



2022

TRANSFER ACTION CAUCUS

A system-wide annual 8-wk examination and response to leaks in the transfer pipeline workgroup

“One **IU** is Any **IU**!”

University Transfer Office

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INDIANA UNIVERSITY

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To ease student transition, through improved access, accuracy, and application of credit, toward degree attainment.

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Document Backdrop

Creating ‘...**broad access to world-class undergraduate education...**’ for Indiana residents and those beyond remains a firm goal of Indiana University (IU). Founded in 1820, IU has grown to be a network of seven campuses, two regional centers, and nine medical campuses throughout the state.¹ Over the course of 200(+) years, IU has attracted and welcomed a diverse, talented, and innovative group of students, scholars, researchers, and educators who create a student-centered, community focused, inclusive environment helping to keep pace with dynamic and changing times. Central to remaining relevant is the approach of **students + credits**. We want students to thrive with great experiences and complete through efficient application of credits to their degree goal.

To do this there must be ease in bringing in credit and accuracy in acceptance and application of credit toward degree goals. Defined as transfer active, all high school students bring some form of credit into the university and continue to amass credits as they complete their degree. Transfer and transfer active students are often first generation, have ancestral or cultural backgrounds other than white, and 25 or older.² IU’s Fall 2021 transfer student data revealed almost **31% of all transfer students were first generation students, another 31% of transfer students identified as belonging to an ancestral or cultural population other than white, and 28% were 25 years or older.**³

Colleges and universities must respond to new data revealing enrollment and student trends. National enrollment reports warn current higher education practices have negatively influenced the rate of success for persons of color, first generation, and adult students.⁴ Declining college-going rates, smaller high school cohorts, skilled worker shortages, and declining enrollment at community colleges have everyone questioning the value of postsecondary institutions.⁵

¹ “About,” Indiana University Bloomington, accessed May 6, 2022, <https://www.indiana.edu/about/index.html#:~:text=Founded%20in%201820%2C%20Indiana%20University,and%20two%20regional%20centers%20statewide>; “IU Locations,” Indiana University, accessed May 5, 2022, <https://www.iu.edu/about/locations.html>.

² D. Shapiro, A. Dundar, F. Huie, P.K. Wakhungu, A. Bhimdiwali, A. Nathan, H. Youngsik, “Transfer and Mobility: A National View of Student Movement in Postsecondary Institutions, Fall 2011 Cohort,” *National Student Clearinghouse Research Center Signature Report*, no. 15 (July, 2018), accessed May 6, 2022, <https://nscresearchcenter.org/wp-content/uploads/Signature-Report-15.pdf>.

³ University Institutional Research and Reporting, “Transfer Summary,” Data Dashboards, Indiana University, accessed April 12, 2022, https://tableau.bi.iu.edu/#/site/prd/views/uirr_iuto_transfer_stats/Summary?iid=5.

⁴ R. Bobbitt, J. Causey, H. Kim, R. Lang, M. Ryu, and D. Shapiro, “Transfer, Mobility, and Progress, Academic Year 2020-2021 Report,” *National Student Clearinghouse Research Center COVID-19*, (August 31, 2021), accessed May, 5, 2022, <https://nscresearchcenter.org/wp-content/uploads/Covid19-TransferMobilityProgress-AY2020-21.pdf>.

⁵ Natalie Schwartz, “Transfer enrollment falls 6.9% in spring from a year ago,” *Higher Ed Dive*, May 3, 2022, <https://www.highereddive.com/news/transfer-enrollment-falls-69-in-spring-from-a-year-ago/623130/>.

A brainchild of Indiana University Director of Transfer, AVP Gentle-Genitty in 2021 called to order the Transfer Action Caucus (TAC). At the height of the pandemic and everything, uncertain in higher education there was need to convene all IU campuses and unit stakeholders to explore enrollment strategies focused on transfer. Because over 80% of IU students brought credit with them even as first time, full-time students, efforts quickly moved to how to remove leaks in the transfer pipeline for all students. Using an *online innovative eight (8) week, 1-hr per week, 4-focus areas, data driven strategic doing process centered on IU's response to its 21 transfer standards*, the TAC initiative grappled with a host of inconsistencies in data, policy, credit, systems, infrastructure, and communication resulting in 91 recommendations.⁶ Response to recommendations were categorized by needing a **Caucus, Campus, or Workgroup** response in 2022.

The remainder of this report speaks to the second year of the TAC. The 2022 TAC focused on continuing the momentum from 2021 and the implementation of the 91 recommendations. During the 8-week, 1-hr per week, 4 focus areas, strategic doing process the TAC responded to the Caucus and Campus recommendations from 2021 and closed out with plans to convene two work groups on Prior Learning and Intercampus transfer and enrollment.

Description of work completed, processes explored, findings, data outputs, and new recommendations for further work are outlined herein.

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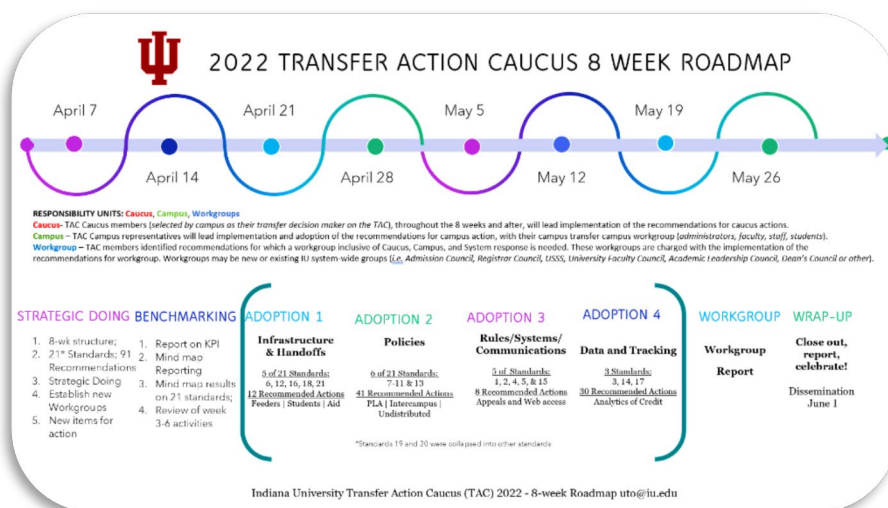
“Any IU is One IU!”

⁶ University Transfer Office, “IUs 21 Transfer Friendly Standards,” Transfer Action Caucus, Indiana University, accessed May 6, 2022, <https://transfer.iu.edu/intranet/IU-21-Transfer-Friendly-Standards.pdf>; University Transfer Office, “Transfer Action Caucus Report,” Transfer Action Caucus, Indiana University, June 2021, accessed May 6, 2022, <https://transfer.iu.edu/intranet/Transfer%20Action%20Caucus/TAC-2021/Final-Report---Transfer-Action-Caucus-06-01-2021.pdf>.

Executive Summary

2022 Transfer Action Caucus

The 2022 Transfer Action Caucus convened Thursday April 7 through Thursday May 26, 2022, with final report submitted on June 1 and available online.



Campus	Application	Admit	Enroll	Yield
IUB	↓ 1884	↓ 1321	↓ 603	↓ 45.65%
IUE	↓ 894	↓ 558	↓ 283	↓ 50.72%
IUFW	↓ 181	↓ 127	↓ 59	↓ 46.46%
IUK	↓ 438	↓ 318	↓ 165	↓ 51.89%
IUN	↓ 623	↓ 431	↓ 236	↓ 54.76%
IUPUI	→ 2950	↓ 1990	↓ 1120	↓ 56.28%
IUPUC	↓ 157	↓ 119	↓ 69	↓ 57.98%
IUSB	↓ 684	↓ 463	↓ 266	↓ 57.45%
IUSE	↓ 510	↓ 371	↓ 231	↓ 62.26%
Total	↑ 8321	↑ 5698	→ 3032	↓ 56.21%

Data from 2021 of students who applied to Indiana University⁷ revealed IU as a system enrolled **53%** of its applicants in the previous year⁸ and 56% in 2022 of the previous. The University Transfer Office (UTO) recommended campuses split efforts equally between applications and enrollments to increase yield.

