HIGHER EDUCATION COORDINATING COMMISSION

2022 REPORT TO THE OREGON LEGISLATURE: 2021 Transfer Portal Investment

Photo courtesy Mount Hood Community College

December 8, 2022
Offices of Community Colleges and Workforce Development and Academic Policy and Authorization
Higher Education Coordinating Commission

TABLE OF CONTENTS

EXECUTIVE SUMMARY

In 2021 the Oregon Legislature invested approximately $1.4 million to be used to foster transfer student pathways, supporting Common Course Numbering and the identification of resources needed for the development of an electronic system ´ 7 U D Q V I H U Z R U N ´ for dissemination of information regarding foundational curriculum (also known as the Core Transfer Maps) and unified statewide transfer agreements (also known as Major Transfer Maps). through The Transfer Portal funding builds on the work of ORS 350.429[1] to fund the research and consulting necessary for an actionable plan for future technology investments to effectively communicate the new transfer pathways to students.

OVERVIEW

For community college students transferring to a university, clearly and accurately communicating pathways and common course numbering is a high need identified by all interested parties. Students find it difficult to make course taking decisions informed by how those credits will transfer and and are often subject to decisions that they do not understand. How credits articulated to degree completion often lacks uniformity and transparency. There is not a centralized place where a student can understand how a completed course would transfer depending on the major and the receiving institution. Sometimes, how credits transfer is at the discretion of individual faculty members or departments. In addition, some higher education institutions may not articulate credits on a transfer V W X G H Q W ¶ V after a student enrolls. Finally, how credits transfer is not fixed and may change over time. How timely changes are communicated internally and externally varies widely depending on the institution. Consequently, the Oregon Legislature has passed several laws that address these issues.

Legislation

In 2011, the Oregon Legislature passed House Bill 3512, codified in Oregon Revised Statute (ORS) 350.395[2], requiring the HECC to create standards related to the ability of students to apply credits earned through courses of study at community colleges to baccalaureate degrees awarded by state institutions of higher education (hereafter, ´ 7 U D Q V I H U 6 W X G H Q W % L O O R I 5 L J K W V ´ The Transfer Student Bill of Rights reuired the establishment of methods to resolve credit transfer issues, which induces the development of uniform, statewide credit transfer pathways. Transfer students often find that while their transfer degree helps them meet the admission standard of the receiving university, their general education and major course of study credits are accepted only on a course by-course, institution-by-institution basis.

Oregon has instituted several transfer degrees and modules during recent decades, including the 90-credit Associate of Arts Oregon Transfer, 45-credit Oregon Transfer Module, and Associate of Science Oregon Transfer. In addition, many institutions have developed articulated agreements among themselves to facilitate successful credit transfer for students.

ORS 350.400 to 350.12 and ORS 350.423 to 350.429[3], further attempt to mitigate credit loss by requiring community colleges and public universities to establish major transfer maps for the most common majors and to establish common course numbering for the most frequently transferred courses. The ongoing work identified in these statutes is intended to create clearly articulated, universally transferrable pathways in high demand majors.

---

[1] Oregon Revised Statute 350- https://www.oregonlegislature.gov/bills_laws/ors/ors350.html
[2] Oregon Revised Statute 350.395- ORS 350.395 Transfer Student Bill of Rights and Responsibilities (public.law)
[3] Oregon Revised Statute 350- https://www.oregonlegislature.gov/bills_laws/ors/ors350.html

To help with these issues, ORS 350.423 requires all public post-secondary institutions of education to adopt systems and accept transfer of academic credits subject to a common course numbering system earned at other Oregon public, post-secondary institutions of education.

PHASE I: BUSINESS CASE FOR ONLINE TRANSFER SYSTEM

In 2021 the Oregon Legislature invested approximately $1.4 million to be used to foster transfer student pathways, supporting Common Course Numbering and the identification of resources needed for the development of an electronic system ´ 7 U D Q V I H U Z R U N ' L V S H for dissemination of information regarding foundational curriculum (also known as the Core Transfer Maps) and unified statewide transfer agreements (also known as Major Transfer Maps)

On August 3, 2022, HECC issued a Request for Proposals (RFP) seeking a business analysis services firm to perform an evaluation and develop a business case for an online system that establishes ways to resolve credit transfer issues for a statewide credit transfer pathway system. The length of the contract was estimated to be 180 days, commencing as soon as possible. After review, the contract was awarded to EdNorthwest, which agreed to perform the Services in two phases: 1. Develop an Oregon Higher Education Credit Transfer Environment Assessment, and 2. Research and Develop a Plan to Create the Online Transfer Portal. Surveys for Phase I closed at the end of August 2022 and findings were processed in September. EdNorthwest presented their findings to HECC staff on September 27, 2022. Afterwards, staff requested that EdNorthwest conduct research on states that have incentivized institutional participation (through legislation, funding, or other measures) for participation in a transfer portal or similar website. This request was addressed via a memo received on November 4, 2022.

The D J H Q Information Technology Strategic Plan ´ , 7 6 3 that outlines the D J H Q Technology investment and Modernization Project efforts. For the Transfer Portal, the ITSP recommendations include the use of a Low-Code Application Platform, coupled with a robust services layer. This approach reduces the maintenance overhead of a technology platform; allows for lightweight application development; provides a foundation for an enterprise data schema and model that best facilitates cross office data analysis; and addresses technology team resource constraints.

Description of project phases from EdNorthwest:

> Phase I: Develop an Oregon Higher Education Credit Transfer Environment Assessment
>
> EdNorthwest assembled a team of researchers with experience working with post-secondary administrators, faculty, staff, and students to lead Phase I to develop an Oregon Higher Education Credits Transfer Environment Assessment. Phase I Deliverables:
>
> 1. Meeting with HECC staff and key affinity groups.
>   a. Held Initial focus group and reviewed Survey with HECC staff and key affinity groups
> 2. Survey
> 3. Follow-up meetings with focus groups
> 4. Presentation (with Findings from Phase II), and technical memo regarding the Survey and focus group data findings to HECC staff. Technical memo included all findings from

[4] Oregon Revised Statute 350- https://www.oregonlegislature.gov/bills_laws/ors/ors350.html

the survey in table format and survey and focus group methods (See Appendix E for the slide deck.)

Phase II: Research and Develop a Plan to Create the Online Transfer Portal

Simultaneous to Phase I, EdNorthwest conducted virtual interviews with representatives from technology firms (e.g., Transferology) and state postsecondary administrators and technology experts in five states with operational transfer portals. The interviews highlighted a range of technical issues related to each V W D W H ¶ V H[S H U L H Q F H in designing and implementing their respective online transfer portals. EdNorthwest conducted an analysis of interview results and developed a set of recommendations to guide the organizational and technical content of the HECC's Online Transfer Portal (see Appendix E). Phase II Deliverables:

1. Interviews with technology platforms and agencies of other states with transfer portals.
2. Presentation (with findings from Phase I), and Phase II memo analyzing the market and other V W D W H ¶ V new data, including recommendations and range of costs.
3. Identified further legislation for mandating implementation of the Online Transfer Portal. (This last point was not included with initial deliverables. HECC staff requested this be added on November 8, 2022; see Appendix D.)

On September 26, 2022, EdNorthwest submitted contract deliverables via three memos:

- Memo 1. State and Vendor Interview Findings
- Memo 2. Oregon Staff Focus Group Findings
- Memo 3. College Student Findings

The following information represents a summary of each of these memos.

Memo I: State and Vendor Interview Findings (Appendix A)

From July through September 2022, Education Northwest researchers conducted interviews with postsecondary transfer administrators in Arizona, California, Minnesota, New Jersey, and South Carolina. Three states ³ Arizona, California, and New Jersey ³ operate ´ K R P H J U R Z Q ´ V\VWHPV developed and maintained by state employees. The other two states ³ Minnesota and South Carolina ³ contract with a third-party vendor to maintain all or part of their transfer website. These vendors include CollegeSource, which operates Transferology® in Minnesota, and AcademyOne, which operates South & D U R O L Q D ¶ V

Multiple meetings were also conducted with representatives from CollegeSource, AcademyOne, and EAB (a third vendor offering transfer support at the institution level) to assess proprietary platform capabilities, costs, and benefits. This information is incorporated throughout the memo to provide additional context.

Memo I summarizes participant perspectives in five main areas related to operating a statewide transfer website: rationale, components, development, costs, and benefits. Note: the term ´ transfer website µ was used throughout this memo, rather than ´ transfer portal, µ since that is the term preferred by the five states included in this study. Figure 1 outlines State costs for transfer websites in the five states interviewed.

Figure 1: State costs for transfer website

State	Staff FTE	Annual budget	Funding sources	Notes
Arizona	5.0	≈$800,000	$200K state/$600K sites	State-developed site
California	5.0	≈$850,000	System offices pay 1/3; colleges pay based on size	State-developed site; Accenture technology support
Minnesota	3.0	$412,000	State funding	State-developed website with CollegeSource managing course equivalency
New Jersey	3.0	Not provided	Fee based with colleges paying based on in- and out-transfer rate	State-developed site
South Carolina	2.0	≈$500,000	State funding	AcademyOne managed

Analysis of state transfer websites indicated that Oregon has several options in designing a transfer portal. Each approach can be tailored to offer a range of functionalities and comes with differing development and maintenance costs. Options are arranged in order of increasing cost (inclusive of start-up and long-term maintenance).

Option 1: Redesign the existing state website

Adapting the existing OR Transfer Compass website to have a simpler, student-facing design could potentially offer the most cost-efficient approach, when accounting for build-out and long-term maintenance.[5] While the State could face substantial front-end costs to design the website, once created, students seeking information on course equivalencies or institutional profiles would use embedded links and be directed to individual college webpages. Site build out would be coordinated by HECC staff, who would convene stakeholders to inform the selection of website components. Efforts also could be undertaken to coordinate with institutional staff members on the creation of comparable information within their websites and the timing for updating course equivalencies and profiles.

Potential Benefits

- Existing HECC site content may be repurposed
- May limit resource duplication
- Student information would not need to be collected between statewide site and institutional sites/tools
- Little or no additional costs to institutions

Potential Drawbacks

- Option does not align with staff and student requests for a centralized transfer hub and statewide course equivalency tool
- Students would need to visit individual college websites to explore course equivalencies and other resources

[5] Note that HECC will need to quantify the cost of developing a student-facing site and staff time necessary for system-wide coordination and site maintenance in the long term. It may be that start-up costs will be more expensive than a vendor-developed solution, though long-term cost savings may bring down overall expenditures. Since site components will affect cost, additional information on site configuration and functionality is needed

- HECC would potentially incur substantial start-up costs to build out the new site
- Website development could prolong rollout

Option 2: Contract with a third party

Outsourcing site development and maintenance could offer Oregon options for expanding site functionality to centralize access for out-of-state students and additional capabilities. Vendors currently offer proprietary transfer portal solutions used in numerous states, and their desire to break into the Oregon market offers HECC options for securing competitive pricing. To assess cost, three leading vendors, AcademyOne, CollegeSource, and EAB provided ballpark estimates of producing a transfer portal, with a set of basic options that Oregon stakeholders stated as essential. While vendors would be responsible for portal creation and maintenance, one or more HECC staff members would need to coordinate site development and use, though vendors believed this work could be performed without hiring additional individuals.

Potential Benefits

- Modules already exist to address many stakeholder identified requests for a statewide course equivalency tool and resources
- Modules have been tested and are likely to have few technical issues
- Students nationwide can explore Oregon institutions and course equivalencies
- Existing HECC staff members would coordinate portal operations with the vendor
- Portal launch within six months or less following contract award

Potential Drawbacks

- New site licensing and maintenance costs, which would be borne by state and/or institutions[6]
- Site functionality is limited to existing modules, changes would require additional cost
- Student information would be shared with vendor
- Potential for duplication of transfer resources maintained by institutions

Option 3: Design and maintain a state administered website

´Home grown¡ software solutions will provide Oregon with options for tailoring site capacities to meet diverse student, institutional, and policymaker needs. This approach will likely introduce substantial new staffing and technology costs. This would include hiring programmers to build out the new portal and a minimum of 3.0 FTE staff members to compile and curate course equivalency and institutional information.

Potential Benefits

- Ability to tailor to diverse student, institutional, and policymaker needs
- Control over site design, contents, and operation
- Strengthen state and institutional relationships
- Student information would not be shared with vendor

Potential Drawbacks

- Site creation will require a substantial investment of resources and time
- New staff salaries/benefits and technology costs, borne by state and/or institutions
- Launch may be delayed a year or more

[6] Note that because some Oregon institutions are already contracting with CollegeSource for its TES and Transferology tools, cost savings could occur if the state were to select CollegeSource as its provider.

- Course equivalency checks limited to Oregon sending and receiving institutions

Memo II: Oregon Staff Focus Group Findings (Appendix B)

In July and August 2022, Education Northwest researchers conducted 14 focus groups with 88 higher education and K-12 staff members to gather information about the perceived purpose and direction of a statewide credit transfer portal. This included 10 focus groups with community college and public university staff members (66 participants), two focus groups with private college and university staff members (10 participants), and two focus groups with K-12 staff members (12 participants).

All seven public universities in Oregon were represented in the focus groups, along with 13 of the 17 community colleges, nine private colleges/universities, and eight schools/districts/education service districts.

Memo II summarizes [illegible] questions about the overall purpose of a statewide transfer portal and how it could be used; specific components that should be included in a portal, including a course equivalency tool and additional resources; and what it would take to develop and maintain the portal.

All participants supported the creation of a one-stop transfer website to centralize information and assist students at various points in their education journey in navigating what can be a confusing process. The need for inclusivity was voiced by stakeholders at all levels given that students may follow differing paths in pursuing a postsecondary education. Key findings include:

Overall website purpose and use

- Community college and university participants emphasized the need for a simple, accessible website to serve as a central information hub that students can use to assess their credit equivalencies and plan their degree pathway.
- K-12 participants requested that a website offer accurate information about how college credits are accepted across [illegible] Oregon education institutions.
- Private college and university participants voiced the need for students to be able to compare degree pathways at all institutions across the state so that students understand the full set of postsecondary options.
- Participants from across institutional levels and types believed that while a website would be instructive, the transfer process would continue to require engagement from institution-based advisors, who help to guide students during the transfer process and may provide the ultimate determination on what courses can be applied and to what major.

Website components

Course equivalency tool

- Participants were generally in favor of including a statewide course equivalency tool on the website. A high-quality statewide course equivalency tool could improve on existing institutionally maintained tools by providing comprehensive, timely, and accurate information about how credits will transfer and apply to majors offered across all Oregon community colleges and universities, eliminating the need for students to visit individual college sites.
- Private colleges and universities viewed a statewide course equivalency tool as an opportunity to present private postsecondary education as a viable option for more students, although they also acknowledged the challenges involved in updating their course articulations.
- K-12 focus group participants said a statewide course equivalency tool would help high school students (and their families and advisors) understand how their credits would transfer after high school and keep track of their college credits earned in high school.

Additional resources

- Community college and public university participants identified a range of additional resources that they would like to see included on a statewide transfer website, including contact information for college transfer advisors; information on which courses are included in the state core and major transfer maps; and college exploration resources with links to information about each institution, such as admission requirements. Community college respondents viewed planning resources as essential at much higher rates than public university respondents, while public university respondents perceived college exploration information as essential at much higher rates than their community college peers.
- Private college/university focus group participants identified college exploration resources and financial information as important to include on a statewide transfer website.
- K-12 focus group participants identified step-by-step information about credit transfer and financial information as essential to include on the website.

Website development and maintenance

- Participants believed that the creation of a transfer website should be a collaborative process, with input from a range of stakeholders, including students.
- Participants requested that state administrators work with college administrators to establish shared deadlines and agreements about when and how course equivalency information would be uploaded to ensure that information is accurate, consistent, and timely.
- Public and private postsecondary institutions have different human and fiscal resource capacities, which may limit their ability to dedicate staff time to support website startup and updating, which introduces potential equity considerations.
- Participants were not aware of how the proposed state transfer website would be designed or maintained, raising concerns that the new site might end up as an unfunded mandate and/or duplicate existing resources currently offered at the institutional level.
- Early investments in design may help with long-term sustainability. Participants highlighted the importance of spending time at the beginning of the development phase to ensure that a statewide course equivalency tool is setup for easy ongoing maintenance, and participants suggested building a website gradually instead of all at once.

Memo III: College Student Survey Findings (Appendix C)

In July and August 2022, Education Northwest and HECC requested that the 17 community colleges and 7 public universities administer a survey to their student body to gather feedback on transfer experiences and the transfer website. A majority of institutions emailed the survey link to their students between late July and early August, and Education Northwest closed the survey on August 31, 2022.

3,415 students responded to the survey. Students came from all public universities and nearly all community colleges. What follows is a summary of Key Findings:

Who took the survey

- The student survey sample drew from nearly all public postsecondary institutions in Oregon and represented the diversity of 2 U H J R Q ' V public postsecondary student population. Students from Oregon came from all regions of the state.
- Nearly three-quarters of respondents currently attend an Oregon public university, while nearly a third attend an Oregon community college. Students were at all stages of their postsecondary education journey, and most were full-time students.

Experiences with earning college credits in high school

- Over one-third of respondents (1,136) had experiences with earning college credit in high school from an Oregon community college or public university, with many seeking out information on how to transfer their credits from community college or university websites.
- Respondents shared conflicting experiences with transferring college credits in high school, with many reporting it was easy and many others reporting challenges.
- Major themes from open-ended responses included that students did not understand how the courses they took in high school would transfer in college, students were confused by the credit transfer process, and students were disappointed by the outcome when college credits transferred as elective credit or negatively impacted their college GPA or financial aid.

Experiences with transfer

- Forty-five percent of survey respondents (1,552) reported they transferred to their current college. The most common transfer pathway for respondents was transferring from an Oregon community college to an Oregon public university.
- Respondents generally relied on the website of their current college (i.e., the college they transferred to) to find information related to transfer or worked with advisors from their previous or current college. Respondents also relied on their current college website and advisors to understand how their credits would transfer.
- Most transfer students (77%) found it somewhat or very easy to understand how their credits would transfer, and most transfer students (88%) were somewhat or very satisfied with the transfer process. However, transfer students also shared a wide range of challenges with the process including a lack of knowledge about what credits would transfer, credits not transferring or counting toward degree requirements, a lack of support, conflicting or inaccurate information from advisors, the time it took for transfer institutions to evaluate credits, the cost associated with transferring credit, and the lack of a comprehensive, centralized website to assess course equivalencies.
- The types of information that transfer students used during the transfer process provides some indication of what kind of information might be useful to include on a state transfer website. About three quarters used college course catalogs, requirements for programs, and information about transfer pathways to help them transfer to their current college or help decide which college to transfer to. The top three pieces of information students wished they had during the transfer process was information about campus life, college admission requirements, and how to appeal a credit transfer decision.

Experiences with transfer planning

- Among survey respondents who have not transferred, almost one-quarter (419 respondents) reported they plan to transfer to a different college in the future. (More students may be considering transfer since one-quarter of respondents reported they are unsure about transfer.)
- Respondents planning to transfer were primarily relying on advisors at their current college to help them with the process, but many were also using college websites where they plan to transfer and their current college website for information about transfer.
- The types of information that students planning to transfer use also provides some indication of what kind of information might be useful to link to on a state transfer website. The top pieces of information students planning to transfer were using were requirements for

academic programs, degree programs, and career paths, followed by information about transfer pathways, college admission requirements, college tuition, and financial aid.

Opinions about a statewide transfer website

- Seventy-five percent of respondents reported that it would be very helpful to have a state website for students transferring college credit or planning to transfer in Oregon.
- Over three-quarters of respondents reported it would be very important to include requirements for academic programs, degree programs, and career paths; financial aid and scholarships for transfer students; a tool to compare college tuition and fees; and a tool to assess course equivalencies on the website.
- Students also provided many write-in responses about additional information or resources to include on the website and these fell into the following categories: course equivalency tools and information to help with credit transfer, degree pathway information, college and financial information, considerations for specific types of students, and site design considerations.

PHASE 2: TECHNICAL SPECIFICATION ASSESSMENT FOR A TRANSFER PORTAL

On October 17, 2022, HECC received one response to the RFQ for Phase II. After review, it was decided that the contract for this phase of the project would be awarded to North Highland. On November 1, 2022, HECC emailed North Highland with a Notice of Conditional Award for Phase II of the Transfer Portal project. HECC's Procurement Office has this information and is working on creating a contract for services, pending successful negotiation of pricing.

The primary objective for the engagement is to develop the artifacts necessary to obtain the Department of Administrative Services' Enterprise Information Services ´ ' $ - 6 (, 6 µ approval. Outcomes and documentation needed will include comprehensive Stage Gate 1 and 2 artifacts (Level 3 oversight), in compliance with DAS-EIS guidelines.

CONCLUSION

Findings from EdNorthwest demonstrate that Faculty and Students in Oregon are in favor of the development of a Transfer Portal that provides the following: 1. a course equivalency tool, 2. access to transfer office advisor/counselor information, 3. college exploration resources and college cost information, 4. and step-by-step information about the credit transfer process.

Interviews with post-secondary faculty and staff raised several concerns about portal development and maintenance:

- Community college and public university participants requested shared deadlines and agreements about when and how course equivalency information would be uploaded to ensure that information is accurate, consistent, and timely.
- Institutions have different human and fiscal resource capacities, which may limit their ability to dedicate staff time to support portal startup and updating, which introduces potential equity considerations.
- Community college and public university participants raised concerns that the new site might end up as an unfunded mandate and/or duplicate existing resources currently offered at the institutional levels.

- Early investments in design and a gradual development process may help with long-term sustainability.

Students shared information on challenges they have faced and resources they would like to see in a portal:

Challenges:

- In close-ended questions, most respondents reported positive experiences with transferring college credit in high school or with their transfer experience. However, in open-ended responses, hundreds of students wrote about a wide variety of challenges:

High school students who earned college credit:

- Did not understand the credit transfer process; and
- Were disappointed by the outcome.

College transfer students:

- Did not understand how their credits would transfer;
- Were surprised when transfer credits were not accepted or did not count toward degree requirements;
- Received no, conflicting, or inaccurate information about credit transfer;
- Had to wait a long time for transfer institutions to evaluate credits; and
- Would have benefited from a comprehensive, centralized website to assess course equivalencies.

Resources:

- About three-quarters of transfer students used college course catalogs, requirements for programs, and information about transfer pathways to help them transfer to their current college or to help make their transfer decision.
- The top-three pieces of information transfer students wished they had during the transfer process were: information about campus life, college admission requirements, and how to appeal a credit transfer decision.
- More than three-quarters of student respondents reported it would be very important to include:
    - Requirements for academic programs, degree programs, and career paths;
    - Financial aid and scholarships for transfer students;
    - A tool to compare college tuition and fees; and
    - A tool to assess course equivalencies.

As HECC moves forward with Phase II, it is important to keep in mind that the Transfer Portal is intended to be a platform where students, parents, advisors, families, faculty, and staff can go to understand how courses articulated degree completion at any Oregon public university and community college. The Online Transfer Portal may also explain how many courses are required to change institutions or majors; identify required courses and their equivalents; show how major and core transfer maps work, list transferable elective courses that will count toward degree and major requirements; and other information that will make transfer more transparent and accessible for all students.


HIGHER
EDUCATION
COORDINATING
COMMISSION
OREGON
1859

Appendix A: Memo 1 (EdNorthwest)

Oregon Transfer Portal Project: State and Vendor Interview Findings (Memo 1)

Background

The Oregon Higher Education Coordinating Commission (HECC) is planning to develop a statewide transfer portal to help Oregon college students navigate the transfer process. The HECC hired Education Northwest to gather data that will inform the development process. There were three main data sources: interviews with state-level administrators from five states that currently operate a transfer portal and three vendors who develop transfer portals for institutions and states; focus groups with K-12, private college/university, community college, and public university staff members; and a survey of Oregon community college and public university students. This is the first of three memos—one for each data source. The fourth deliverable is a presentation that synthesizes findings across all three data sources and includes final recommendations.

Education Northwest began by conducting an online search of state higher education websites in summer 2022. This analysis identified 24 states that maintain a statewide or higher education system-level online presence (See appendix A for the complete list, including links to each state's website and a description of whether the site is operated by a state entity or a third-party vendor). Based on a review of site capabilities and consultation with HECC administrators, Education Northwest then selected a subset of five states for focused study: Arizona, California, Minnesota, New Jersey, and South Carolina.

From July through September 2022, Education Northwest researchers conducted interviews with postsecondary transfer administrators in each of these five states. Interviews were conducted using an open-ended, semi-structured format, guided by a standardized protocol (appendix B). Three states—Arizona, California, and New Jersey—operate home-grown systems developed and maintained by state employees. The other two states—Minnesota and South Carolina—contract with a third-party vendor to maintain all or part of their transfer website. These vendors include CollegeSource, which operates Transferology in Minnesota, and AcademyOne, which operates [redacted]. Multiple meetings were also conducted with representatives from CollegeSource, AcademyOne, and EAB (a third vendor offering transfer support at the institution level) to assess proprietary platform capabilities, costs, and benefits. This information is incorporated throughout the memo to provide additional context.

This memo summarizes participant perspectives in five main areas related to operating a statewide transfer website: rationale, components, development, costs, and benefits. Note that we use the term transfer website throughout this memo, rather than transfer portal, since that is the term preferred by the five states included in this study.

Rationale for Statewide Transfer Websites

State agency administrators in each of the five states reported that transfer website development predated their employment by a decade or more. Launch dates ranged from the mid-1980s to 2010: Arizona (early 2000s), California (1985), Minnesota (2007/08), New Jersey (early 2000s), and South Carolina (2010). These state transfer websites have evolved considerably over time.

Prior to website creation, both Arizona and California had a statewide course equivalency resource that was available in hard copy. California administrators described a process in which state higher education staff members collected articulation agreements from postsecondary institutions, entered them into a state database, and then filed them, resulting in "huge cabinets filled with community college and other catalogs." Agency staff members reviewed these documents to create hard copy course equivalency guides that were mailed annually to transfer advisors at relevant institutions.

Arizona administrators described a similar process. A hard copy course equivalency guide was developed by system administrators for use by transfer advisors at both sending and receiving institutions. Students considering a transfer would meet with a campus advisor, who would look up course tables to determine course equivalencies. In contrast, Minnesota and New Jersey shared that the transfer process had primarily been an institutional function prior to website creation, with campus advisors meeting with students to review coursework and determine course equivalencies.

Across all five states, administrators shared that the transfer process prior to website creation could be challenging for students and advisors alike. To assess their credit transfer options, students had to schedule an advisor meeting at their destination institution, which could take days to book and involve intra-state travel. In some instances, students unwittingly lost credits because their coursework was not recognized at their selected institution, even though it might have been accepted at another institution in the same state. Campus advisors were described as spending significant time responding to student inquiries and scheduling and holding in-person meetings, often for students who decided not to follow through with their transfer. Where articulation agreements were already in place, efforts to award transfer credit were less intensive.

Rationale for transfer website creation was tied to student success in the five states. Administrators in California and Minnesota believed that the decision was driven by legislative efforts to reduce the burden of transferring on students and ease the workload of college advisors. South Carolina administrators said the decision was motivated by the state's [illegible] process, which included a goal of standardizing credit transferability across institutions. New Jersey cited a goal of boosting community college enrollment and retaining students in-state. Additional factors cited by states included the desire to offer students easier access to more uniform information; the ability to update online transfer resources quickly and more effectively than reprinting an equivalency catalog; and the desire to reduce the meeting loads for campus advisors.

> Students know that they have to go to one place. [illegible] I don't need to even talk to somebody. I can go right on the site at 2:00 in the morning, in my pajamas, enter my coursework, and take a look at how that transfers. And I can see all that in front of me[illegible]
>
> – Minnesota

Some states reported initial resistance to website adoption from institutions that already had processes in place. However, the rationale to do what is best for students helped win over the staff at these institutions. Moreover, website adoption did not require individual institutions to give up their transfer protocols; for example, AcademyOne representatives shared that many institutions retain their online course equivalency search features and/or a dedicated webpage targeting transfer students.

The rationale for state-developed websites

States with homegrown transfer websites cited several reasons for their decision. California administrators reported that given the diversity of students in the state, a canned software package would not work for all users. Administrators also shared that while start-up costs for building the site were substantial, ongoing operation required a relatively small staff, making it more cost effective. New Jersey administrators reported that ongoing operational costs were roughly half of their site build.

Arizona administrators reported contracting in the early 2000s with redLantern, LLC., a software vendor acquired CollegeSource in 2008, for support on a course equivalency guide. The state ended this relationship because licensing fees were deemed too expensive and team members had the talent to build a new system more affordably. Agency administrators across these three states (Arizona, California, and New Jersey) were also wary of working with private sector vendors, who were perceived as motivated by profit. One administrator noted that vendors will charge for add-on services or software customization that state agency staff members could offer at little additional cost. It was also suggested that state staff members are more flexible and can turn around requests more quickly, given that their focus is on a single state.

> I think there's more rigidity in a vendor team. When you have an in-house team, you can say, 'Oh, I'm going to change that scope of work.' There's no charge for that. You get to dictate more that flexibility for what you need than when you're with a vendor who's building
>
> — California

All three of these states also reported that building their own site afforded the opportunity to tailor resources to address specific state needs. Transfer office staff members, many of whom previously worked as college advisors, believed they had a more nuanced understanding of state contexts and institutional needs than a vendor. Turnover is also quite low among state staff members, with some having a decade or more of experience. It was suggested that this stability helped agency staff members build trust and establish credibility with college advisors, which might be more difficult for a third-party vendor serving multiple states. Website design ideas were described as bubbling up to state agency staff members from institutional advisors and constituent groups that state staff members periodically convened to gather feedback.

> One of the things our stakeholders appreciate is having a face and a specific person accountable. And we have a bit more investment because we only do this work. We don't do this work for five or six other states. We intimately and exclusively do this work.
>
> — Arizona

New Jersey reported building its transfer website based on existing software used to maintain a centralized articulation database. This software enabled students to audit their progress in completing recommended program coursework for their institution and generate electronic transcripts that included information on course equivalency based on course grades. Given this capability, the state decided to leverage its existing software and build a website around it, rather than seek external support.

The rationale for vendor-developed websites

Minnesota and South Carolina opted to purse vendor-driven solutions for their transfer website development. While current staff members and administrators did not know the rationale for outsourcing the website development, they hypothesized the choice was probably more cost effective since administrative and technology staff members were hired and managed by an external entity. It was also suggested that a third-party approach might have been the easiest way to launch in a timely manner, since key components had already been developed. Indeed, CollegeSource reported that, if all institutions provide equivalency data in a timely manner, the time from contract to statewide launch could be as little as two months, and even less if a staged approach was used (i.e., sites were launched as their materials were completed).

> You have to have a pretty robust technology, not only to build it, but to maintain it. So, for us, that's been the biggest thing. We can't build and maintain these systems ourselves. So, it's been a lot easier to go somewhere else where we know it's out there, and we know what it can do already, just to buy into it.
>
> — Minnesota

Minnesota State (a collective of 26 colleges and seven universities with 54 campuses throughout the state) contracts with CollegeSource to maintain the course equivalency component of its Minnesota State Transfer Information website. Note that the University of Minnesota system office, which was not interviewed, maintains a separate contract with CollegeSource for its partnering campuses. One rationale for contracting with CollegeSource is the widespread use of its Transfer Evaluation System (TES) among state institutions.[1] Over time, Minnesota State has expanded its relationship with CollegeSource to include other degree audit and planning tools. CollegeSource shared that if desired, it can produce a state landing page branded with logos, pictures, and other information, and suggested Wisconsin as a good example of how such a setup could be designed.

South Carolina contracts with AcademyOne to maintain its state transfer website. While current staff members had no knowledge of the vendor selection process, they reported that company representatives were very accommodating and always willing to travel to the state to make presentations and work with staff members, which has influenced their decision to stay with the vendor. It was noted that South Carolina requires at least three bids when contracting out for large projects, and an u Ç K v [•] has been among the least expensive.

Irrespective of their vendors, state administrators reported being pleased with their proprietary websites and the support they receive. While the design and components of these websites were based on pre-existing modules, both AcademyOne and CollegeSource tailored site content to align with state branding. For example, the South Carolina website offers a customized design with a layout and set of transfer options that differ from those offered in Utah and Wyoming, both of which are also AcademyOne clients and have more standardized website designs.

> If we had the team to develop a site in-house that we could tweak every day, that would be great. The disadvantage is when the person with that expertise leaves, then you're stuck. By hiring this outside vendor, they're responsible for having the expertise. It's not my problem if somebody leaves; they have the team and the people to maintain and manage it.
>
> v South Carolina

Vendor perspectives

Vendors spoke of having long-standing relationships and dedicated staff members who work closely with state agency administrators and institutional advisors. Both AcademyOne and CollegeSource said they take pride in offering high-quality services, and both vendors also mentioned their strong partnerships with states and their commitment to client satisfaction, as evidenced by their never having lost a transfer website client.

