

**Transfer Task Force
Recommendations Report**

Executive Summary

After assessing the existing transfer process at the University of Utah, the Transfer Process Working Group, constituted by Senior Vice President Ruth Watkins, makes four types of recommendations: (1) Articulation Tables/Technology/Staff Resources; (2) Further Development of a Transfer Center; (3) Scholarship/Development Funds for Transfer Students; and (4) Community/TIG Experiences. The Working Group broke up into three different subcommittees: (1) the transfer student timeline subcommittee, (2) the best practices subcommittee, and (3) the data/research subcommittee. Each subcommittee contributed significantly to this report. In addition to the recommendations of the Working Group, another outcome of the group is a timeline that can be used in communicating information to transfer students in a clear, accessible way. Pages 2-13 comprise the main report and recommendations. Pages 14-29 comprise additional recommendations that could be carried out by an appointed person in the Transfer Center or elsewhere on campus.

Background

Senior Vice President Ruth Watkins asked 15 staff and faculty of the U to serve on the Transfer Process Working Group on September 2, 2014. Later, in September, she asked Kent Ono (Chair and Professor, Department of Communication) and Teri Clawson (Associate Director, Office of Admissions) to co-chair the group. Ultimately, 17 committee members constituted the working group. The Committee members were:

Kent A. Ono, co-chair	Professor and Chair	Department of Communication
Teri Clawson, co-chair	Associate Director	Admissions
Nicole Batt	Academic Program Manager	Outreach and Engagement
Mary Burbank	Assistant Dean, Director	Urban Institute for Teacher Education
Carolyn Bliss	Professor	Undergraduate Studies
Erin Castro	Assistant Professor	Educational Leadership and Policy
Emily Edmonston	Associate Director	Admissions
Paul Fisk	Transfer Academic Advisor	Student Equity and Diversity
Garrett Kachellek	Associate Director of Orientation	New Student Programs
Cary Lopez	Interim Director	Scholarship Office
Larry Parker	Professor	Education Leadership and Policy

Mark Parker	Associate Dean	School of Business
Kevin Perry	Associate Professor	Mines and Earth Sciences
Terese Pratt	Academic Program Manager	University College
Mark St. Andre	Assistant Dean	Undergraduate Studies
Jason Taylor	Assistant Professor	Educational Leadership and Policy
Brenda Valles	Dir. of Research and Assessment	Equity and Diversity

The “charge letter” from SVP Watkins asked the committee to “enhance the success of our transfer students and to improve our institutional practices in serving transfer students.” To do this, the committee would need to provide “an analysis of current practices in recruiting, admitting, articulating credit, orienting, enrolling, and serving transfer students to degree completion, as well as developing recommendations for how we might improve our processes to better serve and support this important student population.” Co-chairs Ono and Clawson then met with Martha Bradley on October 4 for additional clarification about the charge. SVP Watkins attended the working group’s first meeting on October 28, during which she provided guidance about the working group’s charge. The working group identified three key subcomponents that required consideration, and thus subcommittees were formed focusing on: (1) transfer student timeline, (2) comparing best practices of other universities, (3) data/research committee. Each subcommittee met outside of the regular meeting time. The timeline committee, led by Cary Lopez, conducted over 57 interviews throughout the year, produced a timeline of the transfer experience, and provided recommendations. Then three four-hour sessions were held where data from the interviews were summarized, and recommendations were developed. It is important to say that the working group was not able to meet or interview many students, despite understanding this to be a very important and desirable dimension to a meaningful and complete understanding of the transfer process. The Research and Data Subcommittee submitted a subcommittee report with recommendations and relevant research. The Best Practices Subcommittee evaluated transfer resources at comparable institutions, as well as compared different types of agreements four year universities have made with community colleges.

Introduction

What we know about transfer students:

During the 2014-2015 academic year, there were 22,804 undergraduate students. That year, there were 8,336 transfer students, making up 37% of the total undergraduate population. Of new transfers in 2014, 65% were 20 to 25 years old when they enrolled; 74% of new transfers in the class were white, 10% were Latino, 4% were Asian, and 5% of new transfers represented all other minority groups measured (African American, American Indian or Alaska Native, Hawaiian or Pacific Islander, and Two or More Ethnicities). 43% of new transfers were female (57% were male).

According to statistics provided about students in the 2012-2013 entering class, 4% of new transfer students were foreign. The majority of foreign transfer students came from South Korea (30%) and

China (27%). 71% of new transfer students were enrolled as full-time students (29% were enrolled part-time).

For the 2006 cohort of new transfer students, 17% had graduated after two years, 40% had graduated after three years, 55% had graduated after four years, 61% had graduated after five years, and 65% had graduated after six years. Also for that same cohort, in terms of retention rates of Utah students, 73% had been retained to the second year, 45% to the third year, 25% to the fourth year, 12% to the fifth year, and 7% to the sixth year.

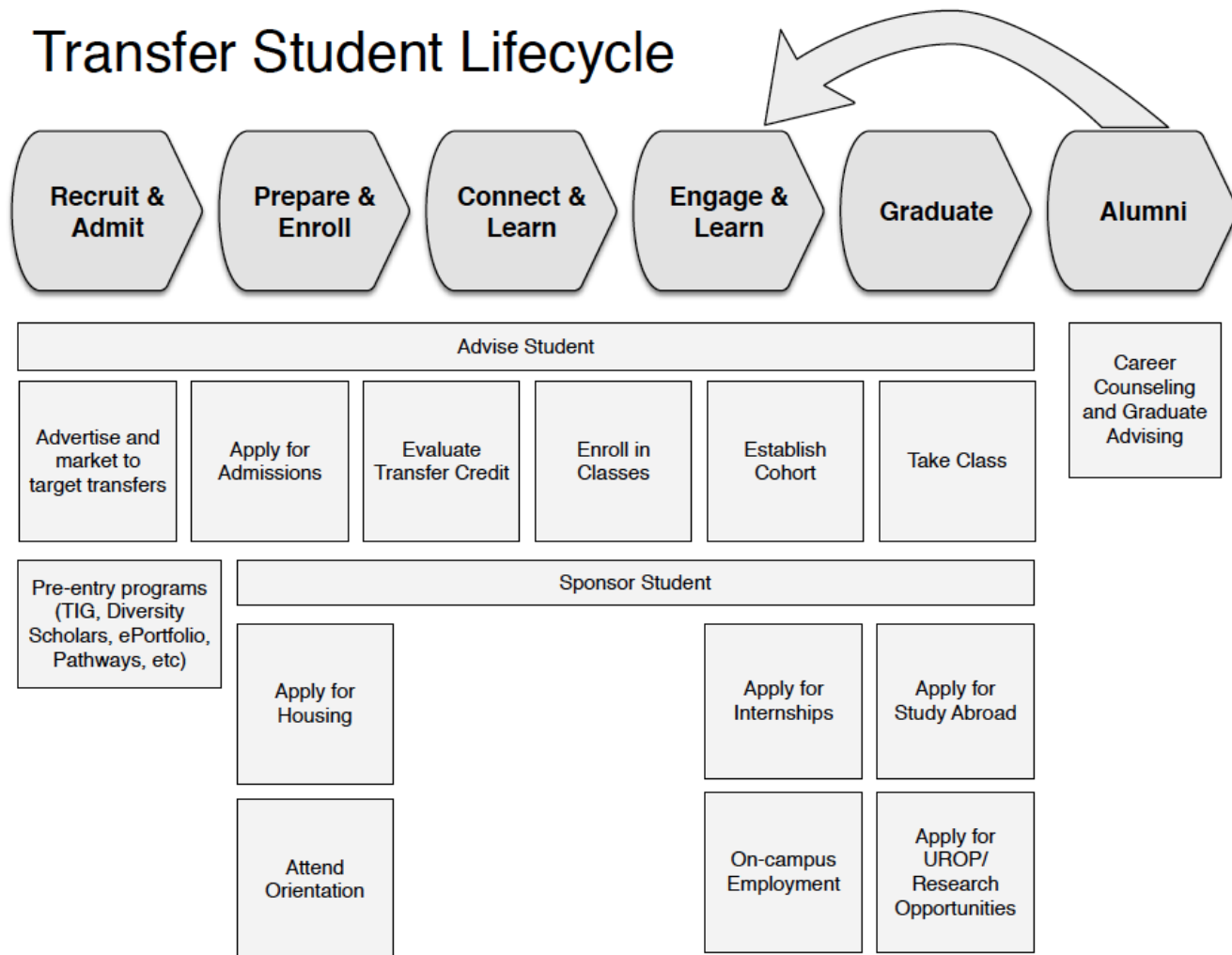
According to 2014 data, 77% of transfer students are coming from in-state schools. Of those 43% come from Salt Lake Community College, 7% from Utah Valley University, 6% from Utah State University, and 5% from Weber State University. For those students coming from out of state institutions, 2% come from BYU - Idaho; less than 1% come from BYU - Hawaii. 19% come from other unlisted schools, and 28% come from California.

