TRANSFER MODEL AND POLICY REVIEW

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UW System Transfer Model Proposal

I. Introduction

The UW System is comprised of 13 four-year universities, and 13 branch campuses. The University of Wisconsin System serves more than 170,000 students each year, offering a total 1283 major programs. In addition, more than one million citizens are served each year via the UW System statewide extension programs.

Transfer between or among institutions of higher education is an important element of the undergraduate experience for many students. Transfer data for academic year 2017-18 show a total of 14,322 student transfers into or within the UW System, with intra-system transfers accounting for 35% of total new student transfer, and transfers from the Wisconsin Technical College System accounting for 25% of this same pool. The University of Wisconsin (UW) System has placed a high priority on improving completion rates, closing the opportunity gap for underrepresented minorities, and minimizing the financial barriers to degree attainment. The strategies outlined for achieving these goals include improving the experience of seamless transfer for students. In this paper, we will discuss the issues that surround the UW System’s current transfer model, analyze alternatives, and make recommendations for meeting goals for student success related to transfer.

The barriers to transfer and the source of disruption experienced by students during their transfer from one UW institution to another or from a WTCS institution to UW System have their roots in the formation of the UW System from disparate institutions. The UW System was created in 1971 via legislation that combined the two public university systems of the state under one board of regents. This legislation resulted in the merger of institutions with eclectic histories as land-grant universities, liberal arts institutions, two-year transfer institutions, and normal schools with the explicit mission of teacher education, and statewide extension offices. The same distinctiveness among institutional missions that has made the UW System strong has also contributed to the tenacity of institution expectations and incongruous visions about transfer across the System.

Additionally, as a result of restructuring efforts in 2018, the current branch campuses of the UW System are administratively aligned with seven of the four-year institutions and comprise the former campuses of the UW Colleges. Dissolution of the UW Colleges took place on July 1, 2018. The UW Colleges were two-year campuses that maintained an explicit mission of providing the freshman and sophomore curriculum for the bachelor’s degree, with the intention of transferring students to the four-year institution of their choice. The UW Colleges campuses also offered Associate Degrees, as well as a single applied bachelor’s degree, the Bachelor of Applied Arts and Science. The UW Colleges offered a fully online
associate degree. The associate degree offered by the former UW Colleges was built upon system wide associate degree standards that brought some coherence to associate level degree programs. These same UW Colleges programs have been incorporated into the curriculum of their respective receiving institutions. As a result, institutions see themselves as offering two distinct associate degrees, one home grown and one inherited from the UW Colleges.

This history of the UW System, and the eclectic nature of institutional missions at the time of the 1971 merger, as well as the restructuring of the former UW Colleges into seven UW institutions, shed light on the historical importance of institutional autonomy within the System and contributes to our understanding of the differing expectations across our institutions with regard to mission and program focus. At the same time, restructuring has resulted in a degree of similarity among these institutions around the core elements of general education curriculum. These observations provide a preamble to understanding the tools, principles, and agreements that were eventually implemented to help students navigate transfer among these institutions.

Currently, UW System Administrative policy SYS 135 (UW System Administrative Policy 135: UW System Undergraduate Transfer Policy\(^1\)) delineates transfer credit principles as well as principles of accommodation for the transfer process to and among UW System institutions. The policy contains several student-centered provisions, including the provision that a course designated as fulfilling a general education requirement at one UW institution will transfer as fulfilling a general education requirement at the receiving UW institution. Also, because UW System has delineated system-wide standards for the Associate Degree (UW System Administrative Policy 115: Associate Degree Standards\(^2\)), the policy provides that transfer students who also hold a UW Associate Degree will have satisfied the general education requirements at the receiving UW institution. In addition, the policy has been recently updated to incorporate language that guarantees transfer admission from the current UW System branch campuses to any UW System four-year institution, providing that certain credit and grade point requirements have been met (formerly UW Colleges Guaranteed Transfer Program). The policy also incorporates language that accommodates the reverse transfer of credits to allow the retroactive award of the Associate Degree for transfer students within the UW, as well as credit for prior learning. In all cases, the policy explicitly recognizes the autonomy of the individual UW System institutions, their unique missions, and the importance of maintaining local program integrity as it relates to the curriculum and transfer.

In addition to delineating transfer between UW System institutions, SYS 135 also outlines transfer between institutions of Wisconsin Technical College System (WTCS) and institutions of the UW System. The principles of accommodation also apply to five of the WTCS institutions that state that if the associate degree is earned at these institutions, then the general education requirements are considered as complete for a UW university. The policy also encourages the development of transfer articulation agreements between institutions when the applied Associate Degree programs of WTCS align with System baccalaureate
degree programs. In fact, SYS 140 (UW System Administrative Policy 140, UW System Guidelines For Articulation Agreements Between UW System Institutions And WTCS Districts) provides explicit guidelines to UW System institutions for developing articulation agreements with institutions within the WTCS. Due to the lack of agreement among WTCS institutions regarding requirements for a major, as well as the multiple distinctive degree programs at the UW institutions, the UW System currently has hundreds of articulation agreements among the WTCS and UW System institutions. This has also contributed to challenging transfer pathways for students both inside and outside of the UW System.

