

## ASPEN/AASCU INTENSIVE | TRANSFER STUDENT SUCCESS & EQUITY | COHORT 1

*\*All sessions to be delivered via Zoom from 2:00 - 4:00 PM EST unless otherwise noted*

| Date    | Session  | Presidents Required |
|---------|--|---------------------|
| Nov. 18 | <b>Kickoff Event: Setting a Bold Transfer Vision   2:00-4:30 PM ET</b>   | ✓                   |
| Dec. 2  | <b>Orientation &amp; Onboarding   Project Managers Only</b>  |                     |
| Jan. 27 | <b>Transfer Success &amp; Equity Outcomes Part I   2:00 -4:30 PM ET</b><br><i>*Institutional Research/Assessment Rep Recommended</i><br>Examine data on current transfer outcomes   Community College data   | ✓                   |
| Feb. 24 | <b>Transfer Think Tank: Transfer Success &amp; Equity Outcomes Part II</b><br><i>*Institutional Research/Assessment Rep Recommended</i><br>Community discussion and work session   Four-Year Data  |                     |
| Mar. 31 | <b>Transfer Vision Statement &amp; Defining Long-Term Goals</b><br>Discuss Team Impact Statement and begin the process of setting measurable goals for improved and more equitable transfer student success  | ✓                   |
| Apr. 28 | <b>Transformational Transfer Models</b><br>Explore innovative transfer models that communicate a clear value proposition to students.  |                     |
| May 26  | <b>Beyond Articulation Agreements: Clear Programmatic Pathways</b><br><i>* Faculty Members/Deans from Corresponding Disciplines from both Institutions and/or Faculty Senate Members Recommended.</i><br>Identify strategies to support two and four-year faculty in creating seamless academic pathways from community college to bachelor's completion |                     |
| Jun. 30 | <b>Transforming Culture: Transfer Receptive Campus Communities</b><br><i>*Student Affairs or Student Success Rep Recommended</i><br>Identify opportunities across the transfer journey to advance transfer receptive culture and foster transfer students' sense of belonging.   |                     |
| Jul. 28 | <b>Student Success and Equity-Aligned Transfer Advising</b><br><i>*Advising Directors from both Institutions Recommended</i><br>Learn key elements of strong transfer-specific advising models, evaluate your institutions' current transfer advising practice.  |                     |
| Aug. 25 | <b>Transfer Think Tank</b><br>Community discussion and work session  |                     |
| Sep. 29 | <b>Transfer Think Tank   Prep for Launch</b><br>Community discussion and work session  |                     |
| Oct. 27 | <b>Strategic Transfer Impact Plan Launch   2-4:30 PM ET</b>  | ✓                   |

Shannon Looney, AASCU Intensive Liaison: [looneys@ascu.org](mailto:looneys@ascu.org)

Heather Adams, Aspen Intensive Liaison: [heather.adams@aspeninstitute.org](mailto:heather.adams@aspeninstitute.org)

## Participant Agenda | August 25, 2022 | 2:00-4:00 PM ET

### Today's Session | Peer Consultancy Think Tank

|                   |   |
|-------------------|---|
| 2:00 – 2:05 PM ET | Welcome & Updates                               |
| 2:05 – 2:25 PM ET | Team Time   Prep for Peer Consultancy   20 mins |
| 2:25 – 2:30 PM ET | Break & Switch to Peer Groups   5 mins          |
| 2:30 – 3:30 PM ET | Peer Consultancy Think Tank   60 mins           |
| 3:30 – 3:45 PM ET | Team Time Next Steps   15 mins                  |
| 3:45 – 4:00 PM ET | Cohort Share Our & Wrap Up                      |

### PRE-WORK

1. **All Participants** | Please take a moment before the session to review your team's work on the Strategic Transfer Impact Plan (STIP). Note what section(s) may still need work in preparation for the Launch on Oct. 27.
2. **Project Managers** | Please ensure everyone knows where to find the latest draft for review.
3. **Project Managers** | Please take a moment to review the agenda guide below before the session to support your team through the activities.