There appears to be a stigma associated with being a transfer student. The word “transfer student” is not popular among the population it is meant to describe. Other terms such as “extra-college,” “advanced education” or “final degree seeking” students are alternative terms that could be used to refer to these students and to market to prospective students. Additionally, in terms of perceptions, transfer students are often thought to be less successful than students right out of high school. Research suggests these perceptions are unfounded; in fact, transfer students are more likely to succeed than traditional students.

Nevertheless, research also indicates transfer students have unique experiences that require a tailored university response. For instance, transfer students may experience a different relationship to: admission, financial aid, declaring a major, becoming oriented to the campus, extracurricular, social, and leadership opportunities, internships, post-degree opportunities, and alumni benefits and networking. Personal finances and commitments to family and work may also differentiate transfer students from traditional ones. Finally, a lack of sense of belonging on campus, a lack of attention and understanding, and general marginalization with regard to the traditional student population may be part of what these students experience.

The transfer student him or herself may not be well understood generally by staff, students, or faculty. For instance, students may come with varied levels of prior educational experience. They may have attended more than one university prior to transfer, or plan to “transfer back” credits to a former university to aid them in degree completion. Students are often enrolled concurrently or may be enrolled dually at two different institutions. Students may have preconceived expectations of administrative processes in regards to the transfer student life cycle and while at a high level these processes should be similar across institutions, the differences cause barriers. The following is a visual representation of this transfer student life cycle:

Transfer Student Lifecycle

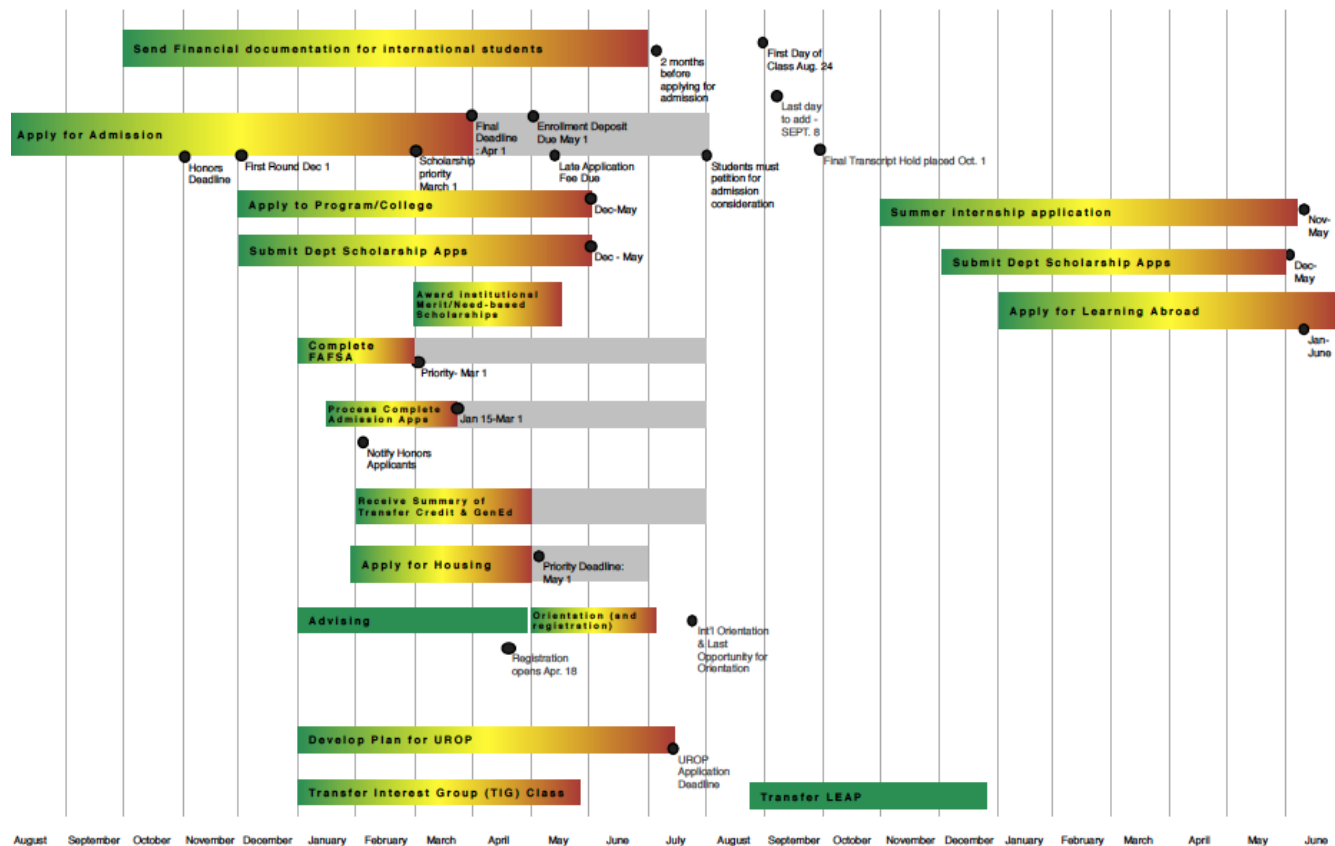


These administrative barriers are highlighted in the misalignment of our deadlines. The following are visual representations of the timelines for Fall and Spring semesters.

Transfer Timeline

Apply for Fall Attendance

Revised February 24, 2015



Note: a full-scale version of the timeline is included in the appendix.

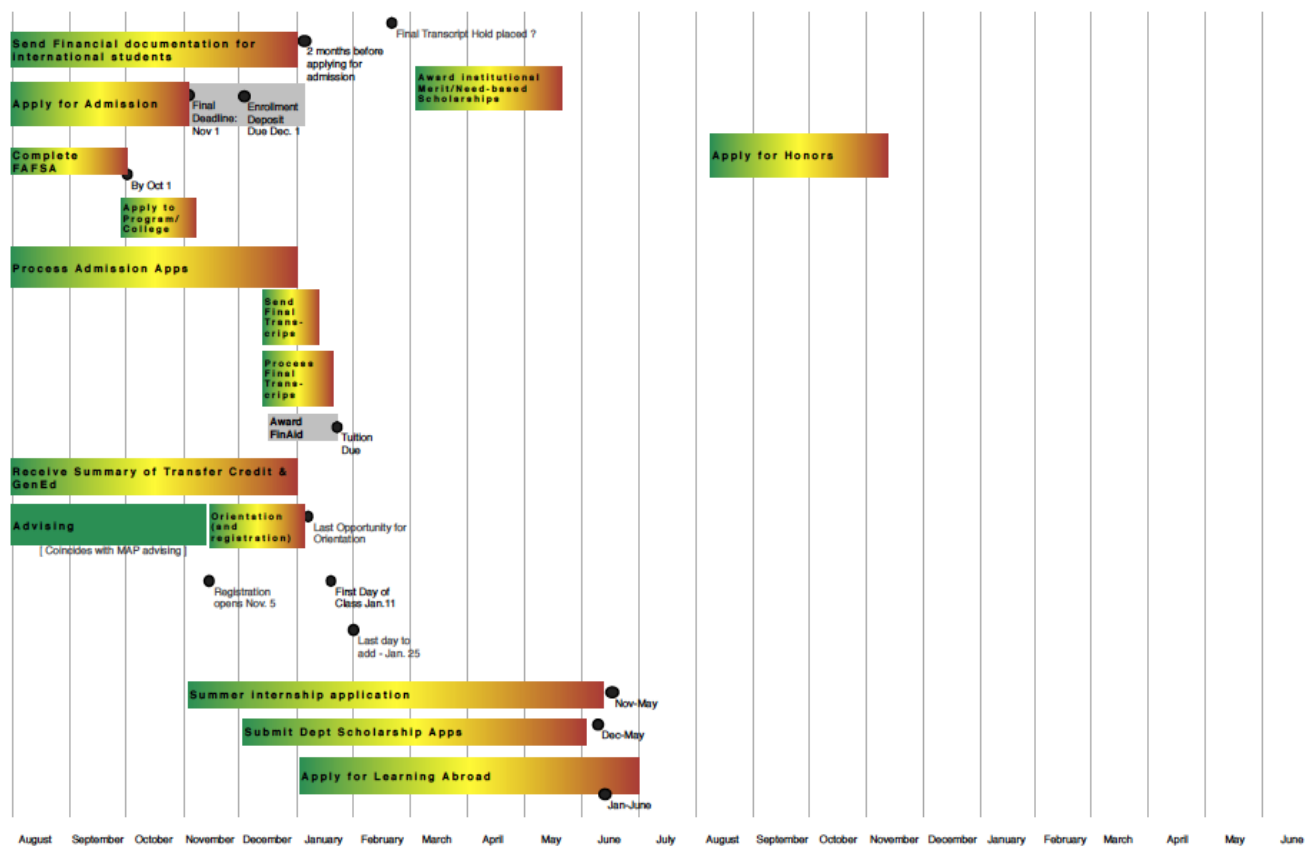
The misalignment of the current state is clearly visible, and a student must be savvy enough to know the difference between “optimal” submission timeframes and “deadlines” - by waiting for the true deadline, in many cases the student will be too late in the cycle for other dependent tasks, such as scholarships, housing applications, program or major applications, etc.