In addition, the Universal Credit Transfer Agreement (UCTA) provides a set of courses that are transferable between all UW System institutions and WTCS districts and which typically satisfy general education or general degree requirements. This roster of transferable courses satisfies the requirement expressed in the 30-credit transfer rule delineated in state statute in 2013 (Wisconsin Statutes, § 36.31(2m)).

UW institutions have also created transfer guides that provide students from the UW Colleges with important information about what courses to take for specific degree pathways and for specific majors.

The UW System implemented the web-based Transfer Information System (TIS) as an online resource to help students identify the specific course-to-course equivalencies in and among UW institutions, as well as equivalencies between the UW System and WTCS. TIS also lists the courses included in the Universal Credit Transfer Agreement by campus, and includes specific transfer guides and articulation agreements that have been crafted within and between these systems. Due to the limited scope and functionality of the TIS platform, UW System is currently pursuing a web-based transfer information technology subscription with CollegeSource in order to utilize two of their products, Transferology and TES. The CollegeSource platform would broaden the scope of information around transfer credit equivalencies and information available for review by students and their families, campus staff, and the public. The new solution would incorporate the established transfer relationships between the UW System and Wisconsin Technical College System as well as information regarding UW System four-year to four-year course transfer equivalencies. In addition, the CollegeSource technology will include a vast network of domestic and international school course information and course information from the military and test credit programs (AP, IB, CLEP, DSST). Students would be able to store a portfolio of completed courses, view transfer equivalencies for selected institutions, and review their completed courses prior to transfer in order to explore replacement courses. Transferology and TES are also mobile-friendly and provide directly linked access to advisor support.

In this review, we will outline issues and models to address transfer concerns for both UW students across UW System institutions as well as concerns for transfer for WTCS students into the UW System. Current data show that the rates of transfer are decreasing: in the five year window following academic year 2012-13, UW System transfer student enrollments dropped 17%. Each student group faces common challenges with transfer including
institutional practices that hinder transfer, program scheduling complexity, bureaucratic hurdles, and unclear communication. The transfer phenomenon is further complicated by student course taking patterns, distinct cultural differences among institutions, and a lack of consensus among the faculty about learning expectations among courses. This review also includes policy recommendations to address these concerns.

II. Background

Transfer of students between or among institutions of higher education is increasingly understood to be an important component of student experience and success. A study by the National Student Clearinghouse Research Center examined a cohort of first-time students between 2008 and 2014, and determined that approximately 1.3 million students (37.2%) transferred institutions at least once during the six-year study.

Transfer data for academic year 2017-18 show a total of 14,322 student transfers into or within the UW System, with intra-system transfers accounting for 35% of total new student transfers. Students transferring from a UW Colleges campus to a UW 4-year campus accounted for approximately 15% of total new student transfers. It is noteworthy that 2016-17 data show that 61% of students transferring out of a UW Colleges campus (and into another UW System four-year campus), did not transfer to what would now be their “home” campus, suggesting that 4-year to 4-year lateral transfers (as opposed to 2-year to 4-year vertical transfers) within the UW System will increase significantly in the wake of the most recent restructuring.

Seamless transfer is critical to minimizing credits to degree, time to degree, and the financial impact of higher education for our students. One of the more impactful issues associated with transfer success is informally understood as the transfer credit “penalty” – instances in which courses taken to meet specific degree requirements at one institution do not transfer to meet similar degree requirements at the receiving institution. This results in repeated coursework for the student, with the concomitant increase in both financial impact and time to degree. This can be particularly problematic for systems such as UWS in which there is not common course content or common course numbering across institutions. A tension clearly exists between the perfect articulation of credits and the institutional autonomy and unique institutional missions that are the tradition in the UW System. This tension has been made more apparent in the wake of the recent restructuring of the UW System.

Despite the fact that the UW System has studied the challenges of transfer in the last decade, challenges remain, especially among the underrepresented students in the System. In November of 2010, the Center for Urban Education released the Wisconsin Transfer Equity Study, which focused on potential barriers to vertical transfer for historically underrepresented students within Wisconsin. The study focused on students transferring from the two-year UW Colleges campuses, and the Wisconsin Technical College System (WTCS) to UW System four-year campuses. Among several conclusions, the study noted that the transfer credit penalty was particularly problematic for students transferring from the technical college system. Additionally, the maintenance and publication of hundreds of
articulation agreements has proved especially demanding in terms of accuracy, currency, and documentation.

**UW System Institutional Alignment of General Education Core**

It is likely that the accommodations principles written into UW System transfer policy, described previously in SYS 135, help to mitigate this loss of credits for intra-system transfers. However, this policy must now be examined in the context of restructuring where transfer from 4-year to 4-year institution will be the primary mode of transfer. What is warranted is a comparison of freshman and sophomore curriculum for degree programs across UW System institutions. In fact, a survey of General Education requirements across the UW System revealed broad agreement on the elements of foundational knowledge required for a liberal arts degree, an alignment which can be captured in a comparison of institutional General Education curricular requirements. This alignment certainly supports and facilitates the principles of accommodation for 4-year to 4-year transfer of General Education course credits that are underwritten in policy.

