TRANSFER ADVISING

Sharpening a Powerful Tool for College Success and Equity

A TACKLING TRANSFER REPORT | 2021

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Transfer Advising: Sharpening a Powerful Tool for College Success and Equity

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TACKLING TRANSFER

The Aspen Institute College Excellence Program, HCM Strategists, and Sova have joined together through the Tackling Transfer initiative to partner with institutional leaders, policymakers, and practitioners in Minnesota, Texas, and Virginia to dramatically improve transfer outcomes for baccalaureate-seeking students who begin at community colleges.

This comprehensive effort incorporates policy, practice, research, and strategic communications to foster the conditions for scaled and measurable improvements for baccalaureate-seeking transfer students, including the large number of students from low-income backgrounds and students of color who begin their education at community colleges.

The Aspen Institute College Excellence Program aims to advance higher education practices and leadership that significantly improve student learning, completion, and employment after college—especially for the many students from low-income backgrounds and students of color on American campuses.

HCM Strategists is a public policy and advocacy consulting firm committed to removing barriers and transforming how education is delivered. Our work focuses on developing sound public policy, aligning teaching and learning practices and advancing meaningful accountability and equitable strategic financing. HCM works to support leaders and organizations that prioritize the voices and outcomes of Black, Hispanic, Native American, recent immigrant, low-income and adult students.

Sova focuses on improving the quality and accelerating the pace of complex problem solving in the areas of higher education and workforce development. Animated by a core commitment to advancing socioeconomic mobility for more Americans, Sova pursues its mission through distinctive approaches to will-building, strategic planning, change leadership and process improvement.

Our work on transfer is made possible by the generous support from Ascendium, ECMC Foundation, Joyce Foundation, and the Kresge Foundation.

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We are also grateful to national, state, and institutional transfer leaders and the individuals who participated in Transfer Virginia who generously shared their time, insights, and experiences for the development of this report.

For a full list of research contacts, see Appendix C.

Institutions researched include: Blue Ridge Community College, Central Virginia Community College, Germanna Community College, John Tyler Community College, Longwood University, New River Community College, Norfolk State University, Northern Virginia Community College, Old Dominion University, Patrick Henry Community College, University of Lynchburg, University of Mary Washington, Virginia Commonwealth University, Virginia Highlands Community College, Virginia State University, and other Transfer Virginia participating institutions; and institutions who participated in Tackling Transfer: Metro State University, San Antonio College, and San Jacinto College.

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Why two- and four-year institutional representatives should read this brief?

Because too many community college **students aren't getting the support** they need to attain a bachelor's degree.

80% of community college students want a bachelor's degree

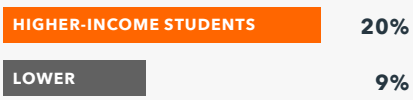
31% of community college students transfer to a 4-year institution

14% of community college students earn a bachelor's degree within 6 years of entry to postsecondary

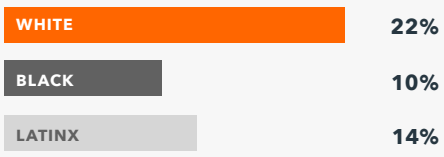
43% of students' credits are not accepted upon transfer

Those poor **outcomes disproportionately impact** Black, Hispanic, and lower-income students.

Six-Year Bachelor's Completion Rate for Students Who Started at Community College by Income, Fall 2012 cohort



Six-Year Completion Rate at a Four-Year Institution for Students Who Started at Two-Year Public Institutions by Race and Ethnicity, Fall 2013 cohort



Advising is a powerful tool that two- and four-year institutions wield—individually and together—to improve transfer student outcomes and reduce inequities. **It must be inclusive of the unique experiences** and needs of transfer students to realize its full impact.

Introduction

The transfer student journey from entering community college to graduating with a bachelor's degree can be complex and challenging to navigate—even with the best laid programmatic pathways. This journey requires students to manage career decisions, program choice, course selection, admissions requirements, and financial implications across multiple institutions with different communications channels, support structures, cultures, and expectations. Combined with that complexity are the layered lives of transfer students. Many are the first in their families to attend college, have limited finances, and cope with systemic racial bias; often they balance family and work responsibilities with their studies. Any delays to their academic plans are costly.

Some of the most effective transfer partnerships between community colleges and universities provide robust, tailored transfer advising as a core strategy to support transfer student success.[1] Indeed, advising has long been recognized as one of the most powerful tools in improving student retention, satisfaction, and completion at two and four-year institutions alike.[2,3] However, for advising systems to be effective for the hundreds of thousands of students who move from community colleges to universities each year[4], they should respond to the unique needs of transfer students–from before they start community college through earning their bachelor's and preparing for life post-graduation.

Unfortunately, research shows that too few students receive adequate transfer guidance from their two and four-year institutions. For instance, data from the Community College Survey of Student Engagement (CCSSE) indicate that 48 percent of returning students who report a goal of transferring never accessed their institution's transfer advising services.[5] Even when students engage with transfer advising, the quality of advising varies. Many studies identify pervasive inaccuracies in two- and four-year transfer student advising, which lead to negative student experiences and costly setbacks.[6,7,8,9] Other studies indicate that students from historically marginalized communities —Black, Hispanic, Native American, and students from lower-income backgrounds —are more likely to experience setbacks as they are less likely to transfer and complete a bachelor's degree, and more likely to accumulate excess credits.[10,11,12,13] If these long-standing inequities are to be overcome, efforts to improve transfer advising should include advancing equity for historically marginalized communities among core redesign goals.

48 percent of returning students who report a goal of transferring never accessed their institution's transfer advising services.

With this report, we aim to support institutional leaders and practitioners in designing advising systems for higher and more equitable success among community college transfer students. We organized our research into three action-oriented steps:

- **Be an Advocate for Better Transfer Advising**
- **Take Inspiration from the Work of Others**
- **Apply Lessons to Your Context Using the Transfer Advising Strategy Planning Tool**

TOOL TIP

Look for Tool Tips throughout this brief to capture your insights in the **Transfer Advising Strategy Planning Tool**.