## Session Objectives

### PARTICIPANTS WILL

- Revisit the STIP draft as pre-work
- Identify one lesson learned and one challenge of practice to share with other teams
- Consult and receive peer-consultancy from other Transfer Intensive teams
- Identify sections needing finalization on the team STIP draft in preparation for the Oct. launch

## Part I | Team Time | Prep for Peer Consultancy | 20 mins

- Prepare to come to the peer consultancy activity with two things:
  - One reflection or lesson learned from your team's work on the Transfer Intensive over the last ten months that may be helpful for other teams.
  - One **challenge of practice** (see definition below) you would like input on from the other teams.
- Please assign a presenter, a timekeeper, and a notetaker for your team.

- Be ready to share and answer clarifying questions from the other teams in your group.
- Please add any notes taken to your team folder.

### What is a Challenge of Practice?

- A challenge of practice is an issue or an action that raises questions, a puzzle.
- This can be an emergent idea or something about a transfer model, strategy, or goal that needs a solution.
- Sometimes, a **challenge of practice** will include an example in the work that illustrates the challenge.
- Often, the description of the challenge impacts multiple parts of students' educational journeys.

### Sample Questions:

- **Our advising office has had success with helping our Hispanic/ Latino students enter the college through targeted programming and supports during their first year of transfer. However, we continue to see low graduation rates for this sub-group of our transfer students.**
  - **Question: What can we do to take the lessons we've learned from our advising programs and integrate them into other areas of campus to make support more effective for transfers?**
- **We keep getting grants to do specific projects with transfer students, but when the money is gone, the work doesn't continue.**

**Question: How do we create structures for transfer that are sustainable?**

### Tips for your challenge of practice share:

- Consultancies tend to be less productive when you are already well on your way to resolving your idea or issue. To get the most out of this exercise, bring an issue that still challenges your team. It is riskier to do, but we guarantee you will learn more.
- Questions that can be answered with a "yes" or "no" generally provide less feedback. Try to pose a question on the challenge that gets to the heart of the matter.

We will bring your team back to the main room for a 5 min break at 2:25 PM ET & teleport your team to your peer group room around 2:30 PM ET.

## Part II | Peer Consultancy Think Tank Quickfire | 60 mins | 20 mins Per Team

Your team will teleport to a room with two other teams. There will be three consultancy rounds

- There will be three teams in each room. Each team will have a total of 20 mins.
  - Please decide the order. Timekeepers, be prepared to keep time.
  - Notetakers can use the space provided below or another document; please ensure that notes taken are uploaded to your team drive for reference.
- For each round, spend the first 2-3 mins of the time sharing the lesson learned
- Provide 1-2 mins for the presenting team to answer questions from the group on their reflection
- Next, the presenting team should share their **challenge of practice** | 1-2mins.
- Spend the rest of the round discussing the challenge as a group.
- Wrap up and move to the next team after 20 mins. Repeat for each team.

### Peer Consultancy Tips

- Peer consultants ask questions to clarify context, push teams' thinking, and consider new ideas.
- Below are some types of questions you could ask. This list is by no means exhaustive but may help you frame your thoughts.
  - **Clarifying questions**
    - Please tell us more about...

- How have you involved stakeholders?
- Can you clarify what you mean by....
- **Probing questions**
  - Have you considered...
  - One thing I wonder is... What do you think?
  - Why do you think this challenge is occurring?
- **Generating a solution/idea:**
  - From what I hear, a key issue is....
  - What assumptions appear to be underpinning this challenge?
  - On our campus, we tried... in a similar situation. Here is what happened.
  - I wonder if we can reframe the challenge as...

### Part III | Around 3:30 PM ET We Will Send You Back to Your Team Room

- Spend 5 mins sharing what you learned or any changes you may want to make based on the insights you gained from your peers.
- Spend 10 mins confirming next steps and action items for your STEP so far.

#### REMINDERS:

- STIP final draft will be due in your team folder or sent to Heather by **EOD on Oct. 6**
- Please have the presidents and cabinet endorsement of STIP by Oct. 6
- Aspen will notify nominated presidents about the opportunity to present on Oct. 27, by Oct. 10 and send prep materials to you and your president.