Most of the UW institutions have based their general education learning outcomes on the AAC&U essential learning outcomes and domains of knowledge. These domains can be used to align current general education requirements to see how closely aligned the various general education frameworks are at this point in time. These learning outcomes were derived from collective work with faculty and staff from over 1500 institutions across the U.S. As seen in the LEAP WI Assessment Report in 2016, all UW institutions have some degree of general education curriculum alignment to the AAC&U’s essential learning outcomes.

**Alignment of General Education Core to UW System Associate Degree Standards**

It is noteworthy that there is also nearly universal alignment of UWS institutional General Education programs with the Associate Degree Standards outlined in UWS policy (UWSAP 115 *Associate Degree Standards*) as seen in the general education alignment in this document. The UWS Associate Degree Standards are built around six knowledge domains, including:

1. Knowledge of Human Cultures
2. Knowledge of the Natural World
3. Effective Communication
4. Intercultural Knowledge and Competence
5. Critical and Creative Thinking Skills
6. Individual, Social, and Environmental Responsibility

Standards 1-4 are built around specific types of course work. For example, curriculum that meets the standard for *Knowledge of the Natural World* is described as typical of coursework in biology, chemistry, etc. In these categories (where it is straightforward to
align the standards with specific course work), their excellent alignment among UWS institutional General Education standards and the Associate Degree standards.

The remaining two standards (Critical and Creative Thinking Skills and Individual, Social, and Environmental Responsibility) are respectively described in UWSAP 115 as being acquired via learning goals in different disciplines throughout the curriculum, or via High Impact Practices. As such, they are integrated across the curriculum and we would not necessarily expect the General Education alignment to Associate Degree standards to be apparent by analyzing General Education curriculum alone. In fact, there is little explicit curricular alignment with these two standards among our institutional General Education programs across the UWS. That being said, it seems likely that both of these standards are being met as students navigate the foundational liberal arts curriculum referenced previously.

It is interesting to note that UW System Associate Degree Standards reflect a national trend in higher education: nearly all AACU members have identified a common set of learning outcomes for their undergraduate students, and there is an increase in general education curricula which include both disciplinary breadth, as well as integrated knowledge.12

Other Sources of Transfer Credit Loss

It is important to note that General Education credits are not the only potential source for credit loss upon transfer. It is also the case that courses that transfer well in the context of General Education may not transfer as meeting curricular requirements in a specific program.

As suggested previously, the system wide agreement regarding foundational curriculum, in combination with student-centered administrative policy, likely mitigates the transfer credit penalty experienced by students transferring laterally among the four-year institutions within the UW System. We performed an analysis of data acquired from the Student Achievement Measure13, which maps student progress and time to completion in institutions of higher education nationwide and includes data for students who have transferred institutions during their college career. We used these data to compare UW System student bachelor’s degree completions between first-time, full-time students, and full-time students who had transferred into UW System institutions. There are a number of observations, most notably that transfer student completions following four years of matriculation at a UW System institution, are, on average, less than one percent behind the six-year completion percentage for first-time students14. These data suggest there is not a dramatic lag in progress to degree for transfer students at most UW System institutions. This observation is not surprising if we assume that students are able to bring significant credits with them from their sending institution indicating a degree of alignment among the curriculum at our UW institutions.

Transfer Among Underrepresented Populations

In order to more fully understand challenges in transfer across all student groups, it is important to note that analysis of disaggregated data should be performed in order to
determine if there are possible barriers to transfer for underrepresented students, and the
degree to which credit loss is impacting success. Additional bottlenecks may occur via the
minimization of available transfer pathways for underrepresented minority students. The
WI Transfer Equity Study mentioned previously, as well as a follow-up study performed by
the UW Colleges Office of Institutional Research, Assessment, and Effectiveness\textsuperscript{15} in January
of 2017, suggest there may be barriers to transfer, or barriers to progress and completion
for underrepresented transfer students. On the national level, these inequities have been
researched extensively. In the review mentioned previously, Taylor et. al\textsuperscript{16} make the
following observations regarding an apparent minimization of transfer pathways:

“Crisp and Nuñez (2014) coined the term racial transfer gap, a term that identifies
an inequity in vertical transfer rates based on race. They used two national
datasets to examine the racial transfer gap and found 45\% of White community
college students transferred compared with only 32\% of African American and
Latinx students, a 13\% gap. In an analysis of data from the California Community
College System, Wassmer, Moore, and Shulock (2004) found that community
colleges with higher Latinx or African American student populations had lower
transfer rates, even after controlling for students’ academic preparation and
socioeconomic status. Most notably, Wood et al. (2011) used data from the
National Postsecondary Student Aid Study dataset and found that White
community college students were 71\% more likely to transfer than students of
color.\textsuperscript{17}

These observations bring the need for disaggregated transfer data into sharp relief. In fact,
the previously referenced WI Transfer Equity reports acknowledged the robust transfer
policy in place within the UW System, while at the same time noting the lack of transfer data
that is systematically collected and analyzed. In short, the authors of the study
recommended an increase in our System focus on transfer accountability metrics across the
UW System, especially for underrepresented students.