Although EAB does not currently contract at the state level, the organization is working with individual institutions, with eight more set to come on board soon. EAB employs a different approach to calculating course equivalencies and conducting degree audits. With the EAB Transfer Portal, information on course equivalencies and degree audits are performed using Banner, Degree Works, in concert with Ellucian Colleague and PeopleSoft software. In lieu of using TES, course equivalencies are populated out of an institutional Student Information System (SIS) using existing code. According to EAB representatives, a website landing page could be created that would allow students to enter their course credits into a transfer credit estimator, which would conduct a degree audit at a selected institution. The software

[1] Oregon currently has 18 institutions using TES, including 7 public universities and 11 community colleges. Two universities are currently using Transferology, which automatically populates TES data. Current expenditures by these institutions are not included in cost estimates provided by CollegeSource, which could represent a savings to sits presently contracting directly with CollegeSource.

would then return a list of best-fit majors and the percentage of the program a transfer student has already satisfied. As an example, EAB has been working with University of Houston to create an online tool to allow students to estimate how many course credits may transfer toward a specific degree program offered at the university; however, the software has yet to be deployed at the statewide level.

Website Components

Website components vary widely across these states, but all five include course equivalency tools. Site functionality is dictated by a range of factors, including state transfer policies and legislative initiatives; administrative staff workload and technical capabilities; field requests for information; and states that subcontract with third-party vendors vs. the existence of modularized content. Another factor is broadband accessibility: Students in rural communities may have limited internet access, leading some states to build sites that run light _and are mobile responsive.

States house their transfer website within the š]Œ higher education web portal, or they create a separate URL linking directly to the site. As an example, Minnesota State [•ra š transfer website is housed within the larger systemwide website, can be accessed through a link in the admissions menu. In contrast, the URL for ASSIST in California, NJTransfer in New Jersey, and SC TRAC in South Carolina link directly to the site. This simplifies typing in URLs, as fewer characters must be entered. Meanwhile, AZTransfer in Arizona links individuals to the main site but students must access the Tools menu to assess course equivalencies and other resources. This was done intentionally, since the site is not intended to be solely student-facing; rather, it is designed for colleges, universities, and other stakeholders.

State websites are intended to support high school and college students in transferring to public in-state colleges and universities. With the exception of California, which is in the process of expanding its website to include private in-state colleges, in-state websites limit students to exploring their public in-state options. Minnesota and South Carolina also provide the option for out-of-state and international students to assess whether their credits may transfer to a public in-state college or university. This is because the two states contract with third-party vendors that maintain comprehensive course equivalency databases.

While each of the five state sites are designed to offer students information on their transfer options, they are not intended to offer a definitive result. The expectation is that students will continue to interface with college advisors to finalize their transfer and determine course equivalencies. For example, the California website includes the following

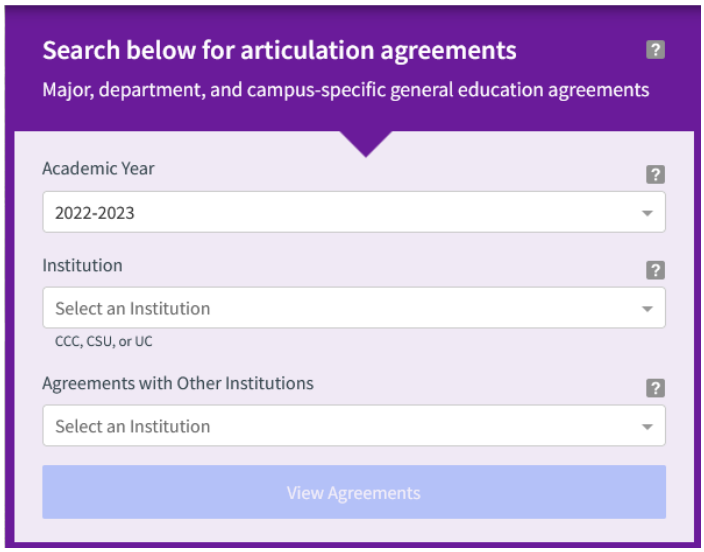
• š] ‰ µ o S$}S7W best used in combination with seein
counselor on your campus. It is intended to help students a
counselors work together to establish an appropriate path
toward transferring from a public California community
} o o P š } ‰ µ o] o] (} Œ v] µ v] À Œ •] s Ç X _

> We wanted to make sure that what we provided was good quality, accurate information that left room for students to work with their advisor when they had those special circumstances or changed their major. Everybody's transfer experience is different. We're not a replacement for an academic advisor [who can] help navigate the personal experience thrgh community college to university.
>
> v Arizona

California

o] (} CE ASSIST was among the simplest transfer websites we reviewed, both in its offerings and its layout. Intended as a repository for articulation agreements among state public higher education institutions, the site has intentionally been designed to offer targeted functionality. It features two options. The first option allows users to perform an interactive search of articulation agreements among o] (} GE v three public higher education systems: California Community Colleges, California State Colleges, and the University of California v by major, department, and campus-specific general education (figure 1). The second option allows users to identify courses equivalencies between California community colleges and state universities; however, only those eligible for articulation or transfer are included. The state anticipates adding more components in the coming years, the most significant being the inclusion of private institutions.

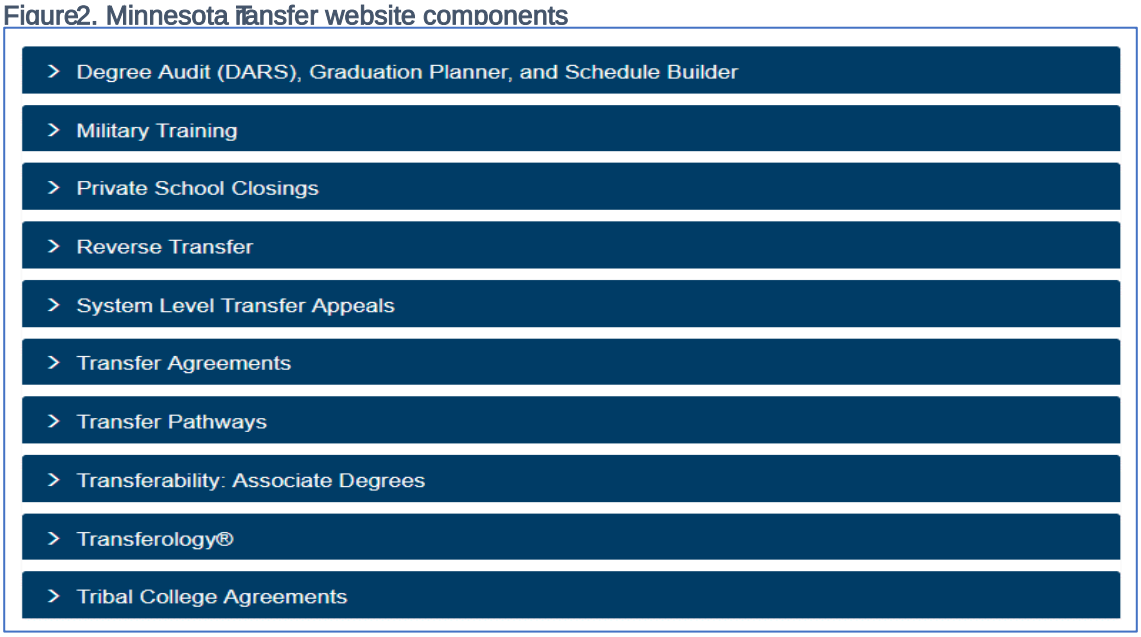
Figure 1. ASSIST articulation agreement interface



Minnesota

Minnesota administrators reported that the decision was made early on to keep Minnesota State Transfer Information to the "bare bones of what students need to be able to transfer." The state looked at the features most often accessed on the previous Minnesota Transfer website, along with those offered in the CollegeSource suite of tools. Consideration was also given to what should be housed on institutional websites vs. the state's site. Users have access to 10 tools (figure 2), which are arrayed in a simple, graphical interface. Users seeking to assess course equivalencies click on the Transferology menu option to view videos describing the platform and a link to the CollegeSource site.

Figure 2. Minnesota Transfer website components



One distinguishing feature of the Transferology platform is that students must create a log-in account and profile to assess their Minnesota course transfer options. Fields allow users to search by courses, standardized exams, or liberal arts credits. An advantage is that the site is not limited to students attending in-state colleges: out-of-state students can assess how their coursework might transfer to any college in the Minnesota State system. The platform also allows users to search for replacement courses (i.e., } µ Œ • • š Z š u Ç š l v š v } š Z Œ • Z } } o v š Œ v • (Œ Œ l š } • š

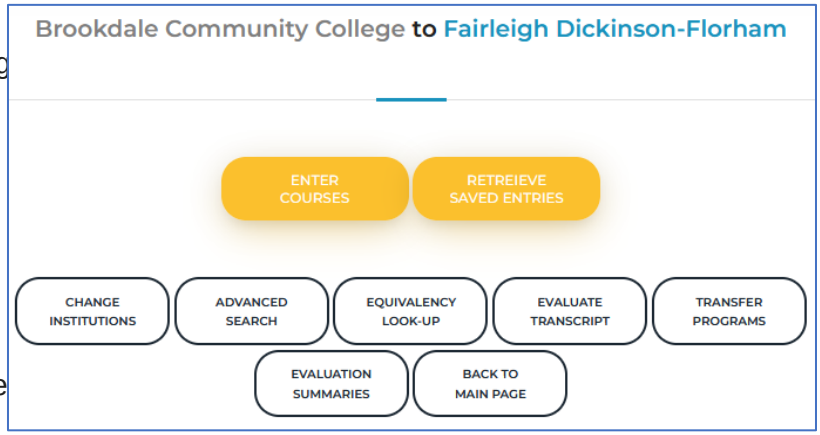
While Transferology does not allow users to run degree audits, CollegeSource does offer a product called uAchieve that enables students to assess how their coursework might apply toward a college major. This option only works if the destination institution has purchased the uAchieve software. (All institutions in the Minnesota State system have this capability; institutions choose, they can also configure the system so that students can import their transcript in lieu of typing. Transferology representatives shared that integrating the uAchieve module statewide is a complex process requiring substantial coding; accordingly, they recommended that if Oregon were to adopt uAchieve, it should be established as a phase two or phase three goal.

New Jersey

The NJTransfer website provides users a robust experience. The site is customized for use by students or staff/faculty members, and both groups have a range of options. Students can explore New Jersey colleges, find transfer events, find course equivalencies, view transfer programs to see the general education requirements of a major and its recommended coursework, or review statewide transfer agreements.

Additionally, students can choose to have a Transcript Evaluation performed based on coursework taken at their community college and a destination college (figure 3). This tool includes a course-by-course equivalency output or by clicking on the Transfer Program Evaluation option, a summary of how courses will transfer to a degree program offered at a selected four-year institution. To support students and advisors in academic planning, this option also profiles credits that may be applied and credits and course codes remaining. Students are not required to register for site use: All information may be entered anonymously. However, students are limited to assessing how course credits may transfer within a New Jersey public college or university.

Figure 3. New Jersey transcript evaluation tool

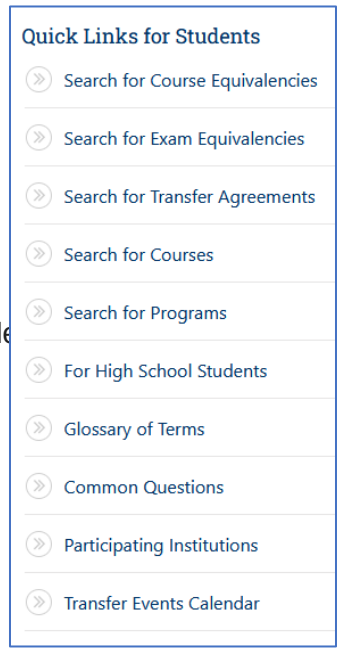


New Jersey also provides a password-protected site for staff and faculty members. Here, institutional staff members can send an official electronic transcript from a two-year to a four-year institution, simplifying the transfer process. The site also allows community colleges to revise or submit new courses or updated course syllabi and four-year colleges to review coursework and determine whether course equivalencies may be awarded. Links to state resources and websites of related stakeholder groups are also provided. The site is visually appealing, with the landing page featuring a rotating carousel of individual state colleges. Users can view a full site profile for each of these colleges and apply online.

South Carolina

The South Carolina TRAC •]š]• •]u]o Œš} E cánt Œ• Ç organized for students, faculty members, and advisors, and administrators. "Quicklinks_ allow students to search for a range of site components, including course equivalencies, exam equivalencies, transfer agreement courses, and programs (figure 4). Users can access profiles of participating colleges, which include information tailored for students interested in transferring. Another option provides support for high school students who want to explore their higher education options.

Figure 4 South Carolina Quick Links



As in Minnesota, out-of-state students can explore how their coursework might transfer to a South Carolina public college or university. For example, a student from Portland Community College interested in searching for South Carolina course equivalencies can enter the name of any state public institution. Upon clicking the "Search_ function, they are presented with a list of all recognized course equivalencies. While students do not need to create an account to use the majority of site features, doing so provides added functionality, such as compiling academic course history or comparing transferability using course equivalency matrices. The AcademyOne software can also provide for transcript evaluation at an added cost.

Arizona

The AZTransfer website offers some of the most advanced functionality of the five sites we reviewed. In addition to offering information found on other state websites, the site has a host of additional features, including the option to view data on statewide transfer and degree attainment; review training resources, including a video library, user manuals, and facilitator trainings; access publications, including handbooks, policy manuals, and annual reports; follow the work of the state steering committee and articulation task force; and identify upcoming transfer convenings.

Œ]ì}v course equivalency resources are housed]v šZ •"Tools[_ section, which offers faculty members, staff members, and students access to transfer information that is continuously refreshed (figure 5). Several features are noteworthy, including the options for high school students to identify dual enrolment courses that may transfer to state universities and for students to search courses that satisfy šZ •šš[• P v Œ o µ š]}v µŒ Œ]µoµu Œ ‹µ]Œs. A third feature Œ]ì}v }u u allows students to explore transfer degree guides that list associated degrees to related baccalaureate degrees for majors offered at Arizona public universities.

Figure 5 Arizona Transfer

Course equivalency search tools are branded for each college: once a student selects their institution, results are presented with the college logo and color scheme. Students need not create an account to access site tools, although college administrators may access password-protected content. The site is also mobile optimized and visually appealing, incorporating photos and icons to organize content.

Website Development

Course equivalency database development

Transfer websites draw on information contained in a centralized database to answer user queries about course equivalencies. Whether maintaining their own systems or contracting with a vendor, states collaborate with participating institutions to upload their course equivalencies (and other desired information) into a statewide database. Quality control is of paramount importance during this process.

States and vendors spoke of delegating a person at each institution to serve as the site manager, in charge of coordinating with the transfer website team to migrate information. In Arizona, these individuals receive annual training to organize and upload site data and to train faculty members at their institution on using the system. The state also maintains a comprehensive Handbook and Policy Manual detailing how the transfer system operates and the responsibilities of institutional staff members. Third-party vendors also reported having a dedicated employee to offer customized site guidance, review materials for quality assurance and, in some instances, take on the responsibility for uploading institutional data. This individual also coordinates with state agency staff members to prompt institutions that are late in delivering files.

Respondents reported that the initial data migration process for course equivalencies is straightforward. Institutional site managers are provided a digital template and instructions for formatting data. Once the templates are completed, they are reviewed for errors and uploaded. Populating the templates can require significant time at the outset, depending on the technology skills of the institutional staff members involved and how the data are stored.[2] Several administrators we interviewed cautioned that the process was more challenging for institutions (often smaller colleges) that lack dedicated IT staff members or did not maintain data in readily transferable formats.

After course equivalencies are entered into the system, they need to be updated on a regular basis. Scheduled updates can occur on a biweekly (Minnesota), weekly (Arizona), monthly (South Carolina), quarterly (California), or annual (New Jersey) basis, although some states allow for changes to be made as needed. The time required to upload this information varies, and the task can be divided among multiple individuals within an institution. State estimates ranged from one to three hours per migration, with more experienced staff members requiring less time. Academy One estimated that updating •] š [• š Œ v (profile required approximately 30 minutes twice a year.

> Once an institution inputs the information and they know how to do it, I don't think it takes a lot of time. It's a simple process. It may take an hour, a couple of hours, if that. Out of our 33 institutions, [our vendor] might call me and say, 'We can't get one institution to input the information.' That's usually because it's a new person, and they don't know how. But if they have any kind of experience doing this, it's not a problem.
>
> v South Carolina

States offering different types of information employ different timelines. For example, while new course equivalencies were deemed more time sensitive (as colleges create new courses at various points during the academic year), other information, such as membership records, curriculum, general studies

[2] Due to the time that has elapsed since the websites were created, state administrators were unable to quantify the time institutional staff members spent uploading equivalency data at the outset of the project. One Arizona administrator suggested that start-up could consume 20 hours a week of a state À o • š ((u u Œ [• š] u š startup, with site-level staff members investing 5–10 hours depending upon their role. These time estimates fell dramatically once the system was operational. Vendors reported that the templates were relatively simple to complete and, if desired, a professional services team could take on the responsibility of uploading data for a fee.

designations, and institutional descriptions may be done on a less frequent basis. According to state administrators, once site coordinators understand the process, they find it easy to submit updates and do not need to devote much time to the task—often as little as a few hours each year.

Fine-tuning the system to address state conditions also requires some consideration. States noted that the applicability of credits can vary by institution, with some courses satisfying different program requirements or being credited differently. State administrators observed that each institution has its own approach to course articulation or course equivalency, and so care must be taken in populating site content. This requires project managers to communicate directly with individual sites to ensure that information is accurate.

Vendors said they were generally able to move quickly on the design of transfer websites and the creation of equivalency databases—often as little as a few weeks. They reported that delays were generally due to institutions not submitting the necessary data in a timely manner. To speed website development, CollegeSource reported that its staff reviews institutional websites, pulling publicly available information (e.g., images, tuition and fees, enrollments) to produce draft college profiles for review. Course equivalencies are compared to information contained within TES to verify their accuracy, and any errors are resolved by contacting institutions directly.

Usability testing

States with homegrown websites recalled performing limited usability testing at the outset. During the initial design phase, drafts were shared with stakeholder groups to solicit recommendations. Typically, these groups consisted of system-level administrators and transfer advisors from participating sites. California noted that, while difficult, finding representative student groups to conduct usability testing was very beneficial. With hindsight, the director wished that developers would have solicited greater feedback earlier in the process. The director also reported that students had a different perspective than college counselors and transfer evaluators. What seems clear to a college administrator or is as clear to students, who lack professional experience and perspective.

> Students had a lot of opinions, but I don't think they really knew what they were looking for. That's why advisor input is so valuable because they see the frustrations that students have, or they've seen so many students come through. Y[that they know what] tools would be helpful.
>
> — Arizona

This sentiment was not shared by all states. Arizona reported that while student focus groups were convened during system implementation, over time it was determined that feedback from students was less useful than feedback from college advisors, in part because the individuals selected were perceived as more organized and responsive than the targeted population. Students were also described as not knowing what they needed. Accordingly, the state has focused on gathering input from advisors who work with a cross-section of students.

Vendors also said they conducted limited usability testing at the state level. According to vendor representatives, this is because their website components/offerings were designed based on nationwide feedback from thousands of users; as such, the need to continually modify components is not a priority. For example, CollegeSource shared that the Transferology software is fully hosted and has been tested by countless users since 2014, so the need to determine what does and does not work is less pressing. Moreover, there is a process for gathering student feedback on a regular basis and making changes as necessary.

Website launch

States reported relatively few challenges in transitioning to their newly designed websites. One administrator observed that turf issues presented a slight challenge, because institutions that created their own tools were initially resistant to change. Another reported hearing concerns that a centralized website, with statewide information on transfer options, might adversely impact some institutions by giving students more options. A third administrator shared the fear that in lieu of transferring, students might opt to remain at their community college and take transfer-eligible courses offered at lower cost.

> If you can give notice to people that something's coming and you can put tutorials or videos out that campuses can put on their websites to tell students this is coming and what it's going to look like, that goes a long way toward making people feel more comfortable with something new.
>
> — California

While these and other unknowns caused some initial apprehension, once websites launched, institutional staff members almost universally appreciated the benefits they offered to both their institutions and students. California shared that its greatest challenge was moving people from a legacy system to the first iteration of their website. New terminology and ways of doing things caused confusion, because people were somewhat set in their ways. State administrators recommended that Oregon announce changes well in advance of site transition and deliver training to support students and advisors in transitioning to the technology. A Minnesota administrator echoed the need for training. They shared that while using Transferology is straightforward, not all institutional users understand its capabilities. For example, site staff members are often unaware of the recruiting functionality built into the website or how to harness its statistical reporting capabilities. South Carolina sought to draw attention to the site by releasing a public service announcement aired on 20 network stations and 35 cable stations around the state.

Website evolution

All state transfer websites have evolved over time. For example, though Arizona launched its site in the early 2000s, much of its current structure dates to 2021, following the hiring of new staff members who took over site management. More recently, analysts reviewed the website in early 2020, just before the start of the pandemic, to consider how to increase its functionality and accessibility. This included using Google Analytics, holding focus groups, and speaking with academic advisors to find the website tools considered most beneficial. Emphasis was then placed on refining these resources to highlight their capabilities and make them easier to use.

A similar evolutionary process has occurred in New Jersey, which over time has added features in response to user needs. Originally launched in 2000 with a course equivalency tool and keyword search, the state added information on transfer programs between two-year and four-year colleges in 2002. Two years after that, transfer events and college profiles features were introduced.

California reported that it is in the process of updating its site in response to a recent legislative mandate that requires the inclusion of private schools. This required hiring IT contractors to build out new system requirements.

Administrators in Minnesota report that while its Transferology features are up to date, as they are maintained by CollegeSource, components on the state site have not been updated due to a lack of fiscal and technical resources.

Website Costs

Each of the five states employed a different strategy for financing their site operations, although in all cases seed funding originated with the state. For example, in California, the state legislature provided resources to support site launch; once built, system support was shifted to the three system offices (California Community Colleges, California State Colleges, and the University of California), each of which pays a third of system costs. The state estimates that the cost of maintaining the site is roughly $850,000 per year, which includes $650,000 in labor (salaries and benefits for 6 FTEs) and $200,000 for technology (e.g., equipment, licensing, hosting) d Z v } o } P Ç } • š • À Œ E Ç ‰ v] v P µ ‰ } v š Z development focus. For example, the state is embarking on a software development effort that will cost an estimated $1.6 million, which includes hiring five web developers. Once modernization efforts are complete, these developers will be released, and the state will return to just its maintenance team.

Generally, state administrators were often unable to provide an estimate of the cost of their initial site buildout. Given the time that has elapsed since system adoption and significant changes in technology (e.g., the shift from site-based servers to cloud computing), it was felt that these amounts would have limited applicability today. South Carolina shared that their initial five-year contract award in 2008 was for approximately $5 million, which covered site development along with seven years of software maintenance. Following this contract, the state was paying approximately $700,000 per year in maintenance costs until about 2017, when the state chancellor negotiated with the vendor that is closer to $500,000 per year. All costs for maintaining the site are borne by the state.

> A homegrown system takes a lot of money to get off the ground. [However], if you have talented IT folks in Oregon who can help make this happen, then it may ultimately lead to cost savings. Looking at the historical trend of the budget for this initiative, that is effectively what has happened here.
>
> v New Jersey

Once their transfer websites were operational, both New Jersey and Arizona adopted a shared financing model similar to the one used in California. In New Jersey, which was unable to supply a cost estimate at the time of this report, all website funding comes from institutional contributions, with charges calculated based on the number of annual incoming and outgoing transfers within institutions.

Arizona employs a mix of state and institutional funding to cover the approximately $800,000 annual cost to operate its website. Approximately 25 percent of these operating costs are funded by the state with the remainder charged to institutions. Community colleges and universities split the amount not covered by state appropriations. For the university's portion, costs are evenly split among the three state universities. For the community colleges, institutions are billed ‰ Œ E } ‰ } Œ E š] } v o u } µ v š • } v full-time student enrollment, as reported by the Arizona auditor general. The state is currently considering a base-plus budget model due to the large disparity between institutions, as the smallest college currently pays about $1,000 annually while the largest pays about $17,000. See Appendix C for a line-item budget.

While Minnesota was unable to provide an estimate of system start-up, administrators provided a detailed multi-year budget for four CollegeSource tools: Achieve Degree Audit, offering an online audit systems for students and advisors to track progress toward degree completion ($86,575); Transferology/Transferology Lab, which allows students to see how course work will transfer and helps advisors create transfer scenarios ($68,643); Achieve Planner, used by students to create roadmaps toward graduation ($140,078); and Transfer Evaluation System (TES), which enables users to locate course descriptions and store, manage, group, and publicize equivalencies ($31,275). These investments, which totaled just over $420,500 in Fiscal Year 2018, include a cost escalation ranging from

3 to 6 percent depending upon tool and year. These costs are in addition to those incurred by the state for staffing and hosting the larger Minnesota transfer website. As in South Carolina, all costs for maintaining the vendor-supplied products are borne by the state. See appendix C for a line-item budget.

Cost drivers

The primary costs for state-maintained websites are labor and technology hosting, with costs varying based on the number of staff members required to operate the system and the roles they fill. For example, Arizona supports a staff of 5.0 FTE that includes a project director, two web developers, and two trainers (figure 6). This team enables the state to build out and maintain most website functions. The director estimated that roughly 75 percent of the state budget is earmarked for labor, with the remainder used for website hosting (i.e., roughly $2,000 per month for Amazon cloud hosting) and other technology and professional development costs. Maintaining the transfer website only accounts for roughly 60 percent of state labor costs, with other time devoted to hosting quarterly steering committee meetings, conducting research, and delivering professional development events. Interviews suggested that Oregon would need fewer people if the focus were solely on maintaining a transfer website.

California also maintains a staff comprising 5.0 FTE, which includes a director, a coordinator, and three statewide articulation specialists. While the ASSIST site offers relatively limited functionality, the large size of the state dictates the need for additional staffing. Moreover, it is anticipated that the addition of up to 80 private institutions will require up to 3.0 additional FTE. Real-time technology support and web hosting on Azure is provided by Accenture, which is contracted through a yearly scope of work. Any additional development needs, for example, site modernization or new components mandated by the legislature, are provided by web developers hired on an as-needed basis.

Transfer site staffing is smaller in New Jersey, which maintains a staff of 3.0 FTE, including a director, a coordinator, and an outreach specialist. The New Jersey site is hosted on NJ eGrant. Similarly, both Minnesota and South Carolina maintain relatively small staffs due to reliance on third-party vendors, with Minnesota supporting a staff of 3.0 FTE and South Carolina 2.0 FTE.

Figure 6: State costs for transfer website

State	Staff FTE	Annual budget	Funding sources	Notes
Arizona	5.0	$800,000	$200K state/$600K sites	State-developed site
California	5.0	$850,000	System office pay 1/3; colleges pay based on size	State-developed site; Accenture technology support
Minnesota	3.0	$412,000	State funding	State-developed website with CollegeSource managing course equivalency
New Jersey	3.0	Not provided	Fee based with colleges paying based on in- and out-transfer rate	State-developed site
South Carolina	2.0	$500,000	State funding	AcademyOne managed

AcademyOne and CollegeSource representatives said states could contract for services without adding staff at the state agency level. It was suggested that Oregon HECC staff members with exiting transfer responsibilities could take on the task of coordinating with vendor staff members, who would maintain system functionality.

While EAB has not yet launched a statewide website, representatives report that the technology currently costs between $40,000 and $70,000 per site. Since the technology draws on institutional SIS and Banner DegreeWorks, institutions would not need to contract with CollegeSource for the TES software, offering some savings. The state would not need additional staff members, as the software would be maintained by the vendor. However, it was suggested that an Oregon HECC representative should be appointed to coordinate website components.

In addition to annual uploads, sites do require ongoing maintenance, with the rate of refresh determined by the type of information. Features that change more rapidly, such as the creation of new courses and their course equivalencies, are updated on a weekly, semesterly, or quarterly basis, with less timely data reviewed annually. The number of staff members on state teams also affects the timing of site updates, with administrators with smaller teams more circumspect about taking on large updates. States also reported incurring costs that are not captured in transfer offer budgets. For example, Arizona reported that Arizona State University offers free IT consulting support as needed, as well as free office space.

Institutional costs

Higher education system offices and institutions face labor costs that are not included in state transfer budgets. For example, the California ASSIST team has three executive sponsors, one from each postsecondary sector. The team also has an unpaid oversight committee that meets bimonthly. Arizona maintains both a steering committee, which consists of institutional representatives from each college and meets quarterly, and a smaller executive steering subcommittee that meets on an as-needed basis. Steering committee members are not compensated, as their time is covered in their institutional salary.

Other institutional costs include updating non-course equivalency website content. Site managers report that, on average, it costs two to five hours per update, which entails reviewing existing data and uploading changes. This time commitment drops as staff members gain experience, but each new staff member requires additional training to learn the system. Staff members in some states also attend professional development trainings, which accounts for approximately three to four hours per year. As the New Jersey site director noted, it is possible to divvy up the time associated with supplying information so that it does not all rest with one individual. For example, the role can be shared by staff members in the registrar and advising departments.

> We do two pushes a year, in the fall and winter, for everyone to get us events. We have the institutional profiles and photographs reviewed annually to ensure all that information is current. And behind the scenes, our program manager does a full sweep of all the links to make sure the URLs are working.
>
> — New Jersey

Minnesota reported investing relatively little time in maintaining its website because the transfer components are all handled by CollegeSource. State agency time is directed at updating transfer agreements among colleges, which is estimated at approximately three hours per month. A staff member completes an annual review of the agreements, which requires approximately eight to 12 hours. The remainder of site functionality is handled by CollegeSource. Institutions program codes into the uAchieve system, which requires a few hours per year. Each institution has its own landing page in Transferology, which requires that staff members periodically review their site to ensure information is

up-to-date and all links are working. Staff accounts also need to be reviewed, with accounts terminated for individuals no longer associated with the institution.

While transitioning to an online website can introduce additional costs, centralizing transfer functions can offer institutional savings in both technology and human resources. For example, it was suggested that deploying all transfer tools on a single statewide server is more cost efficient than maintaining individual sites catering to each institution. States contracting with third-party vendors also reported being able to deliver cost savings. South Carolina shared that once its system was up and operational, system executive director negotiated with AcademyOne leaders to bring down the annual cost of operations by several hundred thousand dollars.

Website Benefits

States reported soliciting feedback in a variety of ways to assess user satisfaction with system features and operation. Transfer steering committee members are consulted on an ongoing basis to obtain leadership perspective. Institutional users are also offered opportunities to share recommendations at professional development trainings. Websites also provide options for users to offer real-time feedback. For example, system operators review "Help Requests" to understand where individuals are encountering difficulty. Feedback can also be solicited through pop-up surveys, such as the one on ^ } µ š Z Œ } o] v [• Á •] š U maintained by AcademyOne, which offers users the option of completing a survey to share their satisfaction with their website experience.

> At the system level, we can sit here and talk all day about what we think the campuses want and need and what the students want and need. But most of us now haven't been on campus for over five plus years. We're not face to face with them anymore. We work with the staff on a daily basis, but we're not on the front lines like they are. So, it's super important for us to always make sure that we're talking to our institutions and that the institutions are getting the feedback from the students.
>
> v Minnesota

California reported that it maintains a feedback survey on its support page and maintains a help desk that users can access through an email account (help@assist.org). The state indicated that they receive a regular contact from the public at the help desk. The state also conducts an annual survey of feedback users to assess their satisfaction. An advisory committee, consisting of faculty members and students also provides input on site functionality, including serving as a sounding board on new site processes, policies, or features. CollegeSource shared that they include a feature called Help Scout, which enables students and college staff members to request support. In most instances, requests are addressed within a few hours of submission.

Not all states conduct ongoing follow-up. New Jersey administrators shared that surveys were conducted in the first few years, but there has been no effort to assess user satisfaction since. It was suggested that Oregon might wish to collect data at the outset to help inform the return on investment in the system and to identify where improvements are needed. Similarly, Minnesota shared that due to staff limitations, relatively little work is done to assess user satisfaction. The state conducts overarching site maintenance on a best-guess basis, with fixes made based on staff assessments of usability. The state reported satisfaction with its course equivalency site, maintained by CollegeSource, reporting that representatives are responsive to questions. CollegeSource maintains a ticketing system within their website, so users who have a question or problem create a work ticket and these requests are addressed relatively quickly.

Tracking user statistics

States reported using Google Analytics to track site usage. Statistics are focused on tracking the number of users and which components of the site users access most often. One challenge in quantifying usage is that most states we interviewed opted not to include a login requirement. New Jersey made this decision based on privacy concerns. Since students could chose to manually enter their academic transcripts into the •] š transcript evaluator, it could be possible to individually identify students. Consequently, the state has structured the site for anonymous usage. The state does, however, track the sending and receiving of official electronic transcripts among participating institutions, which allows administrators to see traffic between pairings of two- and four-year colleges and universities.