Step One
Be an Advocate for Better Transfer Advising

Transfer and advising are each complex, frequently involving decentralized college stakeholders and offices (and in the case of transfer, spanning different institutions). Put together, transfer advising regularly gets lost in the noise of competing priorities. The result is often a well-intended patchwork of tactics that reaches a fortunate few. To bring about systemic change, transfer advising needs advocates. The aim: To have senior leadership and frontline advisors alike understand transfer as a core advising priority and—more importantly—a priority for student success and equity.

We observed transfer advising advocates of all stripes: presidents, vice presidents and deans, directors of transfer admissions, associate deans of advising, and transfer counselors. We found they can make a meaningful difference in three ways:

1. Integrating Transfer into Larger Advising Redesign Efforts

We observed a wide range of advising systems: centralized, decentralized and hybrid; mandatory and proactive advising; and advising guided by data and technology.[14,15] Evidence shows that a combination of these structures, processes, and campus culture shape the success (or failure) of advising reform.[16, 17] In other words, it is difficult to replicate reforms that work at one campus on other campuses. Transfer advising is no different: No one size fits all.

Those leading broader advising reforms have tools to evaluate their advising systems' assets, context, and needs as they relate to student success and equity (see examples below). Transfer advising advocates can ensure that transfer student needs are part of that broader assessment and planning.

TOOL TIP

Include advising redesign assessments in the **Resource** quadrant of the Transfer Advising Strategy Planning Tool. What **Activities** connect those assessments with the transfer advising **Aims**?

Advising Redesign:
Research and Frameworks to Consider

Researchers have developed frameworks for college-wide advising redesign that can provide a foundation for strengthening transfer. For example, Driving Toward a Degree[18] emphasizes five elements in its advising system redesign roadmap: leadership, advising capacity, advising coordination, technology, and student engagement. On engaging students through advising, the Community College Research Center (CCRC) developed the evidence-based framework called SSIPP, which recommends advising interactions be Sustained, Strategic, Integrated, Proactive, and Personalized.[19] CCRC also developed the "Ask-Connect-Inspire-Plan" framework to support more community college students entering programs of study aligned to their interests.[20]

Other research shows that students of color benefit from advising most when it is (1) proactive– advisors regularly take initiative, (2) humanistic–students are able to form genuine bonds with advisors who demonstrate commitment to the student's success, and (3) holistic–extending beyond academics and centering the needs of the whole student, including across dimensions of race, class, gender, age, or other aspects of student identity that inform their experiences.[21] Given the many bachelors-seeking students from lower-income backgrounds and communities of color who start in community colleges, this research on advising students from racially and socioeconomically diverse backgrounds is highly relevant to transfer.

2. Making the Case for Additional Investments

A common refrain: Advising cannot be effective because of limited resources and advisor caseloads that are too high. Indeed, most institutions say these are top barriers to improving advising of all kinds.[22] When institutional leaders invest in advising, evidence suggests a strong return on investment, both in student success and equity, and the increased tuition dollars available to institutions because of greater student success.[23] Our suggestion: Keep track of transfer advising success. As institutional actors work on transfer advising initiatives, they should track short- and long-term outcomes. Data that captures impact will help make the case for investments in scaling what works—whether that is more advisors, specific training, or resources for transfer advising.

3. Elevating Transfer Advising as a Core Element of Strong Institutional Partnerships

The most effective forms of transfer advising include collaboration across transfer partners. Advocates can ensure that transfer partnership conversations include transfer advising, not just the usual discussions of academic matters. This might include connecting the development of clear programmatic pathways and accompanying resources, such as four-year program maps and technology solutions, to transfer advising. That means ensuring advisors are trained to use these tools. Ideally, transfer advising systems and practices would be strategically aligned to shared, measurable partnership goals for transfer outcomes that are endorsed by top leadership and regularly evaluated.

TOOL TIP

Include indicators of success in the **Impact** quadrant of the Transfer Advising Strategy Planning Tool.

Step Two

Take Inspiration from the Work of Others

Using the research process described in Appendix A, we characterized a set of ideal aims of transfer advising that can apply to various institutional contexts (see table thumbnail on the right).

We used these aims to identify examples of strong transfer advising practice. These practices fall into four categories: Investments in partnerships and early outreach, transfer advising process improvement, transfer advisor professional development, and presidential and senior leadership support of transfer initiatives.

Ideal aims of transfer advising systems

Early Connections to Transfer	Responsive Transfer Advising Processes	Timely & Quality Transfer Advising Interactions	Scaled and Sustainable Transfer Support
Transfer aspirations are cultivated as early as possible, especially among historically marginalized communities in majors in which they are typically underrepresented. Transfer intent is identified as soon as possible and prompts specific advising action.	Regular advising interactions support prevention and early identification of missed transfer milestones. Engagement with and translation of high-quality transfer-specific resources is timely and based on individual needs. Financial planning and/or routine collaboration between the advising and financial aid offices is a core component of advising interactions.	Advisors across the board can easily access and convey a strong foundation of accurate transfer information, direct students to transfer resources, and understand when to escalate to known transfer specialists. Early advising shifts to minimize basic information delivery and maximize transfer/major/career exploration and alignment, and connections to non-academic resources that foster success. Upper division advising shifts from focusing on credit loss to timely completion, career alignment, post-graduate success, and connections to non-academic resources that foster success.	Transfer advising is embedded in a broader transfer-supportive culture, considered as a major advising priority, and reflected in a larger institutional strategy to advance success and equity. Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions. Internal and external stakeholders have evidence-based understanding of transfer advising strengths and needs.

Examples of Promising Practice

1. Investments in Partnerships and Early Outreach

Why prioritize identifying prospective transfer students early? Because doing so can then get students on the right path quickly, minimizing excess credits, time to degree, and cost. Some community colleges, sometimes in partnership with universities, connect with potential transfer students prior to enrollment. This approach is especially important for students from historically marginalized backgrounds and first-generation college students.