To accomplish the yield increase, the leaks in the transfer pipeline required attention. The TAC approached transfer leaks from a tactical and strategic doing lens: **Tactical** -W.I.N (Workgroup, Institutionalization, and Nodes) and **strategic doing** (X to Y by When). The Transfer W.I.N strategy, developed by AVP Gentle-Genitty, identifies a problem or situation and creates a **Workgroup** of diverse constituents to study, evaluate, and propose solutions. These solutions are evaluated for goodness-of-fit and friction. If there is a goodness-of-fit and agreement by stakeholders, some or all solutions are adopted as standard operating procedures and therefore **Institutionalized**. After evaluation and use, where noted, emerging solutions may become part of the NODES—annual audit of best practices—conducted by University Transfer Office.

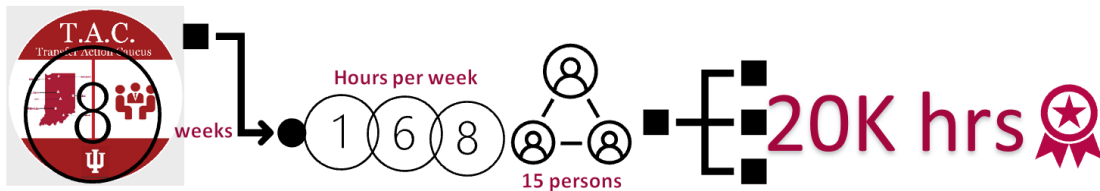
Following the 2022 roadmap, the TAC used strategic doing and benchmarking to study four adoption areas: **1)** Infrastructure and Handoffs | **2)** Policies | **3)** Rules | Communication, and | **4)** Data and Tracking in 8 weeks.

Infrastructure, Handoffs, Rules, and Communications represented five (5) standards each; Policies six (6) and the remainder in Data and Tracking. At its close on May 26, the TAC would have responded to

⁷ University Transfer Office, "The Roadmap," Transfer Action Caucus, Indiana University, accessed May 6, 2022, <https://transfer.iu.edu/intranet/tac.html>.

⁸ University Institutional Research and Reporting, "Transfer Summary," Data Dashboards, Indiana University, accessed April 12, 2022. https://tableau.bi.iu.edu/#/site/prd/views/uiirr_iuto_transfer_stats/ReadMe?iid=1.

91 recommendations with the majority focused on policies (41) and data (30) and given over 20,000 hours of attention to transfer.



The work is not finished by any means. As such, the TAC members agreed to host two workgroups, one on prior learning and the other on intercampus. For the former we would work alongside an existing taskforce on the regionals focused only on prior learning. For the latter, the Caucus agreed to elect a chair, meet August-December to tackle intercampus challenges inclusive of intercampus transfer (*changing campus to seek degree on another campus*) and intercampus enrollment (*taking courses on another campus*).

Prior Learning



Enacting a **workgroup on prior learning** was important because it got special emphasis during the 2022 TAC. Experts wondered in 2020 if higher education would see a surge in enrollment similar to the 2009 Great Recession during which higher education grew because of dislocated workers; however, this has not been the case.⁹ Prospective students in 2022 are resistant to accumulating student debt to fund college or delaying career aspirations long-term.¹⁰ Spurred by a need to improve conditions for non-traditional students such as dislocated workers and people seeking career changes, prior learning

⁹ Jill Barshay, "How the last recession affected higher education. Will history repeat?" *The Hechinger Report*, April 6, 2020, <https://hechingerreport.org/how-the-2008-great-recession-affected-higher-education-will-history-repeat/>; David Steele, "Tide of Exits Without Degrees Still Rising," *Inside Higher Education*, May 11, 2022, <https://www.insidehighered.com/news/2022/05/11/total-students-without-degrees-rise>.

¹⁰ Lindsay Daugherty, "A college degree is no longer always the best pathway to the middle class. That might be a good thing," *Fortune*, April 5, 2022, <https://fortune.com/2022/04/05/college-degree-tuition-costs-certificates-apprenticeship/>.

credit received renewed attention by the state of Indiana and Indiana University as a means to validate college-level learning achieved outside of classrooms and make degree-attainment more viable.

Current legislation in Indiana (HB1549) required the state to convene a workgroup, develop recommendations, establish a clearinghouse, and consult with state higher education institutions to publicize information on PLA. This was on the heels of the Higher Learning Commission, via Assumed Practices, asking all US higher education institutions to establish a policy on prior learning in 2020. IU worked with its internal stakeholders to update existing policies and under the leadership of AVP Gentle-Genitty launched IU's first credit for prior learning policy [ACA60](#) in 2022.

Intercampus Transfer



A loud call for an **intercampus workgroup** was spurred by the many inconsistencies in policy and practices reported. IU has emphasized external credit movement and little effort on internal movement. Tracked in our data as mobility, there are no clear separation or differentiation between intercampus transfer and enrollment. The manual process of choosing to switch campuses and reapply thwarts success. The lack of consistent repeat rules, clarity of fees, common general education, no deferral programs, and replication of course timing results unforeseen struggles for students.

Under AVP Gentle-Genitty's leadership, intercampus enrollment and intercampus terms were redefined in 2018. The UTO office conducted a general education decoupling project in 2018-2019 and in 2020 after consultation, the Academic Leadership Council, addressed course replication and costs related to intercampus transfer. With the help of Registrar Johnston, repeat rules are now being harmonized as the university shifted from a two GPA to a one GPA system in 2021. While this work has been important and helpful, now it's time to fine-tune other underlying factors, generate guidance documents for training, and establish integral standard operating procedures. Creating the next generation of students, who see IU as a destination, must begin with supportive student experiences, translating applications into completions, and regardless of campus, helping them complete with an IU degree.

The Beginning

The Standards.

To demonstrate a commitment to transfer and transfer friendliness IU adopted 21 standards in 2016. These standards align with our policies, practices, and standard operating procedures all cross all IU campuses. They serve as a seal of our commitment to our students, their credits, and student success. The **21 standards** are categorized into one of three areas: **transfer systems** (6 standards), **application of transfer credit** (7 standards), and **services for transfer students** (8 standards).

The 'Met' Criteria.

In 2021, to determine the status of campus' meeting of the 21 standards, a brief evaluation was completed. Campuses rated the 21 standards as 'met' or 'unmet'. '**Met**' was defined by the presence of all five (5) criterion: 1) data, 2) contact person, 3) support, 4) report out, and 5) alignment. '**Unmet**' was the absence of one or more of the five (5) criterion.

Met = all five areas must be enacted to be considered "met"	
a)	Data – utilizes official data points, preferably from UIRR, in relation to standard
b)	Contact person/workgroup – At least one contact person is assigned to respond to this standard
c)	Support – At least one group has been identified to support contact person in responding to this standard
d)	Report out – A reporting stream on this standard is currently in effect
e)	Alignment – Continuous response to mission and purpose

The Data Results.

TAC began with baseline data shown below in tabular form (See Appendix for details). On average **72%** in 2021 and **66%** in 2022 **of the 21 standards were met**. Campuses were allowed to revised rankings, and this affected 2022 ratings. If we examine by category and year 67%| 61% met in **Systems**, 84%|70% met in **Credit**, and 65%|67% in the **Student** component. For 2022, 34% of the standards were unmet. Seven (7) standards are under **60% requiring action namely in systems and students**. The current IU investments to build the **IU Credit Explorer** system and adoption of SmartPanda shows great promise for future impact.

21 TRANSFER STANDARDS MET STATUS

CATEGORIES	STANDARDS	2021 % MET	2022 % MET
TRANSFER SYSTEM	1: Accessible Rule; 2: Public Access to Equivalences; 3: Track and Compare Student Success; 4: Credit Evaluations in 1-Wk; 5: Transparent Appeal Process; 6: Efficient Recording of Articulations	67%	89%
APPLICATION OF TRANSFER CREDIT	7: Regional accreditation course same as campus course; 8: Modality Agnostic; 9: PLA same as Native Courses; 10: Undistributed review for Comparability; 11: Credit across IU same; 12: Partnership with 2yrs institutions; 13: Academic Integrity maintained	84%	70%
SERVICES FOR TRANSFER STUDENTS	14: Transfer info in One Location; 15: Credit Evaluation before Application; 16: Orientation for Transfers; 17: Maintain accurate CTL; 18: Access clear Financial aid info; 19: Early access to Financial Aid; 20: Access to Student Programming; 21: Explain Coursework Acceptance	65%	67%
OVERALL		72%	66%

The 2021 KPI 1 yr. Results.