#### OPTIONAL NEXT STEPS

- **PMs** | Submit your advising activity draft by **EOD Aug. 25**, to be in the drawing for the final TI mini-grant
- **Teams** | Transfer Lounge Office Hours | Sept. 1 & 22, from 2-3:30 pm ET
- **Teams** | Transfer Think Tank | Partnership & Prep for Launch | **Sept. 29, from 2-4 PM ET** |
- **PM & Cabinet Leads** | STIP Submission | Final STIP endorsed by your presidents and cabinet and uploaded to your team folder by Oct. 6

*Team Notes:*

- 

*Lesson Learned:*

-

*Challenge of Practice:*

-

# Aspen-AASCU Intensive: Announcement Toolkit

## Overview:

In November 2021, the Aspen Institute College Excellence Program (Aspen) and American Association of State Colleges and Universities (AASCU) launched the [Transfer Student Success Intensive](#), a year-long initiative designed to support partnerships between community colleges and four-year institutions working to accelerate transfer reform. Aspen and AASCU are excited to support your institution's participation in this project and are grateful for your dedication to equity and student success.

To help your institution highlight this distinction on campus, in your community, and across the field, we encourage you to use this announcement toolkit, which includes social media content, newsletter copy, and a customizable press release. Aspen will be spotlighting the Transfer Intensive using the #TransferIntensive during the week of Jan 24th in celebration of the new year! We would love your teams involved in the initiative this month and all year long if they are interested!

To reinforce the cross-institutional support and momentum for this initiative, we also encourage you to use the #TransferIntensive hashtag across all social posts. If you have any questions or would like to discuss additional communications opportunities, please email Heather Adams at [Heather.Adams@aspeninstitute.org](mailto:Heather.Adams@aspeninstitute.org).

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## Twitter:

- How are we advancing equity & student success at **[INSERT INSTITUTION]**? We're doing our part by joining the inaugural cohort of the @AspenHigherEd & @AASCU #TransferIntensive. What will it entail? Click the link: <https://highered.aspeninstitute.org/transfer-intensive/> @AscendiumEP
- 80% of students enter #comm\_college intending to earn a bachelor's degree, but just 15% do after 6 years. W/ the support of @AscendiumEP, @AspenHigherEd & @AASCU launched the #TransferIntensive to change the reality & we're proud to do our part: <https://highered.aspeninstitute.org/transfer-intensive/>
- Accelerating #transfer reform is a team effort. That's why we're excited to partner w/ **[INSERT INSTITUTIONAL PARTNER]** in the 1st #TransferIntensive, joining 29 other teams of community colleges AND 4-year institutions from across the US. Learn more: <https://highered.aspeninstitute.org/transfer-intensive/>
- Nearly 100 institutions from 25 states applied to join the @AspenHigherEd, @AASCU, & @AscendiumEP #TransferIntensive, leveling the playing field for transfer. We're joining the cause by participating in the inaugural cohort! See how we'll do our part: <https://highered.aspeninstitute.org/transfer-intensive/>

## LinkedIn:

- 30 institutional teams of community college and four-year partners, spanning 20 states, are uniting to accelerate transfer reform in a national effort organized by the @Aspen Institute College Excellence Program, @American Association of State Colleges and Universities (AASCU) & @Ascendium Education Group. We're glad to be part of it, joining **[INSERT INSTITUTIONAL PARTNER]** in the inaugural cohorts of the Transfer Student Success and Equity Intensive. #TransferIntensive Curious what we'll be up to? <https://highered.aspeninstitute.org/transfer-intensive/>
- Students entering **[INSERT INSTITUTION]** and other community colleges across the country intend to earn bachelor's degrees, but too few complete the journey. We're committing to change that reality by joining the @Aspen Institute College Excellence Program and @American Association of State Colleges and Universities (AASCU) Transfer Student Success and Equity Intensive, supported by @Ascendium Education Group. #TransferIntensive More on the intensive below: <https://highered.aspeninstitute.org/transfer-intensive/>