- At Blue Ridge Community College (BRCC) in Virginia, teams of career coaches, admissions, and advising staff connect with admitted students from local high schools to discuss basic transfer information. While visiting high schools, BRCC staff engage with students to understand their interests including transfer and career goals more fully. Gaining this insight, advisors can provide students with personalized recommendations for first term courses, support them in registering for classes, and have begun developing trust in the advising process early.
- New River Community College (NRCC) in Virginia has developed a survey to identify prospective transfer students before they begin their time at NRCC. Students are then connected with a dedicated transfer advisor, who helps students create a personal four-semester plan that meets transfer requirements and provides a map to completing their degree.
- Metropolitan State University in Minnesota has dedicated staff time and financial resources to having a presence at their largest transfer-sending two-year institutions—providing prospective transfer students with hands-on pre-advising and engagement with a four-year transfer advising while they are still attending community college. Metro State also makes an effort to bring prospective transfer students to the university campus to meet with an advisor prior to enrollment and become familiar with the campus environment.[26]

- Old Dominion University in Virginia uses an electronic system to connect with prospective transfer students, who submit a "letter of intent" that is shared with pre-transfer advisors to promote proactive outreach. Through the transfer center, pre-transfer students can easily book appointments to meet with an advisor from the university.

- The University of North Carolina at Chapel Hill (UNC) provides a network of dedicated community college advisors located at two-year partner institutions through their Carolina Student Transfer Excellence Program (C-STEP). These advisors—typically community college faculty or academic advisors—are tasked with identifying students for the C-STEP program, assisting prospective students with the C-STEP application process, and supporting a cohort of students accepted to the program so that they meet admission requirements and are poised to excel academically at Carolina.[27]

2. Transfer Advising Process Improvement

The best advising does not rely solely on the advisor, but includes tools and clear processes for advisors to follow. Concrete guidance on when and how advisors should engage with students sets a baseline of expectations for advising across the board, while providing advisors with support to help them keep up with information from various sources as they guide students.

- Advisors at Blue Ridge Community College ask students to complete long-term plans during their first term, including information about intended majors at the four-year college of their choice. Advisors know to reference these plans in future appointments and nudge students who haven't created one.

- Advisors at San Antonio College, part of the Alamo Colleges District in Texas, follow a clear set of milestones and expectations to ensure students are advancing to their desired goal. They have mandatory checkpoints at 15, 30, and 45 credits. By 15 credit hours, students choose their guided pathway and understand transfer options; by 30 credit hours, students commit to a transfer destination; and at 30 hours and beyond, students plan for transfer—including by getting application and financial aid information.

- Just like their first-time-in-college peers, transfer students at Virginia Commonwealth University are assigned an advisor, with the expectation that they meet each semester. Advisors have targets and aim to meet with 30 percent of students in their 200- to 300-student caseloads in the first month of the semester, 60 percent the second month, and 90 percent by the end of the third month. For the remaining 10 percent of students who don't meet with their advisor in the first three months, advisors book appointments and ask students to show up at the end of the third month. Over 88% of students attend their scheduled appointment.

3. Transfer Advisor Professional Development

The strength of transfer advising hinges on the knowledge of individual advisors. To support advisors in navigating complex transfer policies and meeting the needs of transfer students, institutional leaders can invest in regular professional development for transfer advisors. This supports high-quality transfer advising across the board, instead of having a subset of advisors with comprehensive transfer knowledge who are unable to support all students.

- At San Jacinto College in Texas, advisors attend half-day weekly trainings dedicated to professional development where they learn to ask questions to learn specific information from students to help guide them, and play out scenarios on how to provide students with the information they need on transfer.

- Old Dominion University holds an annual workshop for advisors from top transfer-sending two-year institutions. The sessions cover policy and catalogue changes, new programs, admissions, and financial aid. These sessions also provide an opportunity for

cross-sector community building that helps to develop stronger, continuous partnership.

- The University of Washington (UW) hosts bi-annual in-depth professional development opportunities for two groups of 25 community college advisors. Participants engage in small-group, scenario-based training and do a deep dive into admissions evaluations and transfer application reviews. UW then conducts post-meeting evaluations to inform the next year's content.[28] UW also holds an annual statewide conference with approximately 100 community college advisors and 100 four-year advisors to review transfer admissions and articulation in-depth.[29]

- The University of North Carolina at Chapel Hill spends considerable time and resources to ensure that Carolina Student Transfer Excellence Program (C-STEP) community college advisors are equipped with the support and information they need to support student success. To ensure quality across partner community colleges, UNC supplies new advisors with a standard handbook and, twice annually, all C-STEP advisors convene to share best practices. They discuss how to address challenges in terms of promoting the program, identifying talent, supporting students in meeting requirements, and building community.

4. Presidential and Senior Leadership Support of Transfer Initiatives

We found that good transfer advising reforms are happening in small ways in many places. But it takes presidents and other senior leaders to bring visibility to this work to make clear the importance of these changes to the mission of an institution, and to make sure they are sustained over time.

- Each year the advising office at Blue Ridge Community College creates goals and metrics for itself based on the annual goals of the president. These goals, measures, and objectives—including those related to transfer—are reported and visible to other institutional stakeholders and make clear how advising efforts directly relate to presidential priorities.

- Administrative leaders from Northern Virginia Community College and George Mason University have made substantial investments in transfer advising through ADVANCE, a program that combines dual admissions, clear programmatic pathways and program maps, and personalized success coaching throughout a student's transfer journey, to strengthen their transfer partnership. The presidents of both institutions announced the initiative with the Virginia governor, linking their investments in the initiative to critical workforce development needs in the region they serve.[30] The visibility of presidential support was crucial to keeping the momentum as program leaders scaled ADVANCE across both institutions.

- The provost at Metropolitan State University invested in a comprehensive assessment of the advising systems and culture by the Global Community for Academic Advising (NACADA). Metro State is using the findings of the assessment to advance recommendations to improve consistency across advising through professional development opportunities and changes to the organizational structure of advising.

A Note on Data and Evaluation

In many cases, the sample activities we profile were designed and implemented without a formal assessment plan. As such, we do not have qualitative or quantitative data to assess impact. When institutional actors do not evaluate current or future advising activities, they may find it challenging to procure additional resources to scale or continue certain practices, even when they are effective. Gathering the evidence needed to make a strong case for investment is one reason why the Transfer Advising Strategy Planning Tool, introduced in the final section, emphasizes drawing a link between transfer advising activities and short- and long-term measurable outcomes and impact.

