

# WEBINAR

## Credit When It's Due: Optimizing Reverse Transfer

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### Credit When It's Due

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Office of Community College  
Research and Leadership



COLLEGE OF EDUCATION AT ILLINOIS



# Presenters



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OCCRL Faculty Affiliate

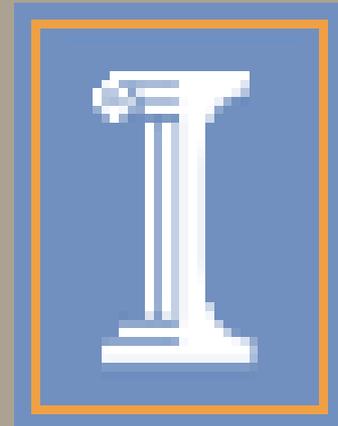
# Agenda

- Credit When It's Due
- “Optimization”
- Five Dimensions - Initial Results from States
- Research Next Steps
- Michigan and Ohio Experience



# OCCRL

Office of Community College  
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# Credit When It's Due (CWID)

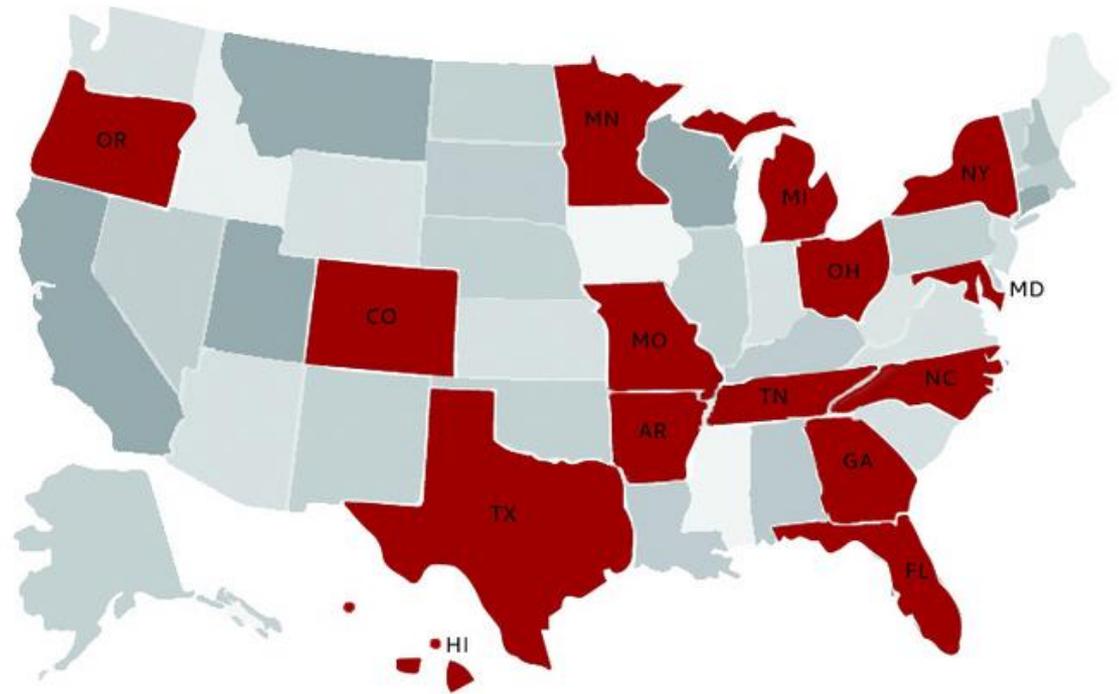
Community college and university partnerships dedicated to awarding associate degrees to transfer students who complete their associate degree requirements while pursuing a bachelor's degree.



# States with CWID Funding

12 Grants – 2012

3 Grants – 2013



Funders: Lumina Foundation, The Kresge Foundation, Bill & Melinda Gates Foundation, USA Funds, The Helios Education Foundation, and Greater Texas Foundation



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# Optimization



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THOUGHT PAPER

January 2015

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

Jason L. Taylor and Debra D. Bragg

 Office of Community College Research and Leadership  
University of Illinois at Urbana-Champaign

Study of optimization of policies and processes using qualitative and quantitative data from the initial 12 CWID states



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# What do we mean by “optimization”?