- How can we make further progress toward the goal of equity & student success? We've decided to join forces with [INSERT INSTITUTIONAL PARTNER] and double down on our efforts to accelerate transfer reform by participating in the @Aspen Institute College Excellence Program and @American Association of State Colleges and Universities (AASCU) Transfer Student Success and Equity Intensive, made possible by @Ascendium Education Group. Learn more about the brand-new initiative below: <https://highered.aspeninstitute.org/transfer-intensive/>
- We know how important it is to level the playing field for transfer and ensure all students have an opportunity to pursue a bachelor's degree. We're delighted to share we are joining 67 other community colleges and four-year institutions from across the country in the Transfer Student Success and Equity Intensive, a year-long effort devoted to that goal. What steps will we take as a part of the Intensive? #TransferIntensive Learn more below: <https://highered.aspeninstitute.org/transfer-intensive/>

### Shareables:

*\*We encourage you to pair the below graphics alongside the suggested promotional copy or as standalone assets. Please note the map shareable is configured for Facebook and LinkedIn.*

- [Fast Facts: Transfer Student Success Intensive](#)
- [Announcement: Transfer Student Success Intensive](#)
- [Map: Transfer Student Success Institutional Teams](#) (for Facebook/LinkedIn)

### E-Blast/Newsletter Copy:

At [INSERT INSTITUTION], increasing community college transfer rates and providing those students with the resources and supports they need to excel is essential to our vision of student success. This month, we took a significant step to realizing that vision as one of members of the [Transfer Student Success and Equity Intensive](#), a national effort to accelerate transfer reform. Organized by the [Aspen Institute College Excellence Program](#) and [American Association of State Colleges and Universities \(AASCU\)](#), the Transfer Student Success and Equity Intensive represents a unique opportunity for community colleges and four-year institutions to come together to develop and implement policies and practices that ensure equitable access, retention, and graduation outcomes. We're proud to partner with [INSERT INSTITUTIONAL PARTNER] in this work over the next year and increase our collaboration to ensure students in the region are well-prepared to excel in the local economy. For more information about this opportunity and to learn about the other 29 institutional teams, visit [this link](#). Make sure to share the news across your networks!

### Press Release:

**[INSERT INSTITUTION]** Joins the Inaugural Cohorts of the National Transfer Student Success and Equity Intensive

*[INSERT INSTITUTION] joins 29 other community college and four-year institutional teams from across the country to accelerate transfer reform*

**[CITY, STATE] [DATELINE]** Nearly two years into the pandemic, community colleges and four-year colleges and universities across the country face an imperative to ensure students from communities disproportionately impacted by the pandemic can access, persist through, and realize their higher education aspirations. This year, [INSERT INSTITUTION] embraced the challenge by coming together with [INSERT INSTITUTIONAL PARTNER] to accelerate transfer reform as a part of the Transfer Student Success and Equity Intensive. The [INSERT INSTITUTION] team will join the first-ever cohorts of the Aspen-AASCU Intensive: Transfer Student Success and Equity, comprised of 29 other two and four-year partnerships from across the country.

The Intensive, funded with the generous support of Ascendium Education Philanthropy, will span the next year, through October 2022. Teams will receive one-on-one consulting with experts and work to identify, collect, understand, and utilize critical transfer outcomes and equity data. As part of this community of practice, teams will attend monthly sessions focused on co-creating practices and policies to improve transfer student success and equity.

*[INSERT QUOTE FROM INSTITUTIONAL PRESIDENT, HIGHLIGHTING IMPACT OF BEING SELECTED]*

[INSERT INSTITUTIONS] will join 67 of their peers in this effort, selected from an applicant pool of 97 institutions and 3 systems from 25 states. Together, these cohorts account for a total enrollment of nearly a million undergraduate students, offering the promise of significant impact.

For [INSERT INSTITUTION], participation in the Transfer Student Success Intensive represents an important extension of efforts to increase community college transfer and bachelor's degree attainment. These include [INSERT TRANSFER INITIATIVES].