Comprehensive Transfer Advising Strategies

Achieving success and equity for transfer students at scale is only possible when a comprehensive strategy brings together the individual tactics profiled here. We profile two examples of how these aims come together on two campuses: San Antonio College, which is part of Texas' Alamo Colleges District, and Virginia Commonwealth University.

San Antonio College Promotes Clear Plans, Tools, and Training for Transfer Advising

San Antonio College (SAC) has a feeling of family, a sense and expectation that everyone in the community is responsible for students' well-being, inside and outside the classroom. That includes transfer students. SAC students transfer at rates eight percentage points above the national community college average. The strategies that guide faculty and staff, the tools at their disposal, and the vision of leadership at San Antonio College all align to ensure transfer students get the individualized support they need from enrollment to transfer, and are prepared to succeed at their transfer destination.

Students at SAC get on the right pathway quickly as advisors ask about their goals and ambitions early, including what they want to study and where they might want to transfer. Students write a mission statement during their first semester. They then create Individual Success Plans, which advisors review and update with each student in their caseload every semester to help them stay on track.

Advising is one of a small number of strategic priorities at SAC, which dedicates funding to ensure a low caseload for advisors: 380 to 1. SAC advisors have clear session milestones and expectations and have the use of extensive tools. For instance, as part of the Alamo Colleges District, SAC advisors have access to over 1,000 Transfer Advising Guides which lay out courses students need to take each semester to transfer with a junior standing to 26 Texas colleges and universities. This clarity helps advisors give accurate guidance. Advisors learn how to use the guides—a part of a set of core competencies—through annual professional development. Other competencies include identifying a student's intent to transfer and understanding the advising milestones.

SAC faculty and staff have strong relationships with university partners. This helps maintain high quality transfer pathways and connect students to resources at transfer destinations. Advisors work with transfer students to make appointments with representatives from four-year institutions, many of whom are stationed at SAC. The four-year staff help students on their applications, connect them to financial aid and scholarships, and provide information on course equivalencies. Advisors also work with faculty from both SAC and partner institutions to stay up to date on course changes and departmental requirements that effect transfer students. SAC faculty and staff work with university partners to update the Transfer Advising Guides each year; they discuss whether courses and academic expectations are aligned and if transfer students are successful.

SAC has continuously improved results: Time to degree and credit hours have decreased across the Alamo Colleges District, with students losing no credits and saving an average of $40,215 upon transferring to a public university within the compact after following one of 500 seamless pathways. Furthermore, students who start at the Alamo Colleges District earn their associate degree in an average of 65 hours, 15 hours below the Texas state average. Also, SAC students complete their bachelor's degree at higher rates than the national average.

Virginia Commonwealth University Brings Together Investments in Advising and Clear Programmatic Pathways

Support at multiple levels, from the president to frontline advisors, sets apart Virginia Commonwealth University's (VCU) transfer efforts. Transfer student enrollment and success is woven into VCU's strategic plan, which has led to high-level decisions that have benefited transfer students. Leaders at VCU invested in a process that helps community college students connect with university advisors early in the transfer journey. Dedicated admissions counselors are based on two-year campuses or frequently travel to connect with students. Those counselors introduce prospective transfer students to resources such as the VCU Transfer Center, where students can work with pre-transfer advisors. Pre-transfer advising is helped by transfer maps that, for each major, span the full four years through to bachelor's degree completion. The maps also contain information about outside the classroom activities that transfer students should consider to enhance their educational experiences as they transition to a new college. The maps contain information about career opportunities, getting connected with the VCU community, financial aid options, and preparing for life after graduation.

		MAXIMIZE COURSE AND DEGREE PLANNING	GET CONNECTED WITH YOUR COMMUNITY	BUILD CULTURAL COMPETENCE	GET REAL EXPERIENCE	PREPARING FOR LIFE AFTER COLLEGE
EXPLORE	YEAR 1	• Attend Reynolds orientation (SOAR). • Use Navigate to schedule an appointment with your academic advisor each semester. • Cultivate relationships with your professors. • Be prepared for academic challenges in your classes and use tutoring resources to get ahead. • Register for SDV 100.	• Get involved with student clubs and organizations. • Volunteer for service learning or community service projects. • Learn about the transfer admission process for VCU. • Explore the Mechanical Engineering website.	• Attend cultural events at community college and/or VCU and celebrate diversity. • Attend VCU's annual Intercultural Festival or another community intercultural event.	• Browse careers related to mechanical engineering through the Virginia Wizard. • Explore the community college's iGrad's Job Genius Search Engine to look into building a career and financial future. • Build a LinkedIn profile.	• Create, upload and update your resume to the College Central Network. • Take a career assessment through the Virginia Wizard. • Practice independent living skills (such as money management, self-care, time management, and personal responsibility). • Assess your preparation for a career by completing a Gap Analysis. • Familiarize yourself with the Career Services offered at Community College and VCU and explore Career Pathways on VCU Career Services' Website.
EXPERIENCE	YEAR 2	• Meet with your academic advisor. • Be prepared for academic challenges in your classes. Use tutoring resources to get ahead. • Research scholarship opportunities and explore your eligibility for the Two-Year College Transfer Grant. • Explore the Mechanical Engineering website. • Explore the Nuclear Engineering concentration of the BS degree.	• Research housing for next year. • Join a professional organization related to mechanical engineering: American Nuclear Society, American Society of Mechanical Engineers. • Visit the VCU campus and attend a transfer admission session. • Explore the Mechanical Engineering website.	• Learn about short-term, semester and year-long study abroad options. • Attend VCU cultural events, including the monthly Global Café, VCU Diversity Scholars in Research week, or Engineering-related events. • Consider learning a foreign language to open doors to international organizations and future study. • Become familiar with OMSA at VCU.	• Attend Career & Internship Fairs at community college or VCU to explore your interests. • Plan to complete at least two internships (job experiences) before your senior year of college. • Create a draft resume and bring it to career services advisor or workshop for review. • Find out about VCU REAL and learn about REAL graduation requirement.	• Take advantage of free Financial Aid counseling. • Conduct informational interviews or shadow someone in a field of career interest. • Using LinkedIn, connect to at least 10 people. Check out the VCU alumni page in My Network. • Consider who you would like to have serve as professional and academic references for future letters of recommendation. • Use the cost calculator to estimate your tuition/fees as an upperclassman at VCU. • Explore the types of aid available at VCU.