In addition, as can be seen on the following page in the “Spring Timeline,” most of our services and programs are aligned to a Fall admission cycle, clearly disadvantaging those transfer students wanting to start at the U in the Spring semester; nevertheless, based on data for the 2012-2015 academic years, 29.85% of transfer students are admitted and begin taking classes in the Spring term.

Transfer Timeline

Apply for Spring Attendance

Revised February 24, 2015



Note: a full-scale version of the timeline is included in the appendix.

In general, it is our conclusion that the University of Utah, like so many universities nationwide, needs to address transfer students as a very large and unique university constituency. There is much that can be done to improve the U's "transfer-receptivity" and to welcome and support transfer students in their educational mission and in their attempt to reach certain educational and career goals and aspirations.

Several programs and resources on campus exist for transfer students, namely the Office of Admissions Transfer Student Guides, Transfer Tuesdays (workshops and events designed to target the needs of transfer students), Advising at the Transfer Center at University College, Tau Sigma Honor Society, Transfer Newsletter, Transfer Orientation Program, and Transfer Retention Program at the Office for Equity and Diversity.

Recommendations

We have four types of recommendations: (1) Articulation Tables/Technology/Staff Resources, (2) Community/TIG Experiences; (3) Further Development of a Transfer Center with associated tasks; (4) Scholarship/Development Funds for Transfer Students. While there are many recommendations, we have grouped and organized them under these four headings.

Articulation Tables/Technology/Staff Resources

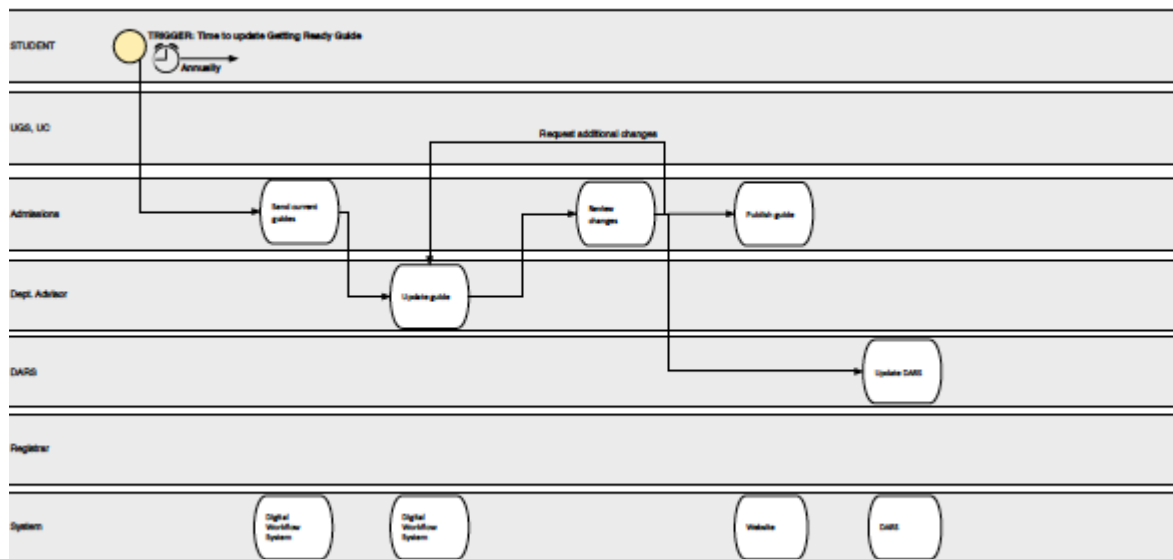
Articulation

Create a robust articulation table of all transferable courses coming into the University of Utah. This would include all in-state and (to the degree possible) out-of-state institutions. All articulations would be available online for prospective transfer students to search in order to understand how courses will transfer prior to admission to the institution, helping the recruitment effort for those students ‘shopping’ for the best transfer institution. This will also ensure consistency of articulated credit. Recommendations for Transfer Articulation include the following:

- Develop a system where departments make decisions regarding transfer course equivalencies, including any general education designations.
- Make the Summary of Transfer Credit sent by the Office of Admissions more robust and friendly and have it include course equivalencies.

The following is a visual representation of an ideal or “dream” articulation process, which is comprised of 3 major phases: Update Getting Ready Guides; Import Transfer Credit/Add Transfer Rule; Identify Repeated Courses.

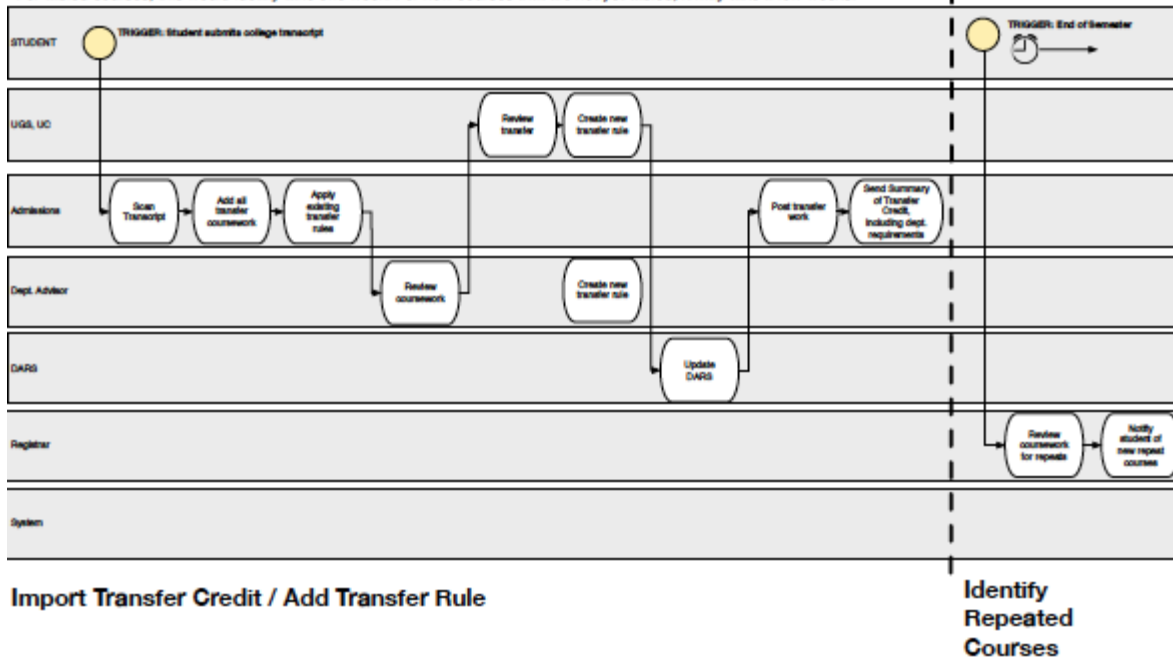
DRAFT DREAM PROCESSES



Update Getting Ready Guide

DRAFT DREAM PROCESSES

For tabled courses, this would ideally take one week. For new courses that are not yet tabled, it may take a few weeks.



Note: a full-scale version of the process flow is included in the appendix.

Technology

Utilize current technology (uAchieve and uSelect) or other technologies used within the industry to house articulations as well as make them available online. We currently have purchased technology we can leverage to make the articulation process more streamlined and also allow students to look at articulation equivalents online prior to admittance to the University of Utah.

We also recommend the use of a technological tool to replace the current paper based Getting Ready Guides. These guides are out of date and difficult for the departments to maintain. They contain articulations as well as suggested guidelines about courses to take at the various institutions across the state. These guides need to be more user friendly, and technology to leverage a “guided pathway” would make this more useful to advisors and students.

Staff Resources

Increase staff to maintain the articulations table and transfer credit practices within the department (Registrar or Office of Admissions). Consideration should be given as to where the transfer articulation responsibilities will be housed. Pac 12 schools have transfer articulation housed within either the Registrar’s office or the Office of Admissions. (Please see [comparison report](#) from the Registrar’s Office.)