After establishing specific areas for work, the TAC closed off with a plan to have at least baseline data points, which may help to define some other measure of progress in addition to the met/unmet criteria. The result were six key performance indicators: 1) Admit-to-Enroll ratio, 2) number of credits brought, 3) general education milestones, 4) dual credit, 5) fall to fall retention, and 6) transfer cohort time to degree.

When comparing the 2021 numbers to the same time in 2022, while factoring in the pandemic, we see a dip in indicators for admit-to-enroll, number of credits brought, and fall-to-fall retention. Conversely, we saw notable increases in first year undergraduates (FYU) bringing general education milestones and increases in both FYU and transfer undergraduate students (TRU) with dual credit, and increases in all three (4, 5, & 6) cohort years for time to degree completion TRUs. In sum, efforts for transfer and investment in transfer seems to be trending upward using the key performance indicators tagged for IU.

Admit-to-Enroll Ratio

All IU:

- 2020- 53.8%
- 2021- 53.2%

This is a decrease of 0.6%.

General Education Milestone

All IU:

	TRU	FYU
2020	640	364
2021	626	372

TRU decrease of 2.2% | FYU increase of 2.2%

Number of Credits brought

All IU:

- 2020 -153,785
- 2021 -138,902

This is a decrease of 10.7%.

Dual Credit

All IU:

	TRU	FYU
2020	365	3,837
2021	384	3,887

TRU increase of 5.2% | FYU increase of 1.3%

Fall to Fall Retention

All IU:

- Fall 2019 – 75.7%
- Fall 2020 – 69.7%

This is a decrease of 6%.



Transfer Cohort Time to Degree:

All IU:

Cohort	Year 4	Year 5	Year 6
4158	37.10%	50.40%	54.70%
4168	37.90%	51.40%	56.00%

Cohort increase 4yr of .8 | 5yr of 1% | 6yr of 1.3%

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The Student Voices.

In addition to the KPIs TAC, members expressed interest in knowing why students who were admitted did not enroll. Because in 2018 UTO, with the support of University Research Office conducted a survey of transfer students to determine perception of transfer friendliness, rather than duplicate a new survey, once again in partnership with UIRR was launched in 2021 of non-enrolled transfer survey. The survey included non-enrolled transfer applicants who applied to IU and were accepted but opted not to enroll. The population invited to participate were 7,347 students from cohort application periods of Fall 2018-fall 2020. Just over 19% of those invited completed the survey. Students were incentivized.

Year	Completed Survey	Partial Response	Refusal	No Email Available	No Response	Survey Invitation Undeliverable	Total
Fall 2018	299	34	60	4	1320	60	1777
Spring 2019	105	14	28	3	500	19	669
Fall 2019	326	41	54	3	1445	43	1912
Spring 2020	139	10	37	4	643	23	856
Fall 2020	390	48	65	1	1612	17	2133

As part of the survey, students were asked to select reasons for which they chose not to enroll at IU. Students could select more than one reason for not enrolling at IU.

Transfer Experience Survey*

University-wide | 2019 responses | Agree + Strongly Agree N=3,482

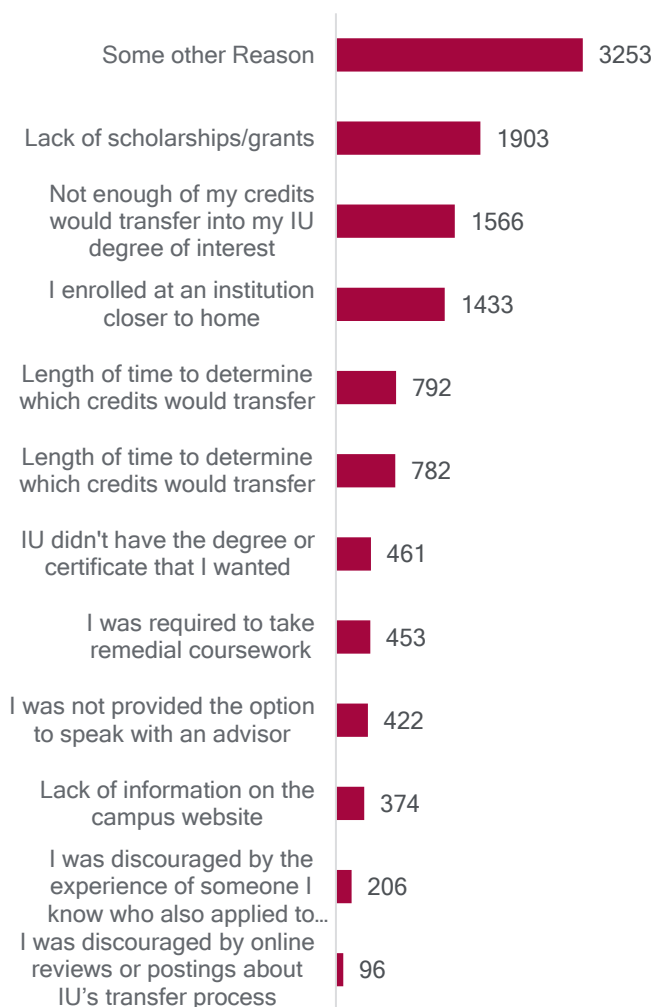
Performing well =>70% | Area for Improvement <69%

1. Satisfaction with campus supports:	68.2%
2. Financial Aid options:	53.1%
3. Time to register:	76.7%
4. Orientation:	60.3%
5. Scheduling	65.6%
6. Sports/Athletics options:	37.2%
7. Admittance to choice program:	87%
8. Explanation for non-admittance:	76.8%
9. Accepted as part of Campus:	70.9%
10. Academic advising timing	51.9% <2wks after enrollment
11. Advising and student success:	70.6%
12. Articulation/Credit decision timing:	40.4%
13. Articulation clarity:	63.7%
14. Articulation consistency:	61.7%
Overall Transfer Friendliness:	80.5%

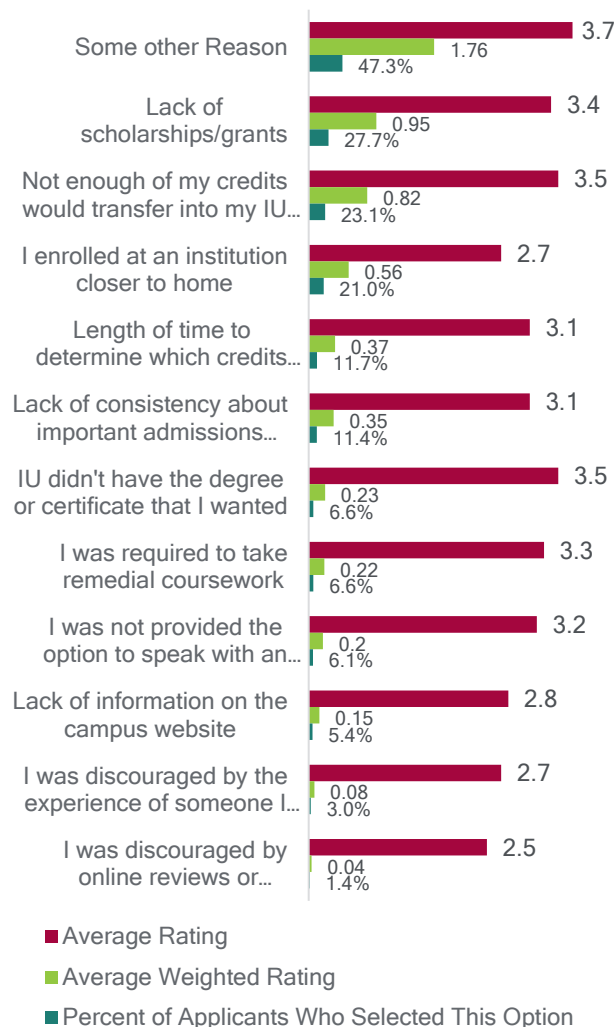
A little less than half of all students selected “some other reason” for not enrolling. Second, third, and fourth reasons for not enrolling at IU were lack of scholarships/grants, not enough of applicants’ credits transferred, and choosing to enroll to an institution closer to home.

