who are transfer students** (universities) **or who transfer within six years of first enrollment** (community colleges)

Due to the relatively small number of candidate institutions (Oregon's seven public universities and seventeen community colleges) and the team's desire to maximize the cross-site variation in institution size and location, the selection process relied on a qualitative assessment of the associated tradeoffs of including each institution. The team

also acknowledges the limitations of the measures used to quantify transfer success by institution.

Taking the factors above into account, the team identified three community colleges and three universities as case study sites, listed and described in Table 1.

**Table 1.** Selected sites

SITE NAME	SITE CHARACTERISTICS
<b>Linn-Benton Community College (LBCC) and Oregon State University (OSU)</b>	A community college and receiving four-year public university with long-standing articulation agreements and a relatively large number of transfer students
<b>University of Oregon (UO)</b>	A public university with better-than-expected bachelor's degree completion rates among transfer students
<b>Western Oregon University (WOU)</b>	A public university with better-than-expected bachelor's degree completion rates among underrepresented minority transfer students
<b>Rogue Community College (RCC)</b>	A rural-serving community college with relatively high transfer rates and better-than-expected bachelor's degree completion rates among transfer students
<b>Southwestern Oregon Community College (SWOCC)</b>	A rural-serving community college with better-than-expected bachelor's degree completion rates among underrepresented minority transfer students

The Oregon Higher Education Coordinating Commission (HECC) and Oregon Department of Education (ODE) provided data that informed the site selection process. HECC data included community college student demographic, enrollment, course taking, and credential award data from 2006-07 through 2016-17 and public university student demographic, enrollment, prior college, and credential award data from 2007-08 through 2016-17. ODE data included K12 student data (demographics, enrollment, and achievement scores) matched to National Student Clearinghouse (NSC) enrollment records for Oregon high school graduates from 2004-05 through 2016-17.

The team used the HECC and ODE data for regression modeling that predicted institution-level probabilities of transfer students earning bachelor's degrees within six academic years of their first enrollment at an Oregon community college. The difference between actual and predicted rates serves as our quantitative measure of each institution's effect on a successful transfer outcome (completing a bachelor's degree within six years of starting at community college). This analysis cannot, however, rule out the possibility that factors outside of institutions' transfer practices—such as aspects of student selectivity not captured by the models—drive the calculated effects. For additional details on the analysis that informed the case study site selection, see Appendix A.

## DATA COLLECTION

Case study research is “a versatile form of qualitative inquiry most suitable for a comprehensive, holistic, and in-depth investigation of a complex issue (phenomena, event, situation, organization, program individual or group) in context, where the boundary between the context and issue is unclear and contains many variables.”<sup>16</sup> Case study research illuminates perspectives on how something works in a particular real life, contemporary setting. In this study, the project team used case study research to understand the complex issue of transfer at a set of institutions in Oregon. The study was guided by the following research questions:

- 1. How do institutions with strong transfer outcomes address transfer in their missions and policies?**
- 2. How do institutions with strong transfer outcomes develop and sustain transfer pathways?**
- 3. What are the transfer-specific advising programs, policies, and practices at institutions with strong transfer outcomes?**

The case studies included interviews with 52 college staff (administrators, advisors, financial aid staff, and faculty), three focus groups with 21 community college transfer students at each of the universities, and a document analysis of each institution's website and transfer resources. Interview protocols asked college staff to reflect on what their institution does best when it comes to transfer, how they knew transfer was a priority, and what could be replicated across the state, and focus groups with students delved into what helped students transfer and what the university did well to support transfer students.

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<sup>16</sup> Harrison, H., Birks, M., Franklin, R., & Mills, J. (2017). Case study research: Foundations and methodological orientations. *Qualitative Social Research*, 18(1). Retrieved from: <http://www.qualitative-research.net/index.php/fqs/article/view/2655/4079#g4>

## Selected Sites for Case Studies



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Together, the six selected institutions provide an informative picture of work to support transfer student success that is likely taking place across institutions in Oregon.

For additional details on the case study approach and data collection, see Appendix B. Appendices C-F provide templates and resources from case study sites that can be adapted for other contexts.

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# SECTION 2

## KEY FINDINGS FROM THE CASE STUDIES

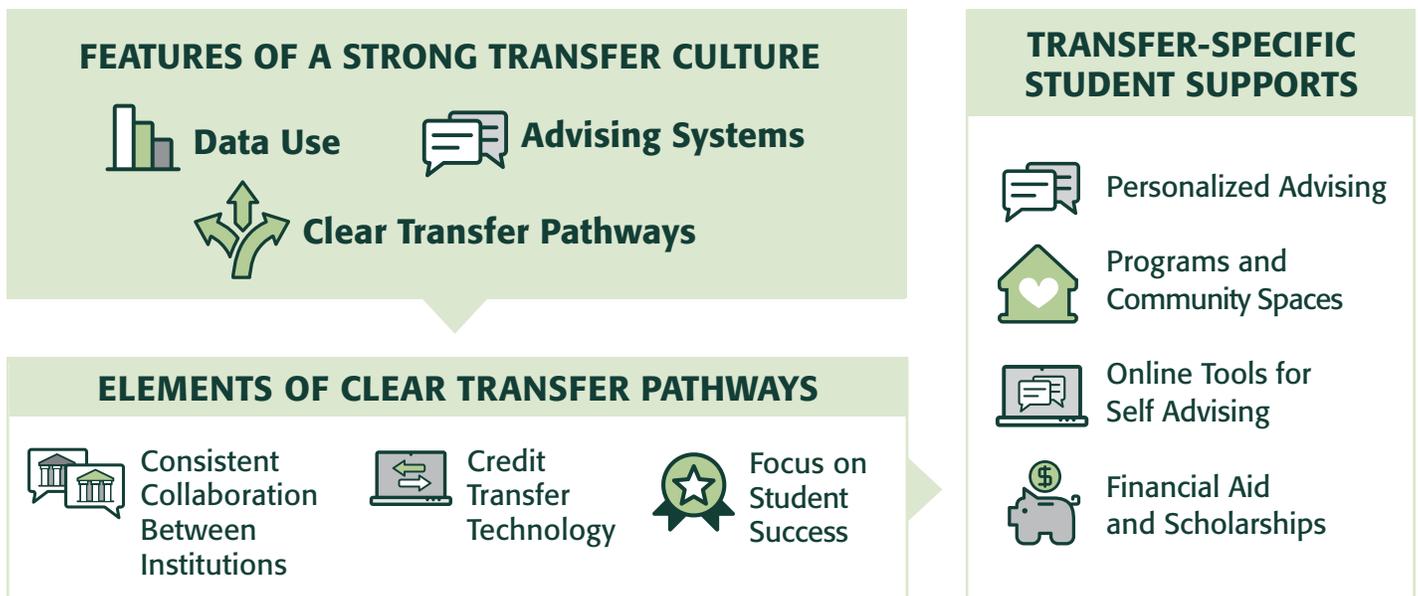
*The case studies found that, overall, stakeholders have a deep commitment to student success and that the student transfer experience is increasing as a priority across the studied community colleges and universities.*

The selected two-year and four-year institutions address transfer in their missions and policies in a variety of ways and consistently cited the following features as key to a strong transfer culture: data use, advising systems, and clear transfer pathways, broadly defined as approaches that streamline the experience of transferring from a two-year to a four-year institution. Although no institution had all three features in place, many were actively investing in transfer students, and all had the desire to improve outcomes for their prospective and matriculated transfer students. In addition, all three universities were hiring transfer specialists, investing in more programming for transfer students, and studying the needs of prospective and matriculated transfer students to identify and begin to remove barriers to bachelor’s degree completion.

Transfer pathways take many forms in Oregon, and case study participants reported that three common conditions contribute to clear transfer pathways: communication and collaboration between community college and university faculty members, investments in technology related to credit transfer and degree audit, and external and/or internal pressures to grow degree programs and improve student outcomes.

Staff and students also commonly cited the following transfer-specific supports as key to transfer student success: personalized advising, transfer-specific programming and spaces, clear online tools to support self-advising, and flexible financial aid and scholarship processes.

Findings from the case study sites also pointed to three broad recommendations related to supporting transfer student success.



## Features of a Strong Transfer Culture

Case study institutions strove to implement the following features that they believed contributed to a strong transfer culture:



Institutions use **DATA** to convey that transfer is a priority and to identify barriers to transfer student success.



**ADVISING** is provided along a coordinated continuum, from community college entry to university degree completion.



**CLEAR TRANSFER PATHWAYS** reduce the likelihood of losing course credit in the transfer process and provide a more seamless transition for students.



### DATA USE

Faculty and staff members frequently cited various metrics that helped them establish that transfer is a priority, as well as identify and begin to address barriers to transfer student success. Community college faculty and staff members discussed the importance of reviewing data on the GPA and degree completion of their students after transferring to a university. They described them as measures of whether their students were prepared enough for university and how well they were served once transferring. University faculty and staff members discussed understanding and broadly disseminating data on the increasing number of transfer students enrolled at their university, as well as the proportion of transfer students. This use of data helped the overall university understand the importance of effectively serving these students.

*We're pretty aware that over half our students are transfer students or will be transfer students. We know that's part of our mission. – Faculty member (WOU)*

Universities are also looking at the characteristics of their transfer student population and course performance to better understand how to serve this unique student population. Each of the three universities had conducted transfer student surveys and/or focus groups to better understand what is working and what needs improvement. These data were then assembled into reports with recommendations and used to inform committees tasked with improving the experience of transfer students and/or disseminated to faculty and staff members.