Reynolds Community College and Virginia Commonwealth University Transfer Major Map - Mechanical Engineering, Bachelor of Science

VCU's integration of pre-transfer advising and maps is best illustrated in two grant-funded programs: The Mellon Pathways to the Arts and Humanities Program (Pathways Program) and the STEM Transitions program, which is supported by a Howard Hughes Medical Institute Inclusive (HHMI) Excellence Award. Both are designed to reach prospective transfer students from J. Sargeant Reynolds Community College and John Tyler Community College who have 15 credits or less, providing them with specialized transfer advising and a community of support.

The Pathways Program gives community college students opportunities to gain research experience, engage with two- and four-year faculty members, explore the career options a humanities degree provides, and make connections with other transfer students and VCU staff. These connections include study abroad, financial aid, and undergraduate research. The STEM transitions program supports success in STEM fields for prospective transfer students from historically marginalized communities. The program creates opportunities for students to build relationships with faculty and peer mentors. It also provides tailored student success programming for those transferring in math and science disciplines. The Pathways Program and STEM transitions activities have another benefit: They promote a sense of familiarity and belonging at VCU before students transfer.

The programs' directors intentionally work to include students from historically marginalized communities by hiring advisors of color, tracking the diversity and outcomes of the program participants, and making equity an explicit goal. While they were started with philanthropic grants, VCU aims to fully fund these initiatives to make them sustainable over the long term by incrementally increasing contributions from the university budget. VCU's transfer leadership is exploring how to apply lessons learned from these two programs to broader transfer advising.

Once transfer students make the transition to VCU, they are supported by a robust advising system and new transfer policies designed to remove barriers to their transition to and graduation from VCU. VCU invested $2.3 million in the advising process to promote early engagement and reduce caseloads to levels below the national average. VCU has a professional advising model and clear expectations that advisors meet with every student in their caseload each semester. Advisors use technology and other tools like the transfer maps to work proactively, quickly, and accurately. This leaves time to focus on more complex discussions with transfer students.

VCU's broader advising strategy keeps in mind the needs of transfer students. For example, advisors receive alerts based on incoming transfer student transcript evaluations that help inform who they refer to tutoring services. Also, VCU offers training to advisors to keep them apprised of new transfer policies. For instance, VCU recently approved a policy that awards experiential learning credit for military service and waives general education requirements for graduates of Virginia's one-year Uniform Certificate of General Studies (UCGS) program and applied associate degree programs in established transfer pathways with VCU.[31] These policies can have a major impact on prospective transfer student access and success, but only if students and their advisors know about them. VCU creates processes that ensure that knowledge.

The systematic and transfer-inclusive approach to advising is showing early signs of success: VCU's transfer students give a higher rating to advising—including the quality and accuracy of information, approachability, and access—than the school's first-time-in-college students, with the Spring 2018 Diverse Learning Environment survey indicating that 81% of new transfer students felt the guidelines for transferring to VCU were easy to understand.

Step Three
Apply Lessons to Your Context Using the Transfer Advising Strategy Planning Tool

The Transfer Advising Strategy Planning Tool (see Appendix B) uses the common aims described in this research to guide two-year and four-year stakeholders through a self-assessment exercise. The aims provide users with a point of reference to assess their own practices and identify reforms. Then users can apply the findings, set priorities, and make the case for strategic investments in transfer advising.

For the tool to be most effective, users should engage decision-makers who have influence over the advising process, professional development, and the advising structure. The tool can be used by teams from individual institutions or in the context of transfer partnerships. We recommend that users employ the tool in both individual and partnership contexts. If the tool is only used by teams from individual institutions, our recommendation is to identify, as part of the exercise, opportunities for collaboration with two-year or four-year partners in addition to campus-level work.

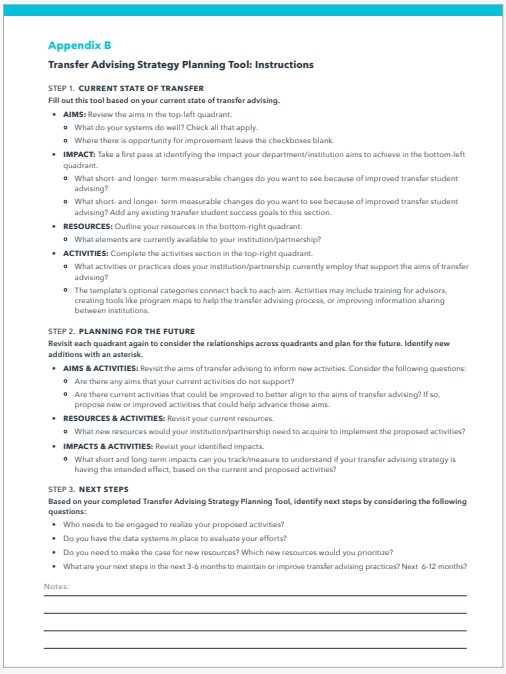
Evaluating Transfer Advising:
Short- and Long-term Indicators

Examples of short-term goals or measures can include increasing the frequency of student-advisor interactions, growing the prevalence of reported transfer intent, or improving early momentum metrics such as credit momentum and course completion within a student's first year, which are associated with improved two-year completion and transfer outcomes, especially among Black and Hispanic students and students from low-income backgrounds. Longer-term goals can include increasing the proportion of students who transfer with an associate degree, reducing the time and credits to bachelor's degree completion, or increasing transfer student diversity at both two-year and four-year institutions. More details on evaluating larger transfer efforts can be found in Evaluating Transfer Student Success and Equity: A Primer on Quantitative Data for Two- and Four-Year Institutions.