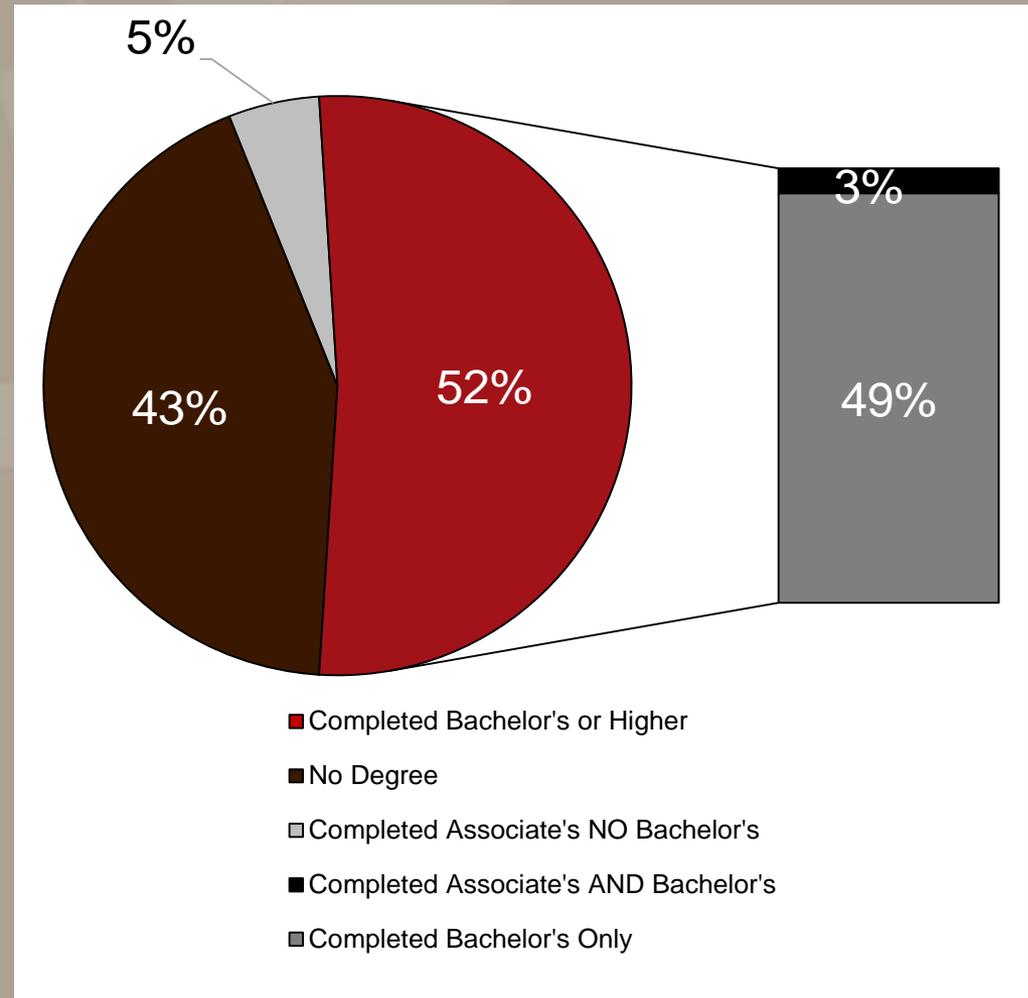
Policy and program change at any level—state, system, institution—that...

- ◆ yields the largest number of students who are eligible for and able to benefit from reverse transfer.
- ◆ enables as many deserving students as possible to be conferred associate’s degrees without diminishing quality or otherwise negatively impacting student learning outcomes and program integrity.
- ◆ Doesn’t overextend resources



# CWID Baseline Study

- About 50% of RT-eligible students do not complete a bachelor's degree four years after transfer
- Only 3% of students completed an associate's degree en route to the bachelor's degree



# Initial Number Associate's Degrees Conferred

Associate  
degrees conferred  
through CWID  
as of March 2014

State	Number of Associate's Degrees
Arkansas	17
Colorado	0
Florida	202
Hawaii	732
Maryland	452
Michigan	375
Minnesota	355
Missouri	13
New York	0
North Carolina	0
Ohio	594
Oregon	200



# Five Dimensions

Student Identification

Consent

Transcript Exchange

Degree Audit

Degree Conferral and  
Advising



# Five Dimensions

## Student Identification

- Partner Institutions
- Eligibility Criteria
- 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

- Notification
- Engaging and Advising Near-Completers



# Student Identification

## Who is involved?

- ◆ State, system or region?
- ◆ Institutions or partnerships?
- ◆ Publics or privates?
- ◆ In-state vs. out-of-state?
- ◆ Associate's-degree granting only?