*We just got information on the courses that transfer students are most likely to fail during their first term and the dollar amount [that course failures] cost students. It's eye-opening to be sitting in a meeting and have that information so clearly laid out. – Advisor (OSU)*



## ADVISING SYSTEMS

Community college and university advisors, faculty members, and staff members described how they seek to provide prospective and matriculated transfer students with a continuum of support from community college entry to degree completion. Transfer advising starts at community college matriculation, when advisors work with students to “backward plan” by first identifying their long-term career goals. Then advisors help students understand the degree or degrees they need to earn to reach that goal, including if it requires them to transfer and earn a bachelor’s degree. Advisors then help students develop a course map, with specific courses in at least the first term, that will enable them to earn the degree that will help them reach their career goal. Community college advisors—who help students plan their courses and financial aid, monitor progress, and provide encouragement—are imperative for successful transfer and progress toward a bachelor’s degree.

*That's part of our role ... really educating them on that piece about how important community college is. It's not "I'm just at community college." It's your freshman and sophomore—permanent record—freshman, sophomore years of your bachelor's program. If you want to get into a program, you need to do well in your freshman- and sophomore-year courses. –Advisor (RCC)*

Advising becomes more of a coordinated system when students can meet with a university advisor on their community college campus who provides them with advice on which courses to take and early connections to resources, faculty members, and staff members. University investments in transfer typically take the form of building these advising systems by hiring transfer coordinators, as well as increasing the number of university advisors on community college campuses and transfer-specific advisors on university campuses. University outreach staff members help prospective transfer students make the best decisions possible by answering questions about the university, course articulation, and financial aid. Across all three universities, outreach occurs annually at all 17 community colleges through Oregon Transfer Days and regularly at neighboring community colleges

through monthly or weekly campus visits. University outreach personnel also work with community college advisors to make sure they have the most current information about the university and transfer processes.

*I visit 17 Oregon community colleges at least once every year and some colleges monthly or weekly. I meet with students and help them navigate the admissions process and generally provide support to students during the transition between community college and the university. –Advisor (OSU)*

Universities are also investing in transfer-specific advisors. Some of these individuals spend time on community college campuses, and others are academic advisors specifically assigned to transfer students at the university.

*... Our “transfer army” keeps growing, and colleges are now hiring transfer advisors. We have four different colleges that have transfer advisors. –Advisor (OSU)*

An OSU transfer advisor explained how they serve as a point of contact and extra layer of support for transfer students before, during, and after they transfer from a community college:

*I work with community college students to help them make informed decisions about where they want to transfer, help them understand the degrees in the college, and help them make their appropriate class choices to take at the community college level because we really would like students to maximize their time and money at the community college level, and we don't want them to get to OSU and then find out retroactively that they haven't taken their appropriate coursework for their intended major. –Advisor (OSU)*

OSU and WOU have also invested in a full-time transfer coordinator or specialist to help support transfer students, and UO plans to create a similar position. These coordinators serve a variety of roles, including making transfer credit articulation more seamless, working on degree partnerships and pathways with community colleges, developing and managing transfer events and programming, and providing direct advising to transfer students.

*The moment I met with [my transfer-specific university advisor], she took on the superpower of helping me. She directed me to the right places and told me if I had any questions to email her and we'd talk, or I could come in for a meeting. –Transfer student (WOU)*

*My transfer advisor here at OSU was super helpful. She was actually in contact with my community college advisor and they really helped me transition through the process. Somewhere along the lines, I had a problem with my two schools talking to each other because my full transcript didn't get pulled over, so I had lost credits. So I went from 144 to 120. I lost my calculus credits and my physics credits and I did not want to take those again. So they both really helped me prove that I'd taken those classes so I didn't have to take them again. It was nice. –Transfer student (OSU)*

Strong advising systems require coordination and training of faculty members to ensure they can be effective. At both community colleges and universities, faculty members typically take over advising once students are “program ready” or in a major. Faculty members can help students develop the academic skills and competencies necessary to succeed in their chosen field, select the appropriate courses to take that will transfer in their major (at the community college level), and refine their career goals. At some campuses, hiring committees discuss the focus on advising with potential faculty members, and existing and new faculty members receive training on how to advise prospective or matriculated transfer students.

*The faculty advisors—we train them in advising systems. Then the work for them is to know and understand their discipline. – Advisor (RCC)*

*If it wasn't for one of my instructors at Chemeketa, I would've taken the wrong biology series, and that would've set me back a whole year. – Transfer student (OSU)*

Finally, early-alert systems are another way transfer students receive additional support and guidance in an overall system of advising. Several community colleges and universities use early-alert software to identify students who are off track, and they are building processes to better provide interventions for these students.



## CLEAR TRANSFER PATHWAYS

Case study participants spoke of many different transfer pathways that are working well for students because they have articulated courses that transfer from community college to university in a student's chosen major and are supported by data use and advising systems. Examples of transfer pathways are outlined in Table 2, and a discussion of developing and maintaining pathways is in the next section.

OSU and UO view their dual-enrollment programs as the most seamless transfer pathways.

OSU's Degree Partnership Program (DPP) allows students to be jointly admitted and enrolled at OSU and any of its community college partner schools. DPP was established in 1998 by OSU and Linn-Benton Community College (LBCC), and it now includes 16 other Oregon community colleges. When asked what OSU does best when it comes to transfer, most respondents said "DPP." By design, DPP is intended to improve the transition from community college to university by allowing students to enroll at OSU and community college at the same time. This allows community college students access to OSU courses, campuses, faculty members, and resources. It also allows them to understand how their community college credits are transferring at the end of each term. OSU has invested in IT infrastructure, particularly related to financial aid, and advising personnel to support DPP on the community college and university campus.

*If the student's at a community college, and they're, like, "OK, I think I want to be at Oregon State," they apply for admission. They have to meet the admission requirements at that time. And they apply very specifically as a degree-partnership student ... they get admitted, and then we, behind the scenes—I have a process where Linn-Benton (in this case) and OSU are sharing information on the student. As the student takes the credit, we get their transcripts as soon as the term is done. We prioritize getting those credits articulated and so forth. Sometimes that's certainly slower than we'd like, but that's one of the things we're working on. But we get those articulated, and the student then can actually see—using what we call MyDegrees, they can actually see how their credits are mapping toward an OSU degree. –Administrator (OSU)*

UO's dual-enrollment program with Lane Community College (LCC) and Southwestern Oregon Community College (SWOCC) also offers access to UO courses, an array of services, and coordinated advising and financial aid processes. The key difference between OSU's and UO's dual-enrollment programs involves designations. Specifically, DPP students can declare OSU or LBCC as their home institution, whereas with UO's program, students are LCC students for the first 90 credits and UO students for 90-plus credits (but they can take classes at either institution).

<sup>17</sup> See <https://olis.leg.state.or.us/liz/2019R1/Measures/Overview/SB3>

**Table 2. Examples of transfer pathways and partnerships in Oregon**

Type	Description
<b>Articulation Agreement</b>	Articulation agreements are formal agreements or partnerships between a university and community college documenting the transfer policies and course equivalencies for a specific academic program.
<b>Career Pathway</b>	Career pathways are state-approved 12- to 44-credit programs in which students gain skills in a specific field and earn a certificate. All career pathways can lead to further education through completion of an associate degree, articulated or related bachelor's degree options, and related graduate degree options. Career pathways use articulation agreements, but they also provide students with a clear road map from education to the workforce in a specific field.
<b>State Transfer Degree</b>	Oregon has three state transfer degrees. The Associate of Arts Oregon Transfer (AAOT) degree is a state-approved 90-credit hour associate degree. The AAOT is designed so that students meet lower-division general education requirements for baccalaureate degree programs at Oregon public universities, but the AAOT does not guarantee junior standing in a major. The Associate of Science Oregon Transfer-Business (ASOT-BUS) and -Computer Science (ASOT-CS) degrees are specialized state transfer degrees for students planning to transfer credits to an Oregon public university business or computer science program.
<b>Applied Baccalaureate (AB) Degree</b>	AB degree programs are designed for individuals with a (non-transfer) terminal Associate of Applied Science (AAS) degree who wish to pursue a bachelor's degree. The AB degree program accepts all the student's AAS credits in fulfillment of the first two years in the bachelor's degree program at the university. Oregon recently passed a bill allowing community colleges to offer AB degrees upon approval from HECC. <sup>17</sup>
<b>Dual Enrollment</b>	Dual-enrollment programs allow students to dual enroll at two- and four-year institutions. They are distinct from dual-credit programs in Oregon, which are community college or university courses offered at a high school and taught by a high school teacher.
<b>Regional Commitment or Agreement</b>	A regional commitment or agreement demonstrates a shared commitment among university and community college presidents to provide seamless pathways from community colleges to universities to the workforce in a specific region. This might include honoring articulation agreements between an individual community college and university across all institutions in the region and/or creating regional articulation agreements.

<sup>18</sup> The following article documents WOU's development of the AB in CS and IS: <https://www.acm.org/binaries/content/assets/education/lighting-the-path-from-community-college-to-computing-careers.pdf>

<sup>19</sup> For local media coverage, see <https://news.sou.edu/2018/11/four-higher-ed-institutions-announce-consortium/>

## Examples of Transfer Pathways and Partnerships in Oregon

OSU relies on major-specific articulation agreements with specific institutions.

*[The articulation agreements] create kind of a road map for students to, you know, kind of “ABC, here’s all the classes you need to take in order to not only graduate with a degree here but then transfer on to another institution” ... I’m very lucky that OSU’s College of Forestry is, like, “Send us students! Please send us students!” So they’re very willing to work through that with us. –Faculty member (SWOCC)*

All community colleges have career pathways.

*Early childhood education is the most beautiful pathway. There’s a 15-credit certificate, and that takes you all the way to a master’s degree in education. It’s beautiful—basic, intermediate, one-year certificate, two-year degree, and then two different degrees that are completely articulated. [RCC students] can walk into elementary ed, early childhood development [at Southern Oregon University (SOU)], and then they can go on to a master’s degree. – Administrator (RCC)*

UO representatives described relying on the statewide transfer degrees.