The potential lack of transfer pathways as well as the loss of credits upon transfer are likely
exacerbated by other issues that impact transfer student success, among them the lack of
adequate student support. In their review of the current literature, Taylor and his
colleagues also explore this problem\textsuperscript{18}. Based on several research studies, they conclude
that “research suggests that institutions do not: provide adequate information and advising,
provide timely and comprehensive academic and social support services, communicate
[adequately] with partner institutions, or provide financial incentives to prospective transfer
students.” These sentiments were echoed in the Wisconsin Transfer Equity Study,
mentioned previously – the authors uncovered a critical lack of internal understanding
regarding the existence and role of transfer advocates across UW System institutions, and
the concomitant lack of appropriate referrals for students. They also reflected on a system-
wide culture that appears to be reactive rather than proactive with meeting transfer student
needs.
III. **Expected Outcomes: Elements of ideal transfer model**

These attributes are derived from a review of relevant literature and research studies about transfer.

a. **Student-Centered and Effective Transfer**

The transfer model is effective if it is explicitly stated, universal, and shared widely. This model will place value on what the student has already accomplished and what knowledge and skills the student brings to the new institution. Reflecting a student-centered model means that students, faculty, and staff can easily navigate the mode. Students will have reduced time and credits to degree. The model is composed of accurate and current information that is available online and understood as a primary decision-making model for students, faculty, advisors, and transfer coordinators.

b. **Capacity and Sustainability**

Campus cultures are intentionally organized around advising and support for students transferring both in and out. The model is supported with staff and professional development in place and is maintained to ensure optimum usage across the System institutions. This includes having the ability to update, monitor, and produce reports for continuous improvement. UW System institutions have the capacity to incorporate any indicated curricular changes within existing curricular structure.

c. **Political/Legal**

The model reflects the roles of the faculty and the institution in decision-making about curriculum and transfer credit. It also is aligned to and supports System and Board policy, as well as legislation in place.

d. **Cost/Efficiency**

The model is sustainable and supports maximized effectiveness while minimizing costs, including time, resources, and staff. The cost and required resources of the proposed alternative are navigable by the UW System.

IV. **Transfer Models**

The following transfer models were reviewed in light of the criteria and outcomes for transfer. See section V for more information.

A. **Block Transfer**

Block transfer is defined as a predetermined number of credits earned through a certificate, diploma, or grouping of courses that can be appropriately transferred to a degree program or other credential. Block transfer agreements are negotiated between individual institutions, and usually involve the receiving institution agreeing to recognize a “block” of the sending institution’s courses as equal to a certain number of
its own courses. Block transfer agreements usually, but not always, involve programs in the same discipline.

B. Course-to Course Transfer

A model for transfer where one-to-one course equivalencies is reviewed by individual faculty members and documented in a transfer information system. Currently, under state statutes, the UW System and the WTCS have identified 30 credits for transfer that are considered “universal.”

C. System-Wide Pathways

A Transfer Pathway is a course plan for a major that, when completed, will allow students to transfer credits from any University of Wisconsin institution to another U, and count all of those credits toward a bachelor’s degree in the specific major or major pathway.

D. Common Core GE

The WI transfer common core are general education classes are common courses found in the curriculum across all UW institutions. The “core” would be defined as a predetermined number of credits that will be reviewed regularly to ensure the common nature. When the defined set of general education courses are successfully completed at a Wisconsin university, they are guaranteed to transfer as a general education common core block to any UW institution, and they will count toward that university’s core general education bachelor’s degree requirements. This is similar to the Western Interstate Commission for Higher Education (WICHE)-led initiative to create a multi-state lower division general education transfer framework based on learning outcomes.

By identifying a Wisconsin Transfer Common Core, the System would promote a transfer approach whereby a subset of general education courses which all “count” as a transferable block toward university requirements. It would also serve as a portable and stackable credential students pursuing an associate’s degree, and can provide an early start on a college degree for high school students.
V. Criteria and Evaluation of Alternatives