States that do not require users to log in are limited in the analytics they can produce. For example, while California reported that it is has roughly 1.6 million unique visitors each year, accessing roughly 6.8 million articulation agreements and 1.0 million transferable courses, staff members are not able to differentiate users by role or track whether they visit multiple areas of the site. Arizona shared that in the past, when it marketed services directly to students, an effort was made to track where traffic originated to assess the relative benefit of advertising expenditures.

Minnesota reported that while it has some analytics on its state-operated components relating to articulation agreements, the information is limited. In the past, the state decided to streamline the site based on data showing that people were not making wide use of it; consequently, features that were not seeing much use were removed. Staff members reported that Transferology provides a tab that allows users to track website transfer statistics, such as the number of courses reviewed or degree audits run. Although state administrators reported that they did not make wide use of Z •] tracking functions, institutions had access to this information and made use of reports based on their own needs.

Website benefits

While difficult to quantify, states spoke to the benefits that transfer websites offered. Arizona, California, and New Jer limit transfer information to public in-state institutions. This is intended to encourage students to stay in-state, as they can see how their credits will apply. In comparison, both AcademyOne and CollegeSource allow users to assess transfer for public and private institutions located in-state, out-of-state, and in some instances, internationally.

> If I go to a community college and I know that there's a website in my state where I can look up every four-year [college and university] and find out how my credits transfer, where I'm losing credits, where I'm not losing credits, who has my major who to reach out to that's actually a transfer representative, then it makes me more likely to explore the options within my state before I look [out of state].
>
> v New Jersey

Other benefits mentioned by state administrators included providing more options for students to explore multiple colleges where credits may transfer; empowering students to own their transfer decision; and motivating students to consider in-state options, as sites do not offer students course equivalency options for private or out-of-state institutions (although South Carolina has allowed private and for-profit institutions founded prior to a certain era). Administrators also suggested that websites helped to reduce costs by easing the workload on transfer advisors.

States that built and operated their own systems spoke of intangibles associated with maintaining a dedicated transfer team. For example, Arizona shared that state community colleges recently received approval to offer four-year degrees, which caused some conflict within the state. The ability to have a trusted and safe space to work together has helped to address these concerns and promote stability.

Administrators also felt that the relationships they have built with institutions has helped to align transfer website functions to institutional needs.

States that maintain vendor-developed systems believed they offered several advantages. One key consideration is that pre-packaged websites and project management supports have helped to speed and coordinate the uploading and curation of site resources. Vendors also employ highly trained technology staff. As one service provider noted, "We're a software company. You tell us what you need, we can build it for you, and we can µ] o] š ‹ Deviations from existing components will, however, incur additional costs.

Concluding Thoughts

Analysis of state transfer websites indicates that Oregon has several options in designing a transfer portal. Each approach can be tailored to offer a range of functionalities and comes with differing development and maintenance costs. We offer three possibilities for HECC consideration, arranged in order of increasing cost (inclusive of start-up and long-term maintenance).

Option: Redesign the existing state website

Adapting the existing [OTransfer Compass website](#) to have a simpler, student-facing design could potentially offer the most cost-efficient approach, when accounting for build-out and long-term maintenance.[3] While the state could face substantial front-end costs to design the website, once created, students seeking information on course equivalencies or institutional profiles would be embedded links and be directed to individual college webpages. Site build out would be coordinated by HECC staff, who would convene stakeholders to inform the selection of website components. Efforts also could be undertaken to coordinate with institutional staff members on the creation of comparable information within their websites and the timing for updating course equivalencies and profiles.

Potential Benefits

- Existing HECC site content may be repurposed
- May limit resource duplication
- Student information would not need to be collected between statewide site and institutional sites/tools
- Little or no additional costs to institutions

Potential Drawbacks

- Option does not align with staff and student requests for a centralized transfer hub and statewide course equivalency tool
- Students would need to visit individual college websites to explore course equivalencies and other resources
- HECC would potentially incur substantial start-up costs to build out the new site
- Website development could prolong rollout

[3] Note that HECC will need to consult with its internal IT staff members to quantify the cost of developing a student facing site and staff time necessary for system wide coordination and site maintenance in the long-term. It may be that start-up costs will be more expensive than a vendor-developed solution, though long-term cost savings may bring down overall expenditures. Since site components will affect cost, additional information on site configuration and functionality is needed.

Option: Contract with a third-party vendor

Outsourcing site development and maintenance could offer Oregon options for expanding site functionality to centralize access for out-of-state students and additional capabilities. Vendors currently offer proprietary transfer portal solutions used in numerous states, and their desire to break into the Oregon market offers HECC options for securing competitive pricing assistance. To cost, we asked three leading vendors, AcademyOne, CollegeSource, and EAB to provide ballpark estimates of producing a transfer portal, with a set of basic options that Oregon stakeholders rated as essential. These estimates are provided in Appendix D. NOTE: While vendors were requested to offer ballpark estimates on the same package of services, only EAB includes Degree Audit. Other vendors indicate they would add additional charges to provide this functionality; accordingly, care should be taken when comparing estimates). While the vendor would be responsible for portal creation and maintenance, one or more HECC staff members would need to coordinate site development and use, though vendors believed this work could be performed without hiring additional individuals.

Potential Benefits

- Modules already exist to address many stakeholder identified requests for a statewide course equivalency tool and resources
- Modules have been tested and are likely to have few technical issues
- Students nationwide can explore Oregon institutions and course equivalencies
- Existing HECC staff members would coordinate portal operations with the vendor
- Portal launch within six months or less following contract award

Potential Drawbacks

- New site licensing and maintenance costs, which would be borne by state and/or institutions[4]
- Site functionality is limited to existing modules; changes would require additional cost
- Student information would be shared with vendor
- Potential for duplication of transfer resources maintained by institutions

Option: Design and maintain a state administered website

Homegrown software solutions will provide Oregon with options for tailoring site capacities to meet diverse student, institutional, and policymaker needs. This approach will likely introduce substantial new staffing and technology costs. This would include hiring programmers to build out the new portal and a minimum of 3.0 FTE staff members to compile and curate course equivalency and institutional information.

Potential Benefits

- Ability to tailor site to diverse student, institutional, and policymaker needs
- Control over site design, content, and operation
- Strengthen state and institutional relationships
- Student information would not be shared with vendor

Potential Drawbacks

- Site creation will require a substantial investment of resources and time

[4] Note that because some Oregon institutions are already contracting with CollegeSource for its TES and Transferology tools, cost savings could occur if the state were to select CollegeSource as its provider.

- New staff salaries/benefits and technology costs, borne by state and/or institutions
- Launch may be delayed a year or more
- Course equivalency checks limited to Oregon sending and receiving institutions

Irrespective of its approach, Oregon will incur additional costs in designing and maintaining an online transfer portal. Sustaining the site will require that the state create a tool that meets diverse stakeholder needs and has strong institutional backing. Stable funding also will be needed to ensure that the portal can operate in the long term. Feedback from states operating transfer websites indicates that following adoption, these systems are valued by students and institutions. Next steps will entail selecting a strategy for portal creation, collaborating with stakeholders to finalize its components, and communicating its benefits to secure statewide support.

Appendix A State Transfer Websites

State	URL	Operator
Arizona	https://aztransfer.com/	State
California	https://assist.org/	State, Accenture support
Colorado	https://highered.colorado.gov/guided-pathways-guaranteed-transfer	Institutional level
Connecticut	https://www.ct.edu/transfer	State, not searchable by course equivalencies
Idaho	https://coursetransfer.idaho.gov/	State
Illinois	https://itransfer.org/	CollegeSource
Indiana	https://transferin.net/	State, not searchable by course equivalencies
Kentucky	http://knowhow2transfer.org/search.asp	CollegeSource
Maine	https://www.maine.edu/students/transfer/	State
Massachusetts	https://www.mass.edu/masstransfer/home.asp	State
Michigan	https://www.mitransfer.org/	State
Minnesota	https://www.minnstate.edu/admissions/transfer/index.html	CollegeSource
Mississippi	https://matttransfertool.com/	State, not searchable by course equivalencies
Nebraska	https://transfer.nebraska.edu/	CollegeSource
New Jersey	https://njtransfer.org/	State
Ohio	https://transfercredit.ohio.gov/apexprod/rws_cems/r/102/home	State
Oklahoma	https://www.okhighered.org/transfer-students/	State
Pennsylvania	https://www.pacollegetransfer.com/	AcademyOne
South Carolina	https://www.sctrac.org/	AcademyOne
Tennessee	https://www.tntransferpathway.org/	State; not searchable by course equivalencies
Utah	https://utahtransferguide.org/	AcademyOne
Virginia	https://www.transfervirginia.org/	/ v š]
Wisconsin	https://www.wisconsin.edu/transfer/	CollegeSource
Wyoming	https://wyotransfer.org/	AcademyOne

Appendix B: State Interview Protocol

Introduction and consent

The Oregon Higher Education Coordinating Commission (HECC) is planning to create a statewide transfer website to help Oregon college students navigate the transfer process. This website would include, at a minimum, a tool to assist students in understanding how their credits will transfer between public postsecondary institutions (the 17 community colleges and 7 universities) in Oregon. This website may also include additional information and resources to help students navigate the transfer process.

HECC has contracted with Education Northwest to understand what it would take to develop a state transfer website. Education Northwest is a nonprofit in Portland, Oregon.

This interview is intended to help us understand how your state's transfer website was created and lessons learned during the process. We also are interested in understanding the benefits it confers.

Education Northwest is also collecting data from Oregon college students through a survey and Oregon community college and university staff through focus group conversations. The information Education Northwest collects will be used by HECC to understand what information, resources, and tools should be included on the state transfer website and the required resources necessary to implement the state transfer website.

We expect this conversation to take no more than 90 minutes, and there are no anticipated risks to participation. Your participation is voluntary, and you may choose not to participate, decline to answer any question, or stop participating at any time. At the conclusion of this interview, we will email you a $50 gift card for sharing your time and expertise.

Deliverables from this project will include PPT presentations and memos to HECC with findings from the student survey, focus groups, and these state interviews. Quotes from this conversation may be used in deliverables but will not be attributed to an individual. While Education Northwest will not share your name in deliverables, we would like to have the option of sharing your name with HECC administrators, who may have follow-up questions about the information that you shared.

Do you have any questions about this project before we begin?

Would it be acceptable to share your name and contact information with HECC administrators in the event that they have follow-up questions?

With your permission, we would like to record this conversation to have a complete record of our conversation. You may request at any time to discontinue or temporarily stop the recording. At Education Northwest, we will store interview notes and this recording in a secure folder that only the research team has access to. Recordings may be transcribed by a third-party transcription service. The audio recording of the conversation and all transcriptions will be erased after the study is done.

Do you agree to have our discussion recorded?

If you have any questions about this project, you can contact Dr. Michelle Hodara at michelle.hodara@ednw.org

Interview questions

Introduction

1. What is your name and role?

Rationale for website development

2. Prior to launching your state transfer website, how did students determine how credits might transfer across institutions?
3. Why did your state decide to develop an online transfer portal?

Website selection

If state-developed website:

4. Why did you choose to go with a state-developed software solution in lieu of purchasing with a third-party vendor?
5. With which vendors did you speak and what were the deciding factors in opting for a state-developed system?
    a. Did program features differ across vendors and, if so, in what respects?
    b. How did costs differ across vendors?

If vendor-developed website:

4. Why did you choose to go with a vendor-provided solution in lieu of developing your own system?
5. Which vendors did you speak to about developing an online transfer website and what were the deciding factors in selecting [enter vendor name] over others?

Website design

6. How did you determine which features and resources to include?
7. If vendor-developed: Did you make v Ç u }] ( ] š] } v • š } š Z Z • u } er o [} ((Œ Ç vendor name]?
    a. If no:
        1. Why did you choose not to modify the website (i.e., features/cost)?
        2. If you were to add additional features to the website, what would they be?
    b. If yes:
        1. What modifications did you make and why?
        2. How did these changes impact the timing of site launch and cost?
8. How was information on course articulation between public colleges and universities inputted into the system?
    a. How much time did this data entry take and who was responsible for entering it?
    b. What is the plan for updating this information when institutions change their courses or rules around course articulation?
    c. Does the credit transfer tool also support high school students who earned college credit from a public institution in the state understand how their credits will transfer if they enroll in a public institution after high school)? If yes, please describe.
9. Did you conduct usability testing during your design process and, if so, how did that help with website design?

Website operations

10. t Z š } • š • Z • Ç } µ Œ • š šed [to site creation and Œ operation, specifically the view itemized budget if possible]
    a. Portal design?
    b. Portal startup?
    c. Annual hosting?
    d. Maintenance?
    e. Portal upgrades?
    f. If vendor-developed: Were initial vendor cost and ongoing maintenance cost quotes accurate?
11. Has the website required additional state and college/university staffing or maintenance costs (or savings)? If yes, please describe.
12. Were there any unanticipated challenges in transitioning to the online portal and, if so, what were they?
13. If vendor-developed: How satisfied have you been with the maintenance and technical assistance services provided by [enter vendor name]?

Website benefits

14. If state-developed: What are some of the benefits and limitations of using a state-developed solution? If vendor-developed: What are some of the benefits and limitations of using a vendor-developed solution?
15. Have statewide transfer rates changed since the implementation of the new system?
16. Do you track portal user statistics and, if so, what metrics do you collect?
17. Have you conducted a user satisfaction survey to assess the benefit the system affords to students and educators?
    a. If yes:
        i. How satisfied are users with the site?
        ii. What modifications would they like to see?
18. With hindsight has your decision to implement the new website justified the time and expense of creating it? In other words, if you were starting again, would you have still made the investment?
19. If you were starting over what would you do differently based on your experience?

Appendix C: State Costs

ARIZONA: AZTRANSFER BUDGET FY2023 Approved			
Revenues	FY23 Approved Budget	Expenditures	FY23 Approved Budget
Beginning Balance:	$516,886	Personal Services	
Six-month contingency	$350,000	Salaries	$413,061
		ERE	$156,963
REVENUE		Administrative Service Charge	$4,731
State Appropriations	$213,700	Total Personal Services	$574,755
CC Match Funds	$277,168		
Univ Match Funds	$277,169	Executive Director	
		Operations	$5,000
Summit Fees & Sponsorships	$58,750	Office Space Lease	$2,300
Credit Card Processing Fee	-	Total Executive Director	$7,300
Other Revenue	-	Communications	
		Operations	$10,000
Total Revenue	$826,787	Marketing/Advertising	$60,000
Total Beginning Balance/Revenue	$1,693,673	Total Communications	$70,000
		Data	
		Operations	$10,000
		Tableau	$10,000
		Total Data	$20,000
		Systems	
		Operations/Equipment	$10,000
		Joint Server Management	$28,500
		Total Systems	$38,500
		Training	
		Operations	$10,000
		Total Training	$10,000
		Special Projects	
		Summit	$70,000
		Total Special Projects	$70,000
		TOTAL EXPENDITURES	$790,555

CALIFORNIA ASSIST BUDGET FY2023	
Item	Budget
Labor (salaries, benefits)	$650,000
Technology (equipment, licensing, hosting)	$100,000
Office space	Remote/no cost
Other (consultants, travel)	$0
TOTAL EXPENDITURES ANNUAL MAINTENANCE	$750,000
One-Time Costs	
Technology Software Development (Articulation modules build-out)	$1,650,000
TOTAL EXPENDITURES MAINTENANCE + MODERNIZATION	$2,400,000

Minnesota Budget

Tool	Function	Cost	Who pays?	Student Use	Campus Use	System Office Use
uAchieve Degree Audit	An online degree audit system that allows students and advisors to track progress toward degree completion while highlighting the remaining courses and requirements needed to graduate.	$341,405 for four years Annual maintenance: FY21 - $81,605 FY22 - $84,053 FY23 - $86,575 FY24 - $89,172	Minnesota State	X	X	X
Transferology/ Transferology Lab	Transferology assists advisors, students, and parents in making educated decisions when transferring credit. Students can enter coursework and instantly see how their coursework transfers and applies to academic programs at member institutions. In the Transferology Lab advisors can create common transfer scenarios, view equivalencies and advise students.	Four-year subscription = $270,692 Annual subscription: FY21 - $64,703 FY22 - $66,644 FY23 - $68,643 FY24 - $70,702	Minnesota State	X	X	X
Academic Planner and Schedule Builder	uAchieve Work v v Œ ® o À Œ P • š Z Æ] • š (i.e., uAchieve Main) and utilized to create interactive Œ } u ‰ • š Z š ( ] v ® o Œ Students š Z š will use these roadmaps of courses to build their own personal plans, helping them stay on track to meet their educational goals. The creation of term-by-term plans in turn provides the school with aggregate data needed for demand analysis and classroom scheduling. The acquisition of the Academic Planner and Schedule were authorized by the Board of Trustees in May 2019. Implementation is proceeding with systemwide rollout anticipated to begin in fall 2020.	One-time license fee $640,956 to be paid in FY19 Implementation + travel $69,200 to be paid in FY20 Annual maintenance FY20 - $149,557 FY21 to $132,037 FY22 - $135,998 FY23 - $140,078 FY24 - $144,280 Three (3) one-year options @ 6% increase per year	Minnesota State	X	X	
Transfer Evaluation System (TES)	TES allows users to locate course descriptions; route and track the evaluation process; store, manage, and publicize the resulting equivalencies; and utilizes algorithms to generate lists of likely equivalencies between institutions	$636,260 five-year total FY22 - $125,238 FY23 - $125,238 FY24 - $127,743 FY25 - $127,743 FY26 - $130,298	Minnesota State		X	X

Appendix D: Vendor Costs

ACADEMYONE	
Public Institutions	
Item	Budget
Website development (24 public institutions)	$100,000
Annual Maintenance	
Annual software license, hosting and support (24 public institutions*)	$250,000
TOTAL EXPENDITURES PUBLIC INSTITUTIONS FIRST YEAR	$350,000
TOTAL EXPENDITURES PUBLIC INSTITUTIONS ANNUAL SUBSEQUENT YEARS	$250,000

Private Institutions	
Item	Budget
Private institutions (15 private institutions @ $3,000/institution)	$ 45,000
Annual Maintenance	
Annual software license and support (15 private institutions @ $7,500/institution)	$112,500
TOTAL EXPENDITURES PRIVATE INSTITUTIONS FIRST YEAR	$157,500
TOTAL EXPENDITURES PRIVATE INSTITUTIONS ANNUAL SUBSEQUENT YEARS	$112,500

TOTAL EXPENDITURES PUBLIC AND PRIVATE FIRST YEAR	$507,500
TOTAL EXPENDITURES PUBLIC AND PRIVATE ANNUAL SUBSEQUENT YEARS	$362,500

* If Oregon were to host the site and software there would be an additional charge of $60,000

Functionality Includes:

- Search for courses, programs, majors, degrees
- Search for course equivalencies
- Assess transcript evaluation
- Search for exam equivalencies
- Search for high school dual credit courses
- Search for military credit
- Institutional profiles, including admission requirements, and tuition and fees
- Institutional transfer office advisor/counselor listings and contact information
- Statewide transfer agreements, including Core Transfer Maps, Major Transfer Maps, Oregon Transfer Module, Statewide Transfer Degrees
- Link to HECC FAQ and Transfer tips
- Transfer Events Calendar
- Help/contact us

Additional Functionality

- Degree Audit – Most clients follow an 80/20 rule: Degree audit is set up for 20 percent of majors that represent 80 percent of the student population. Majors may be added, by institution decision
  - One-time set-up charge: Variable, based on the number of programs/majors to be included.
  - Annual license and support: Variable, based on the number of programs/majors to be included, with cost: First year $100/major (initial coding); Subsequent year $50/major
- Reverse Transfer – an automated system that combines the course data from the community colleges with the course data from 4-year institutions and produces a report showing students that have likely satisfied the degree requirements for an Associate degree.
  - One-time set up charge: $50,000
  - Annual license and support: $50,000

COLLEGESOURCE	
Public Institutions*	
Item	Budget**
Website development	Included
Annual Maintenance	
TES & Transferology subscription + quarterly imports (24 public institutions)	$360,000 - $390,000
TOTAL EXPENDITURES PUBLIC INSTITUTIONS	$360,000 - $390,000***

Private Institutions	
Item	Budget
Website development	Included
Annual Maintenance	
TES & Transferology subscription + quarterly imports (15 private institutions	$150,000 - $170,000
TOTAL EXPENDITURES PRIVATE INSTITUTIONS	$150,000 - $170,000*

TOTAL EXPENDITURES PUBLIC + PRIVATE 1st Year IMPLEMENTATION & MAINTENANCE	$510,000 to $560,000**

* Note that 18 colleges currently contract for TES 2 universities for Transferology. These estimates would provide these products to all institutions, meaning that sites currently contracting for CollegeSource products would realize a cost savings, which could be reallocated to cover website costs. No information was provided on the current levels of expenditure.

** Budget range is intended to account for differences in the number of imports provided annually.

*** All CollegeSource products have a 5 percent annual maintenance price increase

Functionality Includes:

- x Search for courses, programs, majors, degrees
- x Search for course equivalencies
- x Assess transcript evaluation
- x Search for exam equivalencies
- x Search for high school dual credit/concurrent enrollment
- x Search for military credit
- x Search for reverse transfer
- x Institutional profiles, including admission requirements, tuition and fees
- x Institutional transfer office advisor/counselor listings and contact information
- x Statewide transfer agreements, including Core Transfer Maps, Major Transfer Maps, Oregon Transfer Module, Statewide Transfer Degrees
- x Link to HECC FAQ and Transfer tips
- x Help/contact us

Additional Functionality

- x Transfer Events Calendar custom development
- x Degree Audit Requires u Achieve. Currently beta testing PeopleSoft

EAB*	
Public Institutions	
Item	Budget**
Website development (24 public institutions)	Included
Annual Maintenance	
One-time implementation fee**	$360,000 - $600,000
Annual software license, hosting and support (24 public institutions)*	$600,000 - $960,000
TOTAL EXPENDITURES PUBLIC INSTITUTIONS FIRST YEAR	$960,000 - $1,590,000
TOTAL EXPENDITURES PUBLIC INSTITUTIONS ANNUAL SUBSEQUENT YEARS	$600,000 - $960,000

Private Institutions	
Item	Budget
One-time implementation fee**	$ 225,000 - $375,000
Private institutions (15 private institutions @ $3,000/institution**)	$ 375,000 - $600,000
TOTAL EXPENDITURES PRIVATE INSTITUTIONS FIRST YEAR	$600,000 - $975,000
TOTAL EXPENDITURES PRIVATE INSTITUTIONS ANNUAL SUBSEQUENT YEARS	$375,000 - $600,000

TOTAL EXPENDITURES PUBLIC AND PRIVATE FIRST YEAR	$1,560,000 - $2,565,000
TOTAL EXPENDITURES PUBLIC AND PRIVATE ANNUAL SUBSEQUENT YEARS	$975,000 - $1,560,000

* Note that EAB is the only vendor currently offering degree audit as an included feature. Other vendors would incur additional costs if degree audit were to be included.

** One-time implementation fee is intended to support start up programming. Annual costs would be maintenance on an ongoing basis, with some cost escalation added. Budget range is intended to account for potential differences in institutional systems and size, which may affect cost estimates

Functionality Includes:

- Search for courses, programs, majors, degrees
- Search for course equivalencies
- Transcript evaluation is partially supported. Have credit evaluation workflow for students and staff, but do not currently support document collection
- Degree Audit: EAB fully supports the following SIS and degree audit systems: Banner/DegreeWorks, PeopleSoft, Colleague. Any institution on these systems will have degree audit functionality as a part of Transfer Portal. We would add, that this should be considered a Priority 1 functionality is it is the #1 question prospective students have during their exploration process (i.e., how will my credits transfer and apply to the degree?)
- Search for reverse transfer is partially supported.
- Search for exam equivalencies
- Search for high school dual credit/concurrent enrollment
- Search for military credit
- Institutional profiles, including admission requirements, tuition and fees
- Institutional transfer office advisor/counselor listings and contact information

- Statewide transfer agreements, including Core Transfer Maps, Major Transfer Maps, Oregon Transfer Module, Statewide Transfer Degrees
- Link to HECC FAQ and Transfer tips
- Transfer Events Calendar – partially supported. Can list upcoming events and/or links to Calendly for scheduling purposes. Do not currently support a standalone calendaring functionality.
- Help/contact us

Appendix B: Memo 2 (EdNorthwest)

Oregon Transfer Portal Project: Oregon Staff Focus Group Findings (Memo 2)

Background

The Oregon Higher Education Coordinating Commission (HECC) is planning to develop a statewide transfer portal to help Oregon college students navigate the transfer process. HECC hired Education Northwest to gather data that will inform the development process. There were three main data sources: **interviews** with state-level administrators from five states that currently operate a transfer portal and three vendors who develop transfer portals for states; **focus groups** with K-12, private college/university, community college, and public university staff members; and a **survey** of Oregon community college and public university students. This is the second of three memos—one for each data source. The fourth deliverable is a presentation that synthesizes findings across all three data sources and includes final recommendations.

In July and August 2022, Education Northwest researchers conducted 14 focus groups with 88 higher education and K-12 staff members to gather information about the perceived purpose and direction of a statewide credit transfer portal. This included 10 focus groups with community college and public university staff members (66 participants), two focus groups with private college and university staff members (10 participants), and two focus groups with K-12 staff members (12 participants).

All seven [illegible] 17 community colleges, nine private colleges/universities, and eight schools/districts/education service districts. Table A1 in appendix A provides the number of participants by institution type and name, and table A2 provides the number of participants by role.

[illegible] the overall purpose of a statewide transfer portal and how it could be used, specific components that should be included in a portal, including a course equivalency tool and additional resources, and what it would take to develop and maintain the portal. Throughout, findings are presented separately for the community college and public university focus groups, private college/university focus groups, and K-12 focus groups. For the remainder of this memo, we use the term website, instead of portal, since focus group participants were more familiar with that term.

Overall Website Purpose and Use

Community college and public university focus group participants emphasized the need for a simple, accessible website to serve as a central information hub for planning a pathway to a degree.

Participants want a statewide transfer website that focuses on essential information: how credits earned would transfer to different colleges and universities, both prior to students taking courses and subsequent to course completion, and how course credits would be applied to fulfill general education, elective, or major requirements at a given institution.

> I would presume to say that the students just want to know where their transfer credits are going to be accepted and what they're going to be accepted as. Community college focus group participant

> Transfer students are coming [at different points] of their education journey. So I'd like the tool to have the option for someone who is coming out of high school and is going to start at community college, and they can see if I want to transfer to this four-year institution, here are the classes I need to take. Public university focus group participant

Focus group participants also consistently advocated for [illegible] determine how their credits will transfer between institutions and to access links to other information about specific colleges (such as advisor contact information, links to college websites, financial aid information).

> One of the things I hear from students is, they want a place where they can go to have access or links to all the different schools that could be viable options for them, so that they don't have to try to Google every one of the universities that could be a transfer option. Public university focus group participant

Private college/university focus group participants emphasized the need for students to compare degree pathways at all institutions across the state

Focus group participants from private colleges and universities shared how transfer students come to private college and universities from a range of places, including community colleges, four-year institutions, and other private institutions, although community colleges were most frequently mentioned. Most students come from Oregon or another West Coast state, but they also come from outside the region and even internationally. Some students have specific motivations for attending school, such as an athletic scholarship or a specific academic program.

Private college/university staff members also viewed the website as a centralized source of information that can help students see the range of options available to them and find the best fit based on their individual goals and needs. Participants also felt the website could provide a greater understanding of which credits are accepted at private college and universities, how credits align with different degrees, and the potential timeframe for degree completion.

> I view it as an opportunity for students to see the various pathways and the various options available to them. Having a single source that's credible, that's maintained by the by HECC, will allow students to see the plethora of options that are available. Private college/university focus group participant

K-12 focus group participants emphasized that K-12 advisors, high school students, and families need centralized and clear information about how college credits are accepted among Oregon community colleges, public universities, and private colleges/universities

K-12 focus group participants described a lack of understanding among students, families, and even advisors about how college credits earned in high school will transfer to the various institutions. Participants shared that high school students mainly want to know if their college credits will transfer and, if so, how. Many students are disappointed when their credits do not transfer as they thought they

would (e.g., as an elective versus a general education requirement), or if their score on an Advanced Placement exam is not high enough to earn credit.

Focus group participants also envisioned the website as a tool students could use to plan the college-level courses they might take while still in high school. They stressed how important it is for students to take credits with a purpose and to understand how those credits will fit into their college and career trajectories. One advisor suggested the website would be useful during planning sessions with students and families or for students to use as a follow-up to those sessions or when conducting their own research into their options. Participants noted, however, that students and families would need some training or guidance in how to use the site. They suggested group training activities such as hosting a workshop that walks students and families through the tool step by step.

> I think this is just one more tool to put in their toolbox, to be able to help our students gain access to that information easily. Sometimes, when ordering a transcript through a college, they get their transcript, but they still don't know what credit they're going to get. It would be amazing to have that information, to be able to sit down with a student and say, here's the credits you are going to get at [public university name]. K-12 focus group participant

Participants across different institution types emphasized that the credit transfer process will always require advisors for advocacy and guidance.

Focus group participants viewed the website as an opportunity to connect students to advisors at their community college or at the public university to which they are considering transferring, not as a replacement for those advisors. In most of the focus groups, participants from different institutions emphasized the importance of having advisors to help students navigate the transfer process, even if students also use a transfer portal. Examples of how advisors help included advocating for students for the award of a course equivalency, seeking a waiver for a course requirement, helping students plan courses that will have high likelihood of transfer, and facilitating the transfer process across institutions.

> There's been countless times where I have students in specific situations where maybe it can't even be accounted for on a website. Right? They really need to talk to somebody about their specific situation. t Community college focus group participant

A few focus group participants expressed hope that a statewide course equivalency tool might also help parents/caregivers understand the transfer options available to their student, both to educate themselves and to provide better guidance.

> I could see this tool being helpful for families. It may help them make decisions about what school their student wants to transfer into, if they're able to get a sense of what courses are going to be accepted by another institution ahead of time. t Community college focus group participant

Website Components: Course Equivalency Tools

The most common existing course equivalency tools named by community college and public university participants were TES, Transferology, and Banner.

Focus group participants identified several tools they are currently using to help facilitate the credit transfer process, including the Transfer Evaluation System (TES), Transferology, and the Banner Student

Articulation tool, sometimes in combination. Participants representing at least six Oregon colleges and universities discussed the use of TES and Transferology.[1] Both TES and Transferology are created and operated by College Source, Inc. Banner is a database of student information that can be integrated with TES and Transferology or used independently as a degree audit system.[2] Some of these tools are not public-facing and are available only to select college and university staff members.

In general, focus group participants found the TES Transferology to be user friendly and found both to contain a large amount of historical course data, including changes in credit equivalencies over time. Participants did express some concerns about the amount of time it would take to keep TES updated.

> I think the only issue that really arises with TES is the "garbage in, garbage out" factor. It's really hard to keep up with all that information. And every time something changes, we've got to go in and update that. So, I can see where it lags behind. Overall though, there is a lot of good information in there that you can get to that will help. — Public university focus group participant

A statewide course equivalency tool could improve on existing institutional tools by providing timely and accurate information about how credits will transfer and how they will apply to academic majors across Oregon [illegible] colleges and universities

Focus group participants were particularly enthusiastic about a statewide course equivalency tool that could identify how individual courses would articulate to different institutions. Community college and university staff focus group participants generally agreed that students need to know whether their courses will meet elective, core, or major requirements of common majors at different universities and the coursework that would still be required to earn a bachelor's degree. The ability to compare how credits are transferred across Oregon institutions was also seen as a key component of the statewide transfer tool. These features would help students to plan a course of study.

> If we want students to be able to plan as best as possible so that they can complete a degree within a timely manner, we need to be completely transparent in how all of their credits may transfer to whatever their intended university may be. — Community college focus group participant

> I think the planning role is absolutely critical. One of our advising goals at community colleges is to ensure that students don't take credits that aren't going to serve their degree goal, and you can't ensure that unless you're able to plan ahead with accuracy. — Community college focus group participant

[1] Not all participants named the transfer tool used at their institution. The six colleges and universities mentioning TES include Eastern Oregon University, Linn-Benton Community College, Oregon State University, Southern Oregon University, University of Oregon, and Western Oregon University. The two mentioning Transferology were Portland State University and University of Oregon. According to an August 1, 2022 email from College Source Sales Executive Myndi Landry, 18 Oregon colleges and universities currently use TES (Portland State University and the University of Oregon) use Transferology.

[2] Participants from eight colleges and universities reported using Banner as an independent database or degree audit tool. These include Eastern Oregon University, Lane Community College, Oregon State University, Portland Community College, Portland State University, Southern Oregon University, Umpqua Community College, and the University of Oregon.