Transfer Center/Advising/AccessU

Transfer Center

To increase the sense of community and belonging of transfer students, it is suggested the University further build a Transfer Center which would coordinate the services available to transfer students from campus partners. The research/data subcommittees made recommendations to study existing transfer centers at peer institutions around the country. It is suggested to model a center after the University of Arizona's Transfer Center which is much like a one-stop shop for information about transferring to the institution. This model reports to Enrollment Management and has specific transfer recruiters and transfer student events and oversees the transfer articulation processes in conjunction with the Registrar's office. At the University of Utah, we could work within the structure of Enrollment Management to create and administer the center through the Office of Admissions where recruitment, events, and transfer articulation would be housed. This transfer center would also be the first point of contact for early advising of transfer students. Admission counselors would be well versed in articulation and how best to prepare transfer students at the community college to transfer to the University of Utah.

Advising of Transfer Students

Flexibility seems to be the biggest need in regards to advising for transfer students. We recommend utilizing the technology tools available such as online or remote advising (Cranium Cafe) to increase the reach of advisors to transfer students. We also recommend creating senior advisors or experts in the role of transfer advising where these advisors are well versed in transfer articulation issues, campus opportunities for transfer students, and these individuals can train other advisors in the nuances of transfer advising.

AccessU Pathway Program

Continue exploring ways to expand the new pathway program, AccessU. Possible things to do would be to include students who have not yet applied (and thus have not been rejected by the U), students who demonstrate financial need, students who can be targeted by pathway program advertising, as well as students interested in a pathway program right out of high school.

Scholarship/Development Funds for Transfer Students

Scholarships

Review existing scholarships, see if transfers qualify, renegotiate terms of older endowments to see if transfer students can be included, and advertise to prospective transfer students and transfer students scholarship options. Seek out donors to fund transfer students, specifically. Begin by targeting alumni who were transfer students. Through implementing Holistic Admissions for Transfer Students, create a transfer student Admission Index which may allow departments to evaluate more

competitively and comparably incoming transfer students with existing students (who are usually their competition for departmental scholarships).

Community/TIG Experiences

Transfer Interest Groups - use the Department of Communication's Transfer Interest Group approach (see below) as a model for other Departments. Assign staff familiar with TIGs to aid departments in establishing TIGs at SLCC and other relevant institutions.

Communication Transfer Interest Group

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TIG Description

The Communication Transfer Interest Group (TIG) is a collaborative program between the Communication Departments at the University of Utah and Salt Lake Community College. TIG expedites the transfer process for Communication majors from SLCC to the University. The collaboration targets the most capable SLCC students and facilitates and incentivizes both their transfer process and their integration into the Communication major. Specifically, students enroll in COMM 3060, a one credit hour, upper division course. Upon successful completion of the course, students may count the credit towards major and University requirements.

How TIG Works

Communication majors at SLCC electronically enroll in the one credit hour contract course through the Division of Continuing Education. The 50 minute course is taught on the SLCC campus each spring on Friday mornings and provides students with University of Utah credit without having to apply for admissions to the University of Utah. Offering it as a contract course expands the number of qualified students who can enroll in the course at a reduced student fee – \$300 – before they have been accepted for admission at the UofU.

Course Structure: Information and Resources for Students

The course is designed to mimic a University of Utah course in terms of form. That is, students complete brief assignments like those they would encounter at the University: short essays, online and class discussions, and a final exam. More importantly, there are guest presentations by University faculty and staff so students can establish connections prior to transferring. The overarching structure for the course is divided into three categories:

1. **University Resources:** Presentations by advisors from University College and Career Services; course lectures on navigating University website and utilizing campus resources.
2. **Academic Resources:** Presentations by departmental librarian from Marriott Library; lectures on identifying and overcoming academic obstacles, understanding classroom and University etiquette, and reading and writing expectations.
3. **Departmental Resources:** Presentations by departmental academic advisors, faculty, and a tour of the University of Utah department.

Transfer Student Success: Short and Long-Term Benefits

- **Pre-Knowledge.** TIG assists students with an orientation to the University.
- **Academic Expectations.** TIG provides students with information about University- level reading and writing expectations.
- **Etiquette.** TIG reminds students of appropriate etiquette in the classroom – etiquette that can be transferred to a professional context.

- **Overarching Benefits.** TIG alleviates anxieties regarding the transfer process and provides general information regarding academic resources and success.

Short and Long-Term Benefits to Students

- **Myth-Busting.** Disabuses students regarding myths of a University education (e.g. they assume all classes are large lectures).
- **Funding.** The course saves students money due to the reduced price of the contract course, and students in the Communication TIG can apply for departmental scholarships.
- **Community.** Establishes a community and identity for participating students. TIG integrates students into the major by meeting faculty and advisors before they arrive.
- **Engagement.** Students learn about opportunities for campus engagement before they arrive and are better situated to seek out those opportunities.
- **Timely Graduation.** Students who take TIG have a better understanding of the sequences and requirements in the major. As a result, students immediately enroll and engage with coursework that interests them and that leads to the timely completion of their degree.

Benefits to the University

- **Institutional Collegiality.** TIG promotes institutional affiliations with SLCC, as well as relationships with SLCC faculty and advisors. This is due to the promotion of the course, and inviting SLCC advisors to course presentations that are pertinent to them.
- **Timely Admissions.** TIG encourages students to apply for admissions in a timely manner and to register for orientation as early as possible.
- **Stronger Students.** TIG addresses student concerns before they transfer which means students are better focused on coursework, and not on questions they might have regarding academic expectations, processes, or even how to navigate the University website.

Benefits to Other Departments

- **Benefits to Large Majors.** TIG may be especially beneficial to large majors. SLCC students are accustomed to smaller class sizes and a TIG course can mitigate fears of being “lost at sea” by establishing a sense of community amongst the students. In addition, large majors that attract transfer students may benefit the most due to the number of students who will enroll in the class. In general, the class attracts around 20-30 COMM students.
- **Benefits to Small Majors.** If a major is not large enough to attract students to a TIG course, it may consider establishing a course with a complementary major for desired enrollments (e.g. Film & Media Arts and English; Environmental Studies and Geography; Math and Physics). Such collaborations might promote double majoring due to the increased awareness of another major, as well as the ability to plan well in advance for a double major.

Establishing a Departmental TIG Program

1. **Partnership.** Establish a partnership with a corresponding SLCC department. This department will serve as the “Partnering Agency” for the contract course.
2. **Scheduling.** Determine what semester(s) would be most beneficial for offering the course as well as the time of day. Consideration should be given to SLCC course schedules, and student work schedules. A once-per-week morning class or an evening class works best.
3. **Location.** Select the best SLCC campus to teach the course. Consideration should be given to where the department holds the majority of their degree courses.
4. **Proposal.** Submit a “Contract Course Proposal Form” and a course description to the Division of Continuing Education for approval. This form requires signatures from the department chair and the college dean. A new form must be submitted each year.
5. **Advertise.** Promote the course extensively at SLCC through the following venues: flyers posted at the campuses, flyers and information given to academic advisors, electronic flyer sent to primary course instructors to distribute through Canvas. Be certain to include a link for the course so students can easily register (including a QR code works well).

Conclusion

The Transfer Process Working group thinks these four types of primary changes would greatly improve the transfer experience for transfer students. In addition, below is a comprehensive list of recommendations that could be addressed by an appointed person either in the Transfer Center or elsewhere on campus over time. Ultimately, constituting transfer students as a unique constituency worthy of specific university focus, attention, resources, time, and care would go far to improving the experience of transfer students and improve the overall campus, given the significant contribution transfer students make to the U.

Complete List of Working Group Recommendations

RECRUITING

Marketing Campaign Targeted to Transfer Students

- Celebrate the resiliency of transfer students
- Develop Communication Plan for transfer students before AND after Hobsons
- Similar to the Freshmen Communications / Portals Admissions has for freshmen – optimize that for transfer students
- Market of Student Leadership Opportunities
- Create Transfer-specific Student Leadership Opportunities (e.g., Boards)
- Emphasize UROP opportunities
- Market UROP Research Faire to transfer students
- Need for CRM/SLM

ADVISING

- Online based appointments (Appointment Manager)
- Required advising before Orientation
- Online / remote capability (e.g., Cranium Café)
- Early Engagement and Transfer Advising and Pre-Advising
- Best practices around equivalencies – possibly creating a “senior advisor” or “expert” role that allows time to train others

Transfer Center/Office/Body

- Sense of community and belonging – “home on campus”
- TRiO
- CESA
- Services oriented towards these students
- Area to hang out – lockers even! A place to meet others, study areas, etc.