*The ASOT is pretty much the one that we use because it’s been solid, and so there’s not really any reason for us to have anything else, and we get a lot of students who come in with the ASOT. – Advisor (UO)*

WOU offers community college transfer students with an AAS the option to complete AB degrees in liberal studies, psychology, gerontology, computing science (CS), and information science (IS).<sup>18</sup>

*One of my things I hated the most was telling a [community college] student, especially a young student—They’re, like, “Yeah, I want to do this degree with you.” And I’m, like, “OK. Understand it’s a terminal degree.” And that word even sounds bad—because it is. A two-year AAS degree, historically, is a terminal degree. That means it’s not easily transferrable. When this AB came around, voila! It solved that problem ... – Faculty member (WOU)*

OSU and UO have long-standing dual-enrollment programs. WOU is starting to have dual enrollment, as well.

*We feel that if we can get students early into the DPP program, then that is a pathway that makes it less likely that there’s going to be this lost credit or minimizes the lost credit. – Administrator (OSU)*

The Southern Oregon Higher Education Consortium signals a regional commitment among RCC, SOU, Klamath Community College (KCC), and the Oregon Institute of Technology (OIT) to work together to streamline educational pathways and address regional workforce needs.<sup>19</sup>

*We’re going to work together for the best interest of the students. And that’s going to help everyone as a whole because if we can do a better job here [with] preparing students, getting students ready to transfer to OIT or to SOU, then it’s going to help both institutions. – Administrator (RCC)*

## Elements of Clear Transfer Pathways

Stakeholders commonly described three conditions that facilitate the development and maintenance of clear transfer pathways at their institutions and across the state:



**CONSISTENT COMMUNICATION AND COLLABORATION** between the community college and university partners



**TECHNOLOGY** that facilitates credit transfer and degree audit



A focus on **STUDENT ENROLLMENT AND/OR SUCCESS**



### COMMUNICATION AND COLLABORATION

Communication and collaboration between faculty members and advisors

at community colleges and universities is necessary to develop and maintain successful transfer pathways. Bringing together faculty members to discuss how to align courses and curricula was frequently cited as an effective way to create and update articulation agreements. At in-person meetings, documents such as syllabi are sometimes reviewed to ensure content and skills taught at the community college will align with those at the university. Faculty members may sign articulation agreements during these meetings. Additionally, in-person meetings help build relationships between faculty members and facilitate collaboration when updates are needed between meetings.

There were two examples of in-person meetings. First, the OSU College of Business holds meetings twice a year with OSU and LBCC representatives. During these meetings, faculty members and advisors discuss changes to the business program requirements, curricula, and prerequisites and various opportunities for LBCC students (such as an orientation and computer access at OSU).

*Twice a year, in the fall and in the spring, our [advising] office and various faculty members meet with the Linn-Benton Community College faculty and staff in the College of Business, and we share hosting. And that's always a really robust, nice conversation. We know each other pretty well, and that's where we share information.*  
—Advisor (OSU)

*Besides formal agreements, informal communication needs to happen. Otherwise, the formal agreements—they start to separate. Suddenly, you've got to realign them. But what we're doing is we're constantly tweaking them. That's the best way to explain it ... they're naturally going to start separating because you've got one group doing one thing and one group doing the other thing. But then, when you meet, you go, "Uh-oh, wait, wait, we've got a problem," and then you realign ... Twice a year is like the sweet spot ... I look at it, in summary, you've got a transfer agreement. That's one thing—that's only one piece. Communication and collaboration is another piece. And it can happen at the department-to-department level, but it can also happen faculty to faculty member, as well.*  
—Faculty member (LBCC)

Second, RCC and SOU have an annual articulation retreat. This is an evening event that has occurred for the past 10 years, bringing together RCC and SOU faculty members, along with institutional leaders. The event is a catered affair, that includes a few welcoming remarks, followed by work time for faculty members to review articulation agreements and course alignment. A sample agenda based on one of these events is in Appendix C.

*Once a year, we meet with SOU faculty, where data shows that most of our students transfer. All of the faculty at our community college meet with the university faculty in the same departments and sit down at a table for dinner. Faculty discuss areas for improvement in course alignment, make curriculum adjustments, and sign articulation agreements. –Administrator (RCC)*

Consistent informal communication is also necessary to update and maintain articulation agreements. When it is not possible to meet in person, some community college and university faculty members have developed articulation agreements through phone conversations and electronic review of course documents. These agreements require regular communication to inform partners of updates or to make adjustments when necessary.

*I think we have a bigger challenge than some other community colleges because we don't have a university in our backyard, and our students transfer to a lot of different places. Oregon Tech is very good about sending us an articulation agreement every year so that we can verify that the courses we offer and what they want are still the same, and then we update as needed. –Administrator (SWOCC)*

*Our office has done a lot of informal meetings with faculty at various community colleges, which is really nice too because that's a great time to share information, to share updates, to make sure that everybody's kind of on the same page...So it's those relationships that are really important. –Advisor (OSU)*

*I feel like I communicate with who is in charge of education at Chemeketa almost as much as I communicate with my own dean. –Faculty member (WOU)*



## TECHNOLOGY

Investments in technology also enable seamless transfer.

Technology is critical for two main reasons:

- **To help community college students understand if the courses they are taking will transfer into the degree program they are planning to pursue at a university**
- **To allow community colleges to share matriculated transfer students' transcripts and enable universities to seamlessly articulate those credits from one transcript to another**

All institutions have degree audit systems that allow students to understand their progress toward their degree at their institution. But currently only UO has the technology in place to allow prospective transfer students to understand if the courses they are taking will transfer into the major they are planning to pursue. Other institutions are working on implementing degree audit for prospective students. For example, OSU is improving its online tool MyDegree<sup>20</sup> to allow prospective students to understand how their credits will transfer and map onto OSU degree requirements.

*We asked Western: "To do [DPP], we need all this to be able to be done electronically because we have to be able to share student information. I know we're not that far, but we are far." So they stepped up and did that, and we will be sharing everything electronically ... starting next year, our students will be able to go to LBCC and go to Western at the same time—one application, one FAFSA. They can live in the dorm there and still be a student here. They can use both facilities, student support services, learning centers, libraries, as well as athletic centers and things like that. It just makes it seamless for a student. –Administrator (LBCC)*

<sup>20</sup> See [www.ellucian.com/solutions/ellucian-degree-works](http://www.ellucian.com/solutions/ellucian-degree-works)



## STUDENT ENROLLMENT AND SUCCESS

External and internal pressures to expand programs and/or improve student success may also lead to clearer transfer pathways. Grow Your Own (GYO) teacher programs are an example of a career pathway that emerged due to external demand, specifically, the need for more individuals with teaching credentials in Oregon to address educator shortages in rural areas and the need for more bilingual teachers and teachers of color, who reflect student demographics in Oregon. Community college representatives spoke about the motivation faculty and staff members have to develop and grow these pathways to meet regional workforce needs.

*In rural Oregon, we always struggle with serious teacher shortages. This partnership makes it possible for someone who works in the local school district to have a path to obtain a teacher's license. –Advisor (SWOCC)*

*I think this grow-your-own model for teachers is the wave of what's going to happen in trying to diversify the workforce. –Faculty member (WOU)*

In addition, the need to increase enrollment may drive some community college faculty members to take on the responsibility of expanding enrollment in programs in their discipline. One way to attract students to a program is to provide them with a clear path to a bachelor's degree by developing and maintaining articulation agreements with a university. At SWOCC, the forestry, physics, and chemistry faculty members have expanded their programs by developing partnerships with OSU and a clear path to a bachelor's degree, which has attracted more students.

*There's some motivation there for [faculty members] to keep doing this. You want students, so we better have a nice, clear transfer path, or otherwise students will have no need to come to us—they'll go somewhere else that does have that path. So that does help motivate our faculty. –Administrator (SWOCC)*

Similarly, institutional priorities and intrinsic motivation among faculty members to focus on student success may also contribute to developing and maintaining clear transfer pathways. Community college faculty members frequently discussed the need to be responsive to changes in university curricula and course articulations to ensure the success of their students.

*We're all here to help students ... So I would never push back on a change from OSU because that would just be counterproductive for me. I'm trying to get that student from here to OSU successfully. –Faculty member (LBCC)*

*For me personally, it's just wanting students to be successful, and part of that is making sure that their experience transferring is a positive one. The fewer barriers that they have to face, the more successful they will be. They're more likely to stick with the program if they feel that the transition is smooth—and they don't have to retake half the classes. Again, if they're already low-income students, that's even a bigger issue because then they wouldn't have the money to retake all of those classes anyway. –Faculty member (SWOCC)*

Finally, revisions of general education curricula at the university level, driven by the desire to improve student completion, can also contribute to clearer transfer pathways for community college students. For example, in 2017, WOU adopted a 180 (90+90) credit framework, called the WOU Way.<sup>21</sup> The framework includes:

- A self-contained 90-credit program in one's major
- 30 credits of free electives to enable interdisciplinary exploration
- 60 credits of general education

These changes to the general education curriculum should make it easier for transfer students to transfer their course credits and meet degree requirements. OSU also discussed revising its general education curriculum to make it more transfer friendly.