> I don't think it's a stretch for me to say that the common question is, 'What degree program can I complete in the shortest amount of time?' That's often what students are looking for. – Public university focus group participant

Participants also said a statewide course equivalency tool needed to be timely, accurate, and up to date. It is essential that credits are accepted as indicated in the tool. If the tool indicates that a course will transfer between institutions and will meet particular requirements, then these decisions need to be honored by the institutions.

> I think one issue this could help resolve for students is just getting timely information, not waiting for articulations to get done at different schools before they know how courses will apply. They would know in advance before going to some of these different schools. – Community college focus group participant

Private colleges and universities felt that a statewide course equivalency tool would help students consider private postsecondary education as a viable option, although they acknowledged that updating their course articulations was a challenge

Nearly all private college/university focus group participants believed it was important to include private colleges and universities on a statewide course equivalency tool. Many community college students transfer to private colleges and universities in the state, and these students need a central location that can help them determine whether their credits will transfer to their chosen institution. Participants also said many students may be discouraged from considering a private college or university if those institutions are not included on the website. They emphasized the need to provide students with the full scope of options.

> When you think about a student-centered process, a place where students can go and see all the available options, then I think having the private institutions included on the website is a great idea. – Private college/university focus group participant

> If the ultimate goal is to help community college students determine the best pathway toward a four-year degree, then including the private institutions as a viable option makes complete sense to me. – Private college/university focus group participant

Private college/university focus group participants also acknowledged that it may be challenging to include their institutions in the statewide course equivalency tool. Currently, many of these institutions do not use a course equivalency tool and rely instead on individual evaluation of transcripts to determine what credits might transfer.

> We aren't really using any particular tools. So, we evaluate transfer credit on a course-by-course basis only. We do not currently have any articulation agreements with any other institutions. So, we're just looking at individual students and their transcripts and kind of doing those credit evaluations by hand. – Private/university college focus group participant

A few private colleges/universities use TES. These schools report that the system allows students to find course equivalencies but can also be challenging to navigate due to the number of courses in the tool. Additionally, staff members struggle to keep it up to date.

> We have an outward-facing TES site that students can access externally, when there's a transfer course equivalency, if the course is not already in TES, then our faculty can log into TES and make updates so that the curriculum can be updated as we get these course requests. And so, our TES database is sort of a tool that we're trying to build itself in terms of course equivalencies. – Private college/university focus group participant

Another challenge is that private colleges typically have their own unique core courses that are not equivalent to credits from public institutions. As one participant described, [^] v o } š } (š Z Œ] š • š transfer are core credits, and we have a fairly robust core, that's always been an issue for us in terms of š Œ v • (Œ • š µ v š • X _

Some private colleges and universities have articulation agreements in place, others do not. Some have policies to accept certain blocks of credits, such as the Associate of Arts Oregon Transfer (AAOT), but the AAOT does not cover all general education requirements. This means even if an institution accepts that block of credits, it will still take a student longer to complete their degree than it might at another institution. Additionally, private colleges may not accept College Level Examination Program (CLEP) other credits that most public institutions do accept.

To address these issues, several private colleges are currently engaged in projects such as the Oregon Transfer Pathways to the Liberal Arts, which will provide guaranteed transfer pathways for community college students. Some are also revising their policies to expand articulation agreements and to increase the number of transfer students.

One focus group participant noted that a statewide course equivalency tool would provide additional motivation for private colleges and universities to articulate how credits transfer from public institutions to private institutions in Oregon.

> I think it would be useful for us to have a place that clearly articulates our policies in a way that makes sense to a transfer student and then potentially connects them to other tools, like TES, that could allow them to evaluate courses more individually. [Currently], our information is kind of hidden on the admissions website, and it doesn't get updated regularly. So, having external pressure to be clear and have shared information I think would actually be really useful. – Private college/university group participant

K-12 focus group participants said a statewide course equivalency tool would allow high school students, and their advisors and families, to understand how their credits would transfer after high school and keep track of all their college credits earned in high school. Currently, K-12 staff members use several approaches to help facilitate credit transfer for students and former students. One participant noted that some high school staff members help students contact universities to find out how courses will transfer. Other participants encourage students to manage the process themselves or to work with their college academic advisors because [K • š ((} v [š Z À • • to the information they need to assist students.

> We just have the kids request the transcript from the college [through which they earned credit] to be sent to the college they're going to attend, just because we don't know how

> those credits are going to transfer. And we don't know the specifics, so we just kind of let them deal with their college academic advisors on that. – K–12 focus group participant

Another school uses existing degree audit tools available at particular colleges/universities to show students how college credits obtained in high school may count toward a particular degree.

> We use the one d[community college name] website. Now [community college name] for their students, it's all built into their student portal, and they can run any degree audit with a specific degree or certificate that they are interested in. – K–12 focus group participant

Major challenges with existing processes include a lack of awareness about how credits transfer and a lack of coordination among systems. Participants shared that nearly every college and university has a different way of articulating credits, and it can be difficult to find accurate and updated information. Additionally, college course names may be different from the high school course names, so students may not know exactly what course they have matching credit for.

> There could be several dual credit programs in a high school, and we all have a different system, and we all have a different process. And some of those systems and processes don't talk to each other. So, you have maybe a student that has three different student accounts with three different universities or colleges. And the way they apply for the credit is different. – K–12 focus group participant

K–12 focus group participants were very enthusiastic about the idea of a statewide course equivalency tool to help high school students, families, and advisors understand how credits transfer. They want the tool to improve transparency in how credits fit into different transfer pathways. One participant suggested the website should focus on [illegible] purpose. Participants described how valuable dual credit courses can be for students, but also warned against taking them without having a plan in place. Participants want a tool that clearly explains to students how their credits will transfer.

> I think that [a state website] would be very helpful. After being in dual credit the past five years[illegible] we hear [illegible] from students and parents all the time. We know that our high school counselors are completely overwhelmed. So a tool or a resource that we can direct our students to. Because we have so many parents and students that reach out to us before they even think about taking a class. They'll reach out and say, "Hey, what's available at my high school?" So, we give them that information of these are the dual credit classes that are articulated through [community college name]. But [with a statewide website] we can also say, "Hey, here's this tool. If we already know where your student is going, how about you use this tool?" – K–12 focus group participant

Some participants also suggested that students should be able to log into a course equivalency tool to track or store their credit information. This would help students keep track of the credits they have earned and would make the process easier when it comes to requesting and sending transcripts.

> If there's some kind of tracker that also helps the student, so that they can compartmentalize where their credits are with each institution. Or if it's even a dual credit class. Maybe it's just an AP class. Those types of things. I think formulating some generalized student dual credit tracker would be very helpful. – K–12 focus group participant

> I think whether it's a tracker or a portal where they actually store their information, through the website or something. But to keep all that information together because it seems to me that it should be something that a school counselor would have ready access to, but it doesn't appear to be. And so, to have some place where you can have that and store it. And then to have a one click request [for] transcripts [or] to have a state transcript that puts all that stuff on one page. – K-12 focus group participant

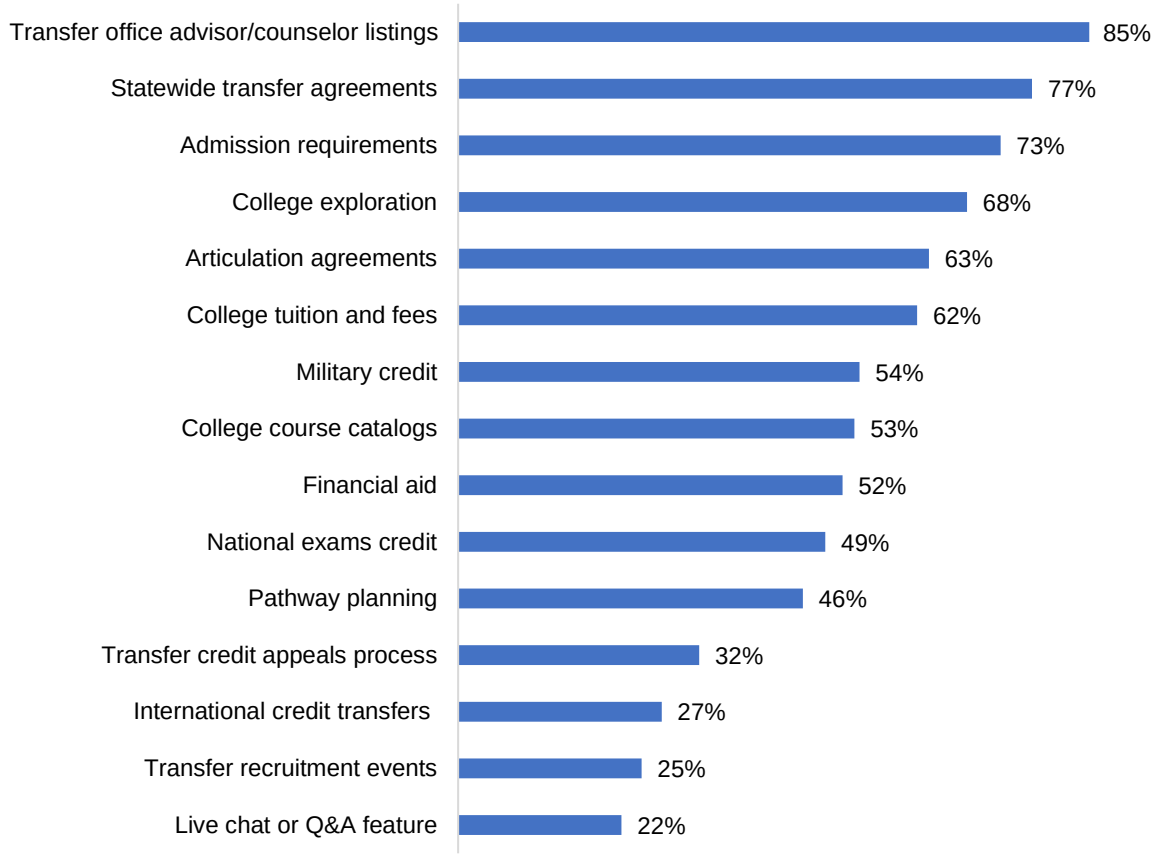
Website Components: Additional Resources

In addition to a course equivalency tool, community college and public university focus group participants identified access to transfer office advisor/counselor information as the most essential resource to include on a statewide transfer website

In our review of other state websites, we identified resources in addition to course equivalency tools that are commonly included. During each community college and public university focus group, we asked participants to take a short survey to rate the importance of including these various additional resources on the Oregon website. We did not administer this survey in the private college/university and K-12 focus groups.

Survey respondents identified a variety of resources as essential to include in the Oregon transfer portal website in addition to course equivalency tools (figure 1). The most common resource identified as essential by respondents was transfer office advisor or counselor listings (contact information for advisors/counselors at each institution). This result aligns with input from the focus groups that suggested advisors would need to help students navigate the website and continue to support the transfer process. More than two-thirds of survey respondents also highlighted the importance of statewide transfer agreements (information on which courses are included in the core and major transfers), map information on college/university admission requirements, and college exploration (links to information on each institution).

Figure 1. Percentage of survey respondents identifying each resource as essential



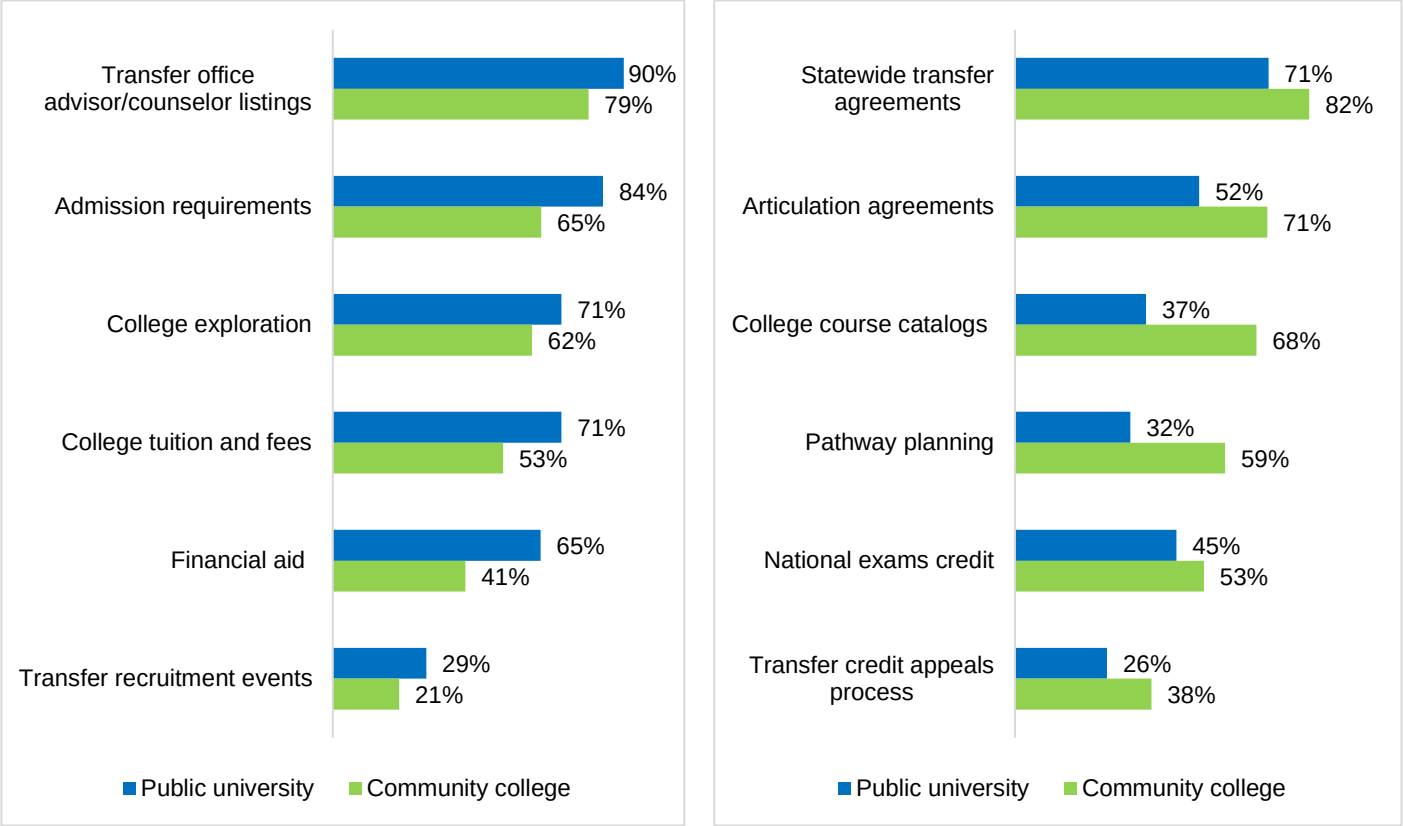
Note: Sample size is 65 survey respondents. Some respondents wrote in additional resources including deadlines and dates and information about transferring to or from the quarter system.

Source: Author's analysis of survey data conducted during focus groups.

Focus group participants also discussed information that would be helpful for students prior to transfer. This included admission and financial aid application deadlines, residency requirements, prerequisites, GPA requirements for particular programs, and how GPAs may transfer across institutions.

Public university and community college participants had different perspectives on several essential resources (figure 2). Community college respondents viewed planning resources, such as statewide transfer agreements, articulation agreements, college course catalogs and pathway planning resources as much more essential than their public university peers. Conversely, public university respondents viewed admission requirements, tuition and fees, and financial aid information as essential at much higher rates than their community college peers.

Figure 2. Percentage of survey respondents identifying select resources as essential, by institution type



Notes: Sample size is 34 community college survey respondents and 31 public university survey respondents.

Source: Author • analysis of survey data conducted during focus groups.

Private college/university focus group participants identified college exploration resources and financial information as important to include on a statewide transfer website. Because private colleges and universities have unique aspects to them, sharing information on what sets institutions apart from one another can help students find the best match for their postsecondary and career goals.

> I think the idea of having some space for each school to lay out what is distinctive about it or how they try to position themselves distinctively so that there can be a potential for a good match between the student and the institution. That makes a lot of sense to me.
> Private college/university focus group participant

Including financial information is also important. Focus group participants described misconceptions about the cost of private higher education and said many students dismiss the option before they have even looked into it. Providing information on financial aid could help students see private colleges as a more viable option.

> I think that we are dismissed as an option a lot of times. Students just see that cost of attendance, that sticker price right off, and just dismiss us as a possibility before even

> initiating a conversation about financial aid and how [college name] can be an affordable place for them to be. So yeah, I think it would be helpful to have information about not just financial aid, not just how they're going to pay for it, but overall, just the value of an education as well. t Private college/university focus group participant

Participants also want to share information on the majors they offer, typical time to degree, and general campus resources (e.g., housing, support services, veteran center, accessibility). Similarly, participants suggested including updated language about regional accreditation versus national accreditation and the fact that the distinction is no longer a federal law. Lastly, they suggested providing contact information for institutional advisors/counselors.

> I think having contact information is something that's important. It's amazing to me how a prospective transfer student will be redirected to me after having contacted six other offices on campus before they finally find their way to me. So, I think having it clearly stated v if I have questions about this, who do I contact at that institution v I think would be really helpful for students. t Private college/university group participant

K t12 focus group participants identified step-by-step information about the credit transfer process as essential to include on the statewide transfer website.

K t12 participants want to see information about how test scores on national exams, such as Advanced Placement (AP), International Baccalaureate (IB), and CLEP, will transfer to the various Oregon higher education institutions.

> I would [suggest] having some sort of map that lets students see how IB, AP and CLEP transfer to different institutions based on what they'll accept and award. I think š Z š [• really important and [will] prevent students from [needlessly] taking those same classes again. t K t12 focus group participant

K t12 participants also requested information about how earning college credit in high school will impact • š µ v š • [( ] v v] o] } [illegible] information and other resources. One participant also mentioned including general information about colleges, such as cost and time to degree comparisons for different programs, certificates, and pathways.

Participants also suggested providing detailed information on how students can successfully transfer credits to their chosen institutions, such as requirements for admission and an accessible way to request or submit transcripts.

> Some of my students think [their transfer credits] are just automatically going to be sent over to wherever they are going. And then they ask me, Z Hey, so where are these credits? [They're like, Z Where are they? Where can I see them? Because they're not telling me I have anything. [And I was like, Z Oh, well, we have to do these next steps. [So maybe having a section v if you take AP, IB, CLEP, this is what next steps look like. t K t12 focus group participant

Website Development and Maintenance

Participants across institution types requested shared deadlines and agreements about accountability.

Focus group participants from across each institution type v community colleges, public universities, private colleges/universities, and K12 schools v emphasized that a statewide course equivalency tool and related resources would need continuous maintenance and upkeep. Reasons for this included frequent changes to curricula, A^ v µ v in•course catalogs that are constantly evolving, and even changes within individual courses such as credit amounts or how the credit can be applied

Participants described how each institution seems to use different methods and timing to enter and publish course equivalency information in their existing tools. An unfortunate consequence of these challenges, a few participants said, was that students who try to plan ahead end up with outdated course equivalency information that is not helpful to them. One proposed solution was to include in the statewide course equivalency tool a shared deadline for submitting course information in order to synchronize the timing of updates.

> I think the big part of it is just that [current tools are] always far behind. It's not accurate information that's actually helping students. It's [we need] one system that we can all put our info into at a certain deadline every year [so it] can be reflected for the next catalog year. Public university focus group participant

Participants also suggested that a level of accountability would be needed to ensure that participating institutions do their part to keep the course equivalency tool accurate and up to date.

> Is there going to be teeth in this? Is it going to be mandatory? Will there be funding? It's not successful if you don't have buy-in from everyone. Community college focus group participant

> I think just that transparency of a site that would be maintained, mandated [and which institutions] would be potentially held accountable. If it says this, [still] going to mean that when the student transfers. Community college focus group participant

Participating institutions have different capacities to provide the FTE needed for maintaining a course equivalency tool, raising potential equity concerns

Almost every focus group participant raised some level of concern about the amount of work it would take to maintain a statewide course equivalency tool. Most participants said their institution would need some portion of a staff member [• š] (for example, .25 to .5 FTE) dedicated to updating course equivalency information in real time to avoid a system-wide lag in the availability of accurate information.

Many participants also Æ ‰ Œ E • • } v Œ E v } µ š š Z Á •] š } Œ E š } } o] v P v ^ µ v stressing the need for support from the state to increase some portion of FTE available at each institution, at least in early stages of development and roll-out. Several representatives from both community colleges and public universities warned that this could be an equity-related concern, because while some institutions may have the resources to devote substantial effort to maintenance, other] v • š] š µ š] } i v µ • • š Œ E E ^ o o Ç µ v Œ E • š ((r c e s t h a t t h e s c h o o l s w o u l d h a v e t o c o m m i t i s •] P v] ( ] v š X _

> Keep in mind that we are very limited in staffing. We don't have the funding, or the bodies to navigate this. What are you asking us to do? How do we support that? Community college focus group participant

Several participants said they needed clarification about whether their institution would be responsible for maintaining their existing tool (for example, TES) in addition to the statewide tool, raising the question of how to avoid duplicating efforts and creating redundancies.

> To have another statewide thing, would we be shutting down [our current tool] and solely manag[ing] this, or is the expectation that institutions now manage two tools? Public university group participant

Early investments in design may help with long-term sustainability.

Several participants highlighted the importance of spending time at the beginning of the development phase to ensure that the course equivalency tool is set up for easy ongoing maintenance and does not become burdensome or obsolete.

Similarly, several participants from across institution types said the website, including the course equivalency tool and additional resources, should be as simple and streamlined as possible, because external links and complex connected features, over time, lead š } ^ Œ } l v o] v the place X _

A couple of participants suggested building a website gradually instead of all at once, starting Á] š Z } µ ‰ o } (l Ç (µ v exš] }] v [_ and moving from there, and ‰ µ •] v P š À Œ] } µ • what ‰ • š } • • • • ^ as a problem_

> I think it's going to depend upon how this is built and what we have to do to it. If it's created and built in a such a way that it doesn't take too much time to just run a report and import it, then it wouldn't impact at least the registrar's office resources-wise. It can be done real quickly if it's set up right. Private college/university focus group participant

One public university participant suggested that the best way to ensure longevity was to find the right balance between relying on automated features and referring users to college advisors.

Summary of Key Findings

All participants supported the creation of a one-stop transfer website to centralize information and assist students at various points in their education journey in navigating what can be a confusing process. The need for inclusivity was voiced by stakeholders at all levels, given that students follow many differing paths in pursuing a postsecondary education. Key findings include:

Overall website purpose and use

- Community college and university participants emphasized the need for a simple, accessible website to serve as a central information hub that students can use to assess their credit equivalencies and plan their degree pathway.
- K-12 participants requested that a website offer accurate information about how college credits are accepted Œ } • • K Œ P } v [• Z] P Z Œ . µ š] } v] v • š] š µ š] } v •

- Private college and university participants voiced the need for students to be able to compare degree pathways at all institutions across the state so that students understand the full set of postsecondary options.
- Participants from across institutional levels and types believed that while a website could be instructive, the transfer process would continue to require engagement from institution-based advisors, who help to guide students during the transfer process and may provide the ultimate determination on what courses can be applied and to what major.

Website components

Course equivalency tool

- Participants were generally in favor of including a statewide course equivalency tool on the website. A high-quality statewide course equivalency tool could improve on existing institutionally maintained tools by providing comprehensive, timely, and accurate information about how credits will transfer and apply to majors offered across all Oregon community colleges and universities, eliminating the need for students to visit individuals college sites.
- Private colleges and universities viewed a statewide course equivalency tool as an opportunity to present private postsecondary education as a viable option for more students, although they also acknowledged the challenges involved in updating their course articulations.
- K-12 focus group participants said a statewide course equivalency tool would help high school students (and their families and advisors) understand how their credits would transfer after high school and keep track of their college credits earned in high school.

Additional resources

- Community college and public university participants identified a range of additional resources that they would like to see included on a statewide transfer website, including contact information for college transfer advisors, information on which courses are included in the state core and major transfer maps, and college exploration resources with links to information about each institution, such as admission requirements. Community college respondents viewed planning resources as essential at much higher rates than public university respondents, while public university respondents perceived college exploration information as essential at much higher rates than their community college peers.
- Private college/university focus group participants identified college exploration resources and financial information as important to include on a statewide transfer website.
- K-12 focus group participants identified step-by-step information about credit transfer and financial information as essential to include on the website.

Website development and maintenance

- Participants believed that the creation of a transfer website should be a collaborative process, with input from a range of stakeholders, including students.
- Participants requested that state administrators work with college administrators to establish shared deadlines and agreements about when and how course equivalency information would be uploaded to ensure that information is accurate, consistent, and timely.

- Public and private postsecondary institutions have different human and fiscal resource capacities, which may limit their ability to dedicate staff time to support website startup and updating, which introduces potential equity considerations.
- Participants were not aware of how the proposed state transfer website would be designed or maintained, raising concerns that the new site might end up as an unfunded mandate and/or duplicate existing resources currently offered at the institutional level.
- Early investments in design may help with long-term sustainability. Participants highlighted the importance of spending time at the beginning of the development phase to ensure that statewide course equivalency tool is set up for easy ongoing maintenance, and participants suggested building a website gradually instead of all at once.

Appendix A

Table A1 presents the number of participants by institution, and table A2 presents the number of participants by role.

Table A1. Number of participants by institution

Institution type and name	Number of participants
Community college participants	36
Blue Mountain Community College	1
Central Oregon Community College	2
Chemeketa Community College	2
Clackamas Community College	3
Clatsop Community College	0
Columbia Gorge Community College	0
Klamath Community College	2
Lane Community College	3
Linn Benton Community College	4
Mount Hood Community College	3
Oregon Coast Community College	2
Portland Community College	7
Rogue Community College	1
Southwestern Oregon Community College	4
Tillamook Bay Community College	0
Treasure Valley Community College	0
Umpqua Community College	2
Public university participants	30
Eastern Oregon University	3
Oregon State University	5
Oregon Institute of Technology	4
Portland State University	4
Southern Oregon University	1
University of Oregon	3
Western Oregon University	10
Private college/university participants	10
Bushnell University	1
Corban University	1
Lewis and Clark College	1
Linfield University	2
New Hope Christian College	1
Oregon Association of Independent Colleges and Universities	1
Pacific University	1
University of Portland	1
Warner Pacific University	1
K-12 participants	12
Chemeketa Community College (worked with high school students)	2
Crook County School District	1
Gladstone High School	1
Logos Charter School	1

Medford School District	2
Northwest Regional Education Service District	1
Portland Public Schools	1
South Umpqua High School	1
Southern Oregon Education Service District	2

Table A2. Number of participants by role

Role	Number of participants
Community college participants	
Academic Provost	0
Student Services Provost	3
Registrar	1
Faculty	0
Academic Dean	5
Financial Aid Officer	0
Advisor	11
Counselor	0
Institutional Researcher	1
Dual Credit Coordinator	2
Other: Assistant Director Admissions & Records	1
Other: Curriculum & Scheduling Coordinator	1
Other: Curriculum, Articulation, and Transfer	1
Other: Dean- transfer articulation & curriculum	1
Other: Degree Audit & Transfer Specialist	1
Other: Degree and Transcript Evaluator	1
Other: Degree/Transcript Evaluator	1
Other: Director of Advising	1
Other: Director of Instructional Support Services	1
Other: Director, Curriculum	1
Other: Graduation Services Coordinator/ Transfer Credit Specialist	1
Other: Instructional Coordinator- University Partnerships	1
Other: Transcript intake, Orientation, Career Services	1
Other: Transfer Credit Articulation	1
Other: Curriculum	1
Public universities participants	
Academic Provost	0
Student Services Provost	2
Registrar	6
Faculty	7
Academic Dean	0
Financial Aid Officer	0
Advisor	11
Counselor	4
Institutional Researcher	2
Dual Credit Coordinator	1
Other: VP Enrollment	1
Other: Admissions Recruitment	1
Other: Articulation Manager	1
Other: Assistant Director for International Student Services	1

Other: Degree partnership coordinator	1
Other: Director, Transfer & Returning Student Resource Center	1
Other: General Education Director	1
Other: Mid-level central administration	1
Other: VP Student Success and Engagement	1
Private college/university participants	
Academic Dean	1
Associate Provost and Dean of Faculty	1
Associate Vice President for Retention and Student Success	1
Core Curriculum Director and Professor of Psychology	1
Director of Academic Advising	1
Organization President	1
Registrar	2
Senior Associate Dean of Admissions U.S. transfer students	1
Transfer Articulation Specialist	1
Vice President for Student Success and Engagement	1
K-12 participants	
Charter Academy Specialist	1
College Access Specialist/ Scholarship Coordinator	1
College and Career Counselor	1
College and Career Readiness Program Manager	1
Diverse Educator Pathways Coordinator	1
Dual Credit Coordinator	1
High School Partnerships Coordinator	1
Logos Scholars Academy Director	1
Program Manager	1
Program Manager for Data & Integrated Instruction	1
School Board Vice Chair	1
Senior Seminar Teacher	1

Notes: Three community college survey respondents selected more than one role. Three university survey respondents selected more than one role.

Source: Community college and public university roles collected from the focus group surveys. Private university and K-12 roles collected during the focus group.

Appendix B

We used three focus group protocols in this study, and all are presented below: one for community college and public university staff members, one for private colleges and universities, one for the 12K focus groups. In addition, the short survey administered during the focus groups with community college and public university staff is also included in this appendix.

Oregon Community College and Public University Staff Focus Group Protocol

Introductions

1. > š [• • š Œ š Á] š Z] v š Œ } µ š] } v • X v Ç } µ Œ v u U

Website Purpose and Use

This Oregon transfer website would include a (or tools) to assist students in understanding how their credits will transfer between public postsecondary institutions (the 17 community colleges and 7 universities) in the state. This website may also include additional information and resources to help students navigate the transfer process.

2. What do you think the purpose of a statewide transfer website should be and why? What informational problem or challenge will this website solve?

3. How do you envision students, their families, and college staff using this site?

Course Equivalency Tool

We next want to understand your opinions on existing course equivalency tools currently in use at your institution, and then we will discuss the purpose and functionality of a statewide course equivalency tool.

4. What tool does your institution currently use (if any) to help students understand how their credits will be accepted at your institution?
    a. In what ways is this tool working well for your institution?
    b. In what ways is the tool not working well?

5. Now think about a statewide course equivalency tool. What functionality do you think would be most useful to students transferring credits between Oregon community colleges and public universities?

Transfer Website Resources

This website may also include additional information and resources to help students navigate the transfer process.

6. In addition to tools to help students understand how their credits will transfer, what other information and resources do students need related to transfer on a state website?

7. t [À v •] v P o } š } (Œ • } µ Œ • } v } š Z Œ • š š Á •] š • X t Œ short survey for you to rank the importance of including these various resources on the Oregon website. [The link to the brief survey will be in the chat.]

Oregon Community College and Public University Survey

Please select your role
[ ] Academic Provost
[ ] Student Services Provost
[ ] Registrar
[ ] Faculty
[ ] Academic Dean
[ ] Financial Aid Officer
[ ] Advisor
[ ] Counselor
[ ] Institutional Researcher
[ ] Dual Credit Coordinator
[ ] Other- Please specify: _____

Please specify the type of higher education institution where you work
[ ] Community college
[ ] Four-year college or university

Please rate the importance of including these resources on the Oregon transfer website

	Essential	Less essential	Not at all essential	I'm not sure
College exploration tool- lists of Oregon community colleges and public universities you can click on to learn more about each college	( )	( )	( )	( )
Admission requirements- links to information on admission requirements to programs, colleges, universities	( )	( )	( )	( )
Financial aid- information on how to apply for financial aid, the types of awards available and any awards specifically reserved for transfer students	( )	( )	( )	( )
College tuition and fees- information on the cost of attending different colleges/universities, including tuition/fees, books/supplies, room/board, expected family contribution (EFC) calculator/chart, net cost calculator (from College Board)	( )	( )	( )	( )
College course catalogs- links to college/university catalogs for the academic year with course listings and descriptions	( )	( )	( )	( )

Pathway planning: information on the programs of study recommended to achieve career goals	( )	( )	( )	( )
Articulation agreements: a database of existing articulation agreements between Oregon community colleges/universities	( )	( )	( )	( )
Statewide transfer agreements: information on which courses are included in the core ar major transfer maps	( )	( )	( )	( )
Transfer recruitment events: dates and descriptions of upcoming events students ca attend	( )	( )	( )	( )
Transfer credit appeals process: how students can appeal a decision and who to contact at an institution	( )	( )	( )	( )
Transfer office advisor/counselor listings: who to contact at a college/university with questions about transferring	( )	( )	( )	( )
Live chat or Q&A feature: to help students get answers to their questions on transfer	( )	( )	( )	( )
National exams credit: searchable listings of exams (e.g., AP, IB) that might be accepted credit	( )	( )	( )	( )
Military credit transfer: list of credits that can be transferred from military organizations and links to resources for active duty and veteran students	( )	( )	( )	( )
International credit transfer: list of courses that can be transferred from international colleges	( )	( )	( )	( )

8. What additional information related to transfer would be useful for the following types of students?
    a. Students earning college course credits in high school from dual credit/College Now, assessment-based learning (ABL), expanded options, AP, IB, CLEP?
    b. Students transferring to/from private Oregon colleges and universities?
    c. Students transferring to/from out-of-state colleges and universities?