TOOL TIP

Appendix B includes an **example of a complete tool to demonstrate a finalized product**.

Transfer Advising Strategy Planning Instruction and Tool



Appendix B

Transfer Advising Strategy Planning Tool: Instructions

STEP 1. **CURRENT STATE OF TRANSFER**

Fill out this tool based on your current state of transfer advising.

- **AIMS:** Review the aims in the top-left quadrant.
  - What do your systems do well? Check all that apply.
  - Where there is opportunity for improvement leave the checkboxes blank.
- **IMPACT:** Take a first pass at identifying the impact your department/institution aims to achieve in the bottom-left quadrant.
  - What short- and longer- term measurable changes do you want to see because of improved transfer student advising?
  - What short- and longer- term measurable changes do you want to see because of improved transfer student advising? Add any existing transfer student success goals to this section.
- **RESOURCES:** Outline your resources in the bottom-right quadrant.
  - What elements are currently available to your institution/partnership?
- **ACTIVITIES:** Complete the activities section in the top-right quadrant.
  - What activities or practices does your institution/partnership currently employ that support the aims of transfer advising?
  - The template's optional categories connect back to each aim. Activities may include training for advisors, creating tools like program maps to help the transfer advising process, or improving information sharing between institutions.

STEP 2. **PLANNING FOR THE FUTURE**

Revisit each quadrant again to consider the relationships across quadrants and plan for the future. Identify new additions with an asterisk.

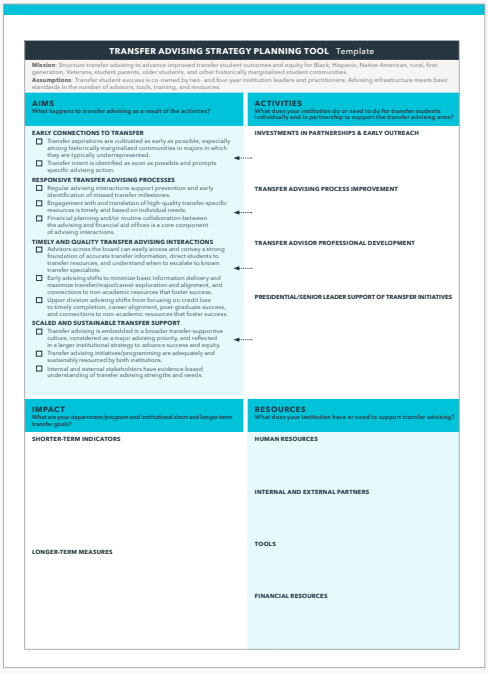
- **AIMS & ACTIVITIES:** Revisit the aims of transfer advising to inform new activities. Consider the following questions:
  - Are there any aims that your current activities do not support?
  - Are there current activities that could be improved to better align to the aims of transfer advising? If so, propose new or improved activities that could help advance those aims.
- **RESOURCES & ACTIVITIES:** Revisit your current resources.
  - What new resources would your institution/partnership need to acquire to implement the proposed activities?
- **IMPACTS & ACTIVITIES:** Revisit your identified impacts.
  - What short and long-term impacts can you track/measure to understand if your transfer advising strategy is having the intended effect, based on the current and proposed activities?

STEP 3. **NEXT STEPS**

Based on your completed Transfer Advising Strategy Planning Tool, identify next steps by considering the following questions:

- Who needs to be engaged to realize your proposed activities?
- Do you have the data systems in place to evaluate your efforts?
- Do you need to make the case for new resources? Which new resources would you prioritize?
- What are your next steps in the next 3-6 months to maintain or improve transfer advising practices? Next 6-12 months?

Notes:



TRANSFER ADVISING STRATEGY PLANNING TOOL Template

Mission: Structure transfer advising to advance improved transfer student outcomes and equity for Black, Hispanic, Native American, rural, first-generation, Veterans, student parents, older students, and other historically marginalized student communities.

Assumptions: Transfer student success is co-owned by two- and four-year institution leaders and practitioners. Advising infrastructure meets basic standards in the number of advisors, tools, training, and resources.

AIMS
What happens to transfer advising as a result of the activities?

EARLY CONNECTIONS TO TRANSFER
- ☐ Transfer aspirations are cultivated as early as possible, especially among historically marginalized communities in majors in which they are typically underrepresented.
- ☐ Transfer intent is identified as soon as possible and prompts specific advising action.

RESPONSIVE TRANSFER ADVISING PROCESSES
- ☐ Regular advising interactions support prevention and early identification of missed transfer milestones.
- ☐ Engagement with and translation of high-quality transfer-specific resources is timely and based on individual needs.
- ☐ Financial planning and/or routine collaboration between the advising and financial aid offices is a core component of advising interactions.

TIMELY AND QUALITY TRANSFER ADVISING INTERACTIONS
- ☐ Advisors across the board can easily access and convey a strong foundation of accurate transfer information, direct students to transfer resources, and understand when to escalate to known transfer specialists.
- ☐ Early advising shifts to minimize basic information delivery and maximize transfer/major/career exploration and alignment, and connections to non-academic resources that foster success.
- ☐ Upper-division advising shifts from focusing on credit loss to timely completion, career alignment, post-graduate success, and connections to non-academic resources that foster success.

SCALED AND SUSTAINABLE TRANSFER SUPPORT
- ☐ Transfer advising is embedded in a broader transfer-supportive culture, considered as a major advising priority, and reflected in a larger institutional strategy to advance success and equity.
- ☐ Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions.
- ☐ Internal and external stakeholders have evidence-based understanding of transfer advising strengths and needs.

ACTIVITIES
What does your institution do or need to do for transfer students individually and in partnership to support the transfer advising aims?

INVESTMENTS IN PARTNERSHIPS & EARLY OUTREACH

TRANSFER ADVISING PROCESS IMPROVEMENT

TRANSFER ADVISOR PROFESSIONAL DEVELOPMENT

PRESIDENTIAL/SENIOR LEADER SUPPORT OF TRANSFER INITIATIVES

IMPACT
What are your department/program and institutional short and longer-term transfer goals?