*[INSERT QUOTE FROM PROJECT MANAGER ON WHAT THE INSTITUTION HOPES TO ACCOMPLISH THROUGH PARTICIPATION IN THE TRANSFER INTENSIVE]*

For a full list of institutions selected for the first two cohorts of the Transfer Student Success Intensive and details about the initiative, please visit <https://highered.aspeninstitute.org/transfer-intensive/>.

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**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 growing population of students of color and students from low-income backgrounds on American campuses. For more information, visit [www.highered.aspeninstitute.org](http://www.highered.aspeninstitute.org)

**The American Association of State Colleges and Universities (AASCU) Division of Academic Innovation and Transformation (AIT)** supports member institutions in their mission to prepare students to lead productive and fulfilling lives. Driven by an understanding that today's colleges and universities need to prepare students for work, life and citizenship in local, national, and global contexts, AIT's programming focuses on civic engagement, international education, student success and teacher education. For more information, visit <https://www.aascu.org/AcademicInnovationandTransformation/>

## Transfer Practice Evaluation Discussion | Notes | 3:05-3:25pm ET | 20-30mins

**Spend 20-30** mins discussing the evaluation survey results. Team facilitators will take notes on this team worksheet during the session. **Please nominate a team member who will be responsible for the report-out in the next session's full-team debrief.**

Where did your team differ?

- Some responses were related to not knowing what existed at the partner institution
- This is also an early indicator/opportunity to better engage
- Specific to data availability, personnel, advising resources
- Data piece: know what we share but do not have all of the information--may be able to strategize better
- How to braid activities together so the experience for students is more seamless
- Outcomes of the evaluation may signal differences in roles and familiarity with how to answer the questions

Where did your team have consensus? Why?

- Consensus largely around the same starting point

What are your partnership's strengths?

- Degree of data sharing and accessibility but more limited on the level of inquiry
- The depth of the relationships across the institutions--provides for exchange of critical information--this could use some expansion
  - Personal relationships help drive these
- A lot of initiatives across institutions are occurring

What areas for opportunities exist?

- Layering on more inquiry around the data when in conversation internally and across institutions
- Broadening the relationships across institutions to help momentum on transfer-specific conversations
  - How to institutionalize those personal
  - Balancing the organic with formalization
- The initiatives referenced above are not coordinated
- Determining shared outcomes and goals



Is there anything from the practice evaluation that needs immediate attention from your presidents?

- The interest of shared goals/outcomes
- Adopting a more transparent and systems point of view

### Current & Future State of Transfer | Notes | 3:25-4:00pm ET

Team facilitators will begin these worksheets in the team breakout sessions on November 18th.

Team Project Managers (PMs) should complete the worksheet after a follow-up meeting with the core team members to ensure consensus if necessary.

Please email your completed worksheet or the link to your completed worksheet to Jaime McCarthy (jaimemccarthy@aspeninstitute.org) by December 17, 2021.

**A. High-Impact Opportunities:** What ~3-5 areas do the team want to prioritize based on their evaluation (i.e. what do they think could have the biggest impact)?

|   |  |   |  |  |
|---|--|---|--|--|
| Opportunity 1:<br>Build shared knowledge of where we are now fully--that this information gets shared | Opportunity 2:<br>Identify & dedicate time to build knowledge; create more intentional engagement on a regular basis | Opportunity 3:<br>Provide regular time to review data/share metrics | Opportunity 4:<br>Understand how the transfer student experience fits into strategic brand | Opportunity 5:<br>Understand and identify which policies makes sense for improving transfer across the two |
|---|--|---|--|--|

**B.** Parse out the “advanced” state components of these high-impact opportunities. What would you need to do within these areas to reach the advanced state?

|                |                |                |                |                |
|----------------|----------------|----------------|----------------|----------------|
| Opportunity 1: | Opportunity 2: | Opportunity 3: | Opportunity 4: | Opportunity 5: |
|----------------|----------------|----------------|----------------|----------------|

**C.** Write ~3-5 sentences that capture the “current state” of practice for your partnership.



Current State of Our Partnership's Transfer Practice:

*This might capture the way your transfer students currently experience your partnership; the attitudes, knowledge, and roles your faculty, staff, administrators have regarding transfer; the levels of investment of your partner institutions. Include both assets and challenges.*

D. Write ~3-5 sentences that capture the desired "future state" of practice for your partnership if you were to address the needs you identified in question one.

