Optimizing Reverse Transfer Policies and Processes:
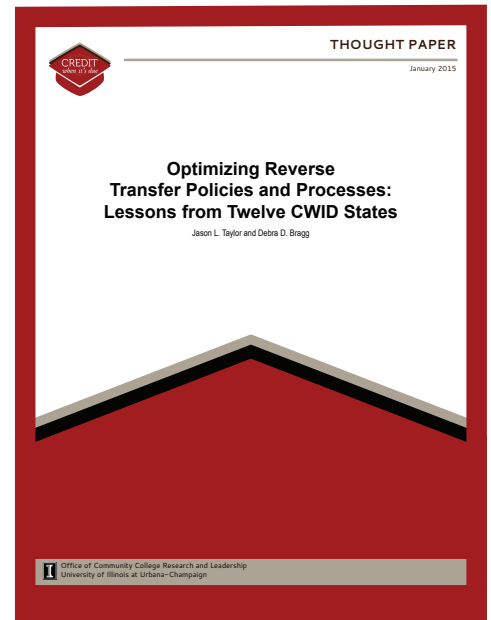# Lessons from Twelve Credit When It's Due (CWID) States

Jason L. Taylor and Debra D. Bragg

The majority of students transfer from a community college to a university without an associate's degree, and many of these students end up without any credential to show for the time they spent in college. Beginning in 2012, 12 states received funding to undertake a new initiative to address the issue of transfer students who have some college but no degree. Optimizing Reverse Transfer Policies and Processes: Lessons from Twelve Credit When It's Due (CWID) States[1] highlights promising developments in the states of Arkansas, Colorado, Florida, Hawaii, Maryland, Michigan, Minnesota, Missouri, New York, North Carolina, Ohio, and Oregon). Since CWID began, Arizona, Georgia, Tennessee and Texas have received foundation funding to implement reverse transfer, and results for these state initiatives will be reported as the CWID initiative evolves.

The goal of CWID is deceptively simple: Make systemic changes in policies and processes to enable more transfer students to attain "credit when it's due". Thus, optimization of reverse transfer refers to change at any level—state, system, or institution—that yields the largest number of students who are eligible for and able to benefit from reverse transfer without overextending resources or diminishing the quality of the undergraduate experience. It is important to assert that optimization is not about awarding credentials to students without careful scrutiny, but awarding credentials based on credits that students have been rightfully earned.

Once the CWID states implemented new policies and processes to support reverse transfer, the number of degrees and credentials has risen precipitously. Reporting about 3,000 degrees through reverse transfer in March 2014, the current estimate of credentials (degrees, diplomas, and certificates) is over 7,000, and this count does not include a few CWID states that are yet to begin conferring degrees.[2]

In nearly all states, systemic changes in transfer policy and processes have smoothed transfer and facilitated degree attainment for students who matriculate to the university without first receiving an associate's degree. Technology applications such as electronic transcript exchange, automated degree auditing, and electronic advising are enabling CWID states to grow the number of degrees awarded over the course of the grant and to sustain these changes into the future. New technologies introduced by the National Student Clearinghouse show promise for further enhancing capacity to confer degrees, beginning with technology to improve transcript exchange within and across state borders.

THOUGHT PAPER

January 2015

**Optimizing Reverse
Transfer Policies and Processes:
Lessons from Twelve CWID States**

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[1] *Optimizing Reverse Transfer Policies and Process: Lessons from Twelve CWID States*, Taylor, J., & Bragg, D. (2015) is available at: http://occrl.illinois.edu/files/Projects/CWID/optimizing-reverse-transfer.pdf

[2] Estimates of reverse transfer credential attainment is based on research conducted by OCCRL's CWID team.

Data gathered by the CWID research team at OCCRL identified five critical processes that need to be addressed in order to bring about systemic change to support reverse transfer. These processes involve student identification, student consent, transcript exchange, degree audit, and degree conferral and advising.
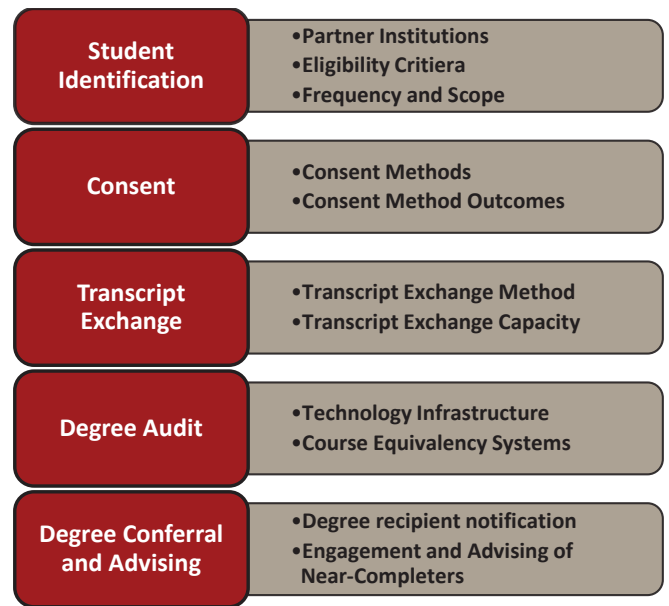
Changes documented in the *Optimizing Reverse Transfer Policies and Processes* paper include creation of a viable pool of eligible students, the use of integrated and scalable student consent methods, the investment in electronic transcript exchange, the automation of degree audit processes, the expansion of course articulation and equivalencies, the proactive advisement of near-degree completers, the notification of degree recipients, and the conferral of degrees without added cost to students.

Student Identification	•Partner Institutions •Eligibility Critiera •Frequency and Scope
Consent	•Consent Methods •Consent Method Outcomes
Transcript Exchange	•Transcript Exchange Method •Transcript Exchange Capacity
Degree Audit	•Technology Infrastructure •Course Equivalency Systems
Degree Conferral and Advising	•Degree recipient notification •Engagement and Advising of Near-Completers

Spotlight on Policies and Processes

The paper provides numerous examples of how higher education systems and systems are improving transfer and articulation policies and processes through CWID. Most of these changes not only impact students eligible for reverse transfer but all students who seek to transfer. For example, New York developed a new process to update and maintain community college course equivalency tables for the entire SUNY system; the STAR system at the University of Hawaii communicates with campus student information systems in real time, allowing all students and advisors to perform degree audits; the university portal systems in North Carolina improved with new technologies that integrate consent; and the general education transfer packages in several states (e.g., Maryland, Minnesota, Missouri, and Ohio) have been utilized more extensively.

Moving Forward

Efforts begun through CWID to improve transfer and articulation need to be encouraged and sustained. Higher Education leaders should look to CWID as an example of how policies and processes can be changed in a relatively short time period, with tangible immediate rewards for students in the form of credentials. Research is needed to continue to examine implementation and sustainability, including continuing to examine the ways transfer can be enhanced to ensure that more students are able to reap the full benefits of a college education.

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