SHORTER-TERM INDICATORS

LONGER-TERM MEASURES

RESOURCES
What does your institution have or need to support transfer advising?

HUMAN RESOURCES

INTERNAL AND EXTERNAL PARTNERS

TOOLS

FINANCIAL RESOURCES

Conclusion

For all transfer students, and especially for the hundreds of thousands of students from Black, Hispanic, lower-income, and first-generation backgrounds, transfer advising can make or break a transfer student's experience. Ultimately, it can be a determining factor in whether a student can complete a bachelor's degree, and do so in a timely and affordable manner.

While so much of what matters occurs in one-on-one conversations between advisor and student, the responsibility for strong transfer advising cannot solely rest with those on the frontlines. Rather, transfer advising should be treated as a shared responsibility between students, advisors, and two- and four-year institutional leaders in various positions, all of whom are needed to support the conditions under which advising can be most effective. As institutional leaders invest in transfer advising, our hope is that the Transfer Advising Strategy Planning Tool can help support those investments to have the greatest impact on higher and more equitable success for transfer students.

TOOL TIP

Complete the **Transfer Advising Strategy Planning Tool** with your team. Find instructions, a blank tool and completed example in Appendix B or as a PDF download.

Appendix A

Identifying Promising Practice and Tool Development

A Summary of Our Process and Findings

The Research Process

The Aspen Institute College Excellence Program conducted 15 calls with representatives from 7 two-year and 8 four-year institutions in Virginia to gather information on transfer advising.

We combined findings from these interviews with insights from other Tackling Transfer states (Minnesota and Texas), the Aspen Prize, and a literature review on both general and transfer-specific advising. We wanted to characterize shared challenges in transfer advising and identify examples of transfer advising practice that meet those challenges. We synthesized our findings into the Transfer Advising Strategy Planning Tool to support institutions in applying lessons from the research.

Summarizing Common and Persistent Challenges in Transfer Advising Practice

Here are recurring themes from our interviews in Virginia. Some challenges are specific to transfer, while others speak to advising more broadly:

- Too often, advising focuses on course selection to ensure that students enroll and complete their degrees on time. As a result, the advising doesn't pay enough attention to exploring students' academic interests and career goals.
- Students do not receive enough support while they are making important decisions about choosing majors. This is validated by research that shows a large proportion of community college students enroll in unstructured general studies or associate of arts programs and take courses that do not prepare them for transfer in a specific field of study.[24] This can lead to excess credit accumulation.[25]
- Self-advising is common: students craft their own transfer plan without the support of advisors. Institutional transfer materials often aren't clear or written with the user experience in mind.
- Most advising systems rely on students to identify themselves as prospective transfers, rather than assuming the responsibility of educating students about transfer. This results in mismatches between students' transfer plans and their career aspirations.
- The quality of transfer advising varies widely, introducing inequities in the transfer student experience and whether transfers are receiving adequate guidance.
- Tailored transfer advising adds more to the workload of advisors who are already overloaded.

Defining the Aims of a Success and Equity-Focused Transfer Advising Strategy

In this research, we assume that one-size-fits-all transfer advising solutions are unlikely. We instead describe the ideal objectives of transfer advising systems.

We categorize these aims into four broad categories:

1. Early Connections to Transfer
2. Responsive Transfer Advising Processes
3. Timely and Quality Transfer Advising Interactions
4. Scaled and Sustainable Transfer Support

IDEAL AIMS OF TRANSFER ADVISING SYSTEMS

Early Connections to Transfer	Responsive Transfer Advising Processes	Timely and Quality Transfer Advising Interactions	Scaled and Sustainable Transfer Support
Transfer aspirations are cultivated as early as possible, especially among historically marginalized communities in majors in which they are typically underrepresented. Transfer intent is identified as soon as possible and prompts specific advising action.	Regular advising interactions support prevention and early identification of missed transfer milestones. Engagement with and translation of high-quality transfer-specific resources is timely and based on individual needs. Financial planning and/or routine collaboration between the advising and financial aid offices is a core component of advising interactions.	Advisors across the board can easily access and convey a strong foundation of accurate transfer information, direct students to transfer resources, and understand when to escalate to known transfer specialists. Early advising shifts to minimize basic information delivery and maximize transfer/major/career exploration and alignment, and connections to non-academic resources that foster success. Upper division advising shifts from focusing on credit loss to timely completion, career alignment, post-graduate success, and connections to non-academic resources that foster success.	Transfer advising is embedded in a broader transfer-supportive culture, considered as a major advising priority, and reflected in a larger institutional strategy to advance success and equity. Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions. Internal and external stakeholders have evidence-based understanding of transfer advising strengths and needs.

Applying the Aims to Identify and Categorize Promising Practice

We identified practices that address the common transfer advising challenges to meet aspects of these aims. We organized these practices into four categories:

- Investments in partnerships and early outreach
- Transfer advising process improvement
- Transfer advisor professional development
- Presidential and senior leadership support of transfer initiatives

Incorporating the Aims into a Tool

We sought to develop a tool that would support two- and four-year stakeholders in applying the common aims to their contexts. We created the Transfer Advising Strategy Planning Tool based on logic models often used in program evaluation by nonprofit organizations.

We tested a version of the tool with 55 individuals from 11 two-year and 7 four-year institutions participating in a professional development session on transfer advising to advance equity. The representatives from each institutional team worked together to apply the tool to their contexts and then provided feedback to refine the tool.

Appendix B

Transfer Advising Strategy Planning Tool: Instructions

STEP 1. **CURRENT STATE OF TRANSFER**

Fill out this tool based on your current state of transfer advising.

- **AIMS:** Review the aims in the top-left quadrant.
  - What do your systems do well? Check all that apply.
  - Where there is opportunity for improvement leave the checkboxes blank.
- **IMPACT:** Take a first pass at identifying the impact your department/institution aims to achieve in the bottom-left quadrant.
  - What short- and longer- term measurable changes do you want to see because of improved transfer student advising?
  - What short- and longer- term measurable changes do you want to see because of improved transfer student advising? Add any existing transfer student success goals to this section.
- **RESOURCES:** Outline your resources in the bottom-right quadrant.
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- **ACTIVITIES:** Complete the activities section in the top-right quadrant.
  - What activities or practices does your institution/partnership currently employ that support the aims of transfer advising?
  - The template's optional categories connect back to each aim. Activities may include training for advisors, creating tools like program maps to help the transfer advising process, or improving information sharing between institutions.