Current State of Our Partnership's Transfer Practice:

*This statement captures what happens after reform. How will your transfer students experience your strengthened partnership? What attitudes, knowledge, and roles will faculty, staff, administrators have now that they didn't have before? What investments have you made? Include your assets and what challenges might remain.*

### Team Debrief and Key Takeaways from Session | 4:00-4:20pm ET | 20 min

Teams will be brought together with their institution presidents and the president facilitator. Take 20 minutes to debrief as a team about learnings from today's session. If you haven't already, teams should designate one team member responsible for the report-out.

Potential questions:

- From presidents:
  - Based on your discussion of the "why" and the "what" of transfer, what do the president/s want the team to consider as they identify practice reforms?
  - What are some ways you can support your team from the presidency?
  - What data and information do the president/s need from the team to flesh out the why and the what of their strategic transfer impact plan?
  
- From the team:
  - What are the top 2-3 high-impact opportunities that you identified through the practice evaluation?
  - Is there anything from the practice evaluation that needs immediate attention?

Notes:



|                                   |
|-----------------------------------|
| Key takeaways from the presidents |
|                                   |

|  |
|--|
| One to three overall takeaways the team has from the day |
|  |

## Transfer Intensive Next Steps

*Check the boxes when your team has completed the task.*

### Next steps for the presidents:

- Meet with your partner president(s) at least once before the March 31, 2022 session to build on the conversation started on November 18 and finalize your shared vision with your teams in the March session. Your team's designated project managers will work with your EAs to coordinate the meeting.
- Attend the next Transfer Intensive session Meet on January 28, 2022 (2-4pm ET), to do a deep dive into transfer data with your team

### Next steps for the teams:

- Project Managers please complete the worksheet started on November 18 and submit completed worksheet to Jaime McCarthy at [jaime.mccarthy@aspeninstitute.org](mailto:jaime.mccarthy@aspeninstitute.org) by December 17, 2021.
  - You may need a follow up meeting with your team if you did not fill out the full worksheet on Nov. 18.
- Work with Institutional Research (or other institutional data analysts) to gather transfer data for institutional transfer data template by December 17, 2021.
  - PMs will receive needed data lists in November and data templates and instructions for filling them out in the PM onboarding on December 2, 2021.
- Meet on December 2 from 2-4pm for the project managers on-boarding and series overview
- Work with your presidents' EAs to coordinate a meeting between the team presidents at least once before the March 31, 2022 session to finalize their vision to share with the team at the March session.
  - See PM guide for guiding questions.



- Meet on January 28, 2022, to do a deep dive into the data with their teams



# 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.



Find strategies and best practices in [Transfer Advising: Sharpening a Powerful Tool for College Success and Equity.](#)

## 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:

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# 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

# TRANSFER ADVISING STRATEGY PLANNING TOOL Completed Example

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- ☑ 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 programs
- 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