# Eligibility Requirements

- No associate's degree
- Residency requirement
- Cumulative college credits
- Other

State	Criteria on Student Eligibility for Reverse Transfer
<b>Arkansas</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating institution (ranges from 15 to 21 college credits)</li> <li>• Student earned 16 or 17 courses (~45 college credits) toward the associate's degree</li> </ul>
<b>Colorado</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating community college (≥ 15 college credits)</li> <li>• Student earned ≥ 70 cumulative college credits</li> </ul>
<b>Florida</b>	<p>Suggested state criteria:</p> <ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating community college (≥15 college credits)</li> <li>• Student completed 36 credit hour general education requirements</li> <li>• Student completed ≥ 60 cumulative college credits</li> <li>• Student is in good academic standing at the community college and the university</li> </ul>
<b>Hawaii</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating community college (≥12 college credits)</li> <li>• Student completed ≥ 61 cumulative college credits</li> <li>• Student has ≥ 2.0 GPA from participating community college</li> </ul>
<b>Maryland</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree or higher</li> <li>• Student completed ≥ 15 cumulative college credits prior to transfer</li> <li>• Student is in good standing at the 2-year and 4-year institution with a GPA of 2.0 or higher</li> </ul>
<b>Michigan</b>	<ul style="list-style-type: none"> <li>• No state policy; but institutional residency requirements range from 12 to 45 college credits.</li> </ul>
<b>Minnesota</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate in arts degree</li> <li>• Student met residency requirement at a participating community college (≥ 12 college credits)</li> <li>• Student does not have an academic suspension on record</li> <li>• Student has not applied to graduate with a bachelor's degree</li> </ul>
<b>Missouri</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating community college (≥ 15 college credits)</li> </ul>
<b>New York</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student earned ≥ 24 college credits at a participating community college and/or met community college residency requirement (varies)</li> </ul>
<b>North Carolina</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating community college (≥ 16 college credits)</li> <li>• Student transcript evaluation occurs between 50 and 90 cumulative credit hours</li> </ul>
<b>Ohio</b>	<ul style="list-style-type: none"> <li>• Student does not have an earned associate's degree</li> <li>• Student met residency requirement at a participating community college (≥ 20 college credits)</li> <li>• Student completed ≥ 45 cumulative college credits</li> <li>• Student has ≥ 2.0 GPA from the university</li> <li>• Student enrolled at a university with intended degree of bachelor's</li> </ul>
<b>Oregon</b>	<ul style="list-style-type: none"> <li>• No state policy; institutional residency requirement is ≥ 16 semester credits or 24 quarter credits</li> </ul>



# Eligibility Requirements



Credit right  
now or...  
Credit when  
ready?



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# Five Dimensions

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## FERPA

- Privacy Technical Assistance Center (PTAC) assisting many states; No written guidance from USDE
- Guidance toward Opt-in

## Dominant Models

- Opt-In: students *actively affirm* consent to have transcripts sent and/or degree conferred
- Opt-Out: if students do not *actively deny* consent, they are assumed to have consented



# Consent Methods

- Traditional: Email, postcards, letters, phone calls
- Technological solutions:
  - Integration with student information system
    - NC use of pop-up screens when students online to register
  - Integration into transfer student admission's application
    - University of South Florida, Texas common application



# Consent Method Outcomes

## Opt-Out

- Virtually all students consent

## Opt-In:

- Consent rate is percent of potentially eligible students who agree to participate of potentially eligible students contacted
- Range: **10% to 50%**