STEP 2. **PLANNING FOR THE FUTURE**

Revisit each quadrant again to consider the relationships across quadrants and plan for the future. Identify new additions with an asterisk.

- **AIMS & ACTIVITIES:** Revisit the aims of transfer advising to inform new activities. Consider the following questions:
  - Are there any aims that your current activities do not support?
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STEP 3. **NEXT STEPS**

Based on your completed Transfer Advising Strategy Planning Tool, identify next steps by considering the following questions:

- Who needs to be engaged to realize your proposed activities?
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Notes:

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- ☐ Advisors across the board can easily access and convey a strong foundation of accurate transfer information, direct students to transfer resources, and understand when to escalate to known transfer specialists.
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- ☐ Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions.
- ☐ Internal and external stakeholders have evidence-based understanding of transfer advising strengths and needs.

ACTIVITIES

What does your institution do or need to do for transfer students individually and in partnership to support the transfer advising aims?

INVESTMENTS IN PARTNERSHIPS & EARLY OUTREACH

TRANSFER ADVISING PROCESS IMPROVEMENT

TRANSFER ADVISOR PROFESSIONAL DEVELOPMENT

PRESIDENTIAL/SENIOR LEADER SUPPORT OF TRANSFER INITIATIVES

IMPACT

What are your department/program and institutional short and longer-term transfer goals?

SHORTER-TERM INDICATORS

LONGER-TERM MEASURES

RESOURCES

What does your institution have or need to support transfer advising?

HUMAN RESOURCES

INTERNAL AND EXTERNAL PARTNERS

TOOLS

FINANCIAL RESOURCES

TRANSFER ADVISING STRATEGY PLANNING TOOL Completed Example

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- ☑ Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions.
- ☑ Internal and external stakeholders have evidence-based understanding of transfer advising strengths and needs.

ACTIVITIES

What does your institution do or need to do for transfer students individually and in partnership to support the transfer advising aims?

INVESTMENTS IN PARTNERSHIPS & EARLY OUTREACH

- Support early high school or Community Based Organization outreach progams
- Dedicate four-year advisors in community colleges
- Targeted programming for historically marginalized students, by discipline as needed.
- Create information-sharing/communication feedback loops between partners.

TRANSFER ADVISING PROCESS IMPROVEMENT

- Develop/refine tools like program maps that facilitate transfer advising interaction and information consistency.
- Develop/refine shared transfer advising processes, frameworks, and/or expectations across advisors.
- Track student intent vs. critical transfer milestones in the student information system.

TRANSFER ADVISOR PROFESSIONAL DEVELOPMENT

- Engage and train advisors with standardized tools, processes, frameworks, and expectations.
- Enable advisor participation in inter and intra-institutional networking and best practice sharing.
- Elevate and compensate advisors to lead or participate in process improvement efforts, such as map development.

PRESIDENTIAL/SENIOR LEADER SUPPORT OF TRANSFER INITIATIVES

- Ensure alignment between transfer advising and broader transfer/student success goals.
- Set expectations and goals for transfer student success and equity for transfer advising systems and staff.
- Include transfer success and equity in accountability and incentive structures for advising and other support staff.
- Pave the way for advising collaboration across two- and four-year institutions, high schools, and other partners.
- Devise plans to convert grant support for advising initiatives to institutional budget over time.
- Ensure transfer outcomes data are collected and shared internally–including with advisors—and with partners.

IMPACT

What are your department/program and institutional short and longer-term transfer goals?

SHORTER-TERM INDICATORS

- Increased number of students who receive transfer advising, especially for students from historically marginalized communities (e.g., Black, Hispanic, Native American, rural, first-generation, lower-income).
- Increased average frequency (e.g., # engagements per term) of advising interactions with prospective transfer students.
- Increased number of prospective transfer students meeting transfer milestones (e.g., complete college-level math in their first year, choose potential transfer destinations by 30 credits, choose major by 30 credits).
- Increased number and frequency of advisors participating in transfer advising professional development.
- Increased number of advisors use program maps to guide students.
- Increased number of students are on a transfer plan or understand how to navigate their transfer plan.

LONGER-TERM MEASURES

- Increased number of students from historically marginalized communities represented on your campus.
- Increased number of students overall and from historically marginalized communities intending to transfer.
- Increased number of transfer students from historically marginalized communities in STEM, Business, Nursing, other impacted majors and/or other disciplines in which they are underrepresented.
- Increased rate of students transferring with an associate degree, and closed gaps for students from historically marginalized communities.
- Increased transfer mobility and graduation rates for transfer students, and closed gaps for students from historically marginalized communities.
- Reduced and equitable time and credits to bachelor's degree completion.

RESOURCES

What does your institution have or need to support transfer advising?

HUMAN RESOURCES

- Professional advisors and/or
- Faculty advisors

INTERNAL AND EXTERNAL PARTNERS

- High Schools
- Two-Year Institutions
- Four-Year Institutions
- Community-Based Organizations (CBO)
- Employers
- Career Services
- Student Success staff
- Admissions staff
- Institutional Research/Data

TOOLS

- Program Maps/Transfer Guides
- Technology
- Website

FINANCIAL RESOURCES

- Grant funding
- Institutional budget
- Institutional innovation/start-up funds

Appendix C

Research Contacts

Velma Bryant, Dean of Student Services, Blue Ridge Community College

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Heather Diritto, Transfer Counselor, Germanna Community College

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Wes Hillyard, Director of Academic Services, University of Mary Washington

Greg Hodges, President, Patrick Henry Community College

Micol Hutchison, Director of Program Development and Student Success, Virginia Commonwealth University

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Alison Weston, Enrollment Management and Transfer Services Coordinator, New River Community College

Terry Young, Interim Vice President of Academic and Student Success Services, Patrick Henry Community College

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