**From:** [Jaime McCarthy](#) on behalf of [CFP Transfer](#)

**To:** [Heather Adams](#); [Jaime McCarthy](#); [Tania LaViolet](#); [Felice Nudelman](#); [Looney, Shannon](#); [Terry Brown](#); [Millicent Bender](#); [Tess Henthorne](#); [Robert Curry](#); [Kevin Walthers](#); [Yvonne Teniente](#); [rreaston@actx.edu](#); [rdloweryhart@actx.edu](#); [ttclunis](#); [allen.bedford@bemidjistate.edu](#); [bonner.karger@bemidjistate.edu](#); [dan.voss@bemidjistate.edu](#); [faith.hensrud@bemidjistate.edu](#); [cje@calpoly.edu](#); [csunata@calpoly.edu](#); [bamerrit@calpoly.edu](#); [mfurlong@calpoly.edu](#); [tharris@calpoly.edu](#); [jarmstro@calpoly.edu](#); [rcostigan@ccri.edu](#); [jwilkie@ccri.edu](#); [sluzzisneesby@ccri.edu](#); [tyalexander@ccri.edu](#); [meghanhughes@ccri.edu](#); [smarcelynas@commnet.edu](#); [BobbyFleischman@ferris.edu](#); [DawnSchavey@ferris.edu](#); [JenniferHegenauer@ferris.edu](#); [JocelynGoheen@ferris.edu](#); [MandySeiferlein@ferris.edu](#); [SteveReifert@ferris.edu](#); [AMulvihill@GatewayCT.edu](#); [mkosinski@gwcc.commmnet.edu](#); [wbrown@gwcc.commmnet.edu](#); [amandakruzona@grcc.edu](#); [billpink@grcc.edu](#); [brianknetl@grcc.edu](#); [emullen@grcc.edu](#); [ebusscher@grcc.edu](#); [mnovakoski@grcc.edu](#); [sheilajones@grcc.edu](#); [valeriebutterfield@grcc.edu](#); [ajclarke@gtcc.edu](#); [bjpitonzo@gtcc.edu](#); [crhodes2@gtcc.edu](#); [dbwalsh@gtcc.edu](#); [stturner@gtcc.edu](#); [alawrence@lander.edu](#); [lwillis@lander.edu](#); [cosentino@lander.edu](#); [sjones@lander.edu](#); [kcalliham@lander.edu](#); [amy.gort@metrostare.edu](#); [carrie.carroll@metrostare.edu](#); [terri.topness@metrostare.edu](#); [ginny.arthur@metrostare.edu](#); [pgiarraf@mdc.edu](#); [janzalot@mdc.edu](#); [kvazquez@mdc.edu](#); [mpumarie@mdc.edu](#); [Charlot\\_Pascale](#); [gail.okane@minneapolis.edu](#); [heidi.aldes@minneapolis.edu](#); [Merry.Schmitt@minneapolis.edu](#); [thomas.williamson@minneapolis.edu](#); [sharon.pierce@minneapolis.edu](#); [kate.cowley@vcc.edu](#); [allison.geisler@itascacc.edu](#); [michael.raich@nhed.edu](#); [bart.johnson@itascacc.edu](#); [bradley.krasaway@rainyriver.edu](#); [wheinema@northshore.edu](#); [adefusco@northshore.edu](#); [bstamm@northshore.edu](#); [ediaz@northshore.edu](#); [screamer@northshore.edu](#); [daoneill@northshore.edu](#); [anne.kamps@nwtc.edu](#); [colleen.simpson@nwtc.edu](#); [jeff.rafn@nwtc.edu](#); [Kathryn.Rogalski@nwtc.edu](#); [Mark.franks@nwtc.edu](#); [pbeaudin@necc.mass.edu](#); [msunday@necc.mass.edu](#); [lglen@necc.mass.edu](#); [btaga@olympic.edu](#); [ewilliamsbryant@olympic.edu](#); [jglasier@olympic.edu](#); [mcockroft@olympic.edu](#); [mwalz@olympic.edu](#); [mcavalluzzi@olympic.edu](#); [gilliam.k@ptc.edu](#); [Paguntalan.C@ptc.edu](#); [rivers.he@ptc.edu](#); [fewox.k@ptc.edu](#); [lindsay.j@ptc.edu](#); [fsanchez@ric.edu](#); [htate@ric.edu](#); [hshadojan@ric.edu](#); [mbrophy@ric.edu](#); [shannon.gilkey@riopc.edu](#); [aheveydoucette@salemstate.edu](#); [bgalinski@salemstate.edu](#); [amcdonough@salemstate.edu](#); [jkeenan@salemstate.edu](#); [prezantr1@southernct.edu](#); [milburnt1@southernct.edu](#); [flynnc15@southernct.edu](#); [joe@southernct.edu](#); [edstromj1@southernct.edu](#); [murphycm@buffalostate.edu](#); [conwayks@buffalostate.edu](#); [bauerce@buffalostate.edu](#); [loretodp@buffalostate.edu](#); [struebel@ecc.edu](#); [tsegai@ecc.edu](#); [Reuter@ecc.edu](#); [kbrenna1@citadel.edu](#); [gwalter1@citadel.edu](#); [jfrishbe@citadel.edu](#); [Jrobin21@citadel.edu](#); [Sselden@citadel.edu](#); [Timothy.Brown@tridenttech.edu](#); [Catharine.Almquist@tridenttech.edu](#); [mary.thornley@tridenttech.edu](#); [Michelle.Caya@tridenttech.edu](#); [Shakitha.Barner@tridenttech.edu](#); [jslee5@uncg.edu](#); [dastorrs@uncg.edu](#); [chancellor@uncg.edu](#); [slraynor@uncg.edu](#); [Pamela.Cavanaugh@ucf.edu](#); [Michael.Johnson@ucf.edu](#); [Theodorea.Berry@ucf.edu](#); [Alexander.Cartwright@ucf.edu](#); [dsuags530@uri.edu](#); [deanlibutti@uri.edu](#); [marc.parlange@uri.edu](#); [jhumphrey@uri.edu](#); [lbeauvais@uri.edu](#); [rooney@uri.edu](#); [meyera@uwgb.edu](#); [alexandm@uwgb.edu](#); [jonesj@uwgb.edu](#); [burnsk@uwgb.edu](#); [ccopelin@wtamu.edu](#); [bjjohnson@wtamu.edu](#); [jbaylor@wtamu.edu](#); [kestes@wtamu.edu](#); [wwendler@wtamu.edu](#); [carbajal@wwwu.edu](#); [hillh9@wwwu.edu](#); [gaffnej@wwwu.edu](#); [mclachm@wwwu.edu](#); [walzm@wwwu.edu](#); [squirer@wwwu.edu](#); [sotos@wwwu.edu](#); [randhaws@wwwu.edu](#); [tanya.armstrong@ucf.edu](#); [angelia.smith@ucf.edu](#); [bernard.huggins@ucf.edu](#); [jennifer.sumner@ucf.edu](#); [ryan.goodwin@ucf.edu](#); [harrison.oonge@ucf.edu](#); [patricia.ramsey@ucf.edu](#); [Kara Parkes](#); [bstevens@ric.edu](#); [vleathers@wtamu.edu](#)