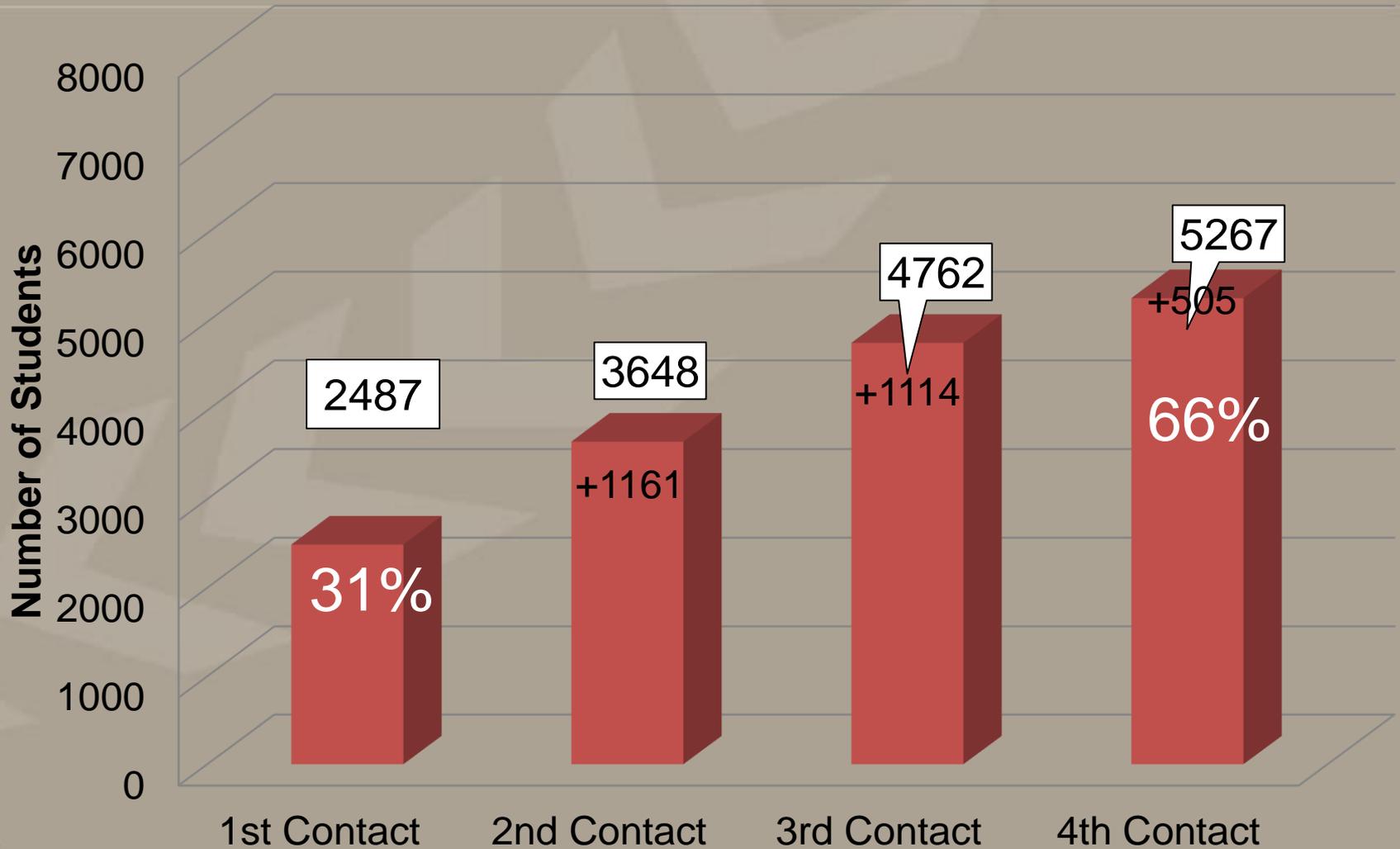


# Consent Gap

State	Number Students Contacted	Number Students Opted In	Consent Rate	Consent Gap
Michigan	13,860	1,804	13%	87%
Missouri	2,008	191	10%	90%
Ohio	6,307	1,464	28%	72%



# Closing the Consent Gap: North Carolina



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# Transcript Exchange

## Methods

- Fully electronic
  - Arkansas, Florida, Hawaii, Minnesota, Ohio
- Partially electronic
  - Missouri
- Manual
  - Maryland, New York, Oregon
- New Solutions:
  - NSC PDF transcript exchange
  - NSC fully electronic solution
  - Parchment (CO & GA)



# Transcript Exchange Capacity

Table 2  
Electronic Transcript Exchange Systems

State	Electronic Transcript Exchange System Description
Arkansas	<p>Arkansas uses a third-party system, the Standardization of Postsecondary Education Data Exchange (SPEEDE) server operated by NSC to facilitate transcript exchange. SPEEDE is a fully electronic transcript exchange system that individual institutions use to both send and receive electronic transcripts.</p> <p>See: <a href="http://speedeserver.org/">http://speedeserver.org/</a></p>
Florida	<p>Transcript exchange in Florida is facilitated by the Florida Automated System for Transferring Educational Records (FASTER). FASTER is used statewide by K-12 institutions and higher education to electronically exchange transcripts and records.</p> <p>See: <a href="http://www.floridastudentfinancialaid.org/FASTER/index.htm">http://www.floridastudentfinancialaid.org/FASTER/index.htm</a></p>
Hawaii	<p>The University of Hawaii (UH) system developed and built the STAR system, which is a cloud-based technology that interfaces and communicates with all UH campus student information systems in real time. STAR allows the system to access students' transcripts and records without the need to send paper transcripts for the purpose of reverse transfer.</p> <p>See: <a href="https://www.star.hawaii.edu:10012/includes/PDFs/student/StarOverview.pdf">https://www.star.hawaii.edu:10012/includes/PDFs/student/StarOverview.pdf</a></p>
Minnesota	<p>The MnSCU system uses an internally developed electronic transcript exchange system called eTranscript to exchange transcripts among MnSCU institutions. The system pulls transcript data from Degree Audit Reporting System (DARS) to generate the eTranscript.</p> <p>See: <a href="http://www.mnscu.edu/board/policy/329.html">http://www.mnscu.edu/board/policy/329.html</a></p>
Ohio	<p>Ohio uses the Ohio Articulation and Transfer Clearinghouse (ATC) to exchange electronic transcripts among Ohio state-assisted institutions within the state.</p> <p>See: <a href="https://www.ohiohighered.org/transfer/atc">https://www.ohiohighered.org/transfer/atc</a></p>