Applicants were asked to rate the importance of reasons why they chose not to enroll at IU on a scale of one to four, one being slightly important and four being extremely important. Ratings

Reasons Selected for Not Enrolling at IU

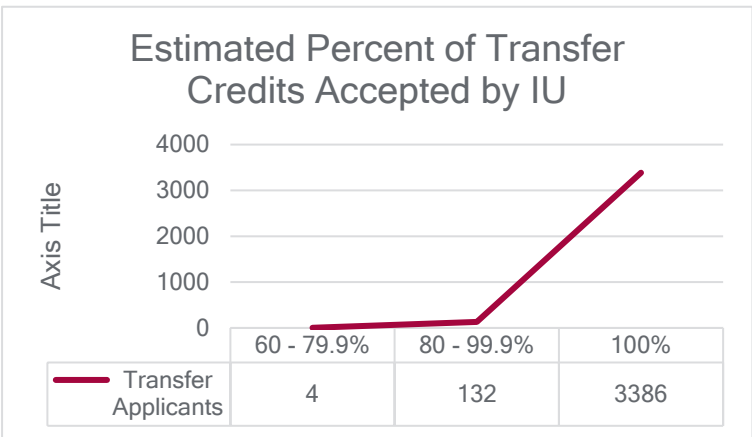
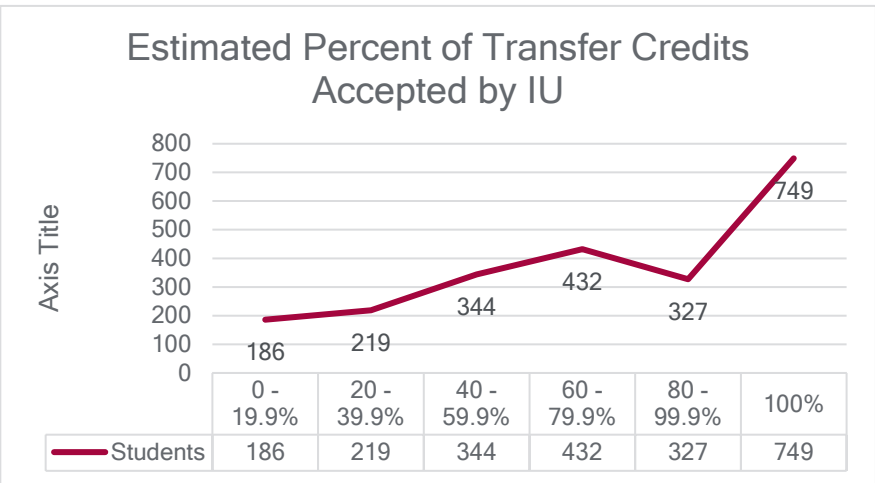


Reasons Selected for Not Enrolling at IU



were also averaged and weighted by the percent of applicants who selected that reason for enrolling.

Applicants were asked to estimate what percent of their transfer credits were accepted by IU. The majority of students (**65.7%**) from fall 2018 – fall 2020 indicated they **did not know what percent** of their prior credits were accepted by IU. This speaks to their own awareness or lack of information. Of those who had some information, about 34.3% of respondents provided their perceived percent of transfer credits they thought were accepted by IU.



Actual percent of transfer credits accepted by IU from fall 2018 – fall 2020 were much larger than applicants’ estimates, raising the question why such a large disparity existed. Of all transfer applicants from fall 2018 – fall 2020, **only 33.2% of applicants who completed the survey estimated all of their transfer credits were accepted at IU**; however, **96.1% of all applicant’s** credits transferred to IU.

Takeaways from the survey.

- Almost half of applicants chose not to enroll for reasons other than those in the survey.
- Life circumstances largely affect decision not to enroll.
- Applicants’ perception of credits accepted varied from actual credits accepted towards their degree.
- Moving forward, IU will need more information to learn what other reasons applicants have for choosing not to enroll at IU than reason provided in the survey. A second question to consider is why students’ estimates of percent of credits transferred to IU compared to actual credit accepted by IU was so large. As most studies go, the non-enrolled survey provided information to IU but also helped to re-center questions and develop new ones to continue to improve the Indiana University system’s transfer friendliness.

Note: [Access Data on Transfer Students and Transfer Activity](#) for the non-enrolled transfer applicant survey at IU’s staff and faculty intranet webpage. [Survey methodology](#) and the [survey questionnaire](#) are posted in the “Read Me” portion of the tableau tables as well as the hyperlinks provided.

The Middle: What we did.

What is TAC?

“A caucus is a closed meeting of a group of persons belonging to the same political party or faction usually to select candidates or to decide on policy: a group of people united to promote an agreed-upon cause.”

-Merriam Webster

Indiana University’s Transfer Action Caucus (TAC) consists of a group of appointed staff and/or faculty meeting annually for 8 consecutive weeks to tackle transfer related barriers. TAC was created to facilitate a space for campuses to collaboratively innovate best practices to increase transfer enrollment at Indiana University.

AIMS

To ascertain where we are, each campus completed a mind map. At the start of the mind map was a rating of the 21 standards. Of the 21 standards, just about 60% have been met. When sub-divided into the four (4) work groups (1-Infrastructure and Handoffs, 2-Policy, 3-Rules/Systems/Communications, and 4-Data & Tracking), policy is the area where there have been the most success, reporting a current overall rating of 81.5% met. Data and tracking had the least items met with a rating of 29%. The Caucus members are actively socializing the challenges and responding to the leaks we know. By the end of the 8-week Caucus process closure, we will report movements on each item.

CAUCUS DIRECTIVES

CHARGE

With the impact of the pandemic, an enrollment crisis, and a recurring need to pivot fast we must act. Pioneering a bold plan to fully activate IUs 21 transfer friendly standards in 8 weeks, IUs Transfer Action Caucus (TAC) is dedicated to solving critical issues impacting transfer vital for student success. The TAC brings together delegated campus representatives, charged with decision making powers, through workgroup consultation, to take immediate action on metrics and consistency for transfer. The TAC will review the past, audit progress, chart action, implement changes, define benchmarks, and track measurable outcomes.

MEETING STRUCTURE

TAC members met weekly for 8 consecutive weeks for 1 hour. University Transfer Office create a road map before the caucus began to structure each meeting addressing items from the 2022 TAC.

Week 1: Strategic Doing

Week 2: Benchmarking

Week 3: Adoption 1- Infrastructure and Hand Off

Week 4: Adoption 2- Policies

Week 5: Adoption 3- Rules/Systems/ Communications

Week 6: Adoption 4- Data and Tracking

Week 7: Campus Report

Week 8: Close Out, Report

COMMUNICATIONS

Each adoption group was assigned a member from the University Transfer Office to communicate changes throughout the process. UTO staff members used various mediums of communication to relay information. Microsoft TEAMS was a key player throughout the caucus to ease the communication lines. Each adoption group had their own channel within TEAMS, where they were expected to communicate regarding the assigned document.

After each TAC meeting UTO drafted a memo to disseminate with campus leadership, or as they see fit. Memos were sent out every Thursday and posted on UTO's webpage.

CAUCUS MEMBERSHIP

Membership was made up of campus and unit representatives.