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**Subject:** Aspen-AASCU Transfer Intensive: Transforming Culture

**Start:** Thursday, August 25, 2022 11:00:00 AM

**End:** Thursday, August 25, 2022 1:00:00 PM

**Location:** <https://aspeninst.zoom.us/j/96304865196?from=addon>

Dear Intensive Cohort 1 participants,

Thank you for holding 2:00-4:00 PM EST on Thursday, August 25, for “Transforming Culture: Transfer Receptive Campus Communities”. As mentioned during our February session, we are shifting this date up and moving the Aug. 25 Transfer Think Tank to the September 29 date. This session is still optional for your presidents.

During this session, your teams will identify opportunities to advance a transfer receptive culture and foster transfer students’ sense of belonging.

If they are not already a member of your core team, we ask that you bring a student affairs and/or student success representative from your institution.

This hold will be updated with materials ahead of the session.

If you have questions, please contact the Aspen team at [cep.transfer@aspeninstitute.org](mailto:cep.transfer@aspeninstitute.org) <<mailto:cep.transfer@aspeninstitute.org>> .

Heather and Jaime

Aspen-AASCU Transfer Intensive

Heather Adams is inviting you to a scheduled Zoom meeting.

Join Zoom Meeting

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162.255.36.11 (US East)

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213.244.140.110 (Germany)

103.122.166.55 (Australia Sydney)

103.122.167.55 (Australia Melbourne)

64.211.144.160 (Brazil)

69.174.57.160 (Canada Toronto)

65.39.152.160 (Canada Vancouver)

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