- SPEEDE
- FASTER
- STAR
- DARS
- ATC



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# Degree Audit

# Technology

- Automated vs. Manual
- University of Hawaii (UH) STAR System
  - Cloud-based system interfaces with student information system
  - UH coding routine automatically audits transfer students' transcripts against associate's degree requirements
  - Student portal with "what if" scenarios
- Ellucian's DegreeWorks (SUNY)
- CollegeSource Inc's u.achieve/DARS (MnSCU)



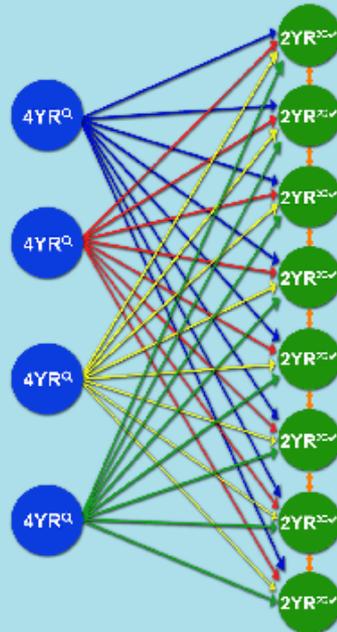
# Technological Frameworks

- Decentralized
- Centralized
- Cloud

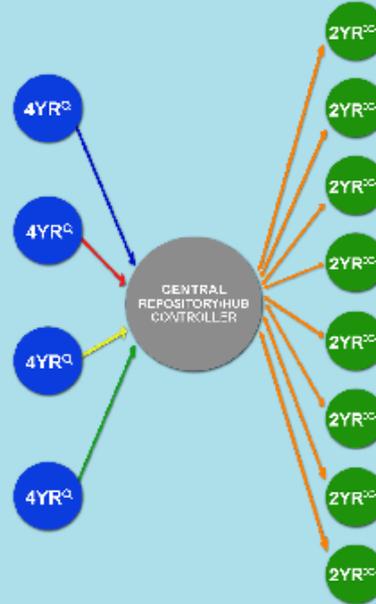
Technological Frameworks for Implementing Reverse Transfer

Version 1.1

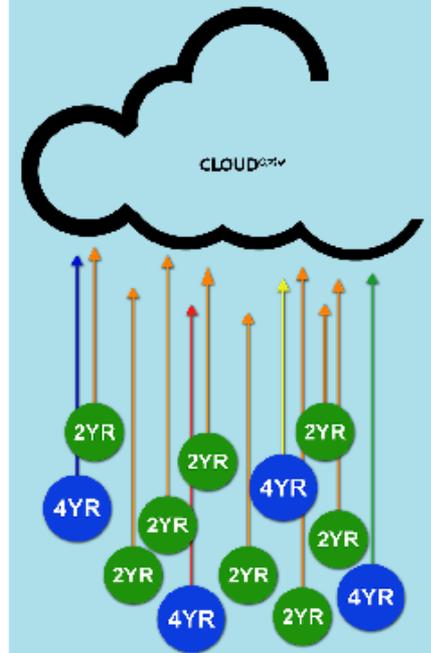
## DECENTRALIZED



## CENTRALIZED



## CLOUD



Legend: Q = Identification → = Transport ⌘ = Transfer Credit Eval Processing ✓ = Degree Audit Processing  
Reverse Transfer = Automation of Q + → + ⌘ + ✓

Please see other side for pros and cons →



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Source: Gary Rodwell (HI) and Technology Working Group

# Course Equivalency Systems

Variation in state equivalency and articulation systems

State-level course equivalency systems

- UH STAR, Ohio Course Equivalency Management System

Private Vendors

- Uselect
- CollegeSource's Transfer Evaluation System



# Emerging Articulation Approaches

## Impact of articulating upper-division courses to the community college (OH)

- Columbus State Community College: ~80% of RT degrees required course substitutions or new articulations

## Competency- or discipline-based (UH)

- 40% RT degrees: course-to-course only articulation
- 20% RT degrees: competency-based only articulation
- 40% RT degrees: mix of course-to-course and competency-based articulation



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# Degree Conferral & Advising

- Notify students and invite to commencement
- Notify universities and send updated records to them
- Advising





# Next Steps: Research



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# Research Questions

- CWID Impact Study Questions
  - How many students are eligible, consent to participate, and receive associate's degrees?
  - Which students are most likely to be eligible for reverse transfer?
  - Which students are most likely to receive a reverse transfer associate's degrees?
  - What is the impact of a reverse transfer associate's degree on students' progress toward the bachelor's degree and bachelor's degree completion?
  - What is the impact of reverse transfer on states' degree attainment and production?