Website Development & Maintenance

9. What do you foresee as key challenges to the development and maintenance of the course equivalency tools and resources we just discussed?

10. What additional resources would be necessary to ensure institutions can update and maintain the tool and resources?
    a. In terms of staffing, how much additional FTE do you think your institution would need to support updating information on the website, including credit equivalencies, links to webpages, etc.?

11. What additional legislation would be necessary to ensure institutions can update and maintain the tool and resources?

Oregon Private College/University Staff Focus Group Protocol

Introductions

1. > š[• •š Œš Á]šZ. Can you each tell me your name, role, and institution?

Website Purpose & Use

2. What are the common transfer pathways students take to/from private colleges and universities in Oregon? For example, do you primarily see Oregon community college students transferring to your institution?

3. How could a statewide transfer website support students transferring to your institution?

4. How do you envision students transferring to private colleges/universities and private college/university staff using a statewide transfer website?

Website Tools and Resources

5. What tool does your institution currently use (if any) to help students understand how their credits will be accepted at your institution?
    a. In what ways is this tool working well for your institution?
    b. In what ways is the tool not working well?

6. The Oregon transfer website would include a tool to assist students in understanding how their credits will transfer between public postsecondary institutions (the 17 community colleges and 7 public universities) in the state. Should this tool also allow students to understand how their credits could transfer from public institutions to private college/universities (and vice versa from private college/universities to public institutions)? Why or why not?

7. This website may also include additional information and resources to help students navigate the transfer process. What are other types of information and resources should be included on a statewide transfer website to help students transferring to private colleges and universities in Oregon?

Website Development & Maintenance

8. What do you foresee as key challenges to the development and maintenance of course equivalency tools and resources we just discussed?

9. What additional resources would be necessary to ensure institutions can update and maintain the tool and resources?
    a. In terms of staffing, how much additional FTE do you think your institution would need to support updating information on the website, including credit equivalencies, links to webpages, etc.?

10. What additional legislation would be necessary to ensure institutions can update and maintain the tool and resources?

Oregon K-12 Focus Group Protocol

Introductions

1. > š [• • š Œ š Á] š Z] v š Œ } µ š] } v • X v Ç } µ school/district/ESD? } µ Œ v u U

Website Purpose and Use

2. What information do high school students need related to college transfer?

3. How could a statewide transfer website support high school students who are thinking about starting at a community college and then transferring?

4. How do you envision high school students, their families, and high school staff (for example, college counselors) using a statewide transfer website?

Transferring college credits earned in high school

Many Oregon high school students earn college credit from dual credit/College Now. We next want to understand your opinions on the existing credit transfer process for high school students who earned college credit in high school from an Oregon community or public university, and then we will discuss the purpose and functionality of a statewide course equivalency tool.

5. What processes or tools do you currently use to help students understand how their college credits earned in high school from an Oregon community or public university will be accepted after they graduate and enroll in an Oregon community college or university?
    a. In what ways is this process/tool working well?
    b. In what ways is the process/tool not working well?

6. Now think about a statewide course equivalency tool. What functionality do you think would be most useful for high school students who earned college credit in high school from an Oregon

community or public university and are planning to enroll in an Oregon community college or university after graduation?
    a. For example, would it be useful for high school students to have access to a tool to evaluate college course credits to see how an individual community college or university would accept the credit?

7. There are other ways students earn college credit in high school. What information or resources related to credit transfer would be useful to students who take AP, IB, or CLEP exams?
    a. What information or resources related to credit transfer would be useful to students who earn college credit in high school in other ways?

Transfer Website Resources

This website may also include additional information and resources to help students navigate the transfer process. These resources may be helpful to high school students thinking about starting at community college and then transferring.

8. In addition to tools to help students understand how their credits will transfer, what other information and resources do high school students need related to college transfer on a state website?

Website Development & Maintenance

9. What do you foresee as key challenges to the development and maintenance of the equivalency tools and resources we just discussed?

Appendix C: Memo 3 (EdNorthwest)

Oregon Transfer Portal Project: College Student Survey Findings (Memo 3)

Background

The Oregon Higher Education Coordinating Commission (HECC) is planning to develop a statewide transfer portal to help Oregon college students navigate the transfer process. HECC hired Education Northwest to gather data that will inform the development process. There were three main data sources: interviews with state-level administrators from five states that currently operate a transfer portal and three vendors who develop transfer portals for states; focus groups with K-12, private college/university, community college, and public university staff members; and a survey of Oregon community college and public university students. This is the third of three memos—one for each data source. The fourth deliverable is a presentation that synthesizes findings across the three data sources and includes recommendations.

In July and August 2022, Education Northwest and HECC requested that the 17 community colleges and 7 public universities administer a survey to their student body to gather feedback on transfer experiences and the transfer website. Most community colleges and all seven universities emailed the survey link to their students between late July and early August, and Education Northwest closed the survey on August 31, 2022. Complete survey questions are in the appendix.

3,415 students responded to the survey.[1] Students came from all public universities and nearly all community colleges. See table 1 for the number of respondents per college.

Table 1. Survey respondents by institution

Institution	Number of Respondents
Eastern Oregon University	43
Oregon State University	1601
Oregon Institute of Technology	98
Portland State University	379
Southern Oregon University	165
University of Oregon	125
Western Oregon University	57
Total university students	2,443
Blue Mountain Community College	<10
Central Oregon Community College	150
Chemeketa Community College	153
Clackamas Community College	95

[1] Students dropped out of the survey at various points and some questions were tailored for certain students using survey logic, so not all questions have 3,415 responses.

Clatsop Community College	<10
Columbia Gorge Community College	<10
Klamath Community College	52
Lane Community College	19
Linn Benton Community College	206
Mount Hood Community College	128
Oregon Coast Community College	12
Portland Community College	107
Rogue Community College	90
Southwestern Oregon Community College	40
Tillamook Community College	0
Treasure Valley Community College	<10
Umpqua Community College	<10
Total community college students	1,034
Total responses	3,477
Total unique respondents*	3,415

* Total unique respondents are less than total responses because some students are concurrently enrolled in multiple colleges and students could select all colleges they currently attend

Note: We do not display data that represents less than 10 students.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Description of Student Sample

Nearly three-quarters of respondents currently attend an Oregon public university (72%), while nearly one-third attend an Oregon community college (30%).

Table 2. Where are you currently attending college?

	Number	Percent
Oregon public university	2443	72%
Oregon community college	1034	30%
Oregon private college	72	2%
Out-of-state college	127	4%
Other college	30	1%

Note: ^ K š Z }G E o P _] write-in responses currently not attending college, will be attending in the fall, graduated from college, online or hybrid, graduate school, or no response. Total number of students responding is 3,415. Total number of responses is greater than 3,415, and percentages do not sum to 100 because students could select all that apply.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Next, we present descriptive statistics on the sample (table 3). Since these were at the end of the survey, some respondents left the survey before completing these items. We have descriptive statistics on about 80 percent of the survey sample.

The sample included students currently in various years in college: 19 percent were first-year students, 21 percent were second-year students, 24 percent were third-year students, 16 percent were fourth-year students, 8 percent were fifth-year students, and 12 percent were sixth-year or more students. Most students were full-time (76%) and originally from Oregon (61%). Students from Oregon came from all seven regions of the state (see table 3).

The survey sample appeared to be slightly more diverse than the overall Oregon public postsecondary student population, although we allowed students to check all that apply to identify their race/ethnicity, which could account for this difference. A } Œ] v P š } , t 2 [• ì ê ì education statewide snapshot,[2] 5 percent of Oregon public postsecondary students were Asian American/Asian, 2 percent were Black/African American, 16 percent were Latino/a/x/Hispanic, 1 percent were Native American/Alaska Native, and less than 0.5 percent were Native Hawaiian/Pacific Islander. In comparison, ten percent of the survey sample identified as Asian American (with many additional • š µ v š • Á Œ] š] v P] v ^ •] v _ • identity), 3 percent identified as Black/African American, 5 percent identified as Latino/a/x/Hispanic, 4 percent identified as American Indian (with an additional <1% identifying as Alaska Native), 1 percent identified as Native Hawaiian, and 1 percent identified as Pacific Islander.

The survey sample also appeared to have a larger population of first-generation students than the overall Oregon public postsecondary student population. } Œ] v P š } , t 2 [• ì ê ì education statewide snapshot, 18 percent of students reported no parents completed education beyond high school on the Free Application for Federal Student Aid (FAFSA). In comparison, 29 percent of the survey sample reported no primary caregivers attended college.

Finally, in terms of gender identity, the majority of survey respondents were female, nearly two-thirds identified as female, about one-quarter identified as male, 6 percent were non-binary/non-conforming, 2 percent were transgender, and the remaining added their own unique response or preferred not to respond.

Table 3. Descriptive statistics of survey respondents

	Number	Percent
Attendance status		
Full-time	2091	76%
Part-time	426	16%
A mix of full-time and part-time	228	8%
Student hometown		
Oregon	1683	61%
Another state in the United States	921	34%

[2] HECC (August 2022) Statewide Higher Education Snapshots https://www.oregon.gov/highered/research/Pages/snapshots.aspx

International (outside of the United States)	136	5%
Region of Oregon for students who selected ^ K Œ P } v _ • Z } u š } Á v		
Central Oregon	142	8%
Eastern Oregon	42	2%
Portland Metro	554	33%
Southern Oregon	208	12%
The Coast	95	6%
The Gorge	35	2%
Willamette Valley	607	36%
Race/ethnicity		
American Indian	113	4%
Alaska Native	11	<1%
Asian American	276	10%
Black or African American	88	3%
Latina/o/x or Hispanic	404	15%
Native Hawaiian	18	1%
Pacific Islander	36	1%
White	1952	71%
Add my own	109	4%
Prefer not to respond	167	6%
Gender identity		
Female	1790	65%
Male	709	26%
Non-binary/non-conforming	167	6%
Transgender	55	2%
Add my own	18	1%
Prefer not to respond	89	3%
First-generation college student status		
No primary caregivers attended college	744	29%
No primary caregivers completed college	1140	42%

Note: Students could check all that apply for race/ethnicity. u Ç } Á v _ Œ responses] vš Ç more than 10 responses were: Asian, European, Indian, and Middle Eastern. ^ u Ç } á v _ gender included 18 unique responses

Source: Transfer Website Feedback Survey administered by Education Northwest.

Experiences Earning College Credit in High School

Over one-third of respondents (37% or 1,136 respondents) reported earning college credit in high school from an Oregon community college or public university. Among these students, many (70%) reported receiving help with transferring their college credits earned in high school from their high school counselors or teachers, followed by college advisors, faculty, or professors (39%). About one-quarter of students (24%) relied on a community college website and 19 percent used a university website, illustrating that students seek out information to support credit transfer on various college websites starting in high school.

Table 4. Who or what helped you with transferring college credits earned in high school to your college/university?

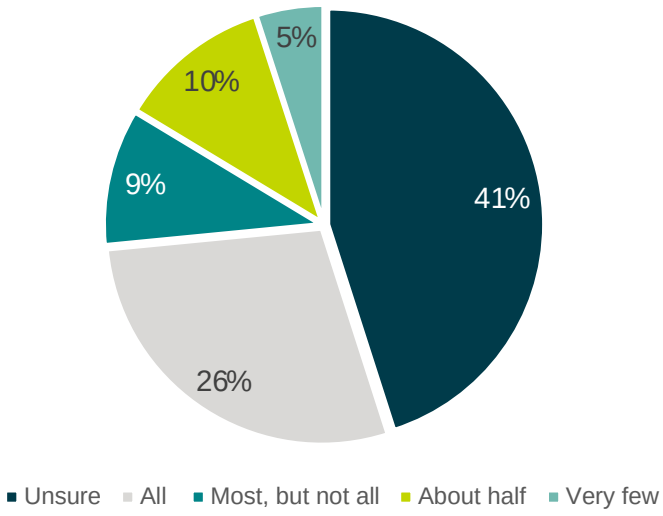
	Number	Percent
High school counselors or teacher	794	70%
College advisors/faculty/ professors	442	39%
Community college website	269	24%
Family members	236	21%
University website	220	19%
Friends	98	9%
Other	59	5%
Another website	10	1%

Note: ^ K š Z Œ _] v o µ responses. Á Œ] š does not remember, did it themselves, nobody, or the TRIO program. ^ v } š Z Œ Á •] š _] v o µ • Á Œ] š] v Œ • ‰ } v • • W } o u P r o g r a m, G E U E À] v U W Œ Willamette Promise. Total number of students responding is 1,136. Total number of responses is greater than 1,136, and percentages do not sum to 100 because students could select all that apply.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Most respondents reported it was somewhat easy (56%) or very easy (26%) to understand how their credits would transfer, while 18% found it not at all easy. However, while most respondents reported the process was easy, a relatively large percentage of respondents (41%) were unsure how many of their college credits earned in high school were accepted at their community college or university after high school (figure 1). About one-quarter of respondents reported all their college credits earned in high school were accepted (26%), while 9 percent reported most credits, 10 percent reported about half, zero reported less than half, and 5 percent reported very few.

Figure 1. About how many college credits earned in high school were accepted for credit at your community college or university?



Note: Total number of students responding is 1,119. ^ > • • š Z v Z o (_] • Æ responses µ š }
Source: Transfer Website Feedback Survey administered by Education Northwest.

Respondents were asked to share any additional information about their experience transferring college credit earned in high school, and there were many conflicting viewpoints. On the one hand, some respondents shared how easy or seamless the experience was for them. For example, one respondent wrote, ^ / š Á • • µ ‰ Œ • Ç v Æ ‰ Respondents explained the process was positive due to having helpful high school advisors or teachers, the simplicity of being in dual enrollment, sending the transcript to the college, or credits successfully transferring. Respondents were very glad to have taken college credits in high school and highly recommended others do the same. One respondent shared, ^ / š Á • P Œ š š Z] v P š } and } o v] v Z] P Z me a lot of money and time while in } o o P X _

However, many other respondents shared challenges with transferring college credit earned in high school. One major theme was a lack of knowledge about how college courses they took in high school would transfer in college. Respondents shared it would have been useful to know before taking the courses how their credits would transfer to different institutions. Many expressed disappointment that š Z] Œ Œ] š • Á Œ v] š institution, or these credits did not count towards their degree. For example, one respondent shared, d Z Ç š Œ v • (Œ Œ µ š v } š (} Œ Á Z š Ç } µ Á } µ o P µ gave me lots of elective credit but not anything useful." Another said, "It would be nice for colleges to clearly show how credits could be helpful because going from high school to college you realize how many credits are a waste of time, but by then it's too late." Some respondents shared š Z Ç] v [š Œ o] Ì how their course grades would negatively impact their GPA or credit transfer. Some also shared they] v k [š how the college credits they earned in high school would impact their financial aid.

Another major theme among respondents was a lack of knowledge about how to transfer college credits earned in high school. One respondent shared, "I / Á] • Z Z] P Z • Z } } o š Z Œ • Á Œ o] š š o the whole process," and another person shared, "d Z d i Ç n [explain how it would work or where to

( ] P µ Œ } µ š Á Z š Á } µ o u ‰ Z •] Ì µ Œ] v P Z] P Z • Z } } o Á Z š Á] o o] u ‰ } Œ š ^ / š • Z } µ o u ‰ Z •] Ì µ Œ] v P Z] P Z • Z } } o Á Z š Á] o o] u ‰ } Œ š ^ / š Á } µ o v] (} Œ > W Œ] š š }] • µ • • o • • } Œ] (Ç } µ v š } ‰ • • š Z W Æ u X _

Some students described difficulties accessing or sending their transcripts, particularly if they had credits from different colleges and universities. Respondents suggested providing easier access to information about what and how credits transfer. One person shared, "I had to transfer these credits." Another mentioned, "I had to go to school as well as AP and IB credit. It is important which AP credits can be earned by just taking the

Transfer Experiences

Forty-five percent of survey respondents (1,552) reported they transferred to their current college. About half of students transferred from an Oregon community college (49%), a quarter came from an out-of-state community college (26%), and a little less than a quarter came from an out-of-state university (21%). Among students who transferred from an Oregon community college or out-of-state college (n = 1,113), 52 percent received an associate degree first.

Table 5. What college/university did you transfer from?

	Number	Percent
Oregon community college	763	49%
Out-of-state community college	400	26%
Out-of-state university	331	21%
Oregon public university	137	9%
Oregon private college	41	3%
Other	39	3%

Note: "Other" responses included international school, out-of-state private, and military. Total number of students responding is 1,552. Total number of responses is greater than 1,552, and percentages do not sum to 100 because students could select all that apply.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Respondents started planning to transfer at different times, some early on in high school (19%), others after their first term (13%) or first year (15%), some during their second year (18%), and 20 percent after their second year. Fifteen percent of respondents starting planning "as a non-traditional student, including after graduation or later in life as a non-traditional student."

Transfer students reported using a range of sources to get information on how to transfer, mainly their current college website (44%), advisors or counselors at their current college (39%), and advisors or counselors at a previous college (37%).

Table 6. Where did you receive information from to help you transfer?

	Number	Percent
Current college website	690	44%
Advisors/counselors at current college	610	39%
Advisors/counselors at previous college	581	37%
Previous college website	277	18%

Family	277	18%
Friends	244	16%
Faculty/instructors/professors at previous college	186	12%
Faculty/instructors/professors at current college	135	9%
Classmates	118	8%
None of the above	122	8%
Other	90	6%
Another website	30	2%

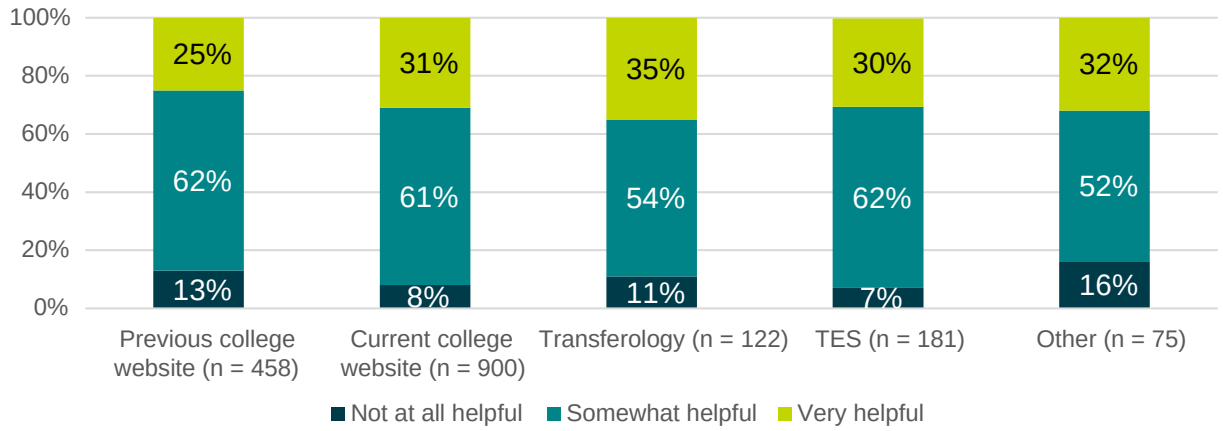
Note: ^ K š Z Œ _] v o-µ responses Á E] high school counselor, figuring it out themselves, college service centers such as career services and registrar, TRIO, and military education specialists. ^ K š Z Œ Á •] š _] v o µ • write-in responses Google, Guild Education, Reddit, public university websites, Assist, Niche, and Transferology Total number of students responding is 1,552. Total number of responses is greater than 1,552, and percentages do not sum to 100 because students could select all that apply.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Students were also asked about the credit transfer process specifically. Most transfer students met with an advisor to review how their credits would transfer. Thirty-one percent met with an advisor from their previous college and 55 percent from their current college. Twenty-seven percent did not meet with an advisor. Most transfer students found it somewhat easy (53%) or very easy (24%) to understand how their credits would transfer, while 23% found it not at all easy.

Seventy-five percent of respondents reported using an online website or tool to learn how their credits would transfer, with the most common being their current college website. Most respondents found the online website or tool they used to be somewhat helpful.

Figure 2. How helpful were the following online websites or tools in understanding how your credits would transfer?

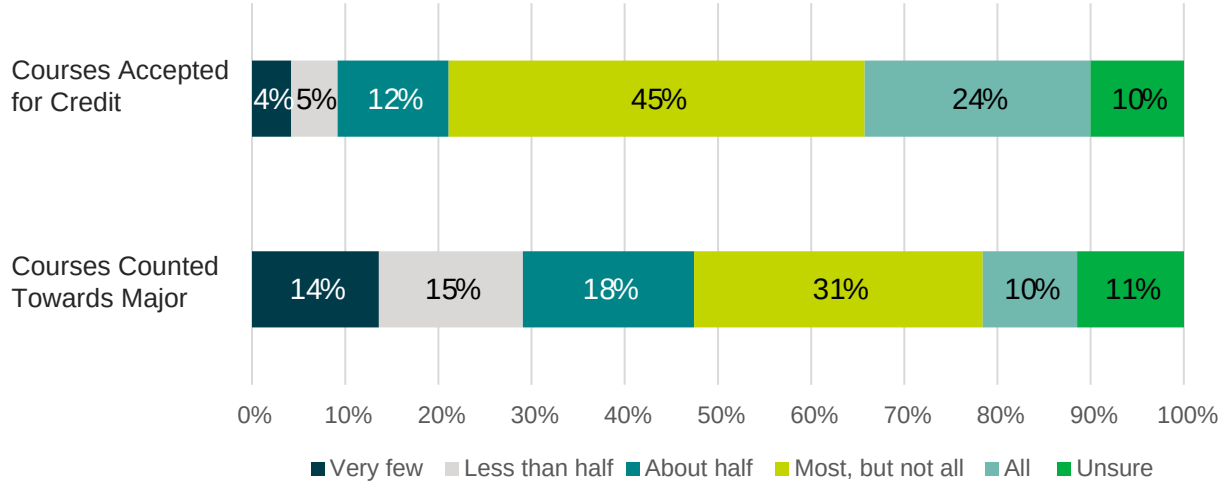


Note: ^ K š Z Œ _] v o-µ responses Á E] Degree Audit Reporting System (DARS), Degree Works, advisor, online } o o P Á •] š U v š Z } Œ] v [š] v Á

Source: Transfer Website Feedback Survey administered by Education Northwest.

Transfer students reported that most (45%) or all (24%) of their previous courses were accepted for credit at their current college. Fewer students reported that most (31%) or all (10%) of their credits counted towards the requirements of their major.

Figure 3. About how many courses taken at your previous college were accepted for credit at your current college and counted towards the requirements of your major?



Note: Total number of students responding is 1,469.

Source: Transfer Website Feedback Survey administered by Education Northwest.

While most transfer students were somewhat satisfied (51%) or very satisfied (37%) with the credit transfer process, many transfer students shared challenges they experienced with the credit transfer process in open-ended responses. The following table summarizes the challenges.

Table 7. What challenges did you experience with the credit transfer process?

Challenge	Example Quote 1	Example Quote 2
Lack of knowledge about what credits will transfer	^ d Œ Ç] v P š } ( ] v š Z µ ‹ µ] À o v] • š Á v } o o	^ h v Œ • š v] v P Á Z š Á } µ o wouldn't transfer, as it seems every college has different transfer requirements _
Credits not being able to transfer	^That not all credits transferred, especially with the community college and out-of-state difference. The] v (} Œ u š] } v } (Á Z Ç Á • v	^ ^ } u } (u Ç o ‹ transfer, and I (o o] l š Z Ç • Z } µ o Z À
Credits not counting towards degree	^ s Œ Ç (Á } µ v š š } Á Œ and almost all of them were just co µ v š • o š] À • X _	^Some classes that I thought would initially transfer well to my current college did not transfer towards my major X _
Lack of support	^ > l } (• } u } v š } Œ Z lack of subject matter expert at transfer	^ > l } (o Œ P µ] v U / having to take more credits than planne

	institution to explain what was going on. _	in my last year of college in order to graduate _
Conflicting or inaccurate information from advisors	^ À] • } Œ • } ([s c o r r e c t] y inform students of what classes count for Œ] š X _	^The last college I attended gave me different information about course requirements that my current university told me we[e not required._
Time to evaluate credits	^ / š š } } l u } Œ š Z v î u } v š u Ç Œ] š • X t Z] Z] • o } v	^It took almost a month to get my credits reviewed and transferred to my current college. It made it difficult to register for the coming term._
Costs	^Paying money I didn[have to transfer credits from dual enrollment X _	^Paying for transcripts X _
No centralized website	^ d Z Œ Œ v } } u ‰ Œ Z v for transfer credit by major and by schoo that I am aware of. A comprehensive site with the transfer credits listed out would] o X _	^ d Z Œ Á • v } • Ç Á •] š classes transferred. California has a Á •] š š Z š • Z } Á • Z } Á o

The top pieces of information transfer students used were college course catalogs, requirements for programs, and transfer pathways to help them transfer to their current college, as well as to help decide which college to transfer to. The top three pieces of information students wished they had during the transfer process was information about campus life (24%), college admission/application requirements (21%), and how to appeal a credit transfer decision (18%).

Table 8. Tell us how you used different kinds of information during the transfer process.

	I used this information mostly to help me transfer to my current college	I used this information mostly to help me decide which college to transfer to	I did not use this information BUT I wish I had this information during the transfer process	I did not use this information
College course catalogs	51%	26%	11%	12%
Requirements for academic programs, degree programs, and career paths	52%	25%	7%	16%
Transfer pathways between my previous institution and other colleges/universities	42%	31%	8%	19%
How to appeal a credit transfer decision	39%	21%	18%	22%
College tuition and fees	29%	20%	14%	37%

College admission/application requirements	28%	18%	21%	33%
Financial aid and scholarships for transfer students	19%	17%	9%	54%
Information about campus life	11%	7%	24%	57%
Housing options on/near campus	17%	12%	9%	62%

Note: Total number of students responding is 1,376.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Respondents were asked to share any additional information or resources they used during the transfer process. The following list summarizes the written responses:

- College advisors
- College admissions staff
- College websites
- College visits
- Friends or peers
- Family
- Currently enrolled students or alumni
- Online searches (Google, YouTube, Reddit)
- TRIO program
- Orientation or other transfer events
- Veteran services
- Transfer guides
- Degree Works or My Degree
- Course equivalencies
- College rankings
- Career choices
- Degrees offered
- Online programs offered
- Dual enrollment
- Living and tuition costs
- Scholarships

Respondents were asked to share any additional information they wished they had during the transfer process. The following list summarizes written responses:

- How credits will transfer
- Degree requirements
- Degree options and career paths
- More help from advisors
- Financial aid and scholarships
- Tuition costs
- Information on out-of-state transfers
- Information on how the transfer process works
- Housing and transportation
- Appealing credit transfer decisions

Transfer Planning Experiences

Among survey respondents who have not transferred, 22 percent (419 students) reported they plan to transfer to a different college in the future, 24 percent reported they are unsure, and 53 percent reported they do not plan to transfer. Among survey respondents who are planning to transfer, three-quarters are planning to transfer to an Oregon public university (75%).

Table 9. What college/university are you planning to transfer to?

	Number	Percent
Oregon public university	315	75%
Out-of-state university	79	19%
Oregon private college	51	12%
Oregon community college	16	4%
Out-of-state community college	<10	2%
Other	4	2%
Unsure	43	10%

E } š W ^ K š Z Œ _]v o•µ]v ÁŒ}]š abroad, fashion school, and their original school. Total number of students responding is 419. Total number of responses is greater than 419, and percentages do not sum to 100 because students could select all that apply.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Some respondents first started planning early on in high school (30%), in their first term (26%), or in their first year (14%). Others started planning during their second year (11%) or after their second year (12%). Most respondents are receiving information from their advisors or counselors at their current college (63%), followed by college websites where they may transfer (38%).

Table 10. Where do you receive information from to plan for transfer?

	Number	Percent
Advisors/counselors at my current college	264	63%
College websites where I may transfer	158	38%
Current college website	113	27%
Advisors/counselors at college(s) where I may transfer	125	30%
Family	100	24%
Faculty/instructors/professors at my current college	83	20%
Friends	81	19%
Classmates	43	10%
Faculty/instructors/professors at college(s) where I may transf	31	7%
Other	16	4%
Another website	<10	1%
None of the above	29	7%

Note: ^ K š Z Œ _] v o•µ]v ÁŒ}]š high school counselors, Google, employer, therapist, and program advisors. ^ v } š Z Œ Á •] š _]v o•µ]v ÁŒ}]š transferology and TRIO. Total number of students responding is 419. Total number of responses is greater than 419, and percentages do not sum to 100 because students could select all that apply.

Source: Transfer Website Feedback Survey administered by Education Northwest.

The top pieces of information students planning to transfer were using were requirements for academic programs, degree programs, and career paths, followed by information about transfer pathways, college admission requirements, college tuition, and financial aid.

Table 11. Tell us how you are using different kinds of information to plan to transfer.

	I am using this information primarily to help me transfer to a specific college	I am using this information primarily to help me decide which college to transfer to	I am not using this information BUT I plan to use it in the future	I am not using this information
Requirements for academic programs, degree programs, and career paths	54%	30%	13%	4%
Transfer pathways between my previous institution and other colleges/universities	40%	27%	18%	16%
College admission/application requirements	40%	27%	23%	10%
College tuition and fees	38%	34%	20%	9%
Financial aid and scholarships for transfer students	38%	29%	23%	10%
College course catalogs	28%	23%	23%	26%
Information about campus life	18%	20%	26%	36%
Housing options on/near campus	17%	16%	20%	47%
How to appeal a credit transfer decision	14%	13%	34%	39%

Note: Total number of students responding is 419.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Respondents were asked to share any additional information or resources they are using to plan for transfer. The following list summarizes the written responses:

- Advisors or counselors
- College websites
- Online research
- Students and alumni
- Friends and family
- TRIO program
- Degree options
- Degree/major requirements

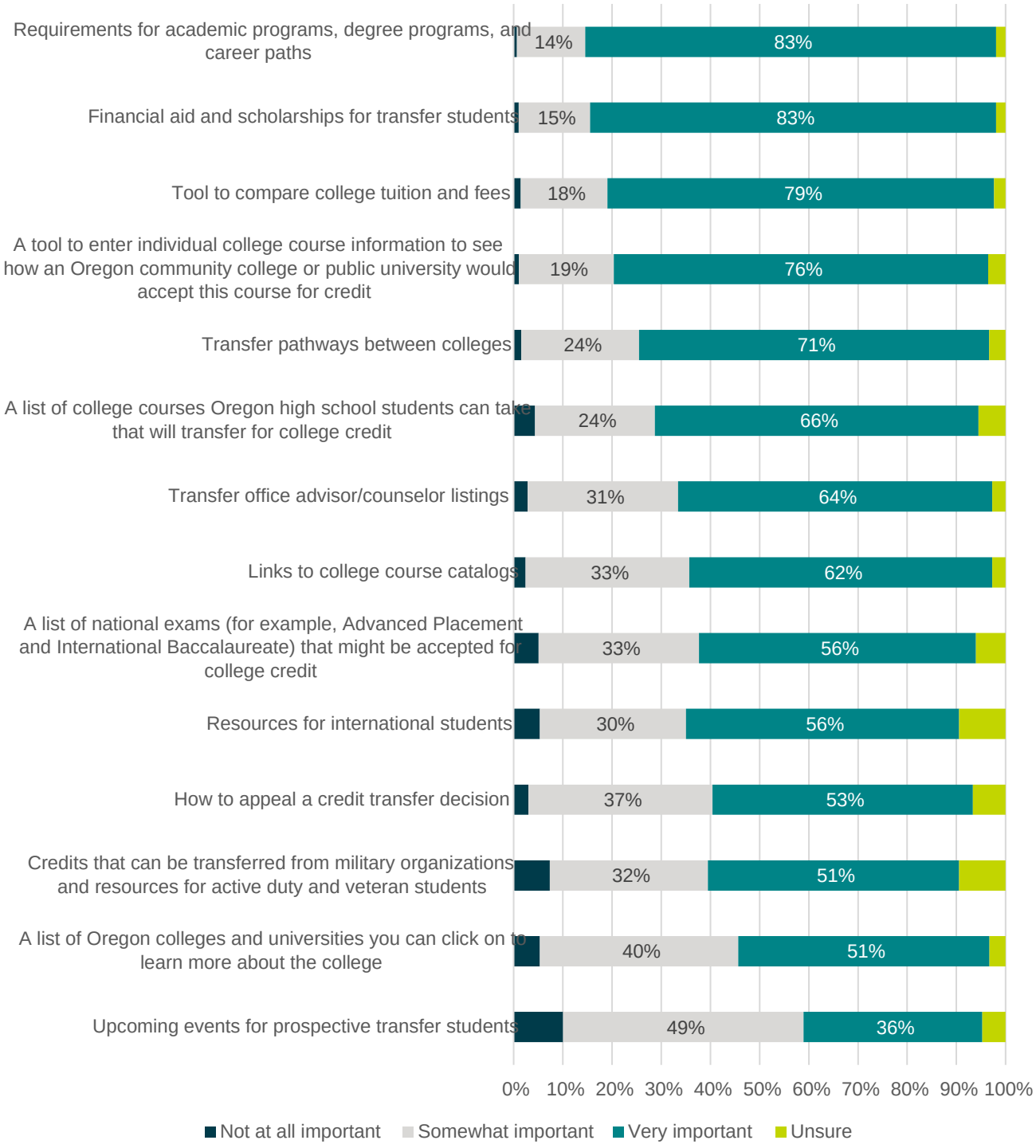
Respondents were asked to share any additional information or resources they wished they had to plan for transfer. The following list summarizes the written responses:

- Step-by-step instructions for the transfer process
- More advising or people to ask questions to
- Financial aids, scholarships, and grants
- Credit transfer equivalencies
- Tuition costs
- Degree pathways

Statewide Transfer Website

Seventy-five percent of respondents reported that it would be very helpful to have a statewide website for students transferring college credit or planning to transfer in Oregon, 17% said it would be somewhat helpful, and only 1% said it would be not at all helpful. Over three-quarters of respondents reported it would be very important to include requirements for academic programs, degree programs, and career paths; financial aid and scholarships for transfer students; a tool to compare college tuition and fees; and a tool to assess course equivalencies in the website (figure 4). These resources were followed by information about transfer pathways (71% rated as important), a list of college courses Oregon high school students can take that will transfer for college credit (66%), transfer office advisory/counselor listings (64%), links to college course catalogs (62%), national exams that might be accepted for college credit (56%), resources for international students (56%), how to appeal a credit transfer decision (53%), credits that can be transferred from military organizations (51%), a list of Oregon college and universities you can click on to explore information (45%), and finally, upcoming events for transfer students (36%).