*We very intentionally crafted our degrees to be transfer friendly. –Faculty member (WOU)*

<sup>21</sup> See [http://www.wou.edu/facultysenate/files/2017/04/WouWay\\_questions.pdf](http://www.wou.edu/facultysenate/files/2017/04/WouWay_questions.pdf)

## SECTION 2: KEY FINDINGS

# Transfer-specific Student Supports

The research team talked to staff members and students about what resources and strategies were most effective in supporting students' preparation for transfer, transition to a university, and university persistence:



The foundation of transfer-specific student supports is **PERSONALIZED ADVISING**, which may come from a variety of sources



**TRANSFER-SPECIFIC PROGRAMMING AND SPACES** at a university are critical to helping transfer students build community and a sense of belonging



**ONLINE TOOLS TO SUPPORT SELF-ADVISING** help students make course selections and understand the number of course credits they will receive for each transferred course



**FLEXIBLE FINANCIAL AID AND SCHOLARSHIP PROCESSES** provide transfer students with a fair shot at scholarship opportunities



### PERSONALIZED ADVISING

Transfer is a complex process; to be successful, prospective and matriculated transfer students need additional and personalized advising support. Transfer advising begins with long- and short-term planning. As noted previously, community college advisors work with students to identify long-term goals, such as what career field they want to pursue, and then map back to the most appropriate degree and major, followed by the university and community college courses necessary to fulfill both the major and general education requirements. Across the community colleges, there was a strong emphasis on early career planning<sup>22</sup> and choosing a major or meta-major as early as possible so students can begin meeting the relevant course requirements. Financial aid is also a key component of these conversations, as community college advisors and faculty members are focused on maximizing time and minimizing debt.

*I always ask students, "What is your end (academic or career) goal?" Then we work our way backward, discussing major, admission, timelines, and [community college] curriculum. –Advisor (SWOCC)*

*We help students figure out what they want to be and work toward that. If students want a particular career, we discuss what degree they will need and what schools offer that degree. What are the entry requirements for transferring to a university with junior-level status in a university with that degree program? Then we sit with the students and figure [out] what classes they need to take. –Advisor (RCC)*

<sup>22</sup> At RCC, students can use the Holland Code to identify career interests. This tool is available at <http://www.rogucecc.edu/counseling/hollandcodes/test.asp>.

Matriculated transfer students need a personalized approach because they have different majors, origin institutions, and backgrounds (e.g., they tend to be older than “traditional” college students, financially independent, caregivers, working). Thus, universities must provide multifaceted advising supports to transfer students through financial aid specialists, academic advisors, faculty mentors, TRIO<sup>23</sup> advisors, student centers (e.g., a veteran’s center, a nontraditional student center, a multicultural center), and other programs.

*We do a really good job of making [students] feel like humans—welcoming their diversity, really encouraging them to expand their horizons and try new things while they’re here. Students have a whole team of people across campus that are here to support them. –Advisor (WOU)*

Many university advisors described working most intensively with students during orientation. For example, at UO, advisors develop a “T-chart” with transfer students during orientation. On the left side of this chart, students list all the resources and people they accessed at community college. On the right side, advisors tell them the equivalent person and/or resource (with acronyms) at UO, and they might physically walk students to the people, centers, or resources they will likely use a lot. An example of a resource university advisors could use with new transfer students is in Appendix D.

*... [L]et’s say it’s a Lane student ... They might say, “I’m in CAR”—the Center for Accessible Resources, which is the disability resource center. And then they have to understand that our acronym is this ... And then the next step is to figure out where [it is] on campus ... And then I ask them, “If you need to use that, do you know how to find them? Do you know where they are?” ... You map out their educational path, but you also have to map out their resources and when they need to engage with these things. –Advisor (UO)*

Some prospective and matriculated transfer students also receive intensive supports from federal programs, such as TRIO and the Educational Opportunity Programs (EOPs)<sup>24</sup>, that are available to low-income and first-generation college students. The focus of these advisory services is similar to those available elsewhere, but they are often more intensive and personalized, as well as mandatory. RCC’s TRIO program<sup>25</sup> is specifically for prospective transfer students. The TRIO advisor meets with all TRIO students regularly and provides guidance on course planning/mapping and financial aid. The goal: Students leave with no loans. Services also include lunch and learns, campus tours (twice a year at public universities), cultural events (such as the Oregon Shakespeare Festival), and one-on-one tutoring.

*For me, I had a TRIO advisor at community college that I would meet with at least once a month. We would plan out how is it going, if it’s too difficult or too easy, and think ahead for the next term. –Transfer student (WOU)*

*There was so much support [from TRIO]. They took me under their wings and found a way to help me with anything I needed—tutoring, advising, a quiet space to do homework, free printing, or assistance with a scholarship application. –Transfer student (UO)*

*Investing in ... the high-touch things [is] expensive, but it works. And programs that support underrepresented students are underfunded, and transfer students are predominantly nontraditional students ... And they, I think, need additional support. And I think even having high-touch [things] in their first term or having an orientation or having a bridge ... makes a huge difference. –Advisor (OSU)*

<sup>23</sup> See <https://oregonTRIO.org/>

<sup>24</sup> For example, <https://eop.oregonstate.edu/>

<sup>25</sup> See <https://web.roguecc.edu/TRIO-student-support-services>

A college success course can also provide transfer advising to community college students by preparing them for transfer and easing the transition for matriculated transfer students. RCC offers a “college success and survival” course that includes academic and career planning, and SWOCC is planning to implement a similar course specifically for transfer students. OSU offers an optional upper-division course that helps students with academic and career planning and provides a community of support. Transfer business students at OSU and UO can also enroll in a course specific to transfers. An example template for a course for new transfer students based on the OSU and UO courses is in Appendix E.

*The transfer transitions course helps to ease transfer students’ transitions into the university. As well as outlining their academic plans, the course aims to provide students with a community of support. –Advisor (OSU)*



## TRANSFER-SPECIFIC PROGRAMMING AND SPACES

Transfer students said campus affinity groups were key for building friendships and seeking advice. University affinity groups offer additional support and community for students of color, first-generation students, students with a disability, nontraditional students, bilingual students, low-income students, undocumented students, veterans, and other student groups.

*So for me [the nontraditional student union] was the biggest thing that was helpful—that was the biggest thing that helped me transition. I met other people that were going through the same thing, and also it was like a hub for resources so that I learned about all the resources that I needed that I would have never learned about.  
–Transfer student (UO)*

*Before my first term on campus I remember walking into the University Center and I bumped into the veterans table. I looked at that and I had my wife and my son in tow and I said, “I need to go talk to these guys because they may have some connections.” They’ve made my transition pretty painless, as far as just going into the veteran’s center if I want to talk to the guys or just take a break from studying or whatever. –Transfer student (WOU)*

Community-building events specifically for transfer students help them develop a sense of belonging. Two of the three universities offer a free orientation specific to transfer students that includes advisors and presents information on topics such as courses, academic resources, social transition, financial aid, campus locations, and online tools. In addition, the three universities each offer some events for transfer students that include meals and other activities. These events provide transfer students with opportunities to get to know other transfer students and build community. At OSU, examples of transfer-specific programming include hikes, “de-stress fest,” dinners, sporting events, and board game night.

*This is the year that they offered a transfer student orientation, rather than grouping us with all the incoming freshmen. We had transfer student specific START days. I feel like that made a significant difference from last year where we would have been with the freshman. It was really nice breaking up into the small groups per college and seeing "Wow, there's not that many of us!...Okay, we can calm down." Then we all had questions and you didn't feel scared to ask in a huge group. You're in a small group and you felt comfortable asking questions. –Transfer student (OSU)*

*There was a transfer student breakfast, and you got to meet the other transfer students who had started in the fall term. The people who were in charge weren't expecting many transfer students to show up for that, [but] at least 50 transfer students came looking for friends and fellowship. –Transfer student (OSU)*

*I think what works well is really targeting and saying, "Transfer students, this is specifically for you." And when they see that for them, they're a little bit more inclined to attend ... I think they're interested in connecting to each other, but it's finding the right time that works for their schedules, finding the right event that works for what they want to do, and finding the right method and communicating that message. –Advisor (OSU)*

A physical space for transfer students is also important. The first floor of WOU's newest residence hall, the LEED Platinum-certified Ackerman Hall, is designated for transfer students. In addition, OSU offers a lounge in a residence hall for transfer students. This space and the aforementioned activities help create a supportive community for transfer students. Further, each of the community colleges has dedicated areas where transfer advising takes place, providing a centralized location for prospective transfer students to locate information and meet with staff members and peers.

*Previously, it was just around advising, and now it's going to be a holistic transition experience. Not only is it "How are you preparing for your academic experience?" but also "How are you finding your community and your fit here?" Really trying to figure out what they want [and] provide it—but also provide it before they even have questions on what they need. –Advisor (OSU)*



## ONLINE TOOLS TO SUPPORT SELF-ADVISING

Students report spending a lot of time self-advising to prepare for transfer, as well as during the transition, especially researching and trying to understand course articulation. While they are at community college, students depend on information from university websites to make their course selections. However, university and community college websites and online tools that provide information on transferring and course articulation vary in content and functionality. The information can be difficult to find and complex to understand, and it is not always up to date. Interview and focus group participants cited Oregon Institute of Technology's (OIT's) website ([www.oit.edu](http://www.oit.edu)) as a standout, as it allows users to select their community college and subject and then see the course equivalencies and the number of course credits they will receive for each transferred course. OIT also evaluates transfer credits upon admission instead of after enrollment, allowing students to better understand what credits they are likely to receive for completed courses. Existing articulation agreements between OIT and community colleges are easy to find; they are available by year and degree on the OIT website. Particularly informative online resources for prospective and matriculated transfer students from the case study sites are in Appendix F.