# Data Note Series

The Purpose of the Data Note Series is to provide ongoing analysis on policy-relevant questions related to reverse transfer using the CWID Baseline Dataset and CWID Impact Study Dataset.



## CWID DATA NOTE

Cumulative College Credits and Reverse Transfer Eligibility

by Matt S. Giani and Jason L. Taylor

DATE NOTE NO. 1

FEBRUARY 2015

### CWID Data Note Series Introduction

This CWID Data Note is the first in a series that will draw upon student-level data collected by the Office of Community College Research and Leadership (OCCRL) to answer key questions of interest to the CWID community related to reverse transfer and transfer more broadly. The intention and purpose of the Data Note Series is to report emerging results from the CWID initiative and to inform ongoing policy development and implementation for states adopting reverse transfer policies. The Data Note series will begin by answering policy-relevant questions using the CWID Baseline Study Dataset, which utilizes data from a single cohort of students who transferred to a university in a CWID state in Fall 2008 and tracks the university persistence and degree completion outcomes for these students through Spring 2012. The dataset includes data from 12 states and includes the records of over 50,000 students. We encourage readers to review the CWID Baseline Report released in October 2013 for a full description of the purpose of the Baseline Study and aggregate results across the 12 states.<sup>1</sup> Subsequent Data Note will draw from the CWID Impact Study Dataset, which tracks the enrollment and reverse transfer outcomes for students who enrolled in CWID-participating universities during the time period in which reverse transfer was implemented.



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# Panelists: Michigan



Chris Baldwin, Ph.D.  
Executive Director, Michigan Center for Student Success  
Michigan Community College Association



Patty Farrell-Cole, Ph.D.  
Director, University Relations and Policy Research  
President's Council, State Universities of Michigan

# CWID in Michigan: Origins & Partners

- Legislative language in 2012 requiring colleges and universities to enter into reverse transfer agreements
- CWID emerged at exactly the right time in May 2012
- All 28 community colleges and 15 public universities agreed to participate in CWID grant proposal
- Led by the Michigan Center for Student Success (within the Michigan Community College Association) and Presidents Council State Universities of Michigan
- Other partners: Center for Educational Performance and Information & Michigan State University



# CWID in Michigan: Grant Components

- Establish a statewide network
- Convene regular meetings of the network members
- Establish a clearinghouse for best practices emerging from local collaborations
- Launch research partnership
- Develop a common set of reverse transfer principles and practices statewide
- Develop state-level data reporting on reverse transfer
- Create marketing and communication materials for use by local collaborations



# CWID in Michigan: Signed Agreements

Nearly 165 reverse transfer agreements in place with more under discussion (as of January 2015)

Common elements in many agreements:

- Share student information in a manner that complies w/FERPA
- Develop a method to track students
- Follow legal and accrediting parameters
- Develop & document the system, processes, communication, etc.
- Explore opportunities to leverage existing technology
- Outline student communication, procedures and advising
- Attend meetings to monitor the local agreement



# Impact of CWID in Michigan

Metric	# of Students	% of Students			
		Sample	Contacted	Consenting	Audited
Sample of students	13,961	100%	N/A	N/A	N/A
Students contacted	13,860	99.28%	N/A	N/A	N/A
Students who opted-in	1,804	12.92%	13.02%	N/A	N/A
Students who did not respond	9,799	70.19%	70.70%	N/A	N/A
Students who did not opt-out	362	2.59%	2.61%	N/A	N/A
Degree audits conducted	1,438	10.30%	10.38%	77.06%	N/A
Students awarded degree	607	4.35%	4.38%	32.53%	42.21%
Students not awarded degree	815	5.84%	5.88%	43.68%	56.68%
Students contacted for follow-up	676	4.84%	4.88%	36.23%	47.01%

# Next Steps in Michigan

- Explore a partnership with National Student Clearinghouse to streamline the sharing of transcripts
- Build consensus and buy-in for a common set of reverse transfer principles and processes that can be adopted consistently statewide
- Develop a common message and supporting communications materials to promote the reverse transfer more effectively and consistently
- Work to integrate key data elements in the the state longitudinal data system to track reverse transfer in the future