Increased Advertised Employment Opportunities for Transfer Student

- Good paying jobs on campus for transfer students
- Close or formalize RA Loophole—positions not advertised, but based on personal relationships with PIs and Faculty

USHE Recommendations

- Common Job/Employment Services Center
- CC responsibility to provide information about additional education relating to career/job support
- Align calendar years
- System-level oversight of Transfer Operations
- Eliminate WICHE Passport
- Review and possibly revamp the Majors Meetings. Sponsorship from on high that the U values these meetings and departments need to attend.
- Transcript fee waived for USHE schools

Relationship development between U of U and SLCC

- Facilitated workshops for professional partnerships among faculty
- Facilitate community at the discipline-specific level
- Discipline-specific professional development opportunities hosted by the U (“come to the U for a semester for a research opportunity,” etc.)
- Designated funding awarded to specific projects
- Grants/awards/recognition
- Awards for departments with successful SLCC relationships
- Partnership committees / outside the classroom connections between groups (student government, advising, etc.)
- Pipelines (Student Involvement Pathways—e.g., Writing Centers, Leadership Programs)
- Research Assistant workshops and a certificate
- Pre-Transfer Certification Workshop (for UROP RAs)
- Developing Curricular Partnerships to Create Student Pathways
 - Formal and informal pipeline programs
 - Includes double majors

ADMITTING/ARTICULATING CREDIT

Timeline alignment (both Fall and Spring applicants)

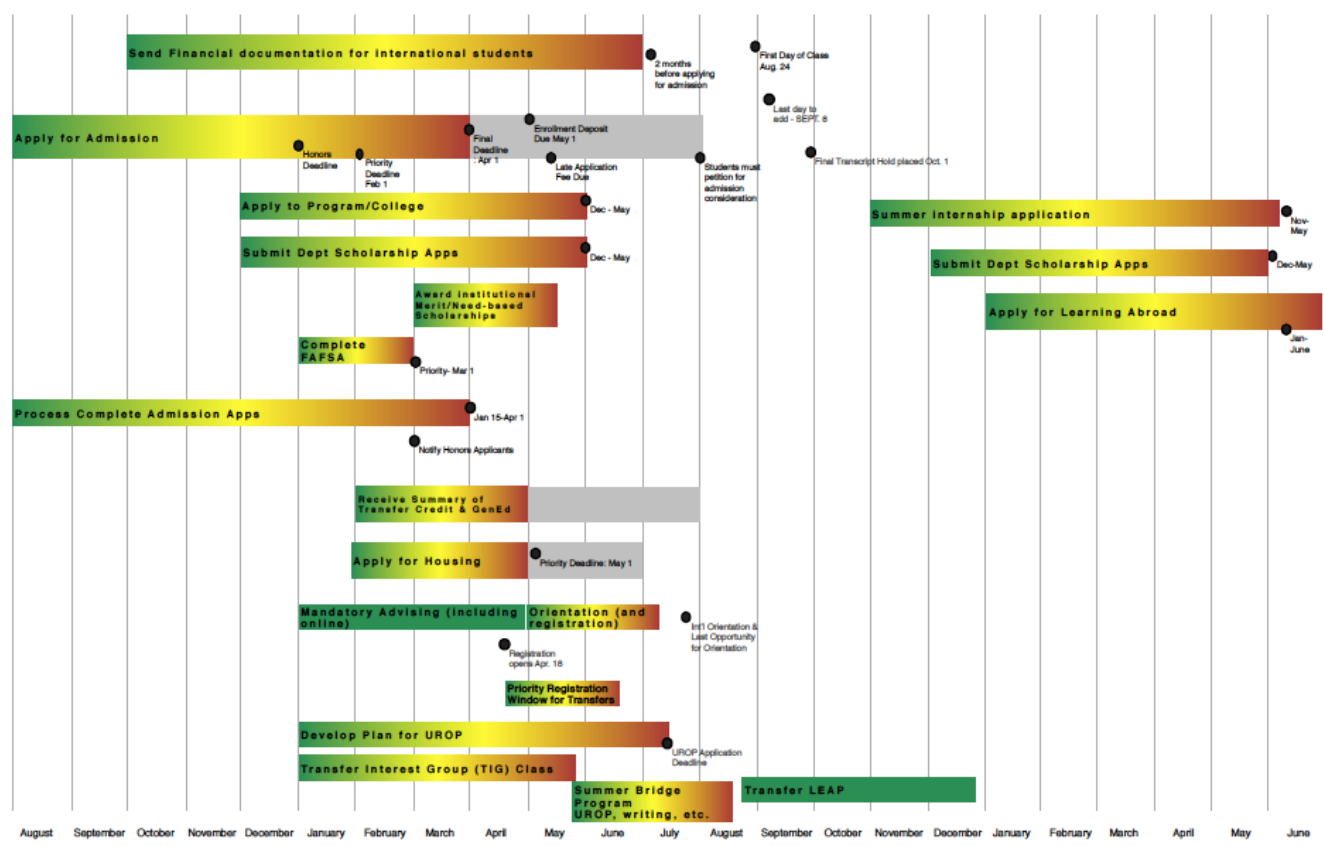
- Create priority deadlines with entitlements
 - Example: Transfer priority registration window – if a student applies by the “priority deadline” for admissions, this is a “reward” for having done so.
 - Scholarships prioritized for those who meet deadlines
- Culture shift – disallow late admits (it doesn’t benefit the student, ultimately)
- Transcript fee waived for USHE schools
- Hold slots open for transfer students in the Honors Program (note that part of this may be improved via timeline alignments)
- Both admit cycles:
 - Admissions office should process transfer applications as they are received
 - Note this may also impact resource requirements and re-evaluation of priorities within Admission; may require additional staffing
- Notify students of transfer credit status as early as possible
 - Note: this is dependent upon the recommendation for automating transfer articulation / transfer credit evaluation processes
- Notify students when they can expect notification of acceptance
 - Note: this will be a shifting date as Admissions redefines their application processes
- Encourage departments to host transfer students to a Welcome Event (luncheon, etc.)
- Offer 1 week intensive courses to meet GenEd requirements during breaks
- Fall admits:
 - Set a deadline for transfer Honors apps: Jan 1
 - Notify Honors applicants by March 1
 - Set Priority Admission deadline (including scholarships) – Feb 1st
- Spring admits:
 - Establish priority admission deadline: Sept 1
 - Award merit scholarships for Spring transfer apps – Sept 1-Nov 1st

The following are visual representations of timeline alignment recommendations:

Transfer DREAM Timeline

General Timeline for Students Applying for Fall Attendance

Revised March 5, 2015

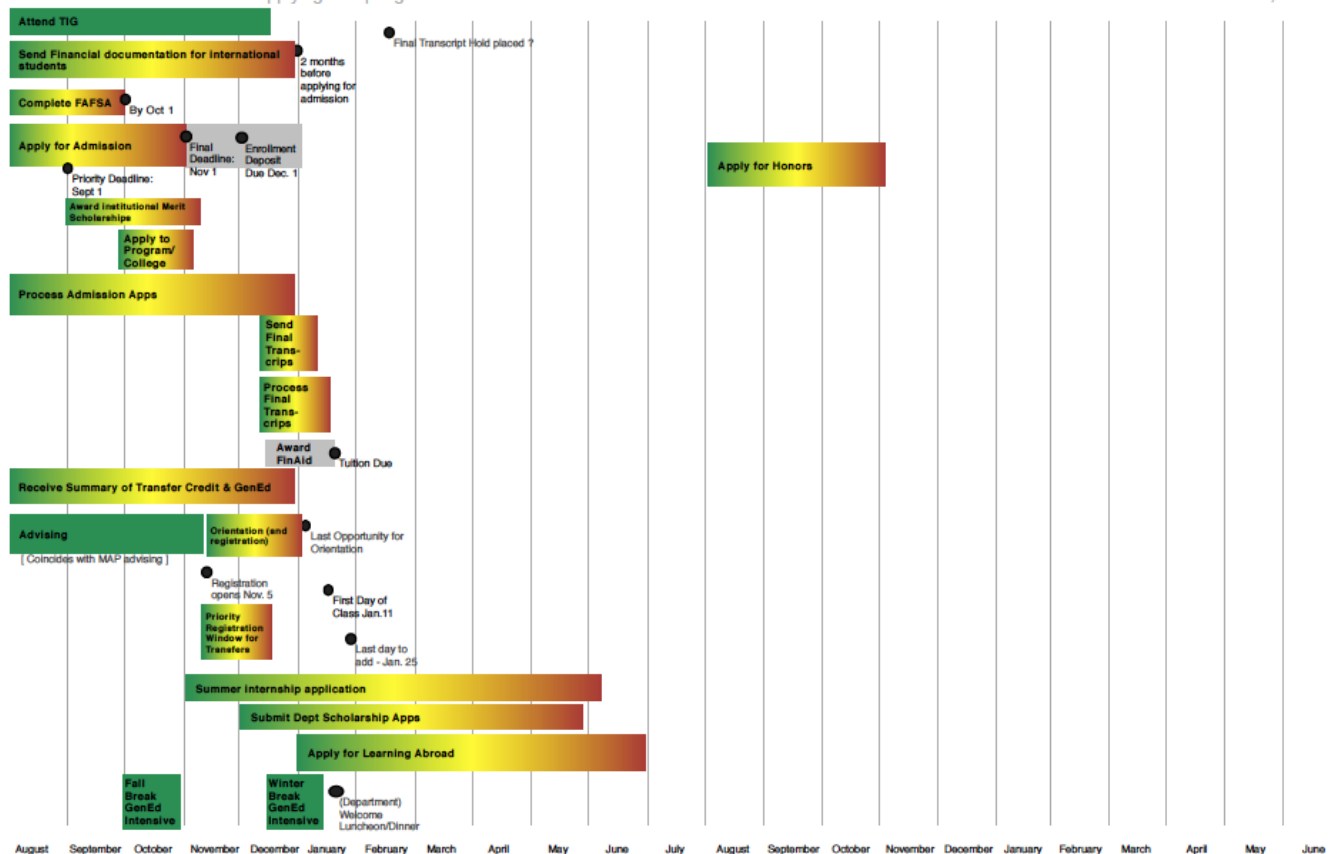


Note: a full-scale version of the timeline is included in the appendix.

Transfer DREAM Timeline

General Timeline for Students Applying for Spring Attendance

Revised March 5, 2015



Note: a full-scale version of the timeline is included in the appendix.

Admissions

- Implement holistic admissions for transfer students
 - Build additional metrics for evaluation for scholarships, programs, etc.
 - Examples include course rigor, grade trends, short answer responses, essays, etc.
 - Essays and evaluation
 - Raise admissions standards for transfer students
- Standardize procedures/best practices for posting credits to OUR academic calendar (currently posting to how the transferable institution sets up their term dates – based on transcript dates), especially as how it relates/impacts Financial Aid
- Increased admissions resources to support Spring enrollment
- Allocate staff for Transfer Evaluations
 - Tabling Articulations
- DARS (upgraded) would be the interpreter
- Determine which system should be the system of record (i.e. PeopleSoft or DARS) (not paper)
 - Upgrade PeopleSoft (e.g., searchable)
 - Start with high transfer institutions

- Possible ownership and approval of ALL credit / equivalency decisions residing with Registrar
 - Identification of ownership/ultimate authority, similar to the system of record question
- Widespread use of electronic transcripts vs. paper (little hard to impact this one – some institutions can't accept electronic transcripts yet)

Summary of Transfer Credit Report

- Make more robust, friendly – include things like remedial courses that don't count, and make that more clear
- Entering all credits
- Include more “next steps” (e.g., “go visit your major advisor to walk through this”)
- Market the ability of this report in CIS (not many advisors even know that students can access this in CIS)

Give Departments a Heads-up about Incoming Admitted Students (not just Transfers)

- Ensure the “Academic Reports” report in CIS pulls based on ADMT status, not MATR
- Have DARS pull from “Completed” status on the models instead of just “POSTED” (which requires matriculated status)
- Advisors
- Faculty as well (who's in the class) – “New to the U”
- Couple this with faculty mentoring training / incentivizing
- Possibly also see classes they'd previously taken and where (i.e. show if student has never taken an upper division class before)
 - Consider FERPA on this point
 - At Illinois, their version of Canvas allows for additional information about students to be accessible to faculty (information about students)

Reverse transfer processes – an institutional agreement that makes this an automatic process

- Opt-out process for students (scholarship issues, etc.)

DARS & Equivalency/Exception processing

- Input courses that satisfy Bachelor Degree Requirements in DARS as rules
- These could also be looked at from a curriculum process and from a deeper institutional level
- Tabling of equivalencies (i.e. allowing DARS to be the rules engine/decision engine)
- Input Upper Division equivalencies as rules (vs. per-student exceptions)
- As part of these recommendations, we recommend additional DARS experts/resources
- DARS rules for U of U learning abroad programs, including residency requirement exception (automated)
- Formalized policy amendment for U of U learning abroad programs (A question arises: “Should we allow for more than 15 credit hours for approved U of U programs, as they are meeting the “spirit” of the law, rather than mandating these be reviewed/approved by the committee?”)
- Streamlining of military curriculum approval processes (look at involving Veterans Affairs at some level)

Repeat policies, procedures

- Mismatch between grade requirement, pre-req, and credit counting. Inconsistency in how we're articulating credits (accepting most recent grade) vs. internal
- Semester-based repeat/duplicate checking process (or more frequent checking)

- Review the repeat policy – what courses count for, what they don't (does it include grade, etc.)

Getting Ready Guides

- Make more user friendly – more along the lines of a “guided pathway”
- Make the updating process / maintenance process much easier (electronic, workflow, leverage technology, etc.).
- Consider using a technological tool instead
- What programs can truly be 2+2
- This could be linked to the curriculum approval/change processes, and part of this overall end-to-end update and decision process
- This could also be a departmental requirement – All departments could know if their programs are 2+2, and if not, why not (i.e. accreditation requirements, etc.)

ORIENTING

Orientation

- Online pre-orientation modules shortly before sessions themselves (expand the recommendation for the Orientation working committee to include some of these specifically for transfer students)
- Monitor the success of the pilot for satellite site orientations
- If advising were not included in the (current) orientation, then flexibility for orientation becomes more possible (5-8pm, 8-11am, etc.)
 - Note that this also implies commitment from departments for advising
 - Challenge will be that these will overlap mandatory advising timelines

Events

- Transfer student welcome (prior to school starting, like Red White & U, scholarship reception, etc.)
- Re-working New Student Welcome to be inclusive of transfer students, or having a second even
- Orientation is piloting “Transfer Student Social,” meet and mingle (during welcome week)
 - Note that transfer students don't necessarily want to be identified as “transfer students”
 - So thinking of events / opportunities in terms of “where you are in life” vs. how you entered our system (“traditional vs. nontraditional” instead of “freshmen vs. transfer”)
- Swoop camp for Transfers (or extended orientation opportunities)
- “Get to know Salt Lake” – programs specifically for out of town and international transfers (getting food of campus, entertainment, where to live, etc.)

ENROLLING AND EDUCATING

- Equally amenable Spring system as Fall
 - Timeline changes (aligning of deadlines)
 - Curriculum alignment – allowing for Spring entry
 - Note that this is department/program specific, and not every department has the resources or curricular structure to do this
- Catalog awareness and/or departmental web pages that really market to transfer students (aligned with the guided pathway concept)
- Template for a Transfer page

- Allow for more flexibility of electives/exceptions/independent study opportunities instead of requiring an additional year of school for scheduling issue
- Document which programs only have courses available in Fall, and help students understand that (including why, of course).
- We used to publish the “usually offered Fall/Spring, Fall only.” we could bring that back in the catalog.
 - This has implications in budgeting/staffing, etc. Tightly aligned with budget schedule, hiring cycle, demand forecasting processes, etc.

Online committee recommendation

- Suggest looking at pain-point courses for transfer students and prioritize those courses for online

S4 committee recommendation

- Enable consistent waitlisting of courses
- Consistent prerequisite checking across campus

College Coordinator (Asst Director/Associate Director role)

- Not all colleges have them
- While it wouldn't be good to pile on more work on these individuals, a “Transfer coordinator” could be useful (or additional knowledge sharing around transfer students)

Fix the alignment/measuring of pre-majors-to-retention. Should also standardize the process for declaring majors.

“Un-declaring” of majors and data transparency about which students are in which academic programs, etc.

- Un-declaring and declaring is a difficult process right now (not all advisors have the system role to allow them to do this)
- Require updating or confirmation of student data (major information, address, etc.) at the time of registration

ePortfolio

- Standardize / recognize portfolio work completed at previous institutions - Consider a pilot initiative that examines the strengths and limitations of current efforts that link portfolio development across SLCC and U of U (e.g., College of Education licensure requirements)
- This may include tool standardization
- USHE level coordination would be helpful

SERVING & SUPPORTING

Scholarships

- Specific to transfer students (including Spring awarding), including communication of the availability of these awards to transfer students
- Perhaps use the T53 subsidy for freshmen for transfer students
- Create scholarship measurement criteria for departments
- Incentivize departments to implement programs (like a TIG or a summer intensive course) with scholarship dollars
- Recognize “transfer-friendly” departments
- Evaluate policy for scholarships – it should this align with Admissions standards (30 credits vs. 60)

Best practice engaged learning or cohort building

- TIG
- Summer boot camp opportunities
- UROP / research certificate idea
- Intensive courses (Spring Break, Winter, Fall Break, etc.)
- Including “off campus” possibilities (Rio Mesa, Centennial Valley, etc.) – especially since many transfer students may not be able to take advantage of semester-long Learning Abroad
- This may just be identifying and communicating these opportunities specific to transfer students

Housing

- Research whether transfer students want on-campus housing. If so, align services for these students.
 - Many students are looking more for “What are the good areas of town? Can I get in the apartments?” More information about resources could help.