*I used the web tools, so my AAOT (Associate of Arts Oregon Transfer)—all the classes that I took, my electives—transferred into my major. –Transfer student (WOU)*

*One of the other things that I found helpful were the websites—being able to go on the community college and my university website and just read about what were the expectations and prerequisites for transferring. So I kind of knew from both institutions what was expected and kind of made sure that those matched up or that I knew what was needed. –Transfer student (UO)*



## FLEXIBLE FINANCIAL AID AND SCHOLARSHIPS

Financial aid is more transfer friendly when there is a single scholarship application for the transfer university as well as flexible deadlines. Because students may transfer to universities at different times, reserving some scholarships for later in the academic year can ensure funding is available for mid- and late-year transfers. Additionally, universities are offering some scholarships mostly or only to transfer students. At OSU, the prior system had an application deadline of February 15. However, many transfer students are admitted after that date and were missing out on applying for scholarships. Now students can apply for scholarships whenever they are admitted using a single general application, and the system will be able to determine all scholarships for which they are eligible. Overall, 30 percent of scholarships at OSU are now going to transfer students, which is a higher rate than in the past. Similarly, UO moved its scholarship deadline from February 15 to April 1 to give transfer students more opportunities to apply.

*I think that the thing I notice kind of anecdotally is just that transfer is constantly part of the conversation, so that even as soon as I arrived, that was what people wanted to talk about ... “How can we make the scholarship process easier, how can we give [transfer students] access to it, given timeline considerations?” ... So I feel like it permeates the conversation consciously. I mean, people are making a mindful attempt to think about if we need to do something different for transfer students—“Where can we improve, and what do they need that might be different from the rest of the student population?” –Financial aid advisor (OSU)*



## SECTION 3

# RECOMMENDATIONS FROM THE CASE STUDIES

*The case studies focused on what's working and what can be replicated across the state to support transfer students; the recommendations below are based on these findings. However, case study participants also described many challenges. To provide additional context for the recommendations we also describe the challenges that each would potentially address.*



**Invest in and continue to refine credit transfer and degree audit technology tools that are useful to registrars, advisors, and students.**



**Invest in more supports for transfer students.**  
(i.e., advisors, training, transfer-specific financial aid and programming).



**Develop and maintain partnerships across the state to maintain existing transfer agreements that are working, develop new agreements, and strengthen the state transfer agreements.**

## A Note About Leveraging Data

Comprehensive data about transfer students and their progress through the higher education system are not readily available, particularly at the statewide system level and for some community colleges. Institutions do not have easy access to the data needed to fully evaluate their programs serving transfer students (e.g., longitudinal data that follow students between institutions). Data on the most effective supports for prospective and matriculated transfer students and the biggest obstacles to transfer and degree completion would help both advisors and faculty as they prioritize and direct resources and policymakers as they consider scaling programs and processes statewide.

Oregon's longitudinal data system houses the data needed to develop systems, tools, and analyses that would allow institutions and the state to better understand transfer patterns and outcomes and the experience of transfer students statewide. A state research agenda about transfer students, built in collaboration with public and private researchers, would be valuable as a roadmap for partnership in understanding and improving the experience of Oregon transfer students.



**Leveraging Oregon's longitudinal data system could help stakeholders better understand how to support successful transfer outcomes and develop plans for scaling successful efforts.**

# 1

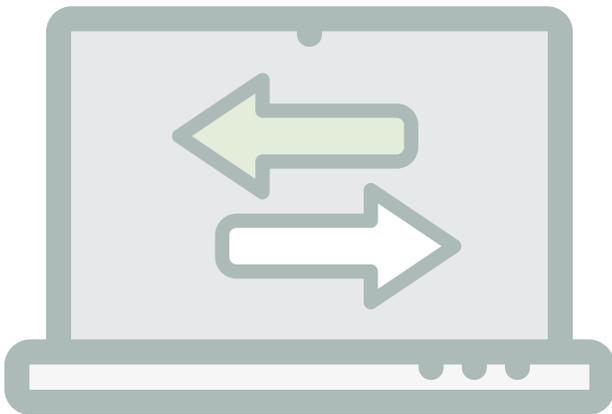
## Invest in credit transfer and degree-audit technology

**CHALLENGE:** We found multiple challenges related to credit transfer and degree audit technology available in Oregon. First, community college students rely on online resources to self-advise, but the accuracy of the information and the function of the online tools varies. In particular, students do not always have access to easy-to-use and up-to-date course equivalency tools to help them select courses at their community college that will transfer to their degree program at a university. Second, most universities do not review transfer course credits until after students have enrolled and registered for classes, so matriculated transfer students do not know to what extent their credits transferred until well into the first term. In some cases, students do not have final approval on their course articulation until six to eight weeks after their first university term has begun. Although the universities are interested in streamlining course approval and articulation, most of the course review systems currently require individual transcript review.

**RECOMMENDATION:** Invest in and continue to refine credit transfer and degree-audit technology tools that are useful to registrars, advisors, and students.

Transfer guides should be easy to access and understand. Along those lines, online tools that can provide accurate and current information on course articulation should be easy to use and available to all community college students to help them understand what to take early in their college career and if the courses they took will transfer before they transition to a university.<sup>26</sup> Ideally, a university's degree audit system could be made available to prospective transfer students so that they know which credits will transfer before they start their first term.

*The thing that we all keep highlighting is the need for web-available information on everything ... From my experience, the students don't mind that the information is complicated ... But it's more about the accessibility—it's accessibility and then maintenance of accessibility because it's got to update every term because gen eds change every term ... The Transferology<sup>27</sup> is fairly good, and it could be made statewide, but each institution would need some resources to update it. –Faculty member (UO)*



<sup>26</sup> See, for example, <https://tcns.org> and <https://tntransferpathway.org>

<sup>27</sup> See Appendix F.

## 2

## Invest in more supports for transfer students

**CHALLENGE:** There is room to improve transfer supports. Most faculty and staff members do not think their institution serves prospective or matriculated transfer students as well as they could, and more resources and financial aid invested in transfer students would help prioritize their bachelor's degree attainment. Some university representatives said there is an inadequate number of transfer advisors and coordinators to effectively serve transfer students and that there is a need for more thorough training for staff members, as well as more events for transfer students.

**RECOMMENDATION: Invest in more supports for transfer students (i.e., advisors, training, transfer-specific financial aid and programming).** Budget priorities reflect institutional priorities. The number of advisors should be sufficient to allow at least a single one-on-one meeting per academic year for each transfer student (preferably more). Advisors who work specifically with transfer students can advise these students more effectively. In addition, faculty hiring practices should emphasize the importance of advising, and ongoing training should be conducted to help faculty advisors understand transfer students' needs and keep them updated on changes in articulation policies.

University staff members also agreed on the need to offer more events for transfer students, although there was little agreement on what events were most effective. Thus, collecting participant numbers and input after piloting events may provide vital information on what's working and what could be improved. Suggestions for events included better (and free) orientations just for transfer students, a summer bridge program for incoming fall transfer students, and a mentoring program that pairs new transfer students with established transfer students. The primary goals of these types of events are to convey institutional knowledge and to build community and a sense of belonging among transfer students. A space for transfer students to gather also serves as a community building resource.



# 3

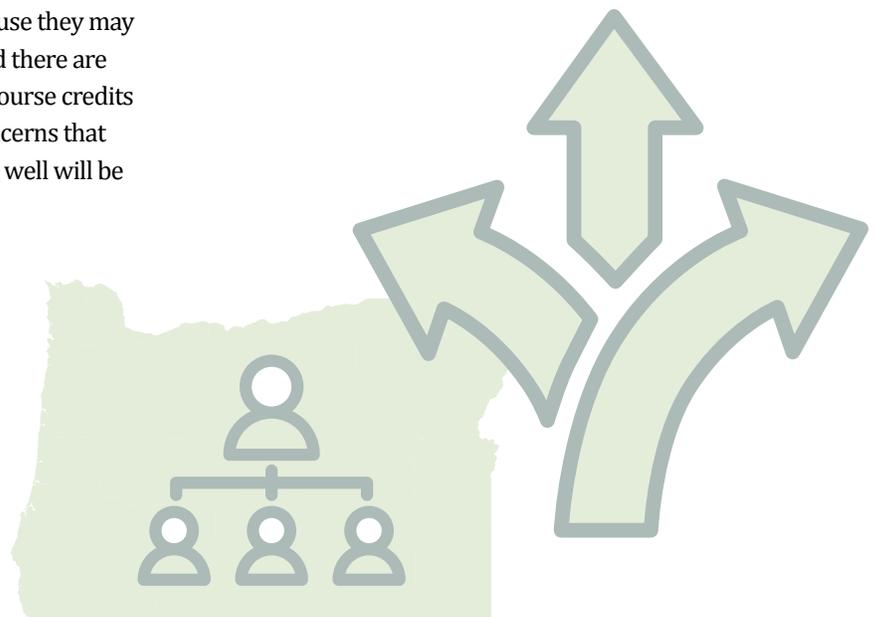
## Develop and maintain transfer pathways

**CHALLENGE:** Developing and maintaining degree partnerships and articulation agreements outside of primary regional partners is challenging. Although many community colleges have successful articulation agreements with their neighboring university where large numbers of their students transfer, the agreements are not universal and students transferring from other community colleges may not have the same guarantee that their credits will transfer. In particular, many rural community colleges in Oregon may not have a neighboring university or primary university partner and thus have to develop articulation agreements with multiple universities, which is time-consuming and difficult for staff members and students to navigate.

The state transfer agreements, called the Major Transfer Maps, should address this challenge by providing statewide transfer pathways that work for all community college transfer students regardless of where they start their education and where they transfer. But, as these statewide transfer pathways are in the early stages of development and implementation, case study participants expressed skepticism that the transfer maps will support transfer students. They believe the process of coming together helps better align programs and courses across Oregon but that the maps themselves are problematic because they may cause more confusion for advisors and students and there are no guarantees that the universities will accept the course credits for courses outlined in the maps. There are also concerns that existing partnerships and systems that are working well will be replaced with something less effective.

**RECOMMENDATION: Develop and maintain partnerships across the state to maintain existing transfer agreements that are working, develop new agreements, and strengthen the Major Transfer Maps.** Regional partnerships—such as the Southern Oregon Higher Education Consortium—may ease the burden of maintaining articulation agreements with individual universities across the state. Partnership members can benefit from degree partnerships and articulation agreements between multiple community colleges and universities (rather than one-to-one agreements) and work together on implementing and strengthening the Major Transfer Maps to ensure they are clear for staff and students and guarantee credit transfer.