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<td>Block Transfer</td>
<td>Course-to Course Transfer &lt;br&gt;One to one course equivalents for transfer from one institution to another &lt;br&gt;Current model reflected in TIS and UCTA &lt;br&gt;72 credit transfer policy from technical colleges &lt;br&gt;Documented in TIS System and publicly shared.</td>
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<td>System-Wide Pathways</td>
<td>System-Wide Pathways &lt;br&gt;Identify sequences of foundational courses for common disciplinary major groupings &lt;br&gt;May be universal pathways across System</td>
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<td>Common Core GE Using Knowledge Domains Approach</td>
<td>Common Core GE Using Knowledge Domains Approach &lt;br&gt;Common GE knowledge domain framework for all System institutions &lt;br&gt;Guaranteed GE completion acknowledged upon transfer from branch to four-year or four-year to four-year &lt;br&gt;Outcome based equivalents of courses are accepted outside of GE</td>
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**MODEL IS EFFECTIVE AND STUDENT CENTERED**<br>The transfer model is effective if it is explicitly stated, universal, and share widely. Reflecting a student-centered model means that students, faculty, and staff can easily navigate the mode. Students will have reduced time and credits to degree. The model recognizes progress toward degree that a student brings to the transfer institution thus Lacks a consistent way to examine courses to ensure equivalency. Students are on pathway that is well defined in term of GE and transition to a degree program. Focus on common knowledge domains student learning outcomes provides greater consistency across System.
| Pathway explicitly identifies requirements. Pathways are clearly articulated and explicit. Pathway for related majors are universal. Pathway information can be easily shared online. Advising for pathways is based groupings of majors. A pathway would be established across institutions for ease of transfer. Easy to track how many students are in a pathway and to track time, credits to degree. A more seamless option for student transfer and supports student success. |
| Saving time and credits to degree. Some specific degree requirements may have to be added after transfer. Challenging to keep accurate and current. Supported by articulation agreements that are publicly shared. |
| Updating current tool is a challenge for institutions. Current information is unreliable. Promotes inconsistency across System. Course transfers but often does not apply to requirements. Course transfer bottlenecks present and remain unresolved. Leads to course repeats, more time to degree and thus not student friendly. |
| Based on proposed SYS policy, courses transfer in knowledge domains consistently across System institutions. Congruence is clearly articulated in this model. Common courses are clearly identified in a knowledge domain for all institutions. One common core framework does not disadvantage one institution. All have access to GE information about common core. |
| CAPACITY AND SUSTAINABILITY | Campus cultures are intentionally organized around advising and support for students transferring both in and out. The model is supported with staff and professional development in place, and is maintained to ensure optimum usage across the System institutions. This includes having the ability to update, monitor, and produce reports for continuous improvement. UW System institutions have the capacity to incorporate any indicated curricular changes within existing curricular structure. |
| --- |
| This model is in operation but not widely used. It is challenging to determine which courses would go into a block outside of general education courses. Currently, due to distinct models of block being used at different universities, we have no ability to monitor this across the System curriculum. Changes would be one by one updates and hard to monitor/update. If the TIS is not kept up to date, there are capacity issues on campuses. Monitoring is not conducted to see where there are issues across the System related to transfer. Curriculum changes take time to input into the System rendering it out of date immediately. Data are often out of date. This model will require significant professional development. Currently, we do not have the capabilities to monitor pathways nor do we have data collection methods designed to measure effectiveness. Curricular changes may be challenging to note and navigate across 13 institutions. |
| POLITICAL/LEGAL | The model reflects the roles of the faculty and the institution in decision-making. It also is aligned to and supports System and Board policy, initiatives and strategic directions. Model aligns with faculty and institution decision-making models. Institutions to determine which credits constitute a block. This will vary Faculty are decision-makers in this model and often do not agree on equivalencies. We would have to establish SYS policy to create pathways. The decision-making is by a faculty committee at the System level and the GE institutional policies as well as System transfer policies can support this model easily. Faculty and institution governance are |
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Upon transfer, the model allows student to transition seamlessly.
from institution to institution which will perpetuate inconsistencies across System. Not fully developed policy on block transfer.

Consensus is lacking and thus creating bottleneck courses. Institutional governance is highly operative in this model and contributes to more inconsistencies for transfer. This current model hinders seamless experiences for students. institution would feel a loss of autonomy in using this model.

involved in creation, evaluation of GE. Supports System direction on transfer and supports principles of accommodation established by System. GE configuration by knowledge domains that are already common across System institutions. Model will be supported with SYS and Board policy for transfer. Aligns with national transfer models thus enhancing student transfer nationwide.

| COST/EFFICIENCY | The model is sustainable and supports maximized effectiveness while minimizing costs, including time, resources, and staff. The cost and required resources of the proposed alternative are navigable by the UW System. Consistent application of model requires more SIS, IT and increased advisors’ and transfer coordinators’ work to ensure. This model is already not sustainable, as it has contributed to repeated courses, additional credits and increased. This model would be costlier to support due to the need for multiple convenings to ensure consistency and agreement on pathway course outcomes, course. GE already exists on each campus and leveraging existing models and documentation provide for cost saving. |
| consistency. Changes to model would be difficult to track due to great variation at each institution related to course sequences in a block. | time to degree. Keeping TIS up to date has been a consistent challenge oftentimes due to a lack of dedicated staff to do this work. | selection, which majors are in which pathway. This is a heavier lift if we want the same pathway at each institution for each type of major. | This model was already in place with the 2-year institutions and can be more readily understood and leveraged for 4-year to 4-year institutions. We are the closest on this model. |
VI. Recommendations

We conducted a review of the various transfer models and analyzed the degree to which they aligned with the criteria set forth previously in this document.

**Course-to-course transfer**

We recommend that the UW System not continue to use course-to-course transfer as the predominant model for transfer of credit. This model demands that faculty identify a one-to-one transfer relationship between individual courses at respective institutions, resulting in a very narrow range of criteria that is utilized for decision-making regarding course equivalencies. This model does not take into consideration that a student may have successfully completed a course in the same knowledge domain, with similar learning outcomes, although the course does not have a direct equivalent title, text, or delivery format at their receiving institution. It is also the case that faculty would not transfer a course that is taught in a delivery format (such as online) that is equivalent to a course that is also taught in a hybrid or face-to-face format. Because the course-to-course transfer model engenders a very narrow definition of equivalency, many students retake courses that are very similar to those that they have already completed in their first institution. This lack of transfer costs student extra time and credits to degree as well as additional tuition charges and the resulting student debt. This model is not student centered.