OTHER CATEGORIES

Various

- Resources to CC departments to do outreach to students and transfer labor
- Curriculum Planning, strategic scheduling – impacts articulation, knowing what counts
- Gen Ed Conference Panel on Transfer

Data

- Student interviews and/or focus groups to discover what students want
- We need to seek out whether or not there is a correlation between incoming GPA and ultimate academic success (i.e. is there data to support raising admissions standards compared to continuing students?). Maybe probation metrics
- Comparing total credits accepted/transferred vs. progression in academic career (Trying to understand credit loss)
- Build predictive metrics into processes (such as number of “lost” credit hours) and accompany with actions (alerting of advisors for reach-out opportunities, etc.)
- International Students - Performance statistics on TOEFL scores vs. transferring in English credits with C or better, Utah schools vs. out-of-state schools, vs. foreign transcripts and success rates (with a goal to evaluate that policy and how that works in holistic admission requirements)
- # of credit hours a transfer student has when they graduate here, compare with Financial Aid requirements and time to complete (i.e. are there correlations there?)
- Research what motivates students to be engaged (or dis-engaged) with activities on campus (academic & career vs. social)
- Build profile models of U of U students (traditional, wanting the “U of U experience” vs. older or family-oriented students who are focused academically but not necessarily looking for social opportunities, etc.)
 - What are the characteristics and main “models” or types of transfer students, and what services do we have and how do they map to those?
- “Ideal path” student vs. “tough cases”
- For students in programs where it doesn’t make sense for them to get an AA / 2 years elsewhere (e.g., Fine Arts), it’s difficult to apply for admissions in the Spring semester of their first year (not enough credits to evaluate, they’ll be considered Freshmen for admissions

standards, etc.). This will always be a difficult case – recommendations are advising/early intervention. This is also the population the Pathways (AccessU) program would ideally be assisting (students who always wanted to be at the U, can't quite meet admissions standards, but always intended to come here).

Research & Data Sub-Committee Report Recommendations

Develop a Transfer Center that Is a Centralized Unit to Organize, Coordinate, and Oversee all Aspects of the Academic and Social Transfer Process

- This overarching recommendation is based in both the scholarship on transfer students and evidence-based practices related to transfer students. Transfer centers differ across institutional types, but most share the common characteristic of housing and coordinating all transfer-related activities on campus. As a hub for programming and information dissemination, transfer centers serve as a one-stop shop for students. We recommend the University of Utah study existing transfer centers at peer institutions around the country (e.g., University of Arizona Transfer Center) to identify best practices and models.
 - Given the breadth of research on transfer students, several sub-recommendations are provided, many of which could be coordinated and led by a Transfer Center. The remaining recommendations are not in any particular order of priority and we would argue they are all equally important and valuable.

Transfer Access (pre-transfer)

Strategically Increase the Number and Proportion of Underrepresented Transfer Students

- Figure A-2 in Appendix A shows that the proportion of transfer students of Color has doubled in the last decade, and this is important progress. The University of Utah should build off of this momentum by committing to institutional policies and budgets that support the growth of underrepresented students on campus and that ensure equity in outcomes.
 - That said, as displayed in Figure C-3 in Appendix C, relative to Pac-12 institutions, the racial/ethnic composition of new transfer students in Fall 2013 at the University of Utah was the least diverse. For example, 77% of new transfer students at the University of Utah were White compared to 29% at the University of California- Berkeley, 50% at the University of Washington, 54% at the University of Arizona, and 58% at the University of Oregon.
- The University of Utah should make the recruitment and support of underrepresented transfer student populations an institutional priority and clearly communicate this priority to campus and community stakeholders, as well as to students. To support this mission, the University of Utah should develop strategic goals related to equity in outcomes for transfer students (Dowd & Bensimon, 2014) as well as commit to institutional accountability measures and develop mechanisms to assess progress.

Develop Financial Awareness and Commitment for Students with Intent to Transfer Prior to Transfer

- *Develop a robust scholarship program for students who intend to transfer to the University of Utah.*
 - Research shows that financial awareness is critical for students in their decision-making regarding transfer and college choice (Long, 2005). Transferring from a low-priced institution to a high-priced institution can present a significant cost risk to students, particularly underrepresented students, so awareness of and access to financial resources is critical.
 - Developing a need-based aid program illustrates a commitment to underrepresented students and demonstrates that the University of Utah values equity. Need-based funding can be used as an effective recruitment tool for underrepresented students who may not consider the University of Utah a feasible financial option. It may also prevent price-sensitive transfer students from stopping-out due to financial constraints (Singell, 2004).
 - There is evidence to suggest that unintended consequences exist for students who are required to maintain a certain GPA as a stipulation to receive funding, such as switching majors and taking fewer credits per semester (Cornwell et al., 2005; Zhang Min, Frillman, Anderson, & Ohland, 2006). Conversations should take place on how best to support transfer students at the University of Utah who are balancing a number of commitments outside of coursework.
 - Evidence on the efficacy of state merit- and need-based aid programs is mixed (Toutkoushian & Hillman, 2012), but recent experimental evidence from Nebraska suggest that a combination of both helps to increase success of underrepresented students and influences students' college choice (Angrist, Autor, & Hudson, 2014).
- *Ensure transfer students are aware of funding opportunities at the University of Utah*
- Information about financial aid is critical to a student's ability to transfer. Awareness of costs related to increased tuition and other expenses to be incurred at the university is necessary for students in order to plan and commit to transferring successfully. Because ambiguity exists around when a student will receive financial aid and if they will receive enough to cover costs, it is critical that the University of Utah provide guaranteed funding for students pre-transfer and that they are aware of these funding opportunities before they apply.
 - Research shows that lower-income students are more sensitive to price and increased cost of attendance (Dynarski, 1999; Long, 2004). The University of Utah should target underrepresented students with intent to transfer with guaranteed funding. Providing potential transfer students with committed funding helps to offset price sensitivity and promotes equity.
 - Institutional aid should address the University's desire for transfer students to attend full-time. Accordingly, the scholarships and other financial incentives should not be designed in a way that requires additional responsibilities (i.e., service) and that recognize the financial constraints faced by diverse transfer populations who need to work and balance other life responsibilities.

Develop Collaborative Dialogue and a Strategic Working Series with SLCC Leaders and Faculty Regarding Transfer

- The partnership between the University and SLCC is not new, but as the University of Utah engages SLCC to improve and streamline the transfer process, the University of

Utah should consider SLCC as a strategic partner in transfer efforts. Eddy's (2010) work on higher education partnerships provides an eight-stage change model for partnerships that could be useful to the University: (a) verbalizing motivation and context for partnering; (b) aligning social capital of champions and leveraging organizational capital; (c) establishing partnership goals and team governance; (d) framing the partnership to stakeholders; (e) negotiating conflict; (f) framing outcomes; (g) evaluating the process; and (h) institutionalizing the partnership (Eddy, 2010, p. 25).

- The University of Utah should draw from this literature as well as existing programs with a track record of effectiveness and consider developing additional strategic collaborations that engage both University of Utah and SLCC faculty and leaders regarding transfer. As noted below, the transfer literature suggests that faculty are critical to transfer student success, so it is critical that both University of Utah and SLCC faculty are equal partners in this engagement.

Enhance Pre-Transfer Academic Advising Services between University of Utah and SLCC

- Academic advising plays a crucial role in the early identification of students with intent to transfer as well as supporting successful transfer of underrepresented students (Bensimon & Dowd, 2009). In partnership with SLCC and other feeder institutions, the University of Utah should identify ways to enhance academic advising and counseling of potential transfer students. Practices should address informational and cultural barriers that transfer students may face (Gabbard, Singleton, Dee, Parker, Fuller, Dowd, Giles, Bensimon, Malcolm, Park, Macias, Fabienke, & Marquez, 2006).

Further Develop and Make Accessible Transfer Admission Practices and Policies, Course Articulation Policies and Information, and Transfer Student Services

- Research on the college choice process suggests that lack of information is a primary stressor of college choice and students often do not have correct or accurate information when making decisions about college (Vultaggio & Friedfeld, 2013).
- This concern is particularly problematic for students who are not privileged with the social and cultural capital needed to navigate the college choice process and transfer process (Nora, 2004). Further, research on transfer students suggests that institutions need to provide more information to prospective students about the transfer process prior to transfer (Townsend & Wilson, 2006).
 - The University of Utah should critically analyze what information is provided to students prior to transfer and better understand, from the student perspective, how this information influences their decisions and behavior. One recommendation is to develop a centralized accessible online presence for transfer students so that they can access updated course articulation information, admission policies, support services, and other important information. However, the University of Utah should recognize that all students may not access or understand this information equally and therefore should provide supplemental pre-transfer support for first-generation students, students of color, and low-income students. This support is particularly important for students *prior to acceptance* to the University of Utah.