Additionally, faculty and advisors need regular and ongoing opportunities to meet with their peers at other institutions to develop and maintain various transfer pathways, including the Major Transfer Maps. Finding the time to travel to and participate in meetings to work on articulation agreements can be a challenge, but institutions that provided transportation and meals for such meetings said they were effective.



# Looking to the Future

In every case study, this project identified evidence of practices designed to support the success of transfer students. In their missions and policies, the studied institutions endeavored to use data to convey that transfer is a priority, coordinate advising across institutions, and continue to bring clarity regarding transfer pathways to reduce lost credits and provide a more seamless transition. They sought to develop and maintain clear pathways and articulation agreements with formal in-person meetings and consistent informal communication. In addition, these institutions prioritize partnerships that address local student and community needs, invest in personalized advising systems and online tools, create physical spaces for transfer students, and offer flexible financial aid.

For the institutions visited, and for all institutions in the state, bringing promising programs such as the ones identified to scale or to completion will require both resources and commitment to addressing systemic challenges.

This project is the first in a broader learning agenda for The Ford Family Foundation around the student transfer experience in Oregon. The Foundation's funding priorities focus on supporting programs and projects that help individuals understand their educational options beyond high school, ensure pathways to a credential are clear and available, and provide supports proven to increase student success. The Foundation serves as a partner and advocate to rural Oregonians and seeks to build the capacity of institutions serving them as they pursue personal, professional, and civic success.

This report will inform the Foundation's next steps in this work, including the possibility of bringing together community college and four-year partners, particularly from rural regions, to discuss the findings and explore potential partnerships to strengthen the system for students. The long-term vision includes developing opportunities for partnerships between institutions committed to employing proven practices. The goal of all these efforts is to increase the number of students who successfully transfer from community colleges to four-year institutions and complete their bachelor's degrees.

This project highlights positive and promising practices across the state as well as opportunities to work together toward improvement. The direction and structure of the Foundation's future work will ultimately depend on what is learned from higher education partners and the students they serve. With the goal of supporting, enhancing, and sharing with institutions to collectively learn and advance improvements for transfer students in Oregon, the Foundation is committed to taking this journey with higher education partners across the state.

# APPENDIX A

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## Transfer Outcome Model Description

ECONorthwest analyzed data from the Oregon Higher Education Coordinating Commission (HECC) and from the Oregon Department of Education (ODE) to aid in the selection of case study sites, developing a separate regression model of transfer-student bachelor's degree completion for each data source. Model development started with the independent variables identified in *The Transfer Playbook*<sup>28</sup>; several of these variables were either not statistically significant in the base model or lost statistical significance after adding student-level characteristics not identified in the Playbook.

The HECC and ODE models both included the following independent variables:

- **Community college characteristics from IPEDS** (percent of fall enrollment by race/ethnicity, percent of fall enrollment that is full time, distance from college to the nearest four-year institution)
- **Cohort** (academic year of first enrollment)
- **Student characteristics** (gender and race/ethnicity)

The HECC model also included student's age, Pell status during the first academic year, and two characteristics of students' zip code of residence, using American Community Survey data: the percentage of the population ages 25 and over with a bachelor's degree or higher, and the percentage of employed individuals in management occupations.

The ODE model included the number of years between high school graduation and first enrollment as well as three variables from K12 years: economically disadvantaged status during high school, standardized performance on state math and reading tests, and fixed effects for the student's high school.

The analysis sample for the ODE model included Oregon public high school graduates whose first college enrollment was during the fall between 2006 and 2012, at an Oregon community college, and who transferred to a four-year institution within six years of their first college enrollment, resulting in an analysis sample of 13,974 transfer students.

The HECC sample included all students whose first college enrollment was during the fall between 2007 and 2010, who earned at least 12 credits during their first academic year, and who transferred to an Oregon public four-year institution within six years of their first college enrollment, resulting in an analysis sample of 10,252 transfer students.

Following the methods described in *The Transfer Playbook*, we calculate for each data set and institution the difference between the actual six-year bachelor's degree completion rate and the rate predicted by the relevant model. This calculated difference serves as our quantitative measure of an institution's effect on transfer success. This analysis cannot, however, rule out the possibility that factors outside of institutions' transfer practices—such as aspects of student selectivity not captured by high school test scores or high school attended (ODE model) or zip code of residence (HECC model)—drive the calculated effects.

The independent variables are all individually statistically significant at conventional levels, with some variations across the models. Overall, the models explain a statistically significant amount of the observed variation in 6-year bachelor's degree completion ( $p < 0.0001$ ), although each explains a relatively small share of the observed variation in this outcome (pseudo-R<sup>2</sup> between 0.01 and 0.09, with models based on ODE data performing better than those based on HECC data). The institution effect described above indicates the extent to which factors associated with students transferring from or transferring to a given institution are correlated with bachelor's degree completion, independent of the effects of the identified independent variables. These factors could include successful institution-level efforts to improve transfer outcomes.

Due to data limitations, students in the analysis samples differ in important ways. The ODE data only includes relatively young college enrollees, and only those who graduated from an Oregon public high school. The HECC data includes all enrollees at Oregon's public postsecondary institutions but excludes private institutions and does not allow for comprehensive controls derived from students' high school experience or outcomes. The time period covered by each data set is also different. The study team took these differences into consideration during the site selection process.

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<sup>28</sup> <http://ccrc.tc.columbia.edu/media/k2/attachments/transfer-playbook-essential-practices.pdf>

# APPENDIX B

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## Case Study Data Collection and Methods

### CASE STUDY APPROACH

Education Northwest developed the case study research questions and approach using the essential practices for transfer outlined in *The Transfer Playbook*,<sup>29</sup> as well as Education Northwest’s research on improving community college students’ credit mobility.<sup>30</sup> The following research questions guided the development of interview and focus group protocols and data analysis:

1. How do two- and four-year institutions with strong transfer outcomes address transfer in their missions and policies?
  - a. What are the features of a transfer culture in a community college setting and in a university setting?
  - b. What kinds of resources and data infrastructure are necessary to develop and sustain strong transfer outcomes?
  - c. What are the barriers to making transfer an institutional priority?
2. How do two-year and four-year institutions with strong transfer outcomes develop and sustain transfer pathways?
  - a. How do colleagues from the two- and four-year institutions collaborate to develop transfer pathways?
  - b. How are transfer pathways updated and improved?
  - c. Are there specific programs or majors that have particularly strong partnerships and why?
3. What are the transfer-specific advising programs, policies, and practices at two-year and four-year institutions with strong transfer outcomes?
  - a. How do community colleges prepare students for transfer?
  - b. How do universities help transfer students navigate from entry to completion?
  - c. How do students develop “transfer college knowledge”?<sup>31</sup>
  - d. Are there culturally responsive advising practices that are particularly effective for students of color and other underrepresented student groups?

Based on these research questions, Education Northwest researchers developed four interview protocols for administrators, faculty, advisors, and financial aid staff, and a student focus group protocol. Protocols for staff focused on 1) institutional missions, policies, and culture, asking about what the institution does best when it comes to transfer and what it means to have a strong transfer culture; 2) advising and student supports, asking what is in place for transfer students overall and students of color and other underrepresented groups to support successful transfer and transitions; 3) transfer partnerships and pathways, asking what kinds of partnerships exist to support transfer; and 4) what should be replicated across the state and what investments are needed to support transfer. Student focus group protocols engaged students in an interactive activity to identify what helped them transfer and what the university did well to support transfer students. For copies of the full protocols, please contact Michelle Hodara.

### DATA COLLECTION

To answer the research questions, Education Northwest conducted case studies of the six institutions, which included interviews with key stakeholders, university transfer student focus groups, and an analysis of the institutions’ websites.

### IRB

Education Northwest maintains an independent, institutional review board that reviews all research activities that involve human subjects. All research activities must be cleared through the IRB before data analysis begins. IRB procedures determined that this project was low risk to participants and was therefore exempt from full review. Federal regulations specify that certain types of research projects pose low risk to participants, and therefore may qualify for exemption

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<sup>29</sup> <http://ccrc.tc.columbia.edu/media/k2/attachments/transfer-playbook-essential-practices.pdf>

<sup>30</sup> <http://educationnorthwest.org/resources/improving-credit-mobility-community-college-transfer-students>

<sup>31</sup> Hodara, M., Martinez-Wenzl, M., Stevens, D., & Mazzeo, C. (2017). Exploring credit mobility and major-specific pathways: A policy analysis and student perspective on community college to university transfer. *Community College Review*, 45(4), 331-349.

under federal regulations (45 CFR 46.101(b)) for the protection of human participants. This project falls under the following exemption category: Research conducted in established or commonly accepted educational settings, involving normal educational practices. This project also does not involve disclosure of any individually identified data, and therefore does not put subjects at risk.

## PARTICIPANT RECRUITMENT

To recruit study participants, the project team did the following: The Foundation reached out to each of the presidents at the six colleges and universities selected for the study and invited them to participate. Once they agreed, researchers at Education Northwest asked the Presidents to connect them to a key contact at the college to plan the site visit. The key contact was an administrator at each college who oversees transfer. The Education Northwest researchers then worked with that individual to identify individuals to interview who were familiar with and involved in transfer systems and supports in the following roles: at least one provost or vice provost, a financial aid director or financial aid advisor, at least two advisors who work with transfer students, and at least one faculty member who was preferably involved in one of the state transfer groups (MTM or OTAC). To protect the identity of participants, we do not provide more specific details on roles and titles in this report. Instead we use the generic terms: administrator, faculty, advisor, and financial aid.