In addition, the current platforms utilized to document the course-to-course equivalencies among institutions and across state systems are a challenge to maintain, resulting in inaccurate, out-of-date, and inconsistent entries. In particular, the current Transfer Information System (TIS) is not up-to-date because institutions create dozens of course changes per year that often do not get entered into the TIS database. Entering changes and equivalencies take more time than transfer offices are able to provide, resulting in outdated information being presented to both students and advisors. Decisions to determine course equivalencies vary greatly by institution and this system promotes further inconsistencies. This system is neither effective nor efficient for students or for institutions, and these issues generate questions about the sustainability of the model for our institutions over time. More importantly, this lack of accurate information is another source of increased time and credits to degree for transfer students.

In conclusion, the model is not student-centered, although the model is supported by current UW System policy and largely supported by governance processes at the institutions.

**Block Transfer**

The block transfer model is utilized for some academic programs in our system program array. In many cases, this is the transfer model used when a student transfers to a UW institution from a WTCS institution. In some instances, courses will transfer as electives, but will not count toward a degree requirement. This will result in the student having to take
more courses to fulfill specific requirements. This again costs the students time, money, and may result in an excess of credits to degree.

The block transfer does not rely on faculty decision making about specific course equivalencies. It does require faculty to look at sequences of courses to determine equivalencies with program requirements and larger sections of the curriculum.

An important problem associated with this model reflects the distinct nature of programming among the various UW System institutions: the block may transfer very well at one institution, however, at another receiving institution the block may not cover as many required courses. This leads to inconsistency both across the UW System as well as the WTCS System. When changes take place in sequences of courses that are the foundation of the block, then another evaluation is required, and that evaluation must take place for all institutions involved. This review may not be as up to date as it needs to be to ensure current equivalencies. This is not a sustainable model because there are great differences among WTCS programs as well as great differences among UW System programs with the same CIP code and title. Currently, the UW System has over 700 articulation agreements that often are out of date due to changes at the institution level. The upkeep of such a transfer articulation system is challenging and not sustainable.

**Transfer Pathways**

Transfer pathways approaches have been effective models across the US as seen in the many proficiency initiatives that have taken place at the national and state levels. The transfer pathway model is very student-centered as it promotes a clear early pathway for students who are headed toward a grouping of possible majors that have similar foundational requirements. Students are able to complete the right courses at the right time for a variety of majors. This saves time to degree as well as credits to degree. This model is also cost effective for institutions as advising and other student support services can be organized around the pathways.

A chief characteristic of this model is a shared understanding regarding the courses that meet the foundational knowledge and skills required of a particular program. In order to build a strong foundation for the transfer pathways, the institutions need to understand common foundational knowledge, skills, and content required for a pathway. Even further, an institution must see how general education requirements align both at the institution level for various degree programs as well as how general education relates to the GE models at other institutions for students on the same and different pathways.

The current policies and processes used to assess pathways are not developed in our System and this would take considerable time to implement. A more prudent step would be to work through the identification of common general education requirements as a foundational step to looking at transfer pathways. We would need to have the building blocks in place before we embark on a full review of the transfer pathways model. This model would also demand that we engage in significant discussion with our main transfer institution, the
WTCS, in order to create a strong shared understanding of the knowledge and skills required for specific academic program pathways.

We have started on such a beginning pathway journey with our current UW System Math Initiative. This could be a building block to our discussions about a common general education core that, once identified, can assist students to build the appropriate Math skills for a possible curricular area. In order to consider the transfer pathway model, we must first build the basis for general education through first identifying what the current state of GE is across our institutions in terms of common knowledge domains. After a fuller understanding of this segment of the curriculum and the transfer possibilities with a common GE model, then we can move to a more complex and sophisticated transfer models such as transfer pathways.

**Common Core GE Using Knowledge Domains Approach**

By doing this analysis, we determined that the transfer model that best meets our established criteria is the Common Core General Education model in which knowledge domains are utilized to organize general education curriculum.

This approach is particularly appealing in that it leverages the current state of our general education curriculum across the UW System institutions, which is generally well-aligned to similar learning domains. The reason for the alignment is two-fold. First, the universities are generally aligned to the AAC&U essential learning outcomes and their associated knowledge domains. Secondly, the coursework for the associate degrees across the System are aligned to the associate degree standards, which also utilize the knowledge domain structure to organize the curriculum. In addition, this curriculum-based transfer model is well aligned with our criteria: it is student centered, efficient, sustainable, and supported by policy and current practices in higher education.

**Effective/Student Centered:**

The model will be clear to navigate and will allow students to transfer their general education courses either in full (as a general education block) or partially (as courses that align with specific knowledge domains) to another UW institution. This approach to transfer recognizes the progress that a student has made in his/her university program to date and would not require students to retake courses.

**Capacity/Sustainability:**

The model reflects the current configuration of general education curriculum across the UW System very well, making it particularly efficient and sustainable. In addition, faculty governance around general education is organized to review general education courses and programs, assessment policies and practices are in place, and the associate degree standards reflecting knowledge domains have been approved.
Political/Legal:

Current UW System policy about transfer already supports principles of accommodation that allow for transfer of general education courses from one institution to another within the UW System, and incorporates the provision that the Associate Degree meets general education requirements across the UW System. Given these foundational provisions, it is relatively straightforward to accommodate the proposed model in policy.