# Panelist: Ohio



Calista Smith  
Project Manager  
Ohio Board of Regents

# Ohio Credit When It's Due Process Model

23 community colleges; 13 public universities

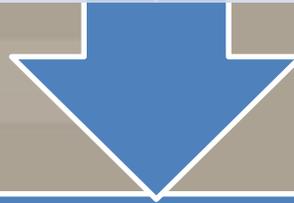
## Part A: Identification to Sending Transcripts

\*HEI Pool of Eligibility

\*University Communicates with Students

Student Authorizes Transcript Release

University Sends Transcript to 2 Year College via ATC



## Part B: Receiving Transcript to Degree Notification

2- Year College Evaluates Credit and Performs Degree Audit

Informs Student of Results

Awards Degree

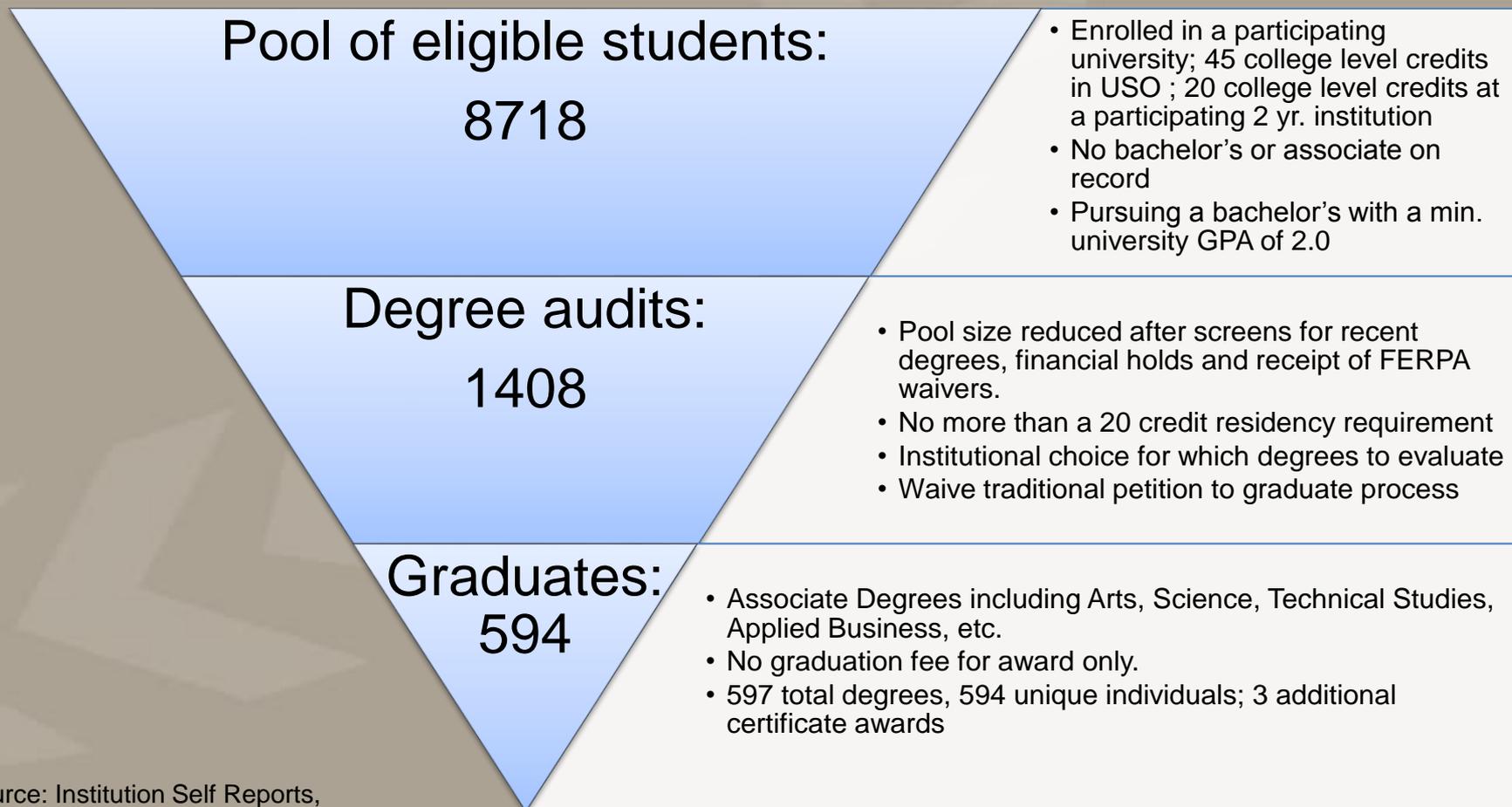
2 Year College Updates University

*\* Process and technology changes anticipated*



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# Round 1 of the Ohio Pilot



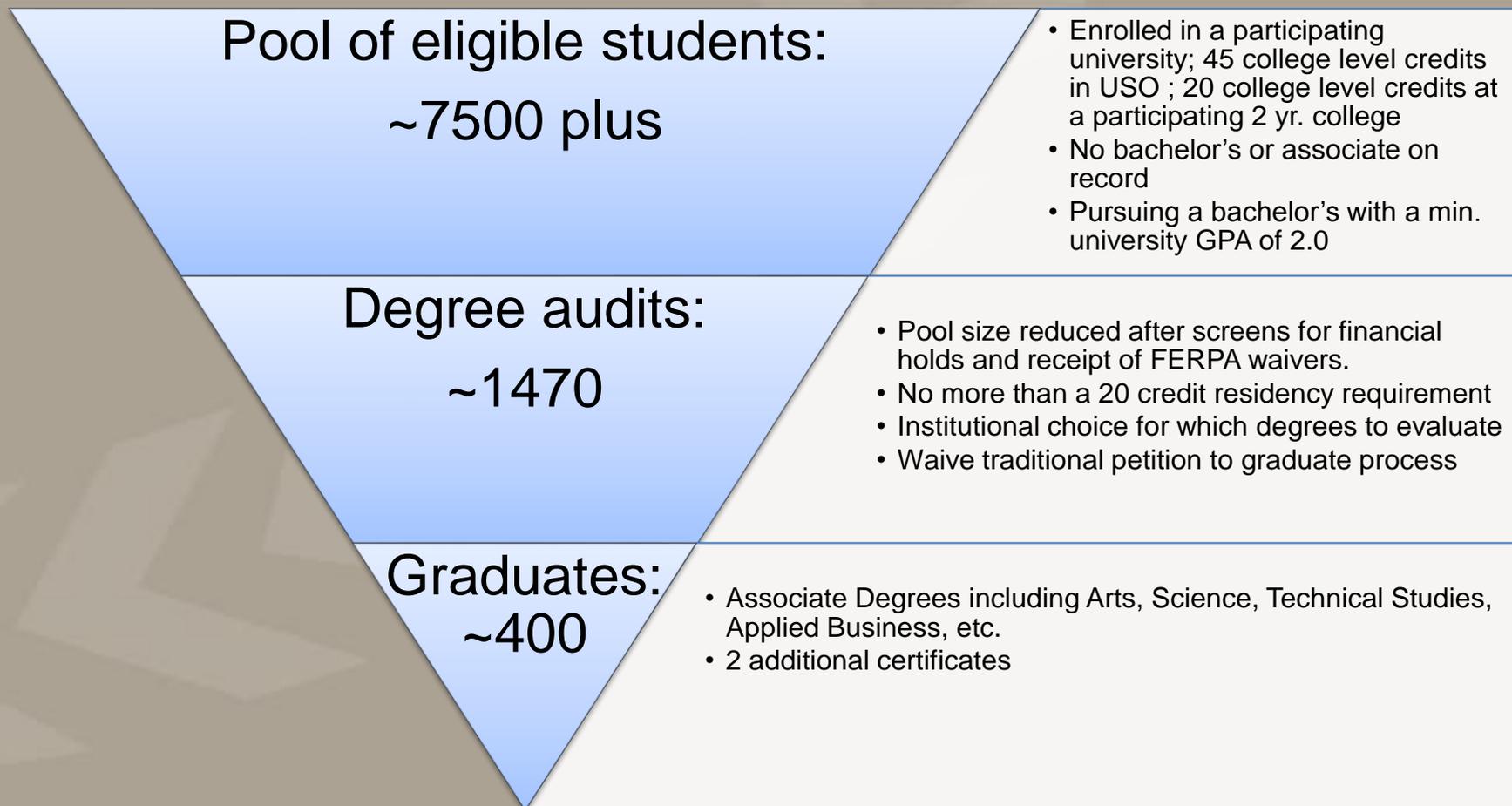
Source: Institution Self Reports,  
September 2013.

Calculations revised 10/18/13



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# Round 2 Self Reports (as of 9/4/14)



# Lessons for Optimization

- Strong four year and two year institutional relationships
  - See benefits to both sides: recruiting, baccalaureate completion, seamless view to student
  - Communication among partners: sending student information, updates on when students are contacted
- Consider adding drop outs to eligibility pool
- Value of incentive structure: state funding for degree awards



# Audience Questions & Answers



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# Contact Information

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Patty Farrell-Cole ([patricia.farrell@pcsum.org](mailto:patricia.farrell@pcsum.org))

Calista Smith ([csmith@regents.state.oh.us](mailto:csmith@regents.state.oh.us))

## **CWID Website & Resources**

<http://occril.illinois.edu/projects/cwid>