Figure 4 How important is it to include the following types of information, resources, and tools on a statewide website for students?



Note: Total number of students responding is 2,820.

Source: Transfer Website Feedback Survey administered by Education Northwest.

Respondents were asked to share any additional information that would be useful on the website. The following table summarizes open-ended responses.

Table 12. What additional information or resources would be useful on a website for students transferring college credit or planning to transfer in Oregon?

Category	Specific examples
Course equivalency tool and the credit transfer process	A tool to assess what credits will be accepted to specific colleges and universities
	A tool to assess what specific majors or degrees transfer credits count towards
	Contact information for advisors or staff to ask general questions to
	How to access, order, and/or send transcripts
	A guide on credit transfer (i.e., step-by-step guide, flowchart, checklist, tutorial video)
	How and when to send AP credits
	Information on semester-to-quarter transfers
Degree pathway information	Degree/major options across colleges and universities
	Degree prerequisites, requirements, and estimated time to degree
	A tool to map out degree/major pathway
	Career pathways for different degrees
College and financial information	A tool that compares colleges and universities
	Cost of tuition, admission costs, cost of living in area
	Financial aid and scholarships
	Transfer deadlines
	Housing resources
	Food resources
	Campus life and student population
	Clubs and extracurricular activities
	Research opportunities
	Accommodations for disabilities
Considerations for specific types of students	Out-of-state students
	High school students
	Graduate students
	Student athletes
	Military students
	Online students
	Non-traditional students

Site design	Simple and easy to navigate
	Keep it up to date
	A Q&A section
	Information about why people transfer, benefits, disadvantages
	A glossary defining key terms

Summary of Key Findings

Who took the survey

- The student survey sample drew from nearly all public postsecondary institutions in Oregon and Œ ‰ Œ • v š š Z] À Œ •] š Ç } (K Œ P } v [• ‰ µ o] ‰ } • š • } v Œ Ç • š µ Oregon came from all regions of the state.
- Nearly three-quarters of respondents currently attend an Oregon public university while a third attend an Oregon community college. Students were at all stages of their postsecondary education journey, and most were full-time students.

Experiences with earning college credits in high school

- Over one-third of respondents (1,136) had experiences with earning college credit in high school from an Oregon community college or public university with many seeking out information on how to transfer their credits from community college or university websites.
- Respondents shared conflicting experiences with transferring colleges credits in high school, with many reporting it was easy and many others reporting challenges.
- Major themes from open-ended responses included that students did not understand how the courses they took in high school would transfer in college, students were confused by the credit transfer process, and students were disappointed by the outcome when college credits transferred as elective credit or negatively impacted their college GPA or financial aid.

Experiences with transfer

- Forty-five percent of survey respondents (1,552) reported they transferred to their current college. The most common transfer pathway for respondents was transferring from an Oregon community college to an Oregon public university.
- Respondents generally relied on the website of their current college (i.e., the college they transferred to) to find information related to transfer or worked with advisors from their previous or current college. Respondents also relied on their current college website and advisors to understand how their credits would transfer.
- Most transfer students (77%) found it somewhat or very easy to understand how their credits would transfer, and most transfer students (83%) were somewhat or very satisfied with the transfer process. However, transfer students also shared a wide range of challenges with the process including a lack of knowledge about what credits would transfer, credits not transferring or counting toward degree requirements, a lack of support, conflicting or inaccurate information from advisors, the time it took for transfer institutions to evaluate credits, the cost associated

with transferring credit, and the lack of a comprehensive, centralized website to assess course equivalencies.

- The types of information that transfer students used during the transfer process provides some indication of what kind of information might be useful to include on a state transfer website. About three-quarters used college course catalogs, requirements for programs, and information about transfer pathways to help them transfer to their current college or help decide which college to transfer to. The top three pieces of information students wished they had during the transfer process was information about campus life, college admission requirements, and how to appeal a credit transfer decision.

Experiences with transfer planning

- Among survey respondents who have not transferred, almost one-quarter (419 respondents) reported they plan to transfer to a different college in the future. (More students may be considering transfer since one-quarter of respondents reported they are unsure about transfer.)
- Respondents planning to transfer were primarily relying on advisors at their current college to help them with the process, but many were also using college websites where they plan to transfer and their current college website for information about transfer.
- The types of information that students planning to transfer use also provides some indication of what kind of information might be useful to link to on a state transfer website. The top pieces of information students planning to transfer were using were requirements for academic programs, degree programs, and career paths, followed by information about transfer pathways, college admission requirements, college tuition, and financial aid.

Opinions about a statewide transfer website

- Seventy-five percent of respondents reported that it would be very helpful to have a state website for students transferring college credit or planning to transfer in Oregon.
- Over three-quarters of respondents reported it would be very important to include requirements for academic programs, degree programs, and career paths; financial aid and scholarships for transfer students; a tool to compare college tuition and fees; and a tool to assess course equivalencies on the website.
- Students also provided many write-in responses about additional information or resources to include on the website and these fell into the following categories: course equivalency tools and information to help with credit transfer, degree pathway information, college and financial information, considerations for specific types of students, and site design considerations.

Appendix

Student Survey Protocol

K Œ P } v [• í ó } u u µ v] š Ç } o o P • v ó ‰ µ o] µ v] À Œ •] š] • Œ • µ Œ À Ç what kinds of information, resources, and tools students would want on a website that would help students with transferring college credits and planning for transfer. Researchers at Education Northwest, v } v ‰ Œ } ( ] š] v W } Œ š o v U K Œ P } v U Œ } v µ š] v P š Z] • Œ • Œ Z U v Coordinating Commission (HECC) is funding this project.

Through July and August 2022, Education Northwest is collecting information from 1) Oregon college students through this student survey, 2) Oregon community college and university staff, and 3) representatives from states with transfer websites. The information Education Northwest collects will be used to help develop a state website for college students.

Your voice is important in providing feedback on the development of this website. After you complete the survey, please provide your name and student email address to enter into a raffle to receive a $100 gift card.

Your responses on this survey are confidential. The information collected on this survey will only be used to understand what transfer information, resources, and tools Oregon college students would like on a website. Your participation in this survey is voluntary. You may choose not to participate, and you can stop participating in the survey at any time with no consequences.

If you have any questions about this project, you may contact Dr. Michelle Hodara at michelle.hodara@ednw.org.

Are you an Oregon college student who is 18 years old or older, and do you agree to participate in this survey? *
( ) Yes
( ) No - Survey ends

Survey Tips: Do not hit the back button in your web browser or you will have to start the survey over. Only use the "Back" and "Next" buttons on the bottom of each survey page. Also please note that you will not be able to advance the survey until answering required questions.

Section 1

The first set of questions ask about your colleges.

1) Where are you currently attending college? Check all that apply.*
[ ] An Oregon community college
[ ] An Oregon public university
[ ] An Oregon private college/university
[ ] An out-of-state college/university
[ ] Other - Write In: _____

If selected "Oregon community college"
Select the name(s) of your community college.*
[ ] Blue Mountain Community College
[ ] Central Oregon Community College
[ ] Chemeketa Community College
[ ] Clackamas Community College
[ ] Clatsop Community College
[ ] Columbia Gorge Community College
[ ] Klamath Community College
[ ] Lane Community College
[ ] Linn Benton Community College
[ ] Mount Hood Community College
[ ] Oregon Coast Community College
[ ] Portland Community College
[ ] Rogue Community College
[ ] Southwestern Oregon Community College
[ ] Tillamook Bay Community College
[ ] Treasure Valley Community College
[ ] Umpqua Community College

If selected "Oregon public university"
Select the name(s) of your university.*
[ ] Eastern Oregon University
[ ] Oregon State University
[ ] Oregon Institute of Technology
[ ] Portland State University
[ ] Southern Oregon University
[ ] University of Oregon
[ ] Western Oregon University

2) Did you transfer to your current college(s) from a different college?*
( ) Yes
( ) No

If responded "YES" to ^] Ç } µ š Œ v • (Œ š } Ç } µ Œ µ Œ Œ v š } o o P ~ • • (Œ } u
3) What college/university did you transfer from? Check all that apply.*
[ ] An Oregon community college
[ ] An out-of-state community college
[ ] An Oregon public university
[ ] An Oregon private college/university
[ ] An out-of-state four-year college/university
[ ] Other- Write In:_____

4) Did you receive your associate degree before you transferred?*
( ) Yes
( ) No

If responded "NO" to ^] Ç } µ š Œ v • (Œ š } Ç } µ Œ µ Œ Œ v š } o o P ~ • • (Œ } u

5) Are you planning to transfer to a different college in the future?*
( ) Yes
( ) No
( ) Unsure

If responded YES to ^ Œ Ç } µ ‰ o v v] v P š } š Œ v • (Œ š }] ((Œ v š } o o P
6) What college/university are you planning to transfer to? Select all that apply.*
[ ] An Oregon community college
[ ] An out-of-state community college
[ ] An Oregon public university
[ ] An Oregon private college/university
[ ] An out-of-state four-year college/university
[ ] Other- Write In: _____
[ ] Unsure

Section 2

This section asks about experiences earning college credit in high school.

7) Did you earn college credit in high school from an Oregon community college or public university?*
( ) Yes
( ) No

If responded YES to ^] Ç } µ Œ v } o o P Œ] š] v Z] P Z • Z } } o (Œ } u v K Œ P } v
‰ µ o] µ v] À Œ •] š Ç M _
8) Who or what helped you with transferring college credits earned in high school to your college/university? Select all that apply.*
[ ] High school counselors or teachers
[ ] College advisors or faculty/professors
[ ] Family members
[ ] Friends
[ ] Community college website
[ ] University website
[ ] Another website- Write In: _____
[ ] Other- Write In: _____

9) How easy was it to understand how your college credits earned in high school would transfer to an Oregon community college or university?*
( ) Not at all easy
( ) Somewhat easy
( ) Very easy

10) About how many college credits earned in high school were accepted for credit at your community college or university?*
( ) None
( ) Less than half
( ) About half
( ) Most, but not all
( ) All

( ) Unsure

11) Is there anything you would like to share about your experience of transferring college credits earned in high school to your college/university?

_____
_____
_____
_____

if responded YES to ^] Ç } µ š Œ v • (Œ š } Ç } µ Œ µ Œ Œ v š } o o P ~ • • (Œ } u] ((

Section 3

This set of questions asks about your transfer experiences.

12) When did you first start planning to transfer?*
( ) High school
( ) My first term in college
( ) My first year in college
( ) My second year in college
( ) After my second year in college
( ) Other- Write In: _____

13) Where did you receive information from to help you transfer? Select all that apply.*
[ ] Advisors/counselors at my previous college
[ ] Advisors/counselors at my current college
[ ] Faculty/instructors/professors at my previous college
[ ] Faculty/instructors/professors at my current college
[ ] My previous college website
[ ] My current college website
[ ] Another website Write In: _____
[ ] Family
[ ] Friends
[ ] Classmates
[ ] Other- Write In:_____
[ ] None of the above

14) Did you meet with an advisor to review how your credits would transfer? Select all that apply.*
[ ] No
[ ] Yes, with an advisor from my previous college
[ ] Yes, with an advisor from my current college

15) How easy was it to understand how your credits would transfer?*
( ) Not at all easy
( ) Somewhat easy
( ) Very easy

16) Which of the following online websites or tools did you use to learn about how your credits would transfer? Select all that apply.*
[ ] Previous college website

[ ] Current college website
[ ] Transferology
[ ] TES (Transfer Evaluation System)
[ ] Other- Write In: _____
[ ] I did not use an online website or tool

If selected^ Previous college website
How helpful was your previous college website in understanding how your credits would transfer?*
( ) Not at all helpful
( ) Somewhat helpful
( ) Very helpful

If selected^ Current college website
How helpful was your current college website in understanding how your credits would transfer?*
( ) Not at all helpful
( ) Somewhat helpful
( ) Very helpful

If selected^ Transferology
How helpful was Transferology in understanding how your credits would transfer?*
( ) Not at all helpful
( ) Somewhat helpful
( ) Very helpful

If selected^ TES~ d Œ v • (Œ À o µ š] } v ^ Ç • š u • _
How helpful was TES (Transfer Evaluation System) in understanding how your credits would transfer?*
( ) Not at all helpful
( ) Somewhat helpful
( ) Very helpful

If selected^ Other _
How helpful was this in understanding how your credits would transfer?*
( ) Not at all helpful
( ) Somewhat helpful
( ) Very helpful

17) About how many courses taken at your previous college were accepted for credit at your current college?*
( ) Very few
( ) Less than half
( ) About half
( ) Most, but not all
( ) All
( ) Unsure

18) About how many courses taken at your previous college counted towards the requirements of your major?*
( ) Very few
( ) Less than half
( ) About half
( ) Most, but not all
( ) All
( ) Unsure

19) How satisfied were you with the credit transfer process?*
( ) Not at all satisfied
( ) Somewhat satisfied
( ) Very satisfied

20) What challenges did you experience with the credit transfer process?
_____
_____
_____
_____

21) Tell us how you used different kinds of information during the transfer process. Select one response for each type of information*

	I did not use this information	I did not use this information BUT I wish I had this information during the transfer process	I used this information mostly to help me decide which college to transfer to	I used this information mostly to help me transfer to my current college
College course catalogs	( )	( )	( )	( )
Requirements for academic programs, degree programs, and career paths	( )	( )	( )	( )
Transfer pathways between my previous institution and other colleges/universities	( )	( )	( )	( )
How to appeal a credit transfer decision	( )	( )	( )	( )

College admission/application requirements	( )	( )	( )	( )
College tuition and fees	( )	( )	( )	( )
Financial aid and scholarships for transfer students	( )	( )	( )	( )
Information about campus life	( )	( )	( )	( )
Housing options on/near campus	( )	( )	( )	( )

22) What additional information or resources did you use during the transfer process?

_____
_____
_____
_____

23) What additional information do you wish you had to help with transfer?

_____
_____
_____
_____

If responded NO to ^] Ç } µ š Œ v • (Œ š } Ç } µ Œ µ Œ Œ v š } o o AND Responded } u] ((
YES to ^ Œ Ç } µ ‰ o v v] v P š } š Œ v • (Œ š }] ((Œ v š } o o P] v š Z (µ š µ Œ

Section 3

This set of questions asks about your transfer planning experiences.

24) When did you first start planning to transfer?*

( ) High school
( ) My first term in college
( ) My first year in college
( ) My second year in college
( ) After my second year in college
( ) Other- Write In: _____

25) Where do you receive information from to plan for transfer? Select all that apply.*

[ ] Advisors/counselors at my current college
[ ] Advisors/counselors at college(s) where I may transfer
[ ] Faculty/instructors/professors at my current college
[ ] Faculty/instructors/professors at college(s) where I may transfer
[ ] Current college website
[ ] College websites where I may transfer

[ ] Another website Write In:_____
[ ] Family
[ ] Friends
[ ] Classmates
[ ] Other- Write In: _____
[ ] None of the above

26) Tell us how you are using different kinds of information to plan for transfer. Select one response for each type of information.*

	I am not using this information	I am not using this information BUT I plan to use it in the future	I am using this information to primarily help me decide which college to transfer to	I am using this information primarily to help me transfer to a specific college
College course catalogs	( )	( )	( )	( )
Requirements for academic programs, degree programs and career paths	( )	( )	( )	( )
Transfer pathways between my previous institution and other colleges/universities	( )	( )	( )	( )
How to appeal a credit transfer decision	( )	( )	( )	( )
College admission/application requirements	( )	( )	( )	( )
College tuition and fees	( )	( )	( )	( )
Financial aid and scholarships for transfer students	( )	( )	( )	( )
Information about campus life	( )	( )	( )	( )

Housing options on/near campus	( )	( )	( )	( )

27) What additional information or resources are you using to plan for transfer?

_____
_____
_____
_____

28) What additional information or resources do you wish you had to plan for transfer?

_____
_____
_____
_____

Section 4

This section asks your opinions on a statewide website for students in Oregon that could help with understanding how college credits might transfer. The website could also help college students plan for transfer.

29) How important is it to include the following types of information, resources, and tools on a statewide website for students?

Course planning and credit transfer*

	Unsure	Not at all important	Somewhat important	Very important
A tool to enter individual college course information to see how an Oregon community college or public university would accept this course for credit	( )	( )	( )	( )
Links to college course catalogs	( )	( )	( )	( )
Transfer pathways between colleges	( )	( )	( )	( )
Requirements for academic programs, degree programs, and career paths	( )	( )	( )	( )
How to appeal a credit transfer decision	( )	( )	( )	( )

College information*

	Unsure	Not at all important	Somewhat important	Very important
A list of Oregon colleges and universities you can click on to learn more about the college	( )	( )	( )	( )
Transfer office advisor/counselor listings	( )	( )	( )	( )
Upcoming events for prospective transfer students	( )	( )	( )	( )

Financial information*

	Unsure	Not at all important	Somewhat important	Very important
Financial aid and scholarships for transfer students	( )	( )	( )	( )
Tool to compare college tuition and fees	( )	( )	( )	( )

Resources for high school students, veterans, and international students*

	Unsure	Not at all important	Somewhat important	Very important
A list of college courses Oregon high school students can take that will transfer for college credit	( )	( )	( )	( )
A list of national exams (for example, Advanced Placement and International Baccalaureate) that might be accepted for college credit	( )	( )	( )	( )

Credits that can be transferred from military organizations and resources for active duty and veteran students	( )	( )	( )	( )
Resources for international students	( )	( )	( )	( )

Section 5

The final set of questions asks about you.

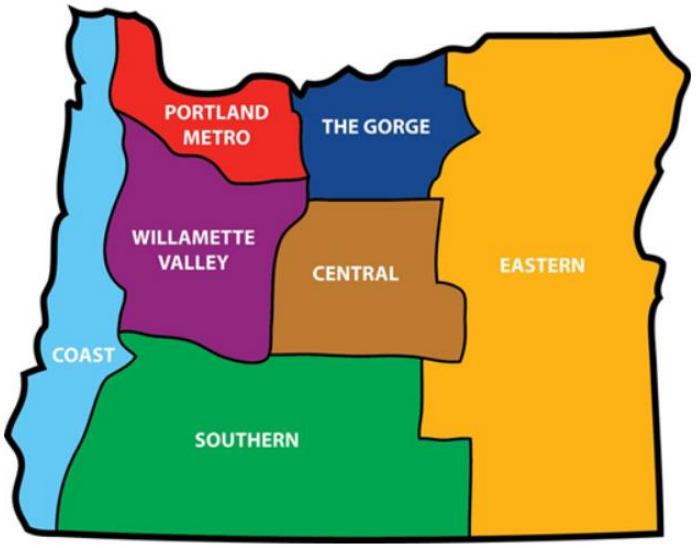
30) What year are you currently in college?
- o First year
- o Second year
- o Third year
- o Fourth year
- o Fifth year
- o Sixth year or more

31) Are you a full-time or part-time student?
- o Full-time (that is, most terms I take 12 credits or more)
- o Part-time (that is, most terms I take less than 12 credits)
- o A mix of full-time and part-time (it varies every term how many credits I take)

32) Where is your hometown? (select one)
- o Oregon
- o Another state in the United States
- o International (outside of the United States)

If selected "Oregon"

x Where in Oregon? (select one)



- x Central Oregon
- x The Coast
- x Eastern Oregon
- x The Gorge
- x Portland Metro
- x Southern Oregon
- x Willamette Valley

33) What is your race/ethnicity? Check all that apply.
- o American Indian
- o Alaska Native
- o Asian American
- o Black or African American
- o Latina/o/x or Hispanic
- o Native Hawaiian
- o Pacific Islander
- o White
- o Add my own: _____
- o Prefer not to respond

34) What is your gender?
- o Female
- o Male
- o Non-binary/non-conforming
- o Transgender
- o Add my own: _____
- o Prefer not to respond

35) Who in your family has attended at least some college? Check all that apply
- o Mother
- o Father
- o Brother/sister
- o Child
- o Spouse/partner
- o Primary caregiver
- o No one
- o Prefer not to respond

36) Who in your family has completed college? Check all that apply
- o Mother
- o Father
- o Brother/sister
- o Child
- o Spouse/partner
- o Primary caregiver
- o No one

- o Prefer not to respond

Thank you for completing the survey!

To enter in a raffle to receive a $100 gift card (via email), please provide your name and student email address. You may only enter the raffle once.

Appendix D: EdNorthwest Memo-Legislation and Facilitating Institutional Participation

Oregon Transfer Portal Project: Legislation and facilitating institutional participation

What legislation is necessary to implement and sustain the Online Transfer Portal?

Summary of findings: Based on a review a transfer legislation over the past four years, we found only three states that have legislation that directly mentions an online platform, and only two of these bills passed (Minnesota and Wyoming). The legislation we identified did not offer details about how the portal development process should proceed or the specific components to be included. Across the five states we studied for this project, while legislation did not directly call for the development of the website, transfer legislation contributed to the state [consideration of the need for a mechanism to support student transfer, which then contributed to the development of transfer website.

In Oregon, legislation could be used to allocate funding for the online portal and to motivate discussion around site components. But there is no precedent in states that have enacted legislation to require participation in an online portal, and state representatives cautioned against using legislation to mandate institutions to participate. (The Maryland bill described below did propose mandating participation, but it did not pass.)

What follows is a description of legislation from across the country, the role of legislation in the creation of transfer websites in the five states we studied for this project, and considerations for Oregon.

Examples of legislation

A review of state postsecondary education legislation maintained by the National Conference of State Legislatures, which tracks bills introduced in the 50 states and District of Columbia, indicates that 30 states have submitted or enacted transfer-related legislation between 2019 and 2022 (see Appendix A). Typically, these bills have been broadly written to highlight the importance of transfer and address the foundational elements of a comprehensive statewide transfer system. Action steps contained within legislation include convening task forces to investigate transfer-related issues and costs, establishing statewide articulation agreements across two- and four-year institutional systems, mandating the transferability of general education credit hours, implementing common course numbering systems, and expanding dual credit options for high school students.[1]

According to CollegeSource, responding to legislative requirements has been a motivating factor for many of their statewide contracts. For example, states subscription to Transferology have been intended to increase transparency around transfer by making course equivalency information publicly available and easier to locate. Since the system software and its capacities are well documented, states contracting with CollegeSource do so with the understanding that the platform will address the high-level goals advanced in state legislation.

[1] See for example Kentucky House Bill 160 (April 2010), which included provisions to: establish a statewide course classification system to monitor the transfer and crediting of lower division coursework; develop policies to align statewide articulation and transfer procedures; and establish common college transcripts to facilitate transfer from community colleges and technical colleges, among other activities.

Several states have directly addressed the need for establishing an online platform to communicate transfer information, although the bills themselves offer few details about how the development process should proceed or the specific components to be included. These include:

- Minnesota State Colleges and Universities, 2010
  Directs the Board of Trustees to implement a plan to improve credit transfers within the system. Key provision include (1) enhancing information on transfer and credit tracking; (2) expanding staff training; (3) identifying discrepancies in credit transfer methods; and (4) requiring institutions to provide prompt documentation of course equivalency determinations. Additionally, the Board is directed to provide systemwide transfer information on the Internet that is easily accessible and maintained in a current and accurate status. Each system college and university shall post information necessary to determine the transferability of course credits on š Z] Œ] v • š] š µ š] } v institutional] š • representative working groups composed of faculty, staff, students, and administrators are tasked with developing a template to be used by colleges and universities to ensure consistent information is made available.

- Wyoming Common College Transcript Implementation, 2019
  Establishes requirements for a common transcript and transfer process system to facilitate program planning and the transfer of students and course credits between community colleges and University of Wyoming. Key provisions include selecting a common transcript and transfer process vendor and adopting (1) electronic course catalog software to ensure a consistent experience for students (with institutions permitted to use differing software), (2) course transfer software, to support in-state and out-of-state transfer students in identifying and reconciling differences in curricular elements of courses with the same course number, and (3) curriculum process management software to ensure consistency in curricular development and streamline the transfer process; and (4) automated transfer and transcription of course credits for credits earned though the common course catalog system and in programs with articulation agreements.

- Maryland Higher Education Transfer Platform (S540) / Transfer with Success Act 2.0 (H598)
  During the 2022 Maryland legislative session, two bills seeking to establish a transfer platform were cross-filed in the senate and house. **While both bills ultimately failed and were adjourned, their intent was to require all Maryland community colleges and four-year institutions receiving state funds to participate in a transfer platform to facilitate student transfer from community colleges to four-year institutions.** The senate bill included an annual $1 million appropriation to support the operation of the proposed platform.

Examples from five states

Education Northwest reached out to the five states originally contacted for this study to solicit feedback on the legislative processes underlying the creation of their state transfer platforms, as well as whether institutions were mandated or incentivized to participate. All states responded to this request. Two vendors offering statewide transfer system software, AcademyOne and CollegeSource, were also supplied information on states with which they have a contractual relationship.

Minnesota shared that they do not have any state legislation that covers their website or Transferology. What follows is more detailed information from the four states that participated in an interview.

Arizona

State legislation relating to postsecondary transfer, first introduced in the 1990s, predated the widespread use of the internet and its associated online tools. As such, the launch of AZTransfer occurred without legislative action, though the site director believes that had online portals existed at the time, bills might have been introduced. Since its inception, no legislation efforts have been undertaken. AZTransfer staff believe this is because they have been proactive in developing the website heading off the need for statutory efforts.

State legislation relating to transfer is profiled on the AZTransfer website, under Chapter 15 of the Arizona Revised Statutes. Here, no mention is made of AZtransfer or the operation of a transfer website. Posted legislation identifies the (1) options for incentivizing the award of transferable postsecondary credit to high school students earning a passing score on a qualifying exam (ARS 15-249.06); (2) general administrative powers and duties of the Arizona Board of Regents, which incudes the consideration of qualifying transfer credits (ARS 15-1626); (3) need for cooperation among community college districts and universities in operating a statewide articulation and transfer system, maintaining a shared numbering system identifying transferable courses, and reporting annually on progress made in articulation (ARS 15-1824); and (4) award of academic and vocational credits that military members may use toward the pursuing of an associate degree or vocational certification (ARS 15-1898).

While legislation has not contributed directly to site operations, AZTransfer administrators have consulted with independent consultants in 2009 and 2013 for the review of site operations and recommendations to enhance its tools, resources, and training resources. The 2013 evaluation of AZTransfer by Hezel Associates, which included analysis of statewide transfer system data and surveys of institutional employees and transfer students, culminated in a 143-page report summarizing site operations and user perceptions. State staff believed that findings from the report may prove useful for Oregon Higher Education Coordinating Commission staff charged with implementing a statewide transfer website, if such a tool is developed. Key findings included the need to increase student awareness of the transfer system, enhance training opportunities for institutional staff engaged in transfer, and expand communications between community college and university personnel to strengthen the consistency of messaging.

California

The state program director shared that the creation of ASSIST was not legislation-based and reiterated that, due to the time that had elapsed since its adoption, the basis for its creation was unknown. Since š Z Á •]š [• o µ v Z U ^^/^d Z • À}oÀ]v Œ•‰}v• š} o P]•o š]}v]Œ Community College (CCC) and California State University (CSU) systems. Although the legislature may not generally impose requirements on the University of California (UC), due to the way its charter is structured, the UC system has been a collaborative partner in responding to legislative mandates.

The ASSIST director noted four legislative actions directed towards the CCC and CSU systems that had implications for the website. However, with the exception of one bill (AB 178), state legislation neither named ASSIST directly nor earmarked funding to support. This has required that ASSIST staff update the site to address new legislative requirements without additional resources or specific direction. Legislation cited include:

- AB 1460 California State University: graduation requirement, (Chapter 32, August 2020)
  Beginning with the 2021-22 academic year, CSU campuses were required to provide for courses in ethnic studies, such that students graduating in 2024-25 academic year are required to

complete a minimum of one-3 unit course in ethnic studies. This new requirement meant that ASSIST needed to implement a new CSU general education area related to Ethnic Studies, and the addition of a complementary 1intersegmental General Education Transfer Curriculum area. Changes also were required in other ASSIST system areas.

- x AB 928 **Student Transfer Achievement Reform Act of 2021 (Chapter 566, October 2021)**
  This bill established the expectation for a single general education transfer pathway to support students in transferring from state community colleges to state 4-year postsecondary education institutions. The legislation also required the ASSIST system to undergo modification in several system areas to provide for the new singular lower division general education pathway.
- x AB 1111 **Postsecondary Education: Common Course Numbering System (Chapter 568, October 2021)**
  Each CCC campus is required to adopt a student facing common course numbering system for all general education requirement and transfer pathways courses on or before July 1, 2024. The changes to course numbering will need to be incorporated into ASSIST, although at the present time the extent of this change on system operations is unknown.
- x AB 178 **Budget Act of 2022 (Chapter 45, Section 190, Provision 25, July 2022)**
  The Association of Independent California Colleges and Universities member institutions are required to be integrated onto the ASSIST platform. This is a fundamental change for ASSIST, which previously was limited to CCC to CSU/UC articulation. The new legislation appropriated $1.5 million to support this new requirement, and ASSIST staff currently in the planning phase for this adoption.

New Jersey

In May 1997, the New J[illegible] Transfer Articulation Principles of New Jersey Colleges and Universities, [illegible] postsecondary leaders recognized the contribution inter-institutional program articulation and credit transfer have in easing student transitions from state community colleges to state colleges and universities. Among its guiding principles was the call for an automated, publicly accessible computer-based information system providing for the electronic transmission and automated assessment of transcripts. It is believed that the ideas contained within this document sparked the process of exploring web systems that ultimately led to the creation of the NJ Transfer website.

Over time, the transfer website has evolved without legislative intervention or significant policy input. [illegible] Comprehensive Statewide Transfer Agreement. This document was intended to promote the seamless transition of students from public associates to public baccalaureate degree granting programs. Its general principles included the expectation that (1) transfer students would be considered to have completed all lower division General Education requirements; (2) an A.A. or A.S. degrees awarded in a New Jersey community college would be fully transferable; and (3) transfer students with an A.A. or A.S. degree would have accepted for transfer exactly half of the credits required for completion of a basic four-year degree.

Corollary principles included the expectation that faculty-to-faculty discussions would continue to occur across institutions, with course evaluations for transfer incorporated into the website. Transfer and community college students also were acknowledged as being responsible for providing their transcripts as part of their transfer application, with NJ Transfer cited as one mechanism by which this should occur.

While the principles released by NJPC were not directed at NJ Transfer, they have had a bearing on site policies and site development when making updates on behalf of the four-year institutions.

South Carolina

In 2005, the South Carolina General Assembly passed the South Carolina Education and Economic Development Act. Included in its provisions was the requirement that the South Carolina Commission on Higher Education convene its Advisory Committee on Academic Programs (ACAP) to address articulation agreements between school districts and public institutions of higher education to ensure seamless pathways, and recommend coursework acceptable for dual enrollment college courses offered to high school students.