At the universities, Education Northwest researchers also worked with the contact to recruit students who transferred from an Oregon community college for the focus group. We provided university staff language to share with transfer students about the study purpose and focus group logistics, as well as google forms to aid in signing up for the focus group. Students were told they would receive a \$20 gift card from their bookstore for participation.

In total, Education Northwest researchers spoke to 73 staff members and students across 40 interviews and focus groups (Table B1).

**Table B1. Site visit participants**

<b>Participants</b>	<b>Number</b>
<b>Administrators (including provosts, vice provosts, deans, and program coordinators and directors)</b>	<b>16</b>
<b>Faculty members</b>	<b>9</b>
<b>Financial aid directors and advisors</b>	<b>7</b>
<b>Advisors and counselors (including specialized advisors, such as TRIO and EOP advisors; advising coordinators and directors; and transfer specialists)</b>	<b>20</b>
<b>Transfer student focus group participants*</b>	<b>21</b>
<b>Total number of participants</b>	<b>73</b>

\*Focus groups ranged in size: There were six to eight students in each focus group. All students transferred from an Oregon community college. Focus group participants included nine students of color and 11 first-generation college students.

## INFORMED CONSENT

At the start of every interview and focus group, we walked participants through an informed consent process (see scripts on following page). All participants received a hard copy and emailed project description of the study with contact information of the researchers.

## **INFORMED CONSENT FOR STAFF INTERVIEWS**

Thank you for meeting with us today. This interview is part of a collaborative research project funded by The Ford Family Foundation. The goal of the study is to learn more about how to support the community college transfer experience in Oregon.

We have identified community colleges and four-year institutions in Oregon with strong transfer outcomes. [SHARE FACT SHEET.] We are conducting case studies to document best practices and effective strategies for supporting transfer in Oregon.

This interview will take about 45 minutes.

Your participation is voluntary, and you may discontinue your participation at any time. If there is a question you are not able to answer, or prefer not to answer, that is fine. If there is anything you discuss that you do not want us to share, please let us know.

This interview is confidential. However, we are interviewing a limited number of people at three community colleges and three universities in the state. The institutions will be identified in our findings. So, given these conditions, please be aware that it may be possible to infer your identity if you share something specific to your position and institution.

Do you have any questions about this study or the way your interview will be used before we begin?

With your permission, I would like to record this interview in order to have a complete record of our conversation. You may request at any time to discontinue or temporarily stop the recording. The audio recording of the interview will be erased after the study is done.

Is audio recording acceptable to you? [If yes, turn on audio recorder]. Thanks, OK, let's begin.

## **INFORMED CONSENT FOR STUDENT FOCUS GROUP**

Thank you for meeting with us today. Our names are Michelle Hodara and Mary Martinez-Wenzl and our preferred gender pronouns are....We are researchers with Education Northwest, a nonprofit organization based in Portland.

We are here today as part of a collaborative research project funded by The Ford Family Foundation. Our goal is to learn more about how to support the community college transfer experience in Oregon.

We have chosen six Oregon community colleges and four-year universities to visit to document best practices and effective strategies for supporting transfer in Oregon. During our visits to universities, we are talking to students like you to learn about your transfer experiences. Your voice is important in all of this, and we appreciate the time you're taking to talk with us.

The group interview will take about one hour.

Education Northwest will keep the information you tell us confidential. We will not report the information to anyone, including your parents, families, and instructors. Your name will not be put on any reports written about this project. The audio recording of the interview will be erased after the study is done.

Even though we will ask students not to talk about the interview with others, we cannot guarantee that others in the group will not share the information. We cannot guarantee that the information you share with other students will remain private.

You can choose not to take part in the study. You may also choose not to answer some or all of the questions and can stop doing the interview at any time.

You will receive a \$20 gift card for your participation.

Do you have any questions about this study or the way your interview will be used before we begin?

With your permission, I would like to record this interview in order to have a complete record of our conversation. You may request at any time to discontinue or temporarily stop the recording.

Is audio recording acceptable to you? [If yes, turn on audio recorder]. Thanks, OK, let's begin.

## DATA ANALYSIS

To analyze the data, Education Northwest researchers first developed a set of codes based on our research questions and interview and focus group protocols. Our 20 codes covered the topics of institutional context, institutional policies and structures, opportunities, student supports, and system collaboration and coordination. We tested these codes on several interview transcripts and revised them to ensure they could be applied to the data consistently and reliably, were clear to researchers coding the data, and paralleled the themes from the research questions and protocols.

All interviews were transcribed and entered into the ATLAS.ti software. Transcript quotes were then labeled with our 20 codes. This process facilitated data management, allowing us to easily sort and retrieve data for further analysis. Researchers coded transcript excerpts inductively for emerging patterns over multiple rounds of coding. After the first round of coding, researchers reviewed all coded data to understand themes by institution and then cross-cutting themes. Researchers then returned to the transcripts to identify any contradictory evidence and ensure we did not miss any themes.

Identified themes based on coding were then documented by Education Northwest researchers in seven memos internal to the project team: a crosscutting themes memo and one memo for each institution. The final step was to synthesize the seven memos into a single memo of crosscutting themes with specific examples drawn from each institution. The findings from the case studies are based on this final memo.

# APPENDIX C

*This sample agenda can be used to convene community college and university advisors and faculty members to discuss articulation agreements and transfer student transitions. This resource was adapted from the Rogue Community College/Southern Oregon University Articulation Retreat agenda.*

## Sample Agenda for Convening

### X Community College and Y University

Insert Community College Logo Here

Insert University Logo Here

#### XXth Annual Articulation Retreat

Date | Time

Location | Location details (floor, room #)

City, State

#### Objectives

- XXX
- XXX
- XXX

**15 minutes** Meet and greet, plus refreshments

**15 minutes** Welcome and opening

- Representative from X Community College
- Representative from Y University
- Introduce attendees of note

**45 minutes** University wide and program updates (example topics: course equivalencies and transferability changes, orientation dates, course prerequisites, summer classes, deadline for transcripts, website advising tools)

**1 hour** Articulation discussions

- Break into work groups by program and service area
  - Service area: Prepare items for discussion
  - Programs: Be prepared to review course articulations

**45 minutes** Dinner/Lunch

**15 minutes** Wrap-up and closing

# APPENDIX D

*This resource can be used by an advisor working with a community college transfer student prior to transfer or during the university orientation. It was adapted from a worksheet used by an advisor at the University of Oregon.*

## Sample Advising Worksheet

### University Name | Campus Resources

**Advisor:** [Name and contact information here]

#### QUESTIONS YOU MIGHT HAVE

- What kinds of transfer-specific programming, resources, and events are available to me?
- What are my housing options as a transfer student?
- How do I apply for financial aid?
- When do I submit my FAFSA?
- I don't understand the financial aid I was awarded. Who can help me?
- Can I take summer classes on financial aid?
- How do I declare or apply for my major?
- What classes do I need for my major?
- How soon can I graduate with my major?
- What are my degree requirements?
- How do I read my degree audit? I don't understand how my courses are counting toward my degree.
- What type of jobs can I get with my major?
- How do I explore careers?
- How do I prepare for an interview?
- Where do I send my transcripts from other schools?
- Who can help me understand academic deadlines?
- What happens if I failed/fail a class?
- How can I better organize my time?
- Who can help me learn how to study better and improve my grades?
- Where can I find tutoring support? I need help in a particular subject area.
- Where do I go to get support if I have a physical or learning disability?
- How do I get help if I think I might have a learning challenge?

#### UNIVERSITY RESOURCE

**Name of transfer student advisor/coordinator here**

Insert link here

Insert location here

**Name of financial aid office/officer here**

Insert link here

Insert location here

**Name of academic advising center/advisor here**

Insert link here

Insert location here

**See a list of all majors and departments here:**

**Name of career center/advisor here**

Insert link here

Insert location here

**Name of registrar here**

Insert link here

Insert location here

**Name of tutoring/academic support center here**

Insert link here

Insert location here

**Name of disability support center here**

Insert link here

Insert location here

## Sample Advising Worksheet (Continued)

### QUESTIONS YOU MIGHT HAVE

- How does this university address diversity and inclusion?
- How do I connect with students from my same background on campus?
- Are there resources to help me feel like I belong here?
- Are there peers who can help me learn about the ins and outs of college life?
  
- What kinds of programming and support are available for nontraditional students?
- Who can provide me with information on housing and child care?
  
- How do I connect with other student veterans?
- Is there a space where student veterans can study?
- How do I find out about programs for veterans and their dependents and family members?
  
- I'm struggling with depression and anxiety.
- I struggle with substance abuse.
- Where can I go to get help?
  
- Where do I find research and experiential learning opportunities?
- Are there any workshops on research-related skills that will help me?
  
- Where do I find service and leadership opportunities on campus or in the community?
  
- Where can I study abroad?
- What are the requirements for study abroad programs?
  
- What are my visa rules and requirements?
- Can I take a term off?
- I'm having academic difficulty. How does this affect my visa?
- Where can I meet other international students?

### UNIVERSITY RESOURCE

#### **Name of campus life contact/center here**

Insert link here

Insert location here

#### **See a list of all student affinity groups here:**

#### **Name of nontraditional student resource here**

Insert link here

Insert location here

#### **Name of veterans resource here**

Insert link here

Insert location here

#### **Name of counseling office/counselor here**

Insert link here

Insert location here

#### **Name of academic resource here**

Insert link here

Insert location here

#### **Name of service and leadership resource here**

Insert link here

Insert location here

#### **Name of study abroad resource here**

Insert link here

Insert location here

#### **Name of resource for international students here**

Insert link here

Insert location here

# APPENDIX E

*This sample syllabus can be used to design a university course for transfer students. It was adapted from Oregon State University and University of Oregon transfer student courses.*

## Sample Syllabus

### Name of Transfer Seminar

Semester Year

Course Number | Number of Credits

Day and Time Course Meets | Room

#### Instructor Name

Office Location

Office Hours

Phone

Email

#### COURSE OVERVIEW

Navigating the transition to a new university can be an exciting and challenging experience. This class is designed to help facilitate your transition by improving your knowledge of the university; guiding you through pertinent policies, procedures, and resources; assisting you in identifying and developing key skills and strategies for success; and encouraging community and student engagement. Critical thinking, group collaboration, and class participation are emphasized as students honor their experiences and explore advice from other transfer students, faculty members, and administrators.