WORKGROUP ASSIGNMENTS

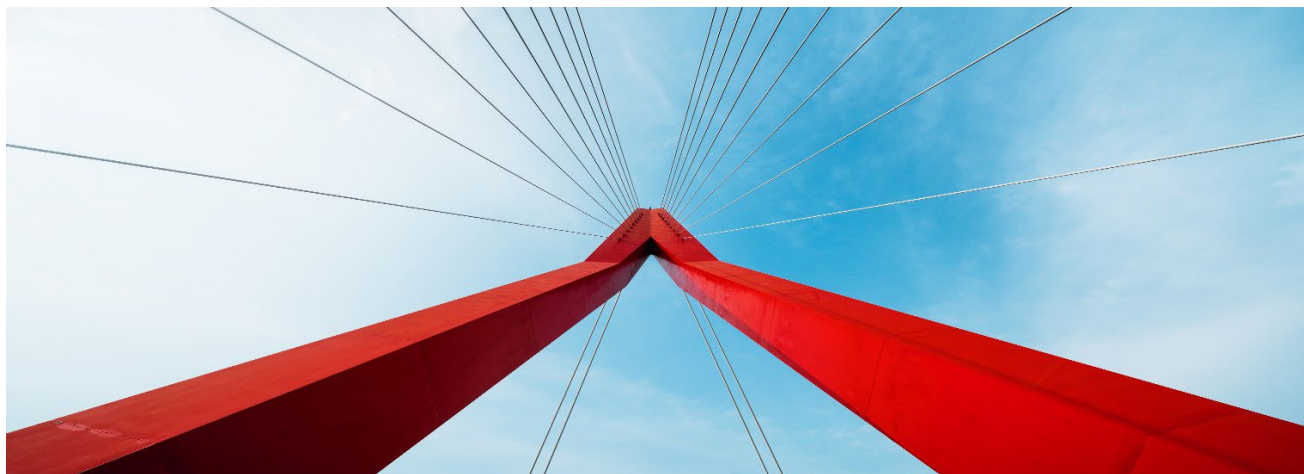
Individual assignments to workgroups were initially based on 2021 TAC workgroup assignments if members participated in the 201 TAC. After the first 2022 TAC meeting, TAC participants were asked to complete a survey and confirm if they wanted to stay in the workgroup they were assigned to, join another workgroup in addition to the workgroup they were initially assigned to, or be removed from the workgroup they were initially assigned to and re-assigned to another.

MEMBERS

- IU Bloomington- Sacha Thieme
- IUPUI
 - Stephanie Lovett (IUPUI)
 - Scott McIntyre (IUPUI Columbus)
 - David Chappell (IU Fort Wayne)
- IU East - TJ Rivard
- IU Kokomo –Christina Downey
- IU Northwest - Kathy Spicer
- IU South Bend - Raman Adaikkalavan
- IU Southeast - Donna Dahlgren
- Office of Online Education - Whitney Shay
- University Institutional Research & Reporting (UIRR) - Oniffe Grizzle
- University Student Services & Systems (USSS) - Daniel McDevitt
- Assistant Vice President for School Partnerships, and Senior Assistant Vice Provost for Undergraduate Education – Mike Beam
- University Transfer Office
 - Donneisha Baker
 - Brian Ornelas
 - La’Kanyere Harrison
 - Josie Martinez
 - Elisa McCaleb
 - Carolyn Gentle-Genitty (Chair)

ADOPTION AREAS: Workgroup Processes & Findings

There were four adoption areas for the caucus: Infrastructure and handoffs, policies, rules/communications/systems, and data and tracking. Each is reported below with mapped standards, members, brief summary and recommendations for which they were asked to respond in the 2022 caucus followed by their strategic doing report.



INFRASTRUCTURE & HANDOFFS

Standards: [6, 12, 16, 18, 19, 20, and 21](#)

Members: Brian Ornelas, Kathy Spicer, Whitney Powell, Christina Downey

Brief Summary: Attendees discussed the need for a larger discussion on recommendations and acquiring capacity to assist improving transfer process. Additionally, members discussed how campuses should re-evaluate policies around transfer credits by disciplines or department. Caucus attendees discussed importance of student insight when re-evaluating transfer infrastructure and policies at IU. Student insight is an integral part of recruiting and retaining transfer students. Transfer Student Advisory Boards (TSAB) are great ways to engage students with campuses and other transfer students.

Other discussions included difficulty students may have understanding if transferring and pursuing a degree at IU is fiscally affordable.

Recommendations: Consider displaying availability of Financial Aid information and scholarships on web.

Continue to assess the current state of barriers within the campuses and use strategic doing as a process to affect change on said items.

Continue to support this work as campus caucus leaders convene their home workgroups to deliberate, compile data, and make real-time changes during the weeks.

Seek ways to incentive student participation in discussions around transfer infrastructure and policy.

Transfer Student Honors Society

Transfer focused Facebook or other social media pages where students can interact

Online orientation through Canvas for transfers (maybe all students) taking online courses that includes chat/discussion feature



POLICIES

Standards:

[7, 8, 9, 10, 11 and 13](#)

Members:

Donneisha Baker, TJ Rivard, Donna Dahlgren, Sacha Thieme, Stephanie Lovett, Michael Beam II

Brief Summary:

Members analyzed obstacles leaders at IU campuses encountered when introducing prior learning credit to staff and faculty, such as skepticism non-traditional learning paths' learning outcomes were equivalent to traditional classroom learning outcomes.

Constituents reviewed previous successes awarding prior learning credit to ITT Tech transfer students when ITT Technical Institutes closed in 2016. Questions were raised how to rekindle same enthusiasm for prior learning credit seen in 2016.

Additionally, attendees acknowledged intercampus transfer requires special attention and may not receive necessary recognition if intercampus transfer continues to be housed under transfer operations.

Recommendations:

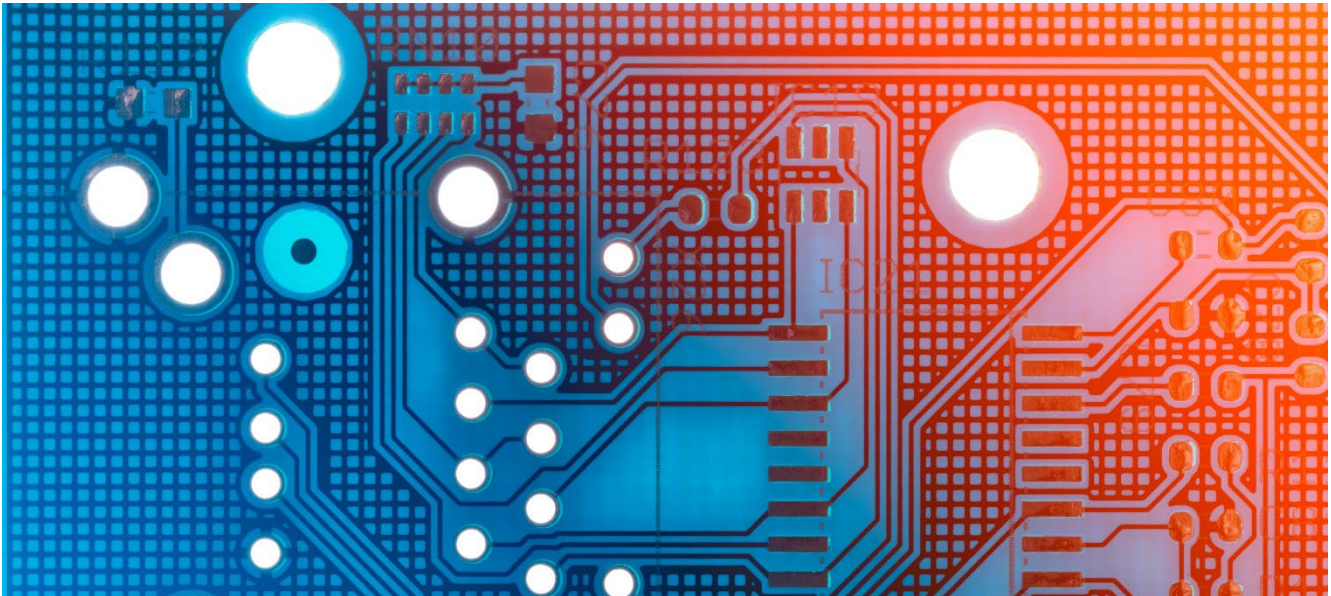
Establish separate website to respond to prior learning and display all information in one place.

Continue to improve processing of undistributed courses and identifying best practices for review among campuses.

Consider prior learning credit and assessment as all credit earned/learned before attending an IU campus.

Develop a process for evaluation of credits (and rules) which value advisor-input.

Establish a mini caucus to examine intercampus transfer infrastructure. Goal to is to identify and addresses the unique challenges facing enrollment and movement of students.



RULES | SYSTEMS | COMMUNICATIONS

Standards: [1, 2, 4, 5, and 15](#)

Members: Josie Martinez, Daniel McDevitt, David Chappell, Scott McIntyre

Brief Summary: Many improvements are in various stages of development when it comes to infrastructure: IU Credit Explorer (transfer course and exam equivalency tool), centralized tool to appeal transfer credit, auditing IU transfer websites to develop better transfer websites.