Members of ACAP, which is comprised of provosts (or their designees) from public 2-year and 4-year colleges and universities, along with representation from the SC Technical College System and private institutions around the state, formed two committees to respond to these requirements. One worked on connecting high school teachers with college/university faculty teaching freshmen level coursework to more closely align the curricula to increase student preparedness for college and student success. The second committee centered on transfer and articulation, from which recommendations to create the SC TRAC website emanated. Consequently, while the motivation for creating SC TRAC came from state legislation, the website itself was not legislatively mandated.

More recently, the South Carolina legislature issued a proviso in 2021 directing the Commission on Higher Education to work with the State Board for Technical and Comprehensive Education and public institutions of higher learning to address transfer. Specifically, the commission is charged with developing policies to guarantee students earning an A.A. or A.S. degree from a public two-year college be granted junior status at a four-year college or university and receive a minimum of sixty transfer credit hours. Course prerequisites and minimum credit requirements for awarding degrees still apply.

Considerations for Oregon

In states with existing transfer platforms, the development of state legislation typically has occurred without input from website operators. Discussions with state representatives and vendors indicate that the responsibility of creating systems typically falls on state higher education boards, which create task forces to specify system functionality. In states subcontracting development, site requirements are written into RFPs or incorporated into vendor contracts.

When asked for guidance to support Oregon, state and vendor representatives offered the following:

- **Avoid being overly prescriptive**
  Representatives emphasized the importance of ensuring that any legislation drafted offer framing P µ] v š Z š ‰ Œ • Œ À • K Œ P } v , [• ion]]] š Ç š] (µ v of website capacities in states has reflected input from institutional representatives, drawn from across participating postsecondary systems, to ensure the final site design addresses field needs.

- **Ensure stable and sufficient funding**
  States recommended that Oregon legislators provide ample funding to build the system and offer predictable funding over time. This is critically important given the variability in state budgets. In setting resource levels, it was suggested that budgets consider the need for change and growth over time. One state website director recommended asking for a significant amount of one-time

funding for startup, and then ongoing funding slightly higher than what might be expected to sustain the site, since there may be requests for additional site functionality or staffing. possible, consider requesting that the expenditure of one-time funding be spaced out over a few years to provide time to do all the necessary stakeholder engagement.

- Collaborate with legislative members

  To avoid surprises, it was suggested that Oregon HECC work with a legislative member or members most dedicate to achieving desired transfer goals. Having an advocate working with and on behalf of the team can help to ensure that the legislative request moves smoothly through the legislative process and avoids surprises. Where possible, engage the field in offering input into •š šµš}ŒÇ À o}‰u vš X • šZ ^}µšZ Œ}o]v Œ ‰Œ • vš š]À } and universities would prefer to develop their own system rather than have something mandated Ç o P]•o š]}v X_

How do states facilitate participation in the portal among public institutions?

Summary of findings: Across all 5 states we studied for this project, participation in the online portal is voluntary. All public institutions participate because it is an expectation from the state, and the online portal is recognized as a valuable tool for institutions and students.

To incentivize institutional participation, Oregon can cover the cost of portal startup and maintenance, ensuring that each campus has the resources needed to enter course and articulation agreements into the database; ensure institutions receive ongoing technical assistance and support; and continue to nurture a statewide commitment to doing what is best for students.

What follows is a detailed description of how the five states facilitate participation, feedback from the vendors on how to incentivize participation, and considerations for Oregon.

Examples from five states

Minnesota shared that the development and maintenance of their transfer website and online resources and tools, including Transferology, are covered by the state, and free to public institutions, so all public institutions participate. What follows is more detailed information from the four states that participated in an interview.

Arizona

The expectation is that all public and tribal institutions participate in supporting transfer, as defined in state statute. State staff believe that they have created a culture of transfer and collegiality in Arizona where participation in AZTransfer is both sought after and requested. State public institutions contribute funds to support the AZTransfer operating budget, with institutional contributions ranging from $1,500 (}Œ šZ •u oo •š }oo P š} ¨íóìUììì (}Œ šZ o ŒP •šX-time š • Œ • } student equivalents (FTSE) as calculated by the state Auditor General. Although private and out-of-state colleges and universities have requested to participate, to date the state has denied all requests.

Institutions voluntarily contribute resources because they value the contribution that AZTransfer provides. The }v• ‹µ v (}Œ v}v‰ Çu vš]• šZ Á]šZ Œ Á o }(v]v•š]šµš]}v š} •dŒ v•(Œ š}}o• v • ŒÀ] •U]v oµ]vP šZ •š š[• }µŒ• ‹µ]À o À]•]vP š}}o•X ^]v šZ •]š [•]v ‰š]}v U }v • been delinquent in their payments and }v Z •

š Z] • • Z } Œ š (o o Á • Œ š] ( ] (š Œ õ ì Ç • X / š] • o] À š Z š u] v] • š
office caused this situation.

According to the AZTransfer director, once the website was up and running, the benefit to institutions was clear. Some institutional leaders and staff were resistant at first, in part because extensive time and investments were needed to produce a working site. It was suggested that institutions prefer a centralized office that is responsible for overseeing, communicating, and leading statewide transfer efforts. This has been especially helpful given the high amount of turnover in higher education vice president and provost positions. It was reported that it would be impossible to maintain statewide momentum on transfer initiatives in the absence of the website and the dedicated AZTransfer team.

AZTransfer staff also report that they are strategic in their efforts, working to intentionally create relevant and purposeful meetings that Œ P } } µ • } (‰ } ‰ o [• š } X d Z AZTransfer Steering Committee, comprised of institutional representatives, convenes quarterly, with one meeting held virtually and another as a two-day summer retreat. Agenda are action-oriented and crafted to ensure that people see tangible progress. Staff also produce detailed annual reports summarizing Arizon[• ‰ Œ } P Œ • • š } Á Œ • achieving its statewide transfer goals.

California

At the time of the website founding, a joint CCC, CSU, UC resolution was released calling for ASSIST participation. The website is now considered the sole repository of public higher education articulation information for the State of California, and it is an expectation that all institutions participate. Participation hinges on the recognition that doing so is in the best interests of students, which state staff believe is more effective than issuance of a legislative directive.

California does not provide institutional incentives to participate in ASSIST. Website staff believe that when institutions feel supported, they are more likely to be committed to their ASSIST work. Website staff are well-trained and dedicated, and in addition to providing ongoing support to system office and campus staff, deliver training on the use of the website to articulation officers. Moreover, system offices have dedicated additional funding when rolling out new system versions or to bring on additional ASSIST staff to help with the work involved. The three system offices commit to equal funding of ASSIST via a multi-year MOU, and this system commitment is credited in building campus support.

New Jersey

Although participation in NJ Transfer is voluntary, all New Jersey public 2- and 4-year colleges and universities have opted for website representation. Beginning in 2001, private in-state institutions were offered access to the system, and a number have opted in over time, most recently Drew University in 2015. Given that roughly three-µ Œ š Œ • } (š Z •] š [• µ P š] • (µ v š Z Œ } µ P Z] v • š on a pro-rata basis of annual statewide transfers, site engagement speaks to the productivity of the system.

According to the website director, institutions join NJ Transfer because they see the value of their engagement, in terms of a shared commitment to equity and their own institutional interest. At the statewide level, institutions recognize that a transfer website offers students the information they need to make informed transfer decisions. And since the software is free, intuitive, and accessible online, users have equitable access to materials irrespective of their geographic location, socioeconomic background, or life circumstances. Moreover, since the website supports transcript analysis, students can map out a

college plan that enables them to assess their transfer options from any public two-year to four-year public (and in some instances, private) college or university in the state.

Institutions also benefit because it increases the likelihood that they will attract in-state transfers. Since the website supports students in assessing where and how their credits will transfer, the platform ‰ Œ } u } š • Z Œ Œ µ] š š } Œ š] v [u } o U o } Á Œ] v P š Z } • } (• Œ] o š C how their prior course credits will be applied. Since NJ Transfer is limited to in-state institutions, many colleges continue to maintain transfer webpages on their own institutional websites to attract out-of-state students. This includes contracting with third-party vendors, such as CollegeSource, to offer access to its Transferology platform.

South Carolina

All public institution of higher education are represented on SC TRAC, even though system participation is voluntary. State representatives report that the Commission on Higher Education, which serves as a } } Œ] v š] v P } Œ (} Œ š Z • š š [• ï ï ‰ µ o] d o v • š] š] v š] v P ( ] v] P Z Œ µ to mandate engagement. The South Carolina Technical College System Board, which has oversight of 16 technical and community colleges has, however, mandated that all institutions participate. Among participating institutions, all but one offer students a mechanism for checking to see how their credits will transfer to a specific major, with the one outlier participating in the rest of the system.

The high rate of participation in SC TRAC is credited, in part, to the fact that the genesis for site development came out of a recommendation from provosts serving on ACAP. Consequently, the four year colleges and universities were all on board from the beginning. It was also suggested that the u } v • š Œ š] } v } (• Ç • š u ‰] o] š] • ‰ Œ } À] Ç u Ç K v U š Z • š š impressed institutional transfer specialists, which helped motivate institutional participation.

Vendor Feedback

The two largest providers of online transfer portals, AcademyOne and CollegeSource, offered feedback on institutional participation for states participating in their systems.

AcademyOne

In addition to South Carolina, AcademyOne services four states: Pennsylvania, Tennessee, Utah, and Wyoming. Portal services for all institutions are contracted directly between the state and AcademyOne. Company representatives reported that they are not aware of how each state funds their contract: it may be that the funding comes directly from the state or through internal fund transfers among participating institutions.

The extent of institutional participation varies. On the transfer websites for Tennessee, Utah, and Wyoming all institutions participate. In Pennsylvania, all state-related colleges participation except for three large institutions: Penn State, the University of Pittsburgh, and Temple. The reason has to do with state requirements associated with transfer. To participate in PA TRAC, institutions must guarantee that all core curriculum courses will be accepted for transfer. The three institutions were unwilling to make this commitment and, as such, the state will not fund their portal participation. While students in other institutions are unable to determine whether their credits may transfer to the three, they can assess whether credits taken at these institutions will transfer to another participating site.

AcademyOne representatives reported that institutions in contracted states do not restrict their transfer related activities to their state-funded portal. For example, some colleges contract for services with CollegeSource for its Transfer Evaluation System (TES) software or to offer Transferology. This allows sites to maximize their marketing exposure by offering students multiple options to learn about their campus. It also ensures that their institution appears in searches by prospective students, who may or may not otherwise access the state-funded website. Institutions may also incorporate transfer information on their own websites, enabling them to share additional details and resources.

To incentivize state and institutional participation, AcademyOne offers add-on components to increase functionality. One example is the Reverse Transfer feature, which enables students to assess whether, and if so, how coursework taken at a four-year college or university may transfer back to their college. They described how Tv v • •] • µ •] v P š Z] • ‰] o] š Ç š } ‰ Œ } u } š } } ‰ Œ š] } v year and four-year colleges as part of its Drive to 55 Tennessee strategy. This statewide effort is intended to equip 55 percent of the adult population with a postsecondary credit or degree by 2025. The state has incentivized institutions to participate in this goal by offering performance-based funding, split across participating institutions, for each person who attains a degree. The Reverse Transfer feature supports students in earning qualifying credit across institutions, regardless of where it is earned.

CollegeSource

The two CollegeSource products, TES and Transferology have been adopted within states and by individual colleges and universities nationwide. CollegeSource representatives shared that while many states offer institutions option of participating in transfer initiatives, Illinois has adopted legislation specifically requiring that all public institutions participate in the Illinois Articulation Initiative. While the legislation does not stipulate the manner of this participation (i.e., institutions are not required to use a specific product, institutions are required to submit and review their courses for statewide transfer. This includes maintaining a complete General Education Core Curriculum package and up to four core courses in a recognized major, provided the public institution has equivalent offerings.

To incentivize institutional participation, the Ohio Department of Higher Education pays for Transferology for any institution that wishes to participate. This approach is in keeping with others with which CollegeSource contracts. Representatives report that most states and/or system offices pay the subscription for their participating institutions.

Considerations for Oregon

State representatives has several suggestions for how Oregon HECC might work to promote institutional engagement.

- **Provide funding to support system startup and maintenance**
  Portal creation and maintenance, particularly related to the database of course articulations, requires time and resources on the part of institutions. Therefore, the most significant return on investment might be to ensure that each campus has the resources needed to enter course and articulation agreements into the database. The California ASSIST director observed that, in a perfect world, there would be an ongoing yearly stipend to fund site articulation officers for ongoing upkeep. CollegeSource representatives echoed this sentiment, suggesting that states offer sustainable funding to ensure the systems may be maintained over time. In their experience, a lack of funding to support such an initiative typically results in a system that leads to failure.

- **Provide ongoing technical assistance and support to sites**
  The AZ Transfer director reported that she and her team serve as transfer experts for the state, and that institutional staff appreciate having a collegial body of peers with whom to share practices and seek solutions and innovations. Annual convenings of institutional transfer experts also offer a forum to build relationships in a structured and focused way. The California director and CollegeSource representatives reinforced this message, noting that, if possible, Oregon should dedicate a state consultant or team to work with college and university staff on an ongoing basis to support website implementation, maintenance, and use.

- **Continue to build a statewide commitment to doing what is best for students**
  The NJ Transfer director noted that top-down mandates are difficult to sustain. She recommended that Oregon focus on promoting institutional engagement by underscoring the benefits a transfer website can offer to students. This entails building a shared vision around the website purpose and collaborative process to shape its design. She also noted that while New Jersey currently operates its own software, it began as a proprietary platform, and so irrespective of whether the system is vendor established or homegrown, a similar communal approach would be ideal.

APPENDIX A

State Legislation: 2019-2022

Alabama
Bill Text Lookup
AL S 360
2021
Higher Education Comprehensive Transition Tuition
Status: Failed - Adjourned- SENATE
Date of Last Action: *3/30/2021
Author: Scofield (R)
Topics: Student Disabilities, Transfer and Articulation, Veterans
Summary: Provides tuition for comprehensive higher education transition and postsecondary programs for children of disabled veterans with intellectual disabilities, amends sections 16-3-21, 31-6-4, and 31-6-6.

Alaska
Bill Text Lookup
AK S 31
2020
University Curricula
Status: Failed- Adjourned- Senate Education Committee
Date of Last Action: *1/23/2019
Author: Stevens G (R)
Topics: Transfer and Articulation
Summary: Relates to the transferability of academic credit for specified courses among postsecondary education programs, relates to the Board of Regents of the University of State.

Arizona
Bill Text Lookup
AZ H 2763
2022
Scholarships and Student Transfers
Status: Failed- Adjourned- House Ways and Means Committee
Date of Last Action: *2/7/2022
Author: Mathis (D) Additional Authors: Cano (D); Hernandez M (D); Schwiebert (D); Solorio (D); Liguori (D); Abraham (D)
Topics: Transfer and Articulation
Summary: Relates to School Tuition Organizations (STO) scholarships, relates to student transfers.

AZ S 1739
2021
College Credit And Incentive Program
Status: Failed- Adjourned- Senate Education Committee
Date of Last Action: *2/1/2021
Author: Marsh (D) Additional Authors: Gonzales (D);Quezada (D);Mendez (D);Engel (D);Bowie (D)
Topics: Transfer and Articulation
Summary: Relates to college credit, relates to incentive programs, relates to repeal.

AZ H 2119
2020
Academic Credits
Status: Failed- Adjourned- SENATE
Date of Last Action: *1/13/2020
Author: Udall (R)
Topics: Transfer and Articulation
Summary: Relates to schools, relates to academic credits, relates to transfer.

California
Bill Text Lookup
CA A 928
2021
Student Transfer Achievement Reform Act
Status: Enacted- Act No. 2021-566
Date of Last Action: *10/06/2021 - Enacted
Author: Berman (D) Additional Authors: Glazer (D)
Topics: Transfer and Articulation
Summary: Establishes the Associate Degree for Transfer Intersegmental Implementation Committee to serve as the primary entity charged with the oversight of the Associate Degree for Transfer. Specifies the committee' s membership. Assigns numerous duties to the committee, including the duty to establish timelines and reporting deadlines relating to reviews of transfer model curricula, and the duty to develop a comprehensive communications plan and guidance to inform students about the ADT pathway.

CA A 111
2021
Postsecondary Education: Common Course Numbering System
Status: Enacted- Act No. 2021-568
Date of Last Action: *10/06/2021 - Enacted
Author: Berman (D)
Topics: Transfer and Articulation

Summary:Requires the California Community Colleges to adopt a common course numbering system for all general education requirement courses and transfer pathway courses, and require each community college campus, on or before a specified date, to incorporate common course numbers from the adopted system into its course catalog. Requires the common course numbering system to be student facing and ensure that comparable courses across all community colleges have the same course number.

CA S 1155
2020
Los Angeles County Community Colleges
Status:Failed- SENATE
Date of Last Action:*2/20/2020
Author: Hertzberg (D)
Topics:Community and Junior Colleges, Transfer and Articulation
Summary:Establishes the Los Angeles County Community Colleges Common Course Numbering Pilot Project. Requires the Chancellor of the California Community Colleges to convene a pilot project task force. Requires the task force to develop a common course numbering system in the subjects of mathematics and language arts. Requires the Chancellor to invite designated community college districts, all of which are located in Los Angeles County, to participate in the task force.

CA A 1527
2020
Postsecondary Education: Associate Degrees for Transfer
Status:Failed- ASSEMBLY
Date of Last Action:*3/28/2019
Author: Burke (D)
Topics:Transfer and Articulation
Summary:Requires the State Department of Education to collaborate with the Trustees of the California State University and the Chancellor's Office of the California Community Colleges to examine the feasibility of integrating academic pathways and degrees into associate degree for a transfer program that would require the attainment of certain number of semester units for a student to progress to a baccalaureate degree.

CA A 2146
2020
Public University Dental School Transfer Program
Status:Failed- ASSEMBLY
Date of Last Action:*2/10/2020
Author: Chiu (D) Additional Authors:Frazier (D);Mayes (R);Allen (D)
Topics:Transfer and Articulation
Summary:Requires the Department of Health Care Services to establish, implement, and maintain the Public University Dental School Intergovernmental Transfer Program, and to

authorize public university dental schools to utilize intergovernmental transfers to support the training and dental care that these schools provide to MediCal beneficiaries.

CA S 484
2019
Public Postsecondary Education Transfer Students
Status: Vetoed- Senate Governor's Vetoes- File No. 41
Date of Last Action:*10/13/2019- Vetoed
Author: Portantino (D)
Topics:Transfer and Articulation
Summary:Requires the governing board of each community college district to direct the appropriateofficials at their respective campuses to identify those students who have completed an associate degree for transfer, notify those students of their completion of the degree requirements, automatically award those students the degree, and add those students to an identification system at the end of each academic year.

Colorado
Bill Text Lookup
CO S 143
2020
Higher Education Student Transition Programs
Status:Failed- Adjourned- Postponed Indefinitely
Date of Last Action:*1/27/2020
Author: Story (D)- Additional Authors:Young M (D)
Topics:Student Supports, Transfer and Articulation
Summary:Establishes a Higher Education Student Transition Program.

CO H 1294
2019
Transfer Apprenticeship Credit to College Credit
Status:Enacted- Act No. 318
Date of Last Action:*05/28/2019- Enacted
Author: Benavidez (D)- Additional Authors:Benavidez (D);Jaquez Lewis S (D);Story (D)
Topics:Community and Junior Colleges, Credit for Prior Learning, Transfer and Articulation, Vocational and Technical Education
Summary:Concerns a requirement that the chief administrative officer of the Colorado community college system create a working group to determine the best manner in which to facilitate the transfer of earned construction industry registered apprenticeship program credit to college credit, makes an appropriation.

Connecticut
Bill Text Lookup

CT H 7253
2019
Distance Learning Programs
Status: Enacted - Act No. 19-174
Date of Last Action: *07/09/2019 - Enacted
Author: Joint Higher Ed; Additional Authors: Butler L (D);Haddad (D);Santiago H (D);Baker (D);Reyes (D);Gibson (D);Michel (D)
Topics: Transfer and Articulation
Summary: Concerns distance learning programs operated by institutions of higher education outside of the state, allows out-of-state institutions of higher education that do not participate in a nationwide, state authorization reciprocity agreement to apply to the Office of Higher Education to operate a distance learning program in the state.

Florida
Bill Text Lookup
FL S 7044
2022
Postsecondary Education
Status: Enacted - Act No. 2022-70
Date of Last Action: *04/19/2022 - Enacted
Author: Education Cmte; Additional Authors: Diaz (R);Rodrigues (R)
Topics: Faculty, Governance, Textbook, Transfer and Articulation
Associated Bills: FL H 7051 - Similar
Summary: Relates to postsecondary education, 1) Provides requirements for lists of required and recommended textbooks and instructional materials for Florida College System institution and state university courses. 2) Revises the maintenance requirements of and information that must be included in the statewide course numbering system, 3) Prohibits public postsecondary education institutions from being accredited by the same agency or association for consecutive accreditation cycles. 4) Allows the Board of Governors to implement a post-tenure review for faculty every 5 years.

Georgia
Bill Text Lookup
GA S 81
2021
Office of College and Career Transitions Name Change
Status: Enacted - Act No. 252
Date of Last Action: *05/06/2021 - Enacted
Author: Mullis (R)
Topics: Transfer and Articulation, Workforce Development
Summary: Relates to the Office of College and Career Transitions and Powers and duties, so as to change the name of the Office of College and Career Transitions to the Office of College

Career Academies, provides for increased technical skills, provides for collaboration between the Technical College System of Georgia and certain entities to support efforts to recruit new industries and expand existing industries, provides for related matters, provides for an effective date, repeals conflicting laws.

Illinois
Bill Text Lookup
IL H 5238
2020
Articulation Initiative Act
Status: Pending - House Rules Committee
Date of Last Action: *2/14/2020
Author: LaPointe (D)
Topics: Transfer and Articulation
Summary: Amends the Articulation Initiative Act, requires the Board of Higher Education and the Community College Board to provide increased access to higher education for students with intellectual disabilities by incorporating vocational training, continuing education certificates, individualized learning paths, life skills, and significantly modified curricula into the Articulation Initiative.

Kansas
Bill Text Lookup
KS H 2144
2019
Community College Course Transfer Credits
Status: Enacted - Act No 41
Date of Last Action: *04/16/2019 - Enacted
Author: Williams (R)
Topics: Community and Junior Colleges, Transfer and Articulation
Summary: Requires the board of trustees of each community college to identify those courses offered by such community college that transfer to all state educational institutions, requires all such courses to be prominently identified on such community college's website and to be accessible through a link on the state board of regent's website.

Kentucky
Bill Text Lookup
KY S 101
2020
Credit Under Articulation Agreements
Status: Enacted - Act No. 57
Date of Last Action: *03/27/2020 - Enacted
Author: Wilson M (R) Additional Authors: Wise (R)
Topics: Transfer and Articulation

Summary: Requires the Council on Postsecondary Education to facilitate the implementation of a standardized articulation agreement for each approved high school career pathway to be honored at any public college or university.

Louisiana
Bill Text Lookup
LA H 231
2022
Higher Education
Status: Enacted - Act No. 205
Date of Last Action: *05/31/2022 - Enacted
Author: Brass (D) Additional Authors: Johnson C (D);Adams (I);Freeman (D);Bryant (D);Carter W (D);Cormier (D);Freiberg (R);Green (D);Hughes (D);Illg (R);Duplessis (D);Newell (D);Selders (D);St. Blanc (R);Thompson (D);Willard (D);Fisher (D);Boyd (D);LaFleur V (D);Horton (R);Glover (D);Seabaugh (R);Cox (D);Garofalo (R);Jefferson (D);Pierre (D);Schexnayder (R);Bagley (R);Carter R (D);Jenkins (D);Lyons (D);Marcelle (D);McFarland (R);Miller D (D);Jordan (D);Stagni (R);Crews (R)
Topics: Transfer and Articulation
Summary: Provides that 4 year colleges and universities and community colleges shall enter into reverse articulation or reverse transfer agreements to facilitate the transfer of academic credits earned by a student while enrolled in a 4 year postsecondary institution back to a community college for the purpose of enabling a student to complete the requirements for an associate degree, provides that the Board of Regents shall develop, and maintain processes to facilitate the reverse transfer of academic credits.

LA S 261
2022
Postsecondary Education
Status: Enacted - Act No. 308
Date of Last Action: *06/10/2022 - Enacted
Author: Fields (D) Additional Authors: Luneau (D);Womack (R);Pope (R);McMath (R);Jackson (D);Harris (D);Foil (R);Fesi (R);Connick (R);Cloud (R);Bouie (D);Bernard (R);Smith G (D);Hewitt (R);Boudreaux (D);Carter G (D);Ward (R);Price (D);Garofalo (R);Mills (R);Cortez (R);Barrow (D);White (R);Tarver (D)
Topics: Transfer and Articulation
Summary: Relates to transfer pathways, provides for a comprehensive system of articulation and transfer of credit between and among secondary and postsecondary education, relates to the duties of the statewide articulation and transfer council, relates to the guarantees in statewide articulation agreements, provides for the Board of Regents duties in the common course numbering system, provides for the creation of statewide transfer pathways in major programs.

Maryland

Bill Text Lookup

MD S 540

2022

Higher Education Transfer Platform

Status: Failed- Adjourned- House Appropriations Committee

Date of Last Action: * 1/28/2022

Author: Elfreth (D) Additional Authors: Reilly (R); Hershey (R); Ready (R); Hester (D)

Topics: Transfer and Articulation

Associated Bills: MD H 598 - Crossfiled with

Summary: Requires each community college and 4-year institution that receives State funds to participate in a transfer platform that the Maryland Higher Education Commission establishes to facilitate the transfer of students from community colleges to 4-year institutions of higher education, alters a certain report that public institutions of higher education must submit.

MD H 598

2022

Transfer With Success Act 2.0

Status: Failed- Adjourned- Senate Education, Health & Environmental Affairs Committee

Date of Last Action: *1/31/2022

Author: Solomon (D)

Topics: Transfer and Articulation

Associated Bills: MD S 540 - Crossfiled with

Summary: Creates the Transfer with Success Act 2.0. Requires higher education institutions to participate in a transfer platform that will allow students and advisors to determine if a course will transfer from any community college to any 4-year institution of higher education. Requires institutions to report on failures to honor transfer platform. Includes a $1 million appropriation to create the transfer platform.

MD S 620

2022

Workgroup on Articulation Agreements

Status: Failed- Adjourned- Senate Education, Health & Environmental Affairs Committee

Date of Last Action: *2/2/2022

Author: Cassilly (R)

Topics: Transfer and Articulation

Summary: Establishes the Workgroup on Articulation Agreements and Transfer Procedures of Institutions of Higher Education in the State to study obstacles encountered by students transferring between community colleges and four-year institutions of higher education in the State, requires the Workgroup to make recommendation to remedy any identified obstacles and report its findings to the Governor and the President of the Senate and the Speaker of the House by January 1, 2023.

MD H 460

2021

Transfer With Success Act
Status:Enacted- Act No. 188
Date of Last Action:*05/18/2021 - Enacted
Author: Solomon (D)
Topics:Transfer and Articulation
Associated Bills:MD S 886 - Crossfiled with
Summary:Requires the Maryland Higher Education Commission to establish certain procedures that require a public institution of higher education that denies the transfer of a credit or course to an enrolled student to report the denial to the student and the institution from which the student originates and submit to the Commission a report each year listing the denials and the reasons for the denials, requires the procedures to direct a certain institution to review a denial of the transfer of a credit or course.

MD S 886
2021
Denial Of the Transfer Of a Credit Or Course
Status:Enacted- Act No.189
Date of Last Action:*05/18/2021 - Enacted
Author: Elfreth (D)
Topics:Transfer and Articulation
Associated Bills:MD H 460 - Crossfiled with
Summary:Requires the State Higher Education Commission to establish certain procedures that require a public institution of higher education that denies the transfer of a credit or course to an enrolled student to report the denial to the student and the institution from which the student originates within a certain amount of time and to submit a certain report each year to the Commission.

MD H 719
2020
Student Transfers
Status:Failed- Adjourned- House Appropriations Committee
Date of Last Action:*1/30/2020
Author: Hornberger (R) Additional Authors:Mosby (D);Stewart (D);Solomon (D);Mangione (R);Kerr (D);Guyton (D);Feldmark (D);Palakovic Carr (D);Bridges (D);Beitzel (R);Ghrist (R);Moon (D);McKay (R);Korman (D);Hettleman (D);Ebersole (D);Washington A (D)
Topics:Transfer and Articulation
Summary:Requires the Higher Education Commission to develop and implement a certain agreement in collaboration with public institutions of higher education, requires a certain agreement to require public senior higher education institutions to offer transfer students from community colleges certain course offerings free of charge under certain circumstances.

MD H 814
2020
Higher Education Credit Transfer

Status: Failed - Adjourned - House Appropriations Committee
Date of Last Action: *2/3/2020
Author: Washington County Delegation
Topics: Transfer and Articulation
Summary: Requires that 100- and 200-level course credits earned by students transferring from community colleges to public senior higher education institutions be transferable, prohibits public senior higher education institutions from denying the transfer of certain credits.

MD H 1082
2020
Transfer Credit Denial
Status: Failed - Adjourned - Senate Education, Health & Environmental Affairs Committee
Date of Last Action: *3/15/2020
Author: Solomon (D); Additional Authors: Conaway (D); Valentine-Smith (D); Hettleman (D); Hornberger (R); Korman (D); Young P (D); Acevero (D); Brady (D); Lehman (D); Lopez (D); Love (D); Qi (D); Stewart (D); Forbes (D)
Topics: Transfer and Articulation
Summary: Requires the Higher Education Commission to establish certain procedures that require a public institution of higher education, that denies the transfer of credits, to report the denial to the institution from which the transfer student originates and submit to the Commission a report each year listing the denials and the reasons for the denials.

Massachusetts
Bill Text Lookup
MA H 4424
2020
Student Academic Transcript Access
Status: Pending - House Third Reading
Date of Last Action: *2/20/2020
Author: Joint Higher Education
Topics: Transfer and Articulation
Associated Bills: MA H 1226 - New Draft of
Summary: Ensures students' access to academic transcripts.

Minnesota
Bill Text Lookup
MN S 114
2022
Higher Education
Status: Failed - Adjourned - Senate Higher Education Finance and Policy Committee
Date of Last Action: *1/13/2021
Author: Clausen (DFL)

Topics:Transfer and Articulation
Summary:Relates to higher education, requires a reverse credit transfer agreement.

MN H 1181
2022
Higher Education
Status:Failed- Adjourned- House Ways and Means Committee
Date of Last Action:*3/11/2021
Author: Bernardy (DFL)
Topics:Transfer and Articulation
Summary:Relates to higher education, provides for certain policy changes, including restrictions on limiting student access to transcripts and modifications to certain grant and loan programs, school accountability provisions, and college savings plans.

MN S 114
2021
Higher Education
Status:Pending- Carryover- Senate Higher Education Finance and Policy Committee
Date of Last Action:*1/13/2021
Author: Clausen (DFL)
Topics:Transfer and Articulation
Summary:Relates to higher education, requires a reverse credit transfer agreement.

MN H 1181
2021
Higher Education
Status:Pending- Carryover- House Ways and Means Committee
Date of Last Action:*3/11/2021
Author: Bernardy (DFL)
Topics:Transfer and Articulation
Associated Bills:MN S 869- Companion
Summary:Relates to higher education, provides for certain policy changes, including restrictions on limiting student access to transcripts and modifications to certain grant and loan programs, school accountability provisions, and college savings plans.

MN S 4420
2020
Higher Education
Status:Failed- Adjourned- Senate Higher Education Finance and Policy Committee
Date of Last Action:*3/16/2020
Author: Rarick (R)
Topics:Transfer and Articulation
Summary:Relates to higher education, modifies reverse credit transfers.

MN H 4455
2020
Higher Education
Status:Failed- Adjourned- House Higher Education Finance and Policy Division Committee
Date of Last Action:*3/16/2020
Author: Bernardy (DFL)
Topics:Transfer and Articulation
Associated Bills:MN S 675- Companion
Summary:Relates to higher education, requires a reverse credit transfer agreement.

Mississippi
Bill Text Lookup
MS S 2826
2020
School District Student Transfers
Status:Failed- Died
Date of Last Action:*2/17/2020
Author: Hill (R)
Topics:Transfer and Articulation
Summary:Removes the authority of the transferring school board to reject a student's application to transfer, prohibits the transferring school district from charging a fee to students accepted by another school district.

MS H 890
2019
Commission on College Accreditation
Status:Failed- Died
Date of Last Action:*1/21/2019
Author: Mettetal (R)
Topics:Transfer and Articulation
Summary:Prescribes certain specific powers for the commission on college accreditation and to transfer the regulatory authority over correspondence courses to the commission, requires entities providing correspondence courses in the state to obtain a permit from the Secretary of State, the Office of the Attorney General and either the State Department of Education.