#### COURSE OBJECTIVES

As a result of active participation in this course, students will:

- Evaluate their transition to, anticipate their path through, and explore careers after university
- Demonstrate knowledge of university student resources and academic programs, opportunities, and requirements
- Identify resources that will support their academic and personal goals
- Identify possible pitfalls to college success and learn how to avoid or overcome them
- Develop a working personal self-development plan that addresses all university and major academic requirements, personal and professional skill development, and career identification and preparation
- Build supportive relationships with classmates, faculty members, and staff members

EXAMPLE TOPICS FOR CLASS SESSION	EXAMPLE IN-CLASS ACTIVITIES	EXAMPLE ASSIGNMENTS	
<b>Making a successful transfer to [university name]</b>	Introductions Connecting activity Syllabus overview	<b>SELF-INTRODUCTION ESSAY</b> In this essay, please tell us a bit about yourself: <ul style="list-style-type: none"> <li>• Where you are from</li> <li>• Your hobbies and interests</li> <li>• Your career goals</li> <li>• What you are hoping to get out of this course</li> <li>• Concerns you may have about transferring to [university name]</li> <li>• Any questions you have—feel free to ask anything!</li> </ul>	
<b>Academic success tools</b>	Meet in the computer lab and walk through the university website resources, the university online course interface (e.g., Blackboard, Canvas), the university degree audit system (e.g., Degree Works), and other online tools.	<b>TERM-BY-TERM ACADEMIC PLAN</b> Map out a term-by-term academic plan of classes that meets all requirements for graduation. If you have not already done so, make an individual advising appointment with an advisor/professor here on campus. Stop by the [insert student advising resource name] (located at [insert location]), call [insert phone number], or email [insert student advising appointments email address] to schedule an appointment.	
<b>Introduction to the university library system</b>	Meet in the library for a library scavenger hunt.	<b>TRANSFER ESSAY</b> Find and read at least two peer-reviewed articles about the transfer student experience. Describe their main takeaways, what you learned from them, and how they apply to your own experience.	
<b>University programming and resources (student affinity groups, academic success center, etc.)</b>	Learn about campus resources and student life. Identify activities that might support your academic, personal, and career goals. Discuss the importance of developing a sense of belonging and campus community.	<b>CLUB OR ACTIVITY WRITE-UP</b> The purpose of this assignment is for you to get involved in university events and begin to feel more connected to the university. Attend at least one university-sponsored club meeting or event during the term. You will need to turn in a one-page write-up about your chosen event. Describe and summarize the event, what you learned from it, and how you might apply that learning. If the event you chose is a meeting of a campus organization you might join, explain what it is and why you chose it. The event could be a club meeting, career services event/workshop, teaching or learning event/workshop, study abroad information session, a guest speaker outside of class, or any other university-sponsored event or workshop. If you have questions about finding an event that works for you, please talk to me.	
<b>Career services</b>	Discover how to make the most of career services, advisors, and programs. Learn about resumes and cover letters.	<b>TERM-BY-TERM PERSONAL DEVELOPMENT PLAN</b> Identify specific career goals for your education, along with specific details about how you will achieve them. It helps to think about this from an employer's perspective—if you were an employer in your field, what academic experiences, professional experiences, and leadership skills would you want an employee to have? As you brainstorm these elements, compile a term-by-term plan that outlines what you will do (in addition to your coursework) to reach your identified goals.	Your plan should address how you will use opportunities to reach your career goals, such as: <ul style="list-style-type: none"> <li>• Internships</li> <li>• Clubs</li> <li>• Professional organizations</li> <li>• Overseas study</li> <li>• Workshops</li> <li>• Career fairs</li> <li>• Informational interviews</li> </ul>
<b>Academic and career planning</b>	Develop a personal development plan that leads to graduation and is aligned to your career goals.	<b>PERSONAL DEVELOPMENT PLAN</b> The personal development plan is designed to be a reflective project. Part 1 includes a term-by-term academic plan, and Part 2 is a term-by-term professional development plan. In these assignments, you will identify goals to help you succeed, graduate, and become employed in your field of interest. You will identify the steps you plan to take both in and out of class to reach these goals, weaving together academic requirements, internships, clubs, professional organizations, and activities to help you reach your unique goals. Your plan should clearly state short- and long-term goals, specific actions you will take to reach these goals, and specific deadlines for completion of these actions.	

# APPENDIX F

## Online Resources

CATEGORY	LINK	WHAT'S HELPFUL AND INFORMATIVE
<b>Degree and career pathway information</b>	<a href="https://www.roguecc.edu/Programs/CareerPathways/Certificates.asp">https://www.roguecc.edu/Programs/CareerPathways/Certificates.asp</a>	<b>Takeaway: comprehensive, informative, clear</b> The RCC Career Pathways Certificates/Road Maps page provides an extensive list of career pathway programs. Links lead to road maps that show the path from a certificate of completion to a two-year degree, four-year degree, and then graduate degree. The graphical pathways go a step further by linking to jobs and wages for each credential/degree type.
<b>Degree and career pathway information</b>	<a href="https://ecatalog.socc.edu/degree-program-information/transfers/">https://ecatalog.socc.edu/degree-program-information/transfers/</a>	<b>Takeaway: well-organized, comprehensive</b> This SWOCC webpage has three tabs. The first provides an overview of transfer, with tips for successful transfer and links to relevant staff members who can help. The second includes links to all transfer degrees. The third provides information on meeting AAOT requirements. Links to transfer degrees offer a new landing page that describes the program and requirements.
<b>Community college transfer landing page</b>	<a href="https://web.roguecc.edu/transfer-center">https://web.roguecc.edu/transfer-center</a>	<b>Takeaway: comprehensive, clear design, informative</b> RCC's all-in-one student transfer webpage begins with a short description of why it's never too early to prepare to transfer, with links to information about university costs and relevant technical documents (such as language, residency, and grading policies). A sidebar links to multiple resources that can help students prepare to transfer, including transfer guides, transfer partnerships, TRIO resources, and the seven partner university course equivalency pages.
<b>University transfer landing page</b>	<a href="https://transfer.oregonstate.edu/">https://transfer.oregonstate.edu/</a>	<b>Takeaway: well-organized, comprehensive, clear visual cues, easy to navigate</b> OSU's transfer student landing page includes links to DPP, eCampus, housing, orientation, FAQs, forms, policies, and family resources. Additional drop-down tabs reveal helpful links for future transfer students, transfer credit resources, next steps for admitted transfer students, financial information, and transfer advisor resources. This webpage is particularly useful because it provides an enormous amount of information that can be located quickly and easily. As a bonus, this webpage includes a link to a virtual tour of the OSU campus.
<b>Dual-enrollment information</b>	<a href="https://www.linnbenton.edu/future-students/make-it-official/osu-degree-partnership/">https://www.linnbenton.edu/future-students/make-it-official/osu-degree-partnership/</a>	<b>Takeaway: easy to navigate, clear visual cues</b> This dual-enrollment landing page outlines LBCC's DPP and includes links for: <ul style="list-style-type: none"> <li>• Future students (brief overview for high school or non-enrolled college students paired with quick links to the application, financial aid, and other helpful topics)</li> <li>• Current partner university students (brief overview of DPP)</li> <li>• Partner university-bound students (brief overview for enrolled students who are interested in transferring to the partner university)</li> <li>• DPP transfer guides (demonstrates how each degree will transfer to the partner university)</li> <li>• OSU Partnership Office (brief overview of OSU Partnership Office events and advising)</li> <li>• Resources (short informational video about DPP and additional relevant information)</li> </ul>

## Online Resources (Continued)

<p><b>Course articulation tools</b></p>	<p><a href="https://registrar.uoregon.edu/transfer-students#transfer-course-equivalencies-section">https://registrar.uoregon.edu/transfer-students#transfer-course-equivalencies-section</a>  <a href="https://www.transferology.com/">https://www.transferology.com/</a></p>	<p><b>Takeaway: easy to use, practical, informative</b>            UO has its own course equivalency tool that allows visitors to see if and how their current credits across hundreds of national and international institutions may transfer to UO. In addition, UO links to Transferology, a comprehensive external digital tool (not affiliated with the university) that allows students to find colleges that might best fit their academic and professional history on a national level. Besides calculating how college credits, exams, or military credits may transfer, this tool also allows visitors to filter for features of their own personal context and preferences, such as state, cost, degree type, and school type.</p>
<p><b>Transfer scholarship information</b></p>	<p><a href="http://www.wou.edu/admission/transfer/scholarships-for-transfer-students/">http://www.wou.edu/admission/transfer/scholarships-for-transfer-students/</a></p>	<p><b>Takeaway: easy to navigate, clear visual cues, practical</b>            This WOU webpage details scholarship and financial aid information specific to transfer students. It also links to a webpage that covers tuition costs and provides a tuition calculator, as well as other financial aid resources.</p>
<p><b>Transfer pathway information</b></p>	<p><a href="https://wou.edu/transferpathways/">https://wou.edu/transferpathways/</a></p>	<p><b>Takeaway: One stop site for transfer information</b>            WOU has developed a comprehensive site for all things transfer. The site includes resources for students, faculty and staff and includes clear information about the transfer process, resources, credit transfer, and more.</p>



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