Implementation would require policy extensions as well as the facilitation of faculty discussions to define system-wide knowledge domains. To preserve institutional autonomy and mission integrity, UW System institutions will individually determine how their courses align to the knowledge domain categories. This work could be accomplished through faculty development programming at centers for teaching and learning throughout the System.

There are multiple additional benefits to this approach. First, the model provides for incentives for both students and institutions. In addition to maintaining the student-centered transfer policies already in place, the more intentional system-wide alignment of general education curriculum, and the option of “block” transfer of general education credits will provide students with more transfer options. Transfer articulated and based on learning outcomes and knowledge domains will streamline articulation across more institutions allowing institutions to accept students from multiple institutions within the System without significant resources spent on transfer coordination.

The general education curriculum across the System will be a coherent building block for multiple degree pathways. The AAC&U essential learning outcomes and knowledge domains have been widely adopted by the UW institutions as well as across the nation. The proposed model insures that the learning outcomes for transfer are consistent with outcomes already articulated on a campus. Faculty will have a common framework as a basis for transfer rather than the current course-to-course transfer or through multiple articulation agreements customized for each institution.

A benefit for WI students is that this approach has been adopted by various other states through a number of national curriculum and transfer initiatives. Several of our UW Institutions have participated in these initiatives and related projects to create transfer pathways and to articulate clear learning outcomes for general education. The UW System associate degree standards are based on portions of these initiatives as well.

These initiatives include:

1. Multi-State Collaborative 9MSC) to Advance Learning Outcomes Assessment, that studied the coring of transfer and non-transfer student work in two ELOs and VALUE Rubrics for state system leaning outcomes assessment.

2. General Education Maps and Markers (GEMS) a multi-faceted AAC&U project grounded in the LEAP Essential Learning Outcomes to develop a framework for general education pathways.

https://www.aacu.org/gens/index.cfm


4. Quality Collaboratives: a project to improve the achievement of learning outcomes and transfer and articulation between two-and four-year institutions by employing the DQP. http://www.aacu.org/qc/

5. Liberal Education and American’s Promise (LEAP) for the AAC&U established essential learning outcomes that can serve as the foundation for the transfer model for general education. https://www.aacu.org/leap/

Our detailed recommendations, below, are focused on three distinct areas: policy, improving system-wide culture around transfer, and an update in the web-based tools used for transfer navigation.

**Policy**

In the case of policy, we consider extensions to policy on lateral transfer among UW System institutions, and vertical transfer between WTCS and UW System institutions.

Our first recommendation with regard to policy is to convene a General Education Steering Committee to discuss the feasibility of transfer models and the current state of transfer in the UW System, assess and recommend system-wide transfer metrics, and to provide analysis of possible policy solutions. This committee would be composed of transfer coordinators, general education directors, and faculty leaders.

With regard to lateral transfer between UW System four-year campuses, current UWS policy (SYS 135) contains multiple student-centered accommodations around transfer, including the course-to-course transfer of General Education credits among institutions, and the role of the completed UWS Associate Degree in fulfilling general education requirements at any UWS institution. We would recommend exploring a policy extension that provides that General Education program requirements fulfilled at one UW System institution also meet the requirements for completion of general education programming any other UW System institution. This would be an adaptation of current UW System policy related to the principles of accommodation for associate degree completion.

In addition to exploring the “block” transfer of general education credits among UWS institutions, we recommend the committee also discuss a policy extension to SYS 135 that recommends general education programming be aligned with UWS Associate Degree
Standards. This action explicitly pulls UW System general education standards into clear alignment with AAC&U knowledge domains and would prevent future “drift” of GE standards.

With regard to vertical transfer between WTCS institutions and UW System, we would recommend exploring a policy extension that provides that general education program requirements fulfilled at one of WTCS’s five liberal arts institutions also meet the requirements for completion of general education programming any UW System institution. We also suggest that WTCS courses be explicitly identified as to the specific knowledge domain into which they fall, and that these equivalencies are accommodated in transfer between systems. Finally, we recommend that UW System leverage the Universal Credit Transfer Agreement as a transfer tool with which to create a block transfer of courses from the WTCS to UW System institutions.

System-wide Transfer Culture

As mentioned previously, in November of 2010, the Center for Urban Education released the Wisconsin Transfer Equity Study used a lens of system policy to explore transfer rates for historically underrepresented students. The UW Colleges Office of Institutional Research, Assessment, and Effectiveness revisited this analysis in January of 2017. The reports noted the robust transfer policy in place within the UW System, while at the same time noting the lack of transfer data that is systematically collected and analyzed. In short, the authors recommended an increase in transfer accountability metrics. Indeed, we note a particular lack of data to help us understand the location of bottlenecks in transfer, or the impact of current transfer practices on the success of underrepresented students. With this in mind, we recommend a more intentional collection and review of transfer data, both to inform the recommended discussion of policy extension (where possible), as well as to provide the basis for the future identification of transfer bottlenecks and possible equity issues. We anticipate the proposed steering committee might make recommendations on important data, but would also suggest collection of the following data:

- Total number of completions that have transferred at some point in their college career. These should be disaggregated by:
  - Sending institution
  - Receiving Institution
  - Total credits attained at time of transfer
  - Total credits to degree
  - GE completion status at time of transfer
  - Grade point average before and after transfer
  - Time to completion
  - URM, 1st generation, Pell eligible status
- Total number of students that have transferred at some point in their college career, disaggregated similarly.
- Transfer supports in place at sending and receiving institutions
- Number of credits rejected toward general education requirements
- Number of credits rejected toward program requirements
Transfer pathways: the collection of data that will map transfer pathways among institutions within the UW System, particularly to find bottlenecks for under-represented students

Data on the relationship between application and eventual transfer, disaggregated by multiple demographics including part-time/full-time status, URM status, first generation status, and Pell eligible status.