Missouri
Bill Text Lookup
MO H 1000
2021
Course Credits
Status:Failed- Adjourned- House Higher Education Committee
Date of Last Action:*2/1/2021
Author: West R (R)

Topics: For Profit/Proprietary, Transfer and Articulation
Summary: Requires public institutions of higher education to accept certain course credits earned at a proprietary school.

New Jersey
Bill Text Lookup
NJ S 2114
2021
Higher Education Common Course Numbering System
Status: Pending - Senate Higher Education Committee
Date of Last Action: *3/16/2020
Author: Corrado (R)
Topics: Student Supports, Transfer and Articulation
Summary: Directs Secretary of Higher Education to establish common course numbering system for public institutions of higher education.

NJ S 2114
2020
Higher Education Common Course Numbering System
Status: Pending - Senate Higher Education Committee
Date of Last Action: *3/16/2020
Author: Corrado (R)
Topics: Student Supports, Transfer and Articulation
Summary: Directs Secretary of Higher Education to establish common course numbering system for public institutions of higher education.

New Mexico
Bill Text Lookup
NM S 77
2021
Two Plus Two Pilot Project
Status: Enacted - Act No. 33
Date of Last Action: * 04/05/2021 - Enacted
Author: Kernan (R)
Topics: Community and Junior Colleges, Transfer and Articulation
Summary: Relates to two plus two pilot project, creates the regional two plus two pilot project to establish a seamless transition from community college to university and measure student and institutional outcomes.

NM H 420
2019
School Advanced Placement Policy and Reporting

Status: Enacted - Act No. 139
Date of Last Action: *04/02/2019 - Enacted
Author: Romero (D) Additional Authors: Romero (D);Figueroa (D);Garratt (D);Lara (D)
Topics: Dual Enrollment, Transfer and Articulation
Summary: Relates to higher education, requires public post secondary educational institutions to accept for credit passing scores on the college board advanced placement examinations, requires the Higher Education Department to report institutional advanced placement policies to the Legislature and the Governor.

New York
Bill Text Lookup
NY A 5500
2019
Undergraduate Student Tuition Assistance
Status: Enacted - Act No. 376
Date of Last Action: *10/17/2019 - Enacted
Author: Simon (D) Additional Authors: Stirpe (D);Ashby (R)
Topics: Financial Aid and Affordability, Transfer and Articulation
Associated Bills: NY S 4121 - Same as
Summary: Amends the Education Law, provides for the eligibility for tuition assistance program awards for certain undergraduates who must transfer to another institution as a result of a permanent college closure.

Oklahoma
Bill Text Lookup
OK H 2750
2021
Transfer Of School Credits
Status: Enacted - Act No. 337
Date of Last Action: *04/28/2021 - Enacted
Author: Baker (R)
Topics: Transfer and Articulation
Summary: Relates to schools, relates to transfer of credits, declares legislative intent, requires credit policy be posted on the campus website, requires biennial reviews of Advanced Placement credit policies, requires reports of noncompliance, provides an effective date, declares an emergency.

OK S 1091
2020
College Credits
Status: Failed - Adjourned - SENATE
Date of Last Action: *2/3/2020
Author: Smalley (R)

Topics:Transfer and Articulation
Summary:Relates to higher education and concurrent enrollment, requires that college credit earned through certain courses be transferred to certain institutions.

Oregon
Bill Text Lookup
OR S 76
2021
Transfer Student Bill of Rights
Status:Failed- Died
Date of Last Action:*1/19/2021
Author: Governor Kate Brown for Higher Education Coordinating Commission
Topics:Transfer and Articulation
Summary:Integrates foundational curricula and unified statewide transfer agreements into Transfer Student Bill of Rights and Responsibilities.

OR S 233
2021
Higher Education Coordinating Commission
Status:Enacted- Act No. 575
Date of Last Action:*07/19/2021- Enacted
Author: Senate Interim Committee on Education
Topics:Transfer and Articulation
Summary:Requires the Higher Education Coordinating Commission to establish common course numbering system for introductory and lower level courses with similar learning outcomes offered at accelerated college credit programs, public postsecondary institutions of education and participating nonpublic postsecondary institutions of education, requires all public postsecondary institutions of education to adopt system and accept transfers of academic credit subject to common course numbering system.

OR H 2346
2021
Transfer Academic Credits
Status:Failed- Died
Date of Last Action:*1/19/2021
Author: Office of Representative Bonham Additional Authors:Leif (R);Morgan L (R)
Topics:Transfer and Articulation
Summary:Allows student to transfer academic credits from any course contained within foundational curriculum to any other community college or public university.

OR H 2769
2021
Higher Education Coordinating Commission

Status:Failed- Died
Date of Last Action:*1/19/2021
Author: Smith (R)Additional Authors:Evans (D)
Topics:Transfer and Articulation
Summary:Directs Higher Education Coordinating Commission to study effectiveness of statutes implementing unified statewide transfer agreements and to determine whether additional legislation is necessary to enhance process of transferring academic credits between community colleges and public universities.

OR S 1521
2020
Transfer Student Bill of Rights
Status:Failed- Died
Date of Last Action:*3/3/2020
Author: Senate Committee on General Government and Emergency Preparedness.
Topics:Transfer and Articulation
Summary:Integrates foundational curricula and unified statewide transfer agreements into Transfer Student Bill of Rights and Responsibilities, requires Higher Education Coordinating Commission to develop standards for minimizing complexity of unified statewide transfer agreements and to develop processes for resolving requests for variances to unified statewide transfer agreements or disputes over what courses are included in unified statewide transfer agreement.

OR S 730
2019
Transfer Student Bill of Rights and Responsibilities
Status:Failed- Died
Date of Last Action:*4/8/2019
Author: Education Cmt
Topics:Transfer and Articulation
Summary:Integrates foundational curricula and unified statewide transfer agreements into Transfer Student Bill of Rights and Responsibilities.

OR H 3212
2019
Academic Credit Transfer Study
Status:Failed- Died
Date of Last Action:*4/11/2019
Author: Marsh (D)Additional Authors:Wilson (R);Reschke (R);Walla (R);Golden (D)
Topics:Community and Junior Colleges, Credit for Prior Learning, Transfer and Articulation
Summary:Directs Higher Education Coordinating Commission to conduct study to determine whether additional legislation is necessary to enhance process of transferring academic credits between community colleges and public universities.

Pennsylvania
Bill Text Lookup
PA H 705
2022
Associate Degree for Transfer Programs
Status: Pending - House Education Committee
Date of Last Action: *3/1/2021
Author: Kinkead (D) Additional Authors: Ciresi (D);Pisciottano (D);Parker (D);Nelson N (D);Guzman (D);Zabel (D);Webster (D);Shusterman (D);Sanchez (D);Isaacson (D);Hohenstein (D);Delloso (D);Freeman (D);Warren (D);Madden (D);Evans (D);Schweyer (D);Rozzi (D);Kinsey (D);Neilson (D);Deasy (D);Galloway (D);Conklin (D);Sturla (D)
Topics: Transfer and Articulation
Summary: Provides for associate degree for transfer programs.

PA H 705
2021
Associate Degree for Transfer Programs
Status: Pending - House Education Committee
Date of Last Action: *3/1/2021
Author: Kinkead (D) Additional Authors: Ciresi (D);Pisciottano (D);Parker (D);Nelson N (D);Guzman (D);Zabel (D);Webster (D);Shusterman (D);Sanchez (D);Isaacson (D);Hohenstein (D);Delloso (D);Freeman (D);Warren (D);Madden (D);Evans (D);Schweyer (D);Rozzi (D);Kinsey (D);Neilson (D);Deasy (D);Galloway (D);Conklin (D);Sturla (D)
Topics: Transfer and Articulation
Summary: Provides for associate degree for transfer programs.

PA H 2447
2020
Associate Degree for Transfer Programs
Status: Failed - Adjourned - House Education Committee
Date of Last Action: *4/27/2020
Author: Ullman (D) Additional Authors: Rozzi (D);Williams (D);Webster (D);Shusterman (D);Kenyatta (D);Howard (D);Hohenstein (D);Delloso (D);Burgos (D);Warren (D);Madden (D);Hill Evans (D);McClinton (D);Caltagirone (D);Kinsey (D);Neilson (D);Donatucci (D);Briggs (D);Murt (R);Galloway (D);Millard (R);Youngblood (D);Readshaw (D);Frankel (D);DeLuca (D)
Topics: Transfer and Articulation
Summary: Provides for associate degree for transfer programs.

PA H 265
2019
Higher Education Transfer Credits
Status: Enacted - Chapter
Date of Last Action: *10/30/2019 - Enacted
Author: Staats (R) Additional Authors: Hill-Evans (D);Simmons (R);Neilson (D);Fee (R);James R

(R);Miller D (D);Irvin (R);Jozwiak (R);Rader (R);Quinn C (R);Mullery (D);Solomon (D);Gleim (R);Kenyatta (D);Mizgorski (R);Polinchock (R);Struzzi (R);Thomas W (R);Williams (D);Moul (R);Roebuck D (D);Sayl
Topics: Credit for Prior Learning, Transfer and Articulation, Workforce Development
Summary: Amends the Public School Code, relates to vocational education, provides for advisory committees, provides for the PA SMART Online Career Resource Center, creates a workforce development program clearinghouse, establishes the Schools to Work Program, provides for the powers and duties of the Department of Labor and Industry.

Tennessee
Bill Text Lookup
TN H 1342
2022
Postsecondary Education Credit Transfer
Status: Failed- Adjourned- HOUSE
Date of Last Action: *2/11/2021
Author: Hall (R) Additional Authors: Ogles (R);Carringer (R)
Topics: Transfer and Articulation
Associated Bills: TN S 636 - Same as
Summary: Requires that a student must sign, instead of initial, a copy of the transferability of credits disclosure that postsecondary educational institutions are required to provide.

TN H 1455
2022
Transferability of Credits Disclosure
Status: Failed- Adjourned- Held on Desk
Date of Last Action: *2/23/2021
Author: Potts (D)
Topics: Transfer and Articulation
Associated Bills: TN S 1490 - Same as
Summary: Relates to Education, increases from 16 to 20 point font the minimum font size a post secondary educational institution must use for the required transferability of credits disclosure given to a student prior to the student signing an enrollment contract.

TN S 2531
2022
Higher Education Commission
Status: Enacted - Act No. 794
Date of Last Action: * 04/08/2022 - Enacted
Author: Haile (R) Additional Authors: Crowe (R);Hensley (R);Bell (R);Lundberg (R);White (R);Powers (R)
Topics: Admissions and Enrollment, Dual Enrollment, Transfer and Articulation
Associated Bills: TN H 2115 - Same as

Summary: Provides that a dual admissions policy in which a person who satisfies the admissions requirements of a two year institution governed by the board of regents and a public university while pursuing a degree program within a transfer pathway program of study is authorized to be admitted to both such institutions.

TN H 1342
2021
Postsecondary Education Credit Transfer
Status: Pending - Carryover - HOUSE
Date of Last Action: *2/11/2021
Author: Hall (R)
Topics: Transfer and Articulation
Associated Bills: TN S 636 - Same as
Summary: Requires that a student must sign, instead of initial, a copy of the transferability of credits disclosure that postsecondary educational institutions are required to provide.

TN H 1455
2021
Transferability of Credits Disclosure
Status: Pending - Carryover - Held on Desk
Date of Last Action: *2/23/2021
Author: Potts (D)
Topics: Transfer and Articulation
Associated Bills: TN S 1490 - Same as
Summary: Relates to Education, increases from 16 to 20 point font the minimum font size that a post secondary educational institution must use for the required transferability of credits disclosure given to a student prior to the student signing an enrollment contract.

Texas
Bill Text Lookup
TX H 35
2021
Single Common Course Numbering System
Status: Failed - Adjourned - HOUSE
Date of Last Action: *7/8/2021
Author: Gervin-Hawkins (D)
Topics: Transfer and Articulation
Summary: Relates to a single common course numbering system for and the transfer of course credit among public institutions of higher education in this state.

TX S 102
2021
Transfer of Course Credit Requirements Enforcement

Status:Failed- Adjourned- Senate Higher Education Committee
Date of Last Action:*1/12/2021
Author: Menendez (D)
Topics:Transfer and Articulation
Summary:Relates to the enforcement of certain requirements regarding the transfer of course credit between public institutions of higher education.

TX H 811
2021
Single Common Course Numbering System
Status:Failed- Adjourned- House Higher Education Committee
Date of Last Action:*1/12/2021
Author: Gervin-Hawkins (D)
Topics:Transfer and Articulation
Summary:Relates to a single common course numbering system for and the transfer of course credit among public institutions of higher education in this state.

TX H 1522
2021
Transfer of Midwestern State University
Status:Enacted- Act No. 417
Date of Last Action:*06/08/2021- Enacted
Author: Frank (R)Additional Authors:Parker (R);Frullo (R);Burrows (R);Spiller (R)
Topics:Transfer and Articulation
Associated Bills:TX S 447- Identical
Summary:Relates to the transfer of Midwestern State University to the Texas Tech University System, to certain fees charged by that system's governing board, and to mandatory venue for actions brought against that system or its institution, officers, or employees.

TX H 2827
2021
Transfer to Higher Education Coordinating Board
Status:Enacted- Act No. 1001
Date of Last Action:*06/18/2021- Enacted
Author: Gonzalez M (D)
Topics:Transfer and Articulation
Summary: Relates to the transfer to the State Higher Education Coordinating Board of certain responsibilities relating to postsecondary education and career counseling.

TX S 25
2019
Public Higher Education Timely Graduation
Status:Enacted- Act No. 1210
Date of Last Action:*06/14/2019- Enacted

Author: West (D) Additional Authors: Hinojosa (D);Lucio Ed (D);Zaffirini (D);Seliger (R);Schwertner (R);Bettencourt (R);Powell (D)
Topics: Credit for Prior Learning, Transfer and Articulation
Associated Bills: TX H 4018 - Duplicate
Summary: Relates to measures to facilitate the transfer, academic progress, and timely graduation of students in public higher education.

TX H 271
2019
Career School and College Transcripts
Status: Failed - Adjourned - HOUSE
Date of Last Action: *4/17/2019
Author: Bernal (D) Additional Authors: Guillen (D)
Topics: Credit for Prior Learning, Transfer and Articulation
Summary: Relates to student access of career school and college transcripts and certificates of completion of training.

TXH 449
2019
Disciplinary Notation of Student Transcript
Status: Enacted - Act No. 727
Date of Last Action: *06/10/2019 - Enacted
Author: Turner C (D) Additional Authors: Davis S (R);Neave (D);Zwiener (D)
Topics: Transfer and Articulation
Summary: Requires that a public or private institution of higher education include a disciplinary notation on a student's transcript under certain circumstances.

TX H 4208
2019
Course Credit Transfer Between Public Institutions
Status: Failed - Adjourned - House Higher Education Committee
Date of Last Action: * 3/8/2019
Author: Pacheco (D)
Topics: Transfer and Articulation
Associated Bills: TX S 2058 - Identical
Summary: Relates to the enforcement of certain requirements regarding the transfer of course credit between public institutions of higher education.

Utah
Bill Text Lookup
UT H 45
2019
Higher Education Credits

Status: Enacted - Act No. 102
Date of Last Action: * 03/22/2019 - Enacted
Author: Peterson V (R) Additional Authors: Peterson V (R); Millner (R)
Topics: Credit for Prior Learning, Transfer and Articulation
Associated Bills: UT H 2 - Similar; UT H 8 - Similar; UT H 27 - Similar; UT H 28 - Similar; UT H 29 - Similar; UT H 48 - Similar; UT H 71 - Similar; UT H 81 - Similar; UT H 118 - Similar; UT H 130 - Similar; UT H 140 - Similar; UT H 146 - Similar; UT H 158 - Similar; UT H 168 - Similar
Summary: Enacts and amends provisions relating to credit for prior learning in higher education, amends provisions related to the State Board of Regents' duties regarding articulation, transfers, and course identification, enacts provisions requiring the State Board of Regents to develop a systemwide plan for advising and communicating about student credit for prior learning and establish policies related to student credit for prior learning, enacts other provisions related to prior learning and student credit.

Virginia
Bill Text Lookup
VA S 77
2019
Dual Enrollment Courses
Status: Failed - SENATE
Date of Last Action: *1/10/2018
Author: Sturtevant (R) Additional Authors: Chase (R)
Topics: Dual Enrollment, Transfer and Articulation
Summary: Relates to dual enrollment courses, relates to quality standards, relates to universal transfer course credit, requires the State Council of Higher Education for Virginia (the Council), in consultation with the Department of Education and each public institution of higher education, to establish quality standards for dual enrollment courses, including quality standards for course instructors, materials, and content, provides that a process by which dual enrollment courses that meet or exceed such quality.

VA H 2236
2019
Postsecondary Schools Enrollment Agreements
Status: Failed - Died
Date of Last Action: *1/9/2019
Author: Rodman (D)
Topics: Transfer and Articulation
Summary: Relates to postsecondary schools, relates to enrollment agreements, relates to disputes, relates to arbitration, requires each postsecondary school that requires any student to submit to arbitration to resolve disputes with the school pursuant to an enrollment agreement to permit the student to report the dispute to any other individual or entity before the arbitration proceeding is initiated or completed.

West Virginia
Bill Text Lookup
WV H 4788
2020
Two Year College Credit Transfer
Status:Failed- Adjourned- House Education Committee
Date of Last Action:*2/10/2020
Author: Rodighiero (D)
Topics:Transfer and Articulation
Summary:Requires credits earned at two year colleges transfer for credit at any other state institution of higher education.

WV S 7
2019
Public School Transfer and Enrollment Policies
Status:Failed- Adjourned- Senate Education Committee
Date of Last Action:*1/9/2019
Author: Rucker (R)
Topics:Transfer and Articulation
Summary:Relates to public school transfer and enrollment policies.

Wisconsin
Bill Text Lookup
WI A 189
2019
University Courses
Status:Enacted- Act No. 46
Date of Last Action:*11/21/2019- Enacted
Author: Born (R)Additional Authors:Brooks R (R);Wittke (R);Myers (D);James (D);Dittrich (R);Plumer (R);Gundrum (R);Testin (R);Feyen (R);Zimmerman (R);Tusler (R);Duchow (R);Quinn (R);Horlacher (R);Edming (R);Nass (R);Allen (R);Skowronski (R);Kulp (R);Murphy (R);Jagler (R);Felzkowski (R);Bor
Topics:Transfer and Articulation
Associated Bills:WI S 165- See Also
Summary:Revises provisions relating to the transferability of courses between the University of Wisconsin System, technical college system, and tribally controlled and private nonprofit colle

---

Wyoming
Bill Text Lookup
WY H 204
2019
Common College Transcripts

Status: Enacted - Act No. 150
Date of Last Action: * 02/28/2019 - Enacted
Author: Northrup (R) Additional Authors: Wasserburger (R);Coe (R);Harshman (R);Bebout (R);Freeman (D);Brown L (R);Ansel Dalton (D);Ellis (R)
Topics: Transfer and Articulation
Summary: Relates to community colleges and the University of Wyoming, revises the requirements for the Community College Commission's common college transcript system, authorizes an at will position.

Appendix E: EdNorthwest Slide Deck

!"#$%&'(")&*+#"",%"-).',"%/#0-1'
23&43&$*')&4'5#0%66#&4)-3%&

!"#$%&&%'()*+,+'+-*'./%0%'1&%"-

!"#$"%&"'()*+(),))

education northwest

- 2$%'3,%4)-'("4$%,'5*6#+/")-'7)),*"-+/"-4'7)88"99")-':(577;"'9'<&+--"-4'/)'*%0%&)<'+'9/+/%'
  /,+-9=%,'<),/+&'/)'$%&<'3,%4)-'#)&&%4%'9/6*%-/9'-+0"4+/%'/$%'/,+-9=%,'<,)#%99>'
- (577'$",%*'5*6#+/")-'?),/$@%9/'/)'4+/$%,'*+/+'/$+/'@"&&"'-=),8'/$%'*%0%&)<8%-/'<,)#%99>'

!"%+%,'-'.#,(#*'/.,%

- A,)B%#/')0%,0"%@
- C$+/'@%'$%+,*'=,)8'9/+==
- C$+/'@%'$%+,*'=,)8'9/6*%-/9
- A),/+&')</")-9'+-*'#)9/9
- D%#)88%-*+/")-9'=),'*%9"4-'<,)#%99

!"#$%&'(#)%")*%+

!"#$%&'()"#&%++

!"#$	!"%&	"'(")*	+$,*
! !"#"$%&"'(')*)(+%$$"+*,%-(&.%*%+%$/#"-'%.(,-*".#,"5/ ! 0%-'1+*"'(2""'3)+4(/"//,%-/(5,*6(6,76".("'1+)*,%-(/*)22 ! 8"+.1,*"'(/*)22(2%.(2%+1/(7.%1&/	! 0%-'1+*"'(/*)*"'()-'(! 0%-'1+*"'(+%991-,*:(+%$$"7"( )-'(&13$,+(1-,#"./,*:(2%+1/(7.%1&/ ! ;,-)$,<"' /*1"'-*(/1.#":=(+%991-,*:(+%$$"7"/()-'(&13$,+(1-,#"./,*,"/(/"-*(/1.#":(*%(/*1"'-*/	! 0%-*,-1"'(+%-#"./)*,%-/(5,*6(/*)*"'()-'(#"-'%.(+%-*)+*/ ! 0%-'1+*"'(&.,#)*"'(+%$$"7">1-,#"./,*:?(+%991-,*:(+%$$"7">&13$,+(1-,#"./,*:?()-'(@ABC(2%+1/(7.%1&/ ! D%-,*%."'(/1.#":(."/&%-/"(.)*"/	! 0%$$"+*"'(+%/*(,-2%.9)*,%-(2.%9(/*)*"/()-'(#"-'%./ ! E-)$:<"'(')*)()-'(&.%'1+"'(9"9%/ ! F.%#,""'("'$,#".)3$"/(*%(GH00

!"#"$%&'()*	!*%)(+,#+&-	!*.+/*("0.*
1#"#*$"-2$ /*-2&($ +-#*(/+*3%	! "#$%&'()%*+$(),-+)./*.+(0*1,+2#$34*"35+6#,$+34*7+$$)/#(34* 8).*9),/):4*3$%*;#&(0*"3,#5+$3*3%<+$+/(,3(#,/ ! "#$%&'()%*+$(),-+)./*3$%*03%*#$=#+$=*%+/'&//+#$/*.+(0* 1'3%)<:>$)4*"#55)=);#&,')4*3$%*?1@*,)A,)/)$(3(+-)/	7)<#*B* /&<<3,+2)/*A),/A)'(+-)/*#$* /(3().+%)*(,3$/6),*A#,(35*,3(+#$35)4* '#<A#$)$(/4*%)-)5#A<)$(4*'#/(/4* 3$%*C)$)6+(/D
4+56*($ *2')"#+&-$ "-2$789:$%#";;$;&)'%$5(&',%	! "#$%&'()%*BE*6#'&/*=,#&A/*.+(0*'#<<&$+(:*'#55)=)*3$%*7 A&C5+'*&$+-),/+(:*/(366*FGG*A3,(+'+A3$(/H ! "#$%&'()%*(.#*6#'&/*=,#&A/*.+(0*A,+-3()*'#55)=)I&$+-),/ /(366*FBE*A3,(+'+A3$(/H ! "#$%&'()%*(.#*6#'&/*=,#&A/*.+(0*/(366*,)A,)/)$(+$#B*LJ* /'0##5/*FBL*A3,(+'+A3$(/H	7)<#*L* /&<<3,+2)/*A),/A)'(+-)/*#$*(0)* A&,A#/)*#6*3*/(3().+%)*(,3$/6),*A#,(35*3$ 0#.*+(*'#&5%*C)*&/)%4*/A)'+6+'*'#<A#$)$ (03(*/0#&5%*C)*+$'5&%)%*+$*3*A#,(354 .03(*+(*.#&5%*(3M)*(#*%)-)5#A*3$%*<3+ (0)*A#,(35*+$*>,)=#$D
1#'2*-#$%'(/*<	! 7#,)*(03$*N4OEE*/(&%)$(/*,)/A#$%)%*(#*(0)*/&,-):D ! ;(&%)$(/*'3<)*6,#<*355*A&C5+'*&$+-),/+(+)/*3$%*$)3,5:*353* '#<<&$+(:*'#55)=)/D	7)<#*N*/&<<3,+2)/*/&,-):*,)/A#$/)/*)53()%*(#*/(&%)$(*C3'M=,#&$%4*)3,$+$= '#55)=)*',)%+(/*+$*0+=0*/'0##54*(,3$/6),*)PA),+)$')/4*(,3$/6),*A53$$+$=*)PA),+)$')/ 3$%*#A+$+#$/*#$*3*/(3()*(,3$/6),*A#,(35[

1%)"'%+%,'-'.2%,%++(#3()"#$%&'(0-'-

!"#"$%&'()*	=6&$,"(#+)+,"#*2>
1#"#*$"-2$/*-2&($ +-#*(/+*3%	! Q0,))*/(3()/*.+(0*0#<)=,#.$*/+()/*(03(*-3,:*+$*'#<A,)0)$/+-)$)// ! >$)*/(3()*(03(*'#$(,3'(/*.+(0*1'3%)<:>$) ! >$)*/(3()*(03(*'#$(,3'(/*.+(0*"#55)=);#&,') ! Q0,))*-)$%#,/*1'3%)<:>$)4*"#55)=);#&,')4*3$%*?1@*.0#*3,)*3'(+-)*+$*(0+/*/A3')
4+56*($*2')"#+&-$ "-2$789:$%#";;$;&)'%$ 5(&',%	! ;(366*6,#<R ! 155*/)-)$*A&C5+'*&$+-),/+(+)/ ! Q0+,())$*'#<<&$+(:*'#55)=)/ ! 8+$)*A,+-3()*'#55)=)/I&$+-),/+(+)/ ! ?+=0(*0+=0*/'0##5/I%+/(,+'(/I)%&'3(+#$*/),-+')*%+/(,+'(/ ! ;(366*0)5%*3*.+%)*-3,+)(:*#6*,#5)/
1#'2*-#$%'(/*<	! 8)3,5:*(0,))KS&3,(),/*#6*,)/A#$%)$(/*3(()$%)%*3$*>,)=#$*A&C5+'*&$+-),/+(:*3$%*$)3,5:*3*(0+,% 3(()$%)%*3$*>,)=#$*'#<<&$+(:*'#55)=) ! Q0)*/&,-):*/3<A5)*.3/*T&/(*3/*%+-),/)*C:*,3')I)(0$+'+(:*3$%*03%*3*53,=),*A#A&53(+#$*#6*6+,/(=)$),3(+#$*/(&%)$(/*(03$*(0)*#-),355*>,)=#$*A&C5+'*A#/(/)'#$%3,:*/(&%)$(*A#A&53(+#$

,-.'(+%(-%."/(0"#1(2'.00

!#"'-/()*")#+%(-,0(*+%

!"#$%&'%()*+,"-.'+.('/ 012'3-*)4'#&-)5'
5+&,'"*"5+.,4'6+.,'+'*%.,&+7"8%('$)9'3-&'
,&+.43%&'".3-&:+,"-.'6",$',$%';%<'5)&5-4%'
-3'$%75".#'4,)(%.,4'+44%44'*-)&4%'
%=)">+7%.*"%4?'+4'6%77'+4'57+.',$%"&'*-77%#%'
5+,$6+<@

!"#$%&'"()*+%,*"-$"+./"-0.-"-0*"+-%'*1-+"222"3%+-"#.1-
-$"41$#"#0*)*"-0*5)"-).1+6*)"7)*'5-+".)*"8$518"-$"9*"
.77*(-*"".1'"#0.-"-0*/:)*"8$518"-$"9*".77*(-*"".+2

U"#<<&$+(:*'#55)=)*6#'&/*=,#&A*A3,(+'+A3$(

!"-0514"-05+"5+"3%+-"$1*",$)*"-$$&"-$"(%-"51"-0*5)"
-$$&9$;<"-$"9*".9&*"-$"0*&("$%)"+-%'*1-+"8.51"
.77*++"-$"-0.-"516$),.-5$1"*.+5&/2"=$,*-5,*+<"
#0*1"$)'*)518"."-).1+7)5(-"-0)$%80"."7$&&*8*<"-0*/"
8*-"-0*5)"-).1+7)5(-<"9%-"-0*/"+-5&&'"$1>-"41$#"#0.-"
7)*'5-"-0*/>)*"8$518"-$"8*-"222"!-"#$%&'"9*".,.?518"
-$"0.@*"-0.-"516$),.-5$1<"-$"9*".9&*"-$"3%+-"+5-"
'$#1"#5-0"."+-%'*1-".1'"+./<"0*)*".)*"-0*"7)*'5-+"
/$%:)*"8$518"-$"8*-".-"A(%9&57"%15@*)+5-/"1.,*B2

UJUBL*6#'&/*=,#&A*A3,(+'+A3$(

C).1+6*)"+-%'*1-+".)*"7$,518"51"A.-'"566*)*1-"($51-+B"
-0*5)"*'%7.-5$1"3$%)1*/2"=$<"!>'"&54*"-0*"-$$&"-$"0.@
$(-5$1"6$)"+$,*$1*"#0$"5+"7$,518"$%-"$6"0580"+70$
.1'"5+"8$518"-$"+-.)-".-"7$,,%15-/"7$&&*8*<".1'"-0*/"
7.1"+**D"!6"!"#.1-"-$"-).1+6*)"-$"-05+'B$%)
51+-5-%-5$1<"0*)*".)*"-0*"7&.++*+"!"1**'"-$"-.4*2

UV&C5+'*&$+-),/+(:*6#'&/*=,#&A*A3,(+'+A3$(

!"@5*#"5-".+".1"$(($)-%15-/"6$)"+-%'*1-+"-$"+**"-0*"
@.)5$%+"(.-0#./+"-0*)*".)*F -0*"$(-5$1+".@.5&.9&*"
-$"-0*,2"G.@518"."+518&*"+$%)7*"-0.->+"7)*'59&*<"
-0.->+",.51-.51*'"9/"-0*"GHII<"#5&&".&&$#"+-%'*1-+"
-$"+**"-0*"(&*-0$)."$6"$(-5$1+"-0.-".)*".@.5&.9&*2"

UV,+-3()*'#55)=)I&$+-),/+(:*6#'&/*=,#&A*A3,(+'+A3$(

!#"'-/(&#4)#,%,'+5(6#*"'+%(%7*.2-/%,&8(##/

- 7)886-"/E'#)&&%4%'+-*'<6F&"#'6-"0%,9"/E'<+,/"#"<+-/9'%G<,%99%*'/$%'-%%*'=),'+'9/+/%@"*%'#
  %H6"0+&%-#E'/))&'/)'$%&<'9/6*%-/9'<&+-'+'*%4,%%'<+/$@+E'F%=),%'/+I"-4'#&+99%9'+-*'/)'+99%
  #)6,9%9'+&,%+*E'/+I%-'@"&&'#)6-/'/)@+,*'4%-%,+&'%*6#+/")-J'8+B),J'),'%&%#/"0%',%H6",%8%-/
  <)/%-/"+&'/,+-9=%,'"-9/"/6/")-9>
- A,"0+/%'#)&&%4%K6-"0%,9"/E'<+,/"#"<+-/9'@+-/'/)'F%'"-#&6*%*'"-'/$%'/))&J'+&/$)64$'/$%E'+#I-)@
  /$%'#$+&&%-4%9')='+,/"#6&+/"-4'#)6,9%'#,%*"/9'@"/$'<6F&"#'"-9/"/6/")-9>
- 1LMN'<+,/"#"<+-/9'@+-/'+'/))&'$"4$'9#$))&'9/6*%-/9'#+-'69%'/)'I%%<'/,+#I')='/$%'#)&&%4%'#,%*"/9
  %+,-'"-'$"4$'9#$))&'+-*'+99%99'$)@'/$)9%'#,%*"/9'@)6&*'/,+-9=%,>

!#""-/(&#4)#,%,'+5(900.':#,-/(
"%+#*"&%+('#(.,&/*0%(

- 7)886-"/E'#)&&%4%'+-*'<6F&"#'6-"0%,9"/E'=)#69'4,)6<'
  <+,/"#"<+-/9""*%-/"="%.*"//($0($'-1/2"'(0223."(
  -453/0'6.071/"80'(3120'%-$301(9'/$%'8)9/'%99%-/"+&'
  ,%9)6,#%'/)"'-#&6*%"'-'+'9/+/%@"*%'<),/+&>'
- A,"0+/%'#)&&%4%K6-"0%,9"/E'=)#69'4,)6<'<+,/"#"<+-/9'
  "*%-/"="%.*"088"9"(":#80'-$301("'/07'."/(-14(.088"9"(
  .0/$(3120'%-$301(9'%99%-/"+&>
- 1LMN'=)#69'4,)6<'<+,/"#"<+-/9""*%-/"=$%.*"//($0($'&<;
  /$"#(3120'%-$301(-&07$($="(."'43$($'-1/2"'(#'0."//(
  +9'%99%-/"+&>