The standards within this group thematically showed information regarding transferability and applicability toward program requirements of prior college credits accessible to prospective students. In addition, current students may also need access to a credit appeals process since it was determined that a consistent process to appeal transfer course rules does not exist across the IU system.

Recommendations: Improve credit transfer services to provide prospective and enrolled students with insight into credit articulations.

Use IU Credit Explorer (a centralized tool to appeal transfer credit) has capability to replace current systems.

Provide feedback to proposed user interface design with initial launch in August.

Develop consistent process to appeal transfer course rules and generate systematic definition of “appeals” by next year’s caucus.

Use the IU Credit Explorer project as an opportunity to identify and review IU’s transfer-related content across system.



DATA & TRACKING

Standards:

[3, 14, and 17](#)

Members:

La’Kanyere Harrison, Oniffe Grizzle, Raman Adaikkalavan

Brief Summary:

Members developed a 21 Standard Benchmarking and Measuring to identify how each campus are benchmarking and measuring each of the 21 standards to restructure IU’s 21 Transfer Standards to have a built-in assessment for tracking its success. 6 campuses completed the survey.

Initial Analysis was completed and some of the standards needs systematic and coordinated workflow to enable regular auditing and reporting than databased measurement and analysis.

Recommendations:

Form a taskforce to revise IU is 21 Transfer Friendly Standards and create assessment for new standards.

Achieve Phi Theta Kappa Transfer Honor Roll within a certain number of years.

Develop a diverse transfer benchmarking workgroup to analyze factors affecting transfer student success.

Create university benchmarks, measurements, and best practices and dashboards to track them.

2022 Benchmarking and Measuring Assessment

SUMMARY

The data and tracking adoption area determined to effectively track and measure the effectiveness of each standard, a baseline needed to be established to determine if and/or how the campuses were measuring the 21 standards. It was determined that standard 7 and 9 are the key standards that need collaboration and unity by each campus to help progress the remaining 19 standards. Standard 7 and 9 both address the equitable treatment of credit regardless of source (still abiding by Indiana University standards).

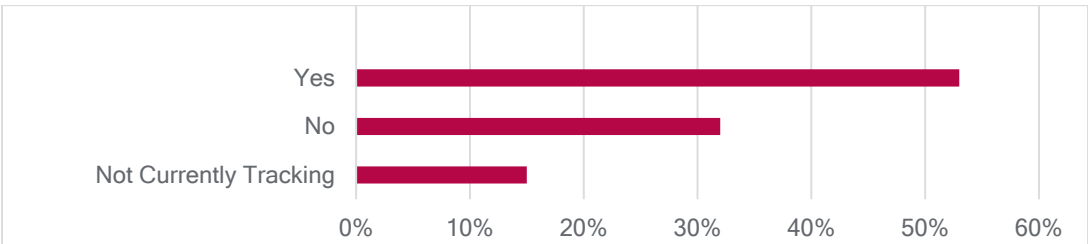
SURVEY DETAILS

This assessment was composed of two questions for each of the standards and took approximately 1 hour to complete. Each campus consulted with other campus stakeholder to complete the assessment. Overall, six of 9 campuses completed the assessment: IU East, IU Fort Wayne, IU Kokomo, IUPUI and IUPUC.

HIGHLIGHTS

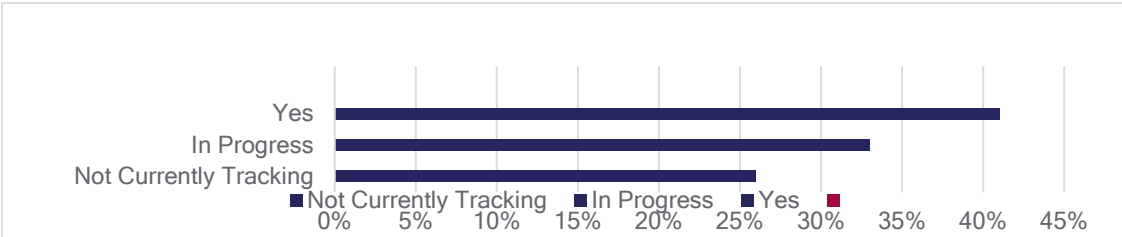
Do you have a benchmark defined to measure the 21 standards?

53% of the participating campuses currently have a benchmark defined to measure the 21 standards, while 32% are in the process of developing a benchmark and 15% are not currently tracking the 21 standards.



Are you currently measuring the 21 standards?

41% of the participating campuses are currently measuring the 21 standards, while 33% are in the process of identifying how the 21 standards can be measured on their campus and 26% are not currently measuring the 21 standards.



The End: Accomplishments and Where to from here



2022 TAC Campus Initiatives:

Indiana University continually works to find innovative and strategic initiatives to improve/ increase transfer enrollment on each campus. Below you will find a brief summary of the **present**, work that is in progress now and **future**, work to be done beyond the caucus.

IU Southeast

IUS has formed a workgroup (adopted on their campus 1st) to address PLA inconsistencies and requirements at IUS. This initiative has transformed into a system wide workgroup aiming to address/develop a best practice, and/or policy edits/formation, combined with transparency across each campus. IUS is looking to collaborate with IUPUI on the use of their PLA forms to assist with the process. House Bill 1549 has prompted many of our IU campuses to complete a website content audit. IUS plans to do the same but is looking for ways to collaborate with other IU campuses to create consistent location on the website for specific information. Course articulation reviews, how many times are faculty reviewing the same course? This is an issue on IUS campus because faculty are indicating that they do not want to make certain courses rules even though they have reviewed the course for example, 10 times. IUS administration is looking to step in and create boundaries that clearly state if a course is review X number of times with the same outcome, it will automatically become a rule.

IU Kokomo

IUK has been working with their advising office to propose a new standard operating procedure to present to the Faculty Senate General Education Committee that will explore how exceptions can be made for course that satisfy general education requirements. In tandem, IUK would also like to explore the option of creating and implementing general education requirements fulfillment courses (Gen Ed Tags). These gen ed tags would allow for more applicability of credit towards degree completion. Auditing on campus transfer websites while also constructing a specific place for PLA. Leveraging transfer agreements (Transfer Articulation Agreements and Guaranteed Admissions) to increase partnerships with external institutions while also recruiting new students. To remain competitive and cutting edge IUK wants to continue expanding collaborative programs on their campus to remain flexible and transfer friendly.

IU East

IUE has been in an exploration phase reviewing and auditing all the resources offered to transfer students. Learning about the financial aid resources that are available for transfer students and how IUE can help to ease any financial barriers. Reviewing of websites that display transfer related material to review the accuracy and relevance of the information displayed. Progressing and maintaining a 48-hour credit evaluation review process that uses undistributed credit as a place holder until the evaluation is complete. IUE want to convene a general education task force to address, “What does it mean to IU East if students are completing their general education courses before transferring to IU East?” Examining the impacts of the students completing the ICC during high school. IUE want to make it a point to start using UIRR to actively track transfer data to respond to data trends and to evaluate the effectiveness of their 2+2 Articulation Agreements.

IU Northwest

IUN has been working with their staff and faculty to ensure all transfer credit evaluators have been trained properly to review and process transfer credit. While also reducing the outstanding transfer credit evaluations in TES waiting to be reviewed. IUN is planning to take advantage of the TES feature to create transfer guides with external partner institutions in Illinois. Auditing and reflecting on current resources related to transfer specific scholarships and TSAB. Are they effective in their current state? What improvements could be made to increase enrollment and engagement. IUN is looking to identify a faculty member as a transfer advocate to bring transfer related concerns to IUN Faculty Organization. Improving the various transition and handoff experience between admissions, advising, academic units etc. for students at their campus. What is the best way to track students once they graduate to predict potential career outcomes for other students? Website audit and reconstruction is something happening on many of the IU campuses. IUN wants to also develop a PLA assessment for work experience to bring in college credit.

IU South Bend

IUSB is currently diving into the data to pull out 2-3 actionable items that can be changed immediately to increase enrollment. Developing a process that assigns all incoming transfer students, student success coaching. This initiative targets transfer retention. Engaging students with established students, staff, or faculty can help with a sense of belonging. Rewriting transfer scholarships to provide more aid available to transfer students. Completing a review and audit of the transfer related webpages. Building the pages out more to include financial aid, advising, admissions, orientation, etc. Creating a one stop shop website for transfer students.