- Aim to become a ‘transfer friendly’ institution by considering how underrepresented transfer students perceive the University of Utah through messaging and outreach efforts. Develop a campus-wide marketing campaign that communicates institutional value and support of underrepresented transfer students. Disseminate current information and facts about transfer students to larger campus community.
- Review transfer website and other first-contact platforms to assess messaging and perception (e.g.: Currently, the first sentence greeting readers to the transfer page is: “All new transfer students are required to meet with an advisor AND attend an orientation session *before* they can register for their first semester at the U.” <http://advising.utah.edu/transfer/>)

Consider Policies and Practices that Support Transfer Students from All Types of Sending Institutions and All Types of Transfer Students

- Figure A-2 in Appendix A shows that nearly half of all transfer students (43%) transfer from SLCC, and about 33% transfer from other in-state public and private institutions. In addition, about 25% of transfer students at the University of Utah transfer from institutions outside the state of Utah. In addition to the implementation of new programs and policies that support transfer access from SLCC, the University of Utah should identify ways to support transfer students and underrepresented transfer students from other in-state institutions and out-of-state institutions.
- Although the two- to four-year pathway (vertical transfer) is a predominant pathway for transfer students at the University of Utah, it is not the only type of transfer. Student mobility is increasingly the norm in higher education including concurrent enrollment, summer enrollment at other institutions, lateral transfer, and reverse transfer (Townsend, 2001). As the University of Utah adopts new policies or revises existing policies, all types of student transfer mobility patterns should be considered.

Transfer Success (post-transfer)

Develop Programs to Support Transfer Students’ Academic Integration, Involvement, and Success

- *Target Programs and Policies for Transfer Students in Their First Semester After Transfer*
 - Research shows that most transfer students experience “transfer shock,” as reflected in a dip in transfer students’ university GPA after they transfer to the university (Cejda, 1997; Diaz, 1992; Laanan, 2001). Although the evidence suggests that many transfer students recover from transfer shock (Diaz, 1992), ameliorating or eliminating transfer shock is in the best interest of the student and institution. Because transfer shock often occurs in the first semester after transfer, it is critical that academic and social programming is attentive to this critical time period.
- *Leverage Existing Programs and Develop New Programs that Support Both Academic and Social Involvement and Integration*
 - Although social and academic integration and involvement are empirically linked to college students’ success, the literature is mixed on the relative importance of social and academic integration and involvement for transfer students (Bahr et al., 2013).

- However, several studies show that transfer students do not have the time to be involved socially nor are they necessarily interested in social activities outside of class (Bahr et al., 2012; Bers et al., 2001; Owens, 2010; Reyes, 2011; Townsend & Wilson, 2009; Townsend & Wilson, 2006). Expecting participation in social activities from non-traditional students who have family and work obligations may not be realistic nor is it supported by the research. Thus, students' interaction on campus is inside classrooms, and therefore interaction with faculty, teaching assistants, and peers is important.
 - Similarly, research shows that transfer students' involvement in academic activities such as peer-based activities related to the department and professional goals, peer study groups, faculty research projects, and discipline-focused clubs are conducive to engagement (Bahr et al., 2012; Laanan et al., 2010; Owens, 2010; Reyes, 2011; Townsend & Wilson, 2006). Identifying programs that support both academic and social involvement is a promising strategy for transfer students (Bahr et al., 2013).
- *Explore Issues of Campus Climate and How It Impacts Underrepresented Transfer Student Satisfaction, Experience, and Success.*
 - As displayed in Table B-2 in Appendix B, transfer students of Color on campus graduate at lower rates than all other transfer students. The University of Utah should commit to investigating the reasons for disproportionate outcomes and ameliorating these barriers for transfer students of Color.
 - Campus climate greatly affects how underrepresented student populations at Predominantly White Institutions, and particularly students of Color, experience the institution (Hurtado, 1992); it is likely that this research extrapolates to transfer students of Color. Perceptions of campus climate are important for underrepresented students with perceived racial tension leading to an overall reduced sense of belonging (Locks, Hurtado, Bowman, & Oseguera, 2008). The University of Utah should investigate how racial microaggressions (Solorzano, Ceja & Yosso, 2000), educational deficit thinking, (Valencia, 2010), perceptions of prejudice (Cabrera, Nora, Terenzini, Pascarells & Hagedorn, 1999) and other issues associated with climate impact *transfer student* experience, satisfaction, and completion.
 - Develop and support existing programs on campus that are successful in targeting and supporting underrepresented student populations at the University of Utah. Explore possibilities for augmenting such programs to support underrepresented transfer student success and consider guaranteeing conditional admission to the University of Utah for participants of pre-college programs.

Identify Mechanisms to Minimize Transfer Students' Credit Loss

- *Develop a mechanism to identify which students lose transfer credits and understand why students lose credits.*
 - Despite the proliferation of state and institutional policies to facilitate the transfer of credits across institutions, evidence suggests that credit loss after transfer is a significant obstacle for transfer student success. Recent research based on a nationally representative sample of students who transferred 48 or

more credits shows that 10% of students lost 90% or more credits, 58% did not lose more than 90% of their credits, and 28% lost between 10% and 89% of their credits (Monaghan & Attewell, 2015). Further, credit loss was a negative predictor of 6-year bachelor's degree attainment, even after controlling for GPA and other critical factors.

- The University of Utah should conduct a transcript analysis of transfer students to understand the scope and nature of credit loss at the University of Utah. Through this process, the University of Utah should engage faculty, the registrar, admissions, academic advisors, and other key stakeholders to understand why students lose credit and develop policy recommendations to reduce credit loss. The University of Utah should also focus this analysis on pathways in STEM disciplines and other disciplines with sequential curricula that often result in credit loss.

Engage University of Utah Faculty and Launch a Faculty and Staff Professional Development Series on Transfer Students

- *Identify ways to change faculty (mis)perceptions of transfer students to reduce transfer students' stigma and capitalize on transfer student strengths.*
 - Some research shows that approximately 25% to 33% of transfer students experience transfer stigma in that they report feeling rejected based on their transfer student status (Alexander et al., 2009; Moser, 2012), and that transfer stigma may negatively impacts students' academic adjustment after transfer (Laanan et al., 2010).
 - Transfer student capital is emerging as an important construct in the literature that is defined as processes that allow transfer students to acquire skills and knowledge to navigate the transfer process successfully (Laanan et al., 2010; Moser, 2012).
- *Identify and develop faculty that act as transfer student agents and champions within academic departments.*
 - Faculty are critical to transfer students' success and act as "transfer agents" that support students, particularly low-income and underrepresented students (Dowd, 2011; Dowd, Pak, & Bensimon, 2013). Examinations of existing models should be considered.
 - Research also shows that faculty act as "transfer champions" because they influence admissions, curriculum, assessment, and other important campus policies that influence transfer students' access (Dowd, 2011).

Engage in State-Level Conversations to Further Support Transfer Students

- *Identify and Support State Transfer & Articulation Policies*
 - State articulation and transfer policy plays a key role in supporting student mobility throughout the state via state policies such as articulation agreements, common course numbering, and transferrable general education, for example (Anderson et al., 2006). Many of these policies support student mobility within the state, but, as previously noted, research suggests that students still lose credit after transfer (Monaghan & Attewell, 2015).
 - The University should consider engaging in state-level conversations about additional state-level policies and practices that support transfer students such

as state-level transfer pathways (see SUNY Transfer Paths),¹ reverse transfer policies (see below), and competency-based models of transfer and articulation (see University of Hawaii general education student learning outcomes).²

¹ <http://www.suny.edu/attend/get-started/transfer-students/suny-transfer-paths/>

- *Engage in Conversations regarding a Statewide Reverse Transfer Policy*
 - Reverse transfer programs and policies are expanding throughout the country (Garcia, 2015; Taylor & Bragg, 2015). Research on the potential of reverse transfer policies is promising (Taylor et al., 2013) and states participating in the Credit When It's Due initiative have awarded over 3,000 associate's degrees as of early 2014. The University of Utah should consider implementing a reverse transfer program with SLCC and consider supporting a statewide policy that is likely to optimize the number of students potentially impacted by reverse transfer (Taylor & Bragg, 2015).

Appendix

The following are links to documents in the [UBox folder](#) :

[Full Size Graphics of Transfer Timeline](#)

[Research and Data Subcommittee Full report](#)