In addition to the need for a more data driven analysis to identify transfer issues, these same reports also noted the need for a more “transfer-centric” culture among the UWS campuses. As mentioned previously, the report uncovered a critical lack of internal understanding regarding the existence and role of transfer advocates across UW System institutions, and the concomitant lack of appropriate referrals for students. This lack of support has been exacerbated by iterative administrative restructuring in the former UW Colleges campuses, and we recommend an increase in both transfer support personnel, as well as the development of operational plans to increase the visibility and navigability of transfer supports system-wide.

Tools

As described previously, UW System is actively pursuing a web-based transfer information technology subscription with CollegeSource in order to utilize two of its products, Transferology and TES. The CollegeSource platform would broaden the scope of information around transfer credit equivalencies and information available for review by students and their families, campus staff, and the public. The added functionality found in the CollegeSource products would provide a more easily navigable and robust transfer review experience to a larger network of potential students, enhancing transfer technology and promoting seamless transfer. Movement to this updated technology aligns well with the other recommendations made in this report, and we recommend the adoption of the CollegeSource platform.

Endnotes


5 CollegeSource Transferology web site: http://www.collegesource.com/products/transferology/, January 2019


A table that aligns UWS institutional general education requirements with Associate Degree standards is included as Appendix B.

11 UW LEAP: LEAP Report Fall 2016. See Appendix C


13 Student Achievement Measure web site https://www.studentachievementmeasure.org/

14 Figures that summarize selected Student Achievement Measure data are included as Appendix D.


Transfer Model and Policy Review Goals

Goal: Review current literature related to transfer, general education frameworks and curriculum alignment models and approaches
1. Explore AAC&U projects related to general education-GEMS, DQP,
2. Explore passport transfer initiatives such as WICHE, Multistate Collaborative

Goal: Identify issues related to transfer in the UW System
1. Explore data related to transfer across the System and with the WTCS System
2. Review recommendations from the WI Transfer Equity Study
3. Review current transfer models nationally and in the WI System
   a. Identify model attributes
   b. Identify principles of accommodation

Goal: Evaluate transfer models both national and in WI
1. Evaluate transfer models with criteria identified from the literature review
2. From the review, identify additional principles of accommodation related to current issues

Goal: Enhance the culture of transfer across the UW System
1. Identify transfer metrics
   a. Collaborate with OPAR to identify current metrics in place
   b. Propose metrics to enhance the culture of transfer by measuring dimensions for underrepresented students

Goal: Create a lower division transferable general education core
1. Map associate degree standards and current general education frameworks at UW institutions
   a. Identify degree of conformity between knowledge domains of the associate degree standards and the various general education frameworks.
   b. Identify common core elements among all UW institution general education frameworks
2. Convene UW System General Education Directors and Transfer Coordinators
   a. Review GE and Associate degree standards mapping project and approach
   b. Verify alignment and identify core common GE requirements
   c. Define knowledge domains
   d. Define institution level alignment guidelines
   e. Prepare report on status of knowledge domain alignment and results

Goal: Collaborate with Transferology System Team to make the technology support the model
1. Convene campus teams
2. Create guidelines for assignment of courses; GE cores to the record
3. Pilot use of Transferology for this model
Goal: Update SYS 135 policy for transfer that reflects restructuring status as well as principles of accommodation
   1. Review SYS 135 in light of restructuring of the UW Colleges and new GE core transfer model
   2. Draft accommodations principles
   3. Update policy to reflect new model
## Transfer Curriculum Model Budget Spring 2019-Spring 2021

<table>
<thead>
<tr>
<th>Budgeted Expenses Categories</th>
<th>Budget Amount</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>System-wide GE convenings</td>
<td>Summer 19; Fall 19; Spring 2020; Fall 2020 4 meetings $6000 each meeting Total $\text{24,000}$</td>
<td>Gathering GE directors and transfer coordinators of all institutions to have discussions on GE transfer model; share progress on work, create taxonomies, affirm common measures</td>
</tr>
<tr>
<td>Teaching and Learning Center Professional Development meetings</td>
<td>19-20; 20-21 4 meetings total for each of 13 institutions X $500 per meeting for two years Total $\text{26,000}$</td>
<td>System support for additional Teaching and Learning Center workshops for General Education curriculum classification</td>
</tr>
<tr>
<td>GE Assessment Convening</td>
<td>Summer 19; Fall 19; Spring 20; Fall 2020 $2000 per meeting or $\text{8000}$</td>
<td>Assessment Directors and GE directors meeting for assessment plan development.</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$\text{58,000}$</td>
<td></td>
</tr>
</tbody>
</table>