IU Bloomington

IUB has leveraged the engagement and support of transfer students by establishing a New Student Transition Subcommittee. This subcommittee aims to create transparency through active communication with transfer students. They assess and evaluate bottlenecks transfer students experience at each member’s point of contact. In conjunction with, IUB evaluates the enrollment funnel to look for opportunities to grow. Created efficiencies by partnering with undergraduate education to assist students with the application and understanding of undistributed credit. Along with collaborating in active conversation with their campus advising community to start leveraging transfer prospect data in SIS, so that advisors and other campus partners are aware of student level of engagement or interest in their campus.

IUB plans to expand their relationship with undergraduate education to include PLA acceptance and processes. They are currently developing a “Transfer Hub” website that will provide one consistent link for transfer students to learn about the various steps needed to transfer to IUB.

IUPUI (IUFW & IUPUC)

IUPUI is the powerhouse for transfer at IU. IUPUI admits and enrolls more transfer students than any other IU campus. IUPUI has a complex transfer process because they are the only IU campus that partners with Purdue University to offer Purdue degree's as well. Another unique characteristic about IUPUI is that they have two satellite campuses, Indiana University Fort Wayne, and Indiana University Purdue University Columbus. IUPUI now completes all the operational processes for its own campus, plus the two satellite campuses as well.

IUPUI created a Center for Transfer and Adult students to respond to that demand of increased transfer enrollment. CTAS works with transfer students on advising, student success coaching, and many other initiatives that help transfer retention. IUPUI also implemented a scheduling system called Calendly. This system is used for students to be able to go to IUPUI's website and schedule an appointment with an admissions counselor right on the spot, without having to call or email anyone to set up.

IUPUI has just started an 11-month program- Aspen-AASCU Transfer Intensive in partnership with the central ITCC campus. This program is designed to create an aligned transfer strategic plan for both campuses. Another goal of this program is to remove barriers. To help better understand the PLA process on their campus admissions representatives sent a survey out to all academic units requesting information regarding their PLA process.

Faculty completing transfer evaluation have been a consistent issue on this campus. In response to the issue, IUPUI launched a homegrown transfer evaluation routing system that notifies students, faculty, and staff of the status of the evaluation. IUPUI plans to release new versions to increase speed and efficiency based on user feedback.

IUPUC and IUFW typically follow the same operational procedures that IUPUI implement. IUFW has started new initiatives by creating new transfer student orientation. They are looking to improve website transparency. Website transparency is an initiative for all IU campuses currently.



Recommendations

Each Adoption area workgroup was given at least one response area around which to focus their work during the 8 weeks. Below we list the response areas; a statement on the current state, and recommendations.

INFRASTRUCTURE AND HAND-OFFS

Response Areas: Feeders | Students | Financial Aid

Current State: Challenges in tracking handoffs, time, and supports; no consistent system

Feeders: Many; not familiar with all; need to establish process to stay current in interacting with them

- Tracking course titles and consistent use of course is needed
- Data needed annually to see # of students who come in from feeder using articulations
- Use data to report on whether agreements must be formed, continued, or closed out

Students: Define policies around re-evaluation of rules (e.g., by whom, by when, how often)

- This isn't done outside of CTL reviews. IUB has started a process.
- This requires a campus discussion
 - Transfer staffing-generally 1 person on the Regional Campuses, IUPUI team also does IUFW and IUPUC.
 - Faculty capacity is insufficient

Financial Aid: FA is present; however, information is scattered and scholarships are prevalent to FYU's.

- More resources should be deployed
- Transparency of options along with recognition of challenges students face with funds finishing before they complete
- Use of work study to boost student income and completion

RECOMMENDATIONS:

- Initially, reports can be run from TES that identifies changes in course titles and descriptions beginning with top feeders. This could provide a sample.
- Campus processes can be determined based on these reports, or does this work need to be centralized (the external course changes will affect all campuses).

- If centralized, is faculty used from each campus (where applicable), or does the re-review result apply to all campus rules?
- ASU has a great webpage for transfer FA – links to FA from the main transfer page
- Ideally, it would be great if links to FA and transfer scholarships be located on the main campus transfer page (where Credit Explorer would be housed. The left side of the transfer page could have a list of links – agreements, FA, Transfer scholarships, TSAB information, etc.).
- Produce more \$ for transfers – identify funding options and request a larger transfer budget
- Use a simplified calculator and/or visual example of cost through completion

DATA AND TRACKING

Response Areas: Analytics of Credit

Current State: Structure and data tracking one of weakest areas to tell unified stories

Analytics of Credit

Restructure IU's 21 Transfer Standards to have a built-in assessment for tracking its success

- Review standards and update/revise/add to make IU Transfer Friendly.
- Creation of execution/implementation and measurement plan for each standard.
- Achieve Transfer Honor Roll in year X:

<https://www.ptk.org/recruiters/university-transfer-recruiters/transfer-honor-roll>

Benchmarking

Develop transfer related benchmarks to be able to track success

- 1) Survey and analysis of aids and obstacles to student success
- 2) Create university benchmarks, measurements, and best practices
- 3) Create live dashboards to track benchmarks

Recommendations

- Establish a year-long taskforce
 - Fall 2022 to Spring 2023;
 - Appointments of members made in Summer 2022;
 - Report due in May 1, 2023
- Establish a 2nd workgroup
 - Invite transfer specialists, admissions, advising, enrollment management, and IR
 - Established by the beginning of Fall 2022
 - Final report due in May 2023.

RULES, SYSTEMS, AND COMMUNICATION

Response Areas: Appeals | Website

Current State

Recommendations

Improve credit transfer services to provide prospective and enrolled students with insight into credit articulations.

Use IU Credit Explorer (a centralized tool to appeal transfer credit) has capability to replace current systems.

Provide feedback to proposed user interface design with initial launch in August.

Develop consistent process to appeal transfer course rules and generate systematic definition of “appeals” by next year’s caucus.

Use the IU Credit Explorer project as an opportunity to identify and review IU's transfer-related content across system.

POLICY

Response Areas: PLA | Intercampus | Undistributed Credit

Current State

Recommendations

- Establish one site on each campus that clearly defines PLA, which departments accept it and how (exam, portfolio, both), and what courses a student can apply PLA’s to.
- Propose a schedule for the review of articulation rules in SIS.
- Establish a caucus to address intercampus transfer/enrollment.



Conclusions

The 2022 Transfer Action Caucus aimed to address the 91 recommendations from the 2021 TAC. The recommendations were condensed and given to each adoption area to address. Each area presented **their** strategic plans to address the recommendation, but **there is still work to be done**. During the 8 weeks of TAC, **many** cross-campus relationships and collaborations were **strengthened and** created. Members indicated that building these relationships became an unintentional but integral part of the caucus. The caucus opened doors for leaders on each campus to be able to reach out to each other as needed for advice on best practices implemented on each campus. We found that after hearing each campus' initiatives and processes, other campuses were very open to adopting them. The TAC is not perfect by any means. We use each year to make improvements.

The goal is to unify Indiana University as much as possible – “Any IU is One IU.” We are all in this journey together.

Appendices

ICHE POLICIES

- [Degree Maps \(Indiana Code § 21-12-14\)](#)
- [Approval or Disapproval of Branches, Degrees, and Programs \(Indiana Code § 21-18-9-5\)](#)
- [Common Course Numbering System \(Indiana Code §21-18-9-7\)](#)
- [Undergraduate Degree Programs; Number of Credit Hours \(Indiana Code § 21-18-9-8\)](#)
- [Transfer of Credits Among State Educational Institutions; \(Indiana Code § 21-42-3-2\)](#)
- [Statewide Transfer General Education Core \(Indiana Code § 21-42-3-5\)](#)

TRANSFER NODES

(<https://transfer.iu.edu/intranet/Nodes-of-Transfer-Success-Initiative---FINAL-1.pdf>)

WEEKLY MEMOS SHARED WITH CAMPUS LEADERSHIP – (SEE FOLLOWING PAGES)

- Also posted online at: <https://transfer.iu.edu/intranet/tac.html>

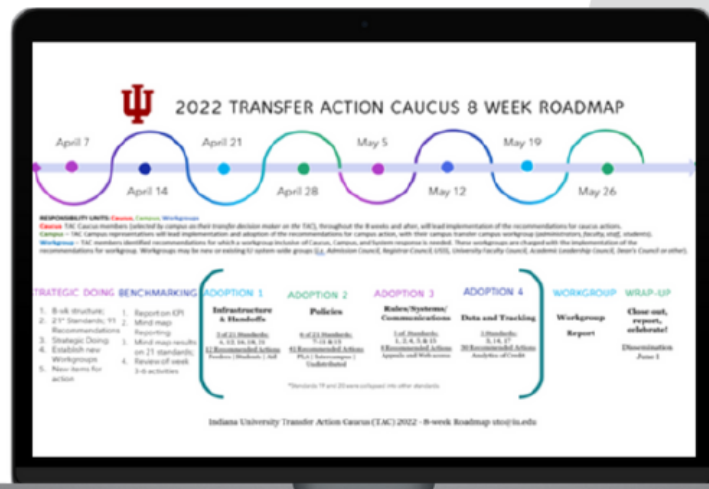
Thursday, April 7, 2022



TRANSFER ACTION CAUCUS

MEMO:

All IU campuses and relevant units (USSS, UIRR, OOE, and University Transfer Office), are engaged in responding to our 21 transfer standards and using the 2021 TAC 91 recommendations for action. Following each of the 8 weekly meetings, a memo is disseminated to inform your leadership of the discussions taking place.



WHAT HAPPENED?

University Transfer Office presented the 2022 TAC framework. Members completed introductions, shared how they conducted their mind map assessments, and engaged in dialogue. The TAC tackled transfer issues from two tactical lenses, W.I.N (Workgroup, Institutionalization, and Nodes) and strategic doing (X to Y by When). TAC members spent the first meeting focusing on establishing the tone of where we are, what we did, and defining where we go next. The 91 recommendations of the 2021 TAC was used as the gauge alongside the Dr. Doug Shapiro's keynote from the IU 2022 Transfer Symposium. In sum, we have made some progress but with clearer indicators we have a better baseline from which to expand. We established co-lead sub-groups and assigned UTO staff to each to begin work. We agreed on at least one workgroup on credit to be convened and another possibly on degree development and P-20 pipeline exploration may be needed.

WHAT'S NEXT?

We will examine met-unmet mind map and establish clearer indicators and define institutional benchmarks in the next meeting. Each caucus representative received a template of expected caucus barrier-response deliverables. Each was asked to assess the current state of those barriers at their home campus and to use a strategic doing process to affect change on said items. To support this work campus caucus leaders were asked to convene their home workgroups to deliberate, compile data, and make real-time changes during the 8 weeks

MAKE IT HAPPEN STEPS FOR LEADERS:

- At next leadership meeting ask what your campus wants to do to improve transfer enrollment
- Host conversations on potential changes to Business Standard Operating Procedures.
- Lend support for your campus representative to respond to these specific barriers for your campus.



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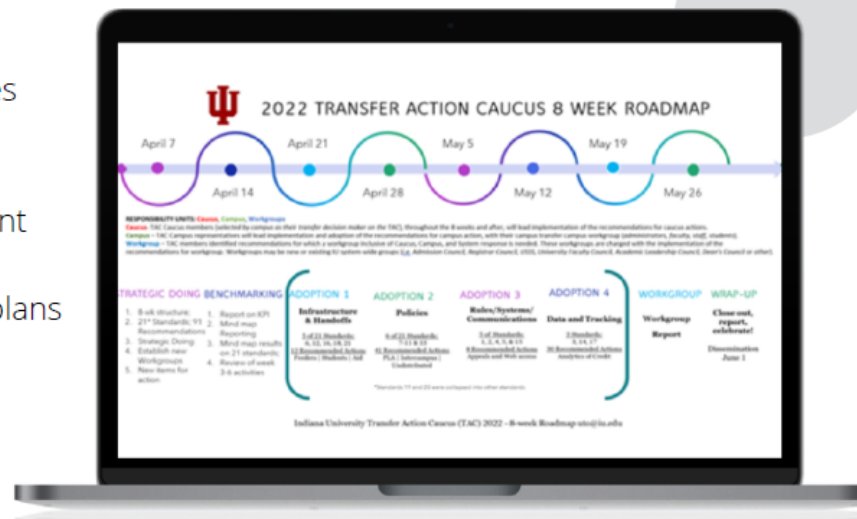
Thursday, April 14, 2022



TRANSFER ACTION CAUCUS

MEMO:

Your campus representatives once again met to discuss progress towards the 21 IU standards. This week we spent time evaluating the past and present and benchmarking plans for the future.



WHAT HAPPENED?

UTO presented a data snapshot with projected benchmarks on admit to enroll ratio, number of credits brought, general education milestone, IU dual credit, fall to fall retention, and transfer cohort time to degree. A year-over-year comparison report on our progress on the IU 21 standards was shared. We spent time reviewing the student demographics inclusive of 25 years and older, those who entered with a STGEC/ICC, full-time 1st semester at IU status, identified as an ethnic minority, female, and or first generation.

WHAT'S NEXT?

We aim to refine indicators and map benchmarks to determine success year to year. We will continue to assess the current state of the standards on the campus level and use our strategic doing process to affect change. Additional data will be collected via survey on implementation of 2021 recommendations and what defined data points help to determine success, at the campus level, on Transfer systems, Services, and application.

MAKE IT HAPPEN STEPS FOR LEADERS:

- We invite campus leaders to invite Caucus representatives to their cabinet meetings
- Support campus in completing Qualtrics survey for data gathering and tracking
- Continue to spotlight importance of supporting and growing transfer pipeline.



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MEMO:

2022 TRANSFER ACTION CAUCUS 8 WEEK ROADMAP

April 7 April 21 May 5 May 19 May 26
 April 14 April 28 May 12

RECOMMENDED DOWNSIDE *Caucus, Caucus, Workgroup*

Caucus - 100 Caucus members selected by campus as their transfer decision maker on the TAC, throughout the events and after, will lead implementation of the recommendations for campus action.

Caucus + TAC - Campus representatives will lead implementation and adoption of the recommendations for campus action, with their campus transfer campus working committees, faculty, staff, students.

Workgroup - TAC members identified recommendations for which a working group include all Caucus, Campus, and System members is needed. These working groups are charged with the implementation of the recommendations for working. Workgroups may be new or existing to system-wide group (e.g., Academic Council, Registrar Council, University Faculty Council, Academic Leadership Council, Board's Council on ethics).

STRATEGIC DOING BENCHMARKING

1. 8-10th standards, 11
2. 11th standards, 11
3. Recommendations
4. Strategic Design - 11
5. Establish new
6. Workgroups
7. New, new, for
8. action

ADOPTION 1

Infrastructure & Headline

1. 8-10th standards, 11

2. 11th standards, 11

3. Recommendations

4. Strategic Design - 11

5. Establish new

6. Workgroups

7. New, new, for

8. action

ADOPTION 2

Policy

1. 8-10th standards, 11

2. 11th standards, 11

3. Recommendations

4. Strategic Design - 11

5. Establish new

6. Workgroups

7. New, new, for

8. action

ADOPTION 3

Rules/Systems/Customization

1. 8-10th standards, 11

2. 11th standards, 11

3. Recommendations

4. Strategic Design - 11

5. Establish new

6. Workgroups

7. New, new, for

8. action

ADOPTION 4

Data and Tracking

1. 8-10th standards, 11

2. 11th standards, 11

3. Recommendations

4. Strategic Design - 11

5. Establish new

6. Workgroups

7. New, new, for

8. action

WORKGROUP

Workgroup

Report

Clear out, report, celebrate!

Discontinue

Phase 1

*Standards 10 and 20 were collapsed into other standards

Indiana University Transfer Action Caucus (TAC) 2022 - 8 Week Roadmap utspc@iu.edu

5) Work with other campuses to determine what is working or possible.

We will continue to assess the current state of barriers within the campuses and use strategic doing as a process to affect change on said items. Please continue to support this work as campus caucus leaders convene their home workgroups to deliberate, compile data, and make real-time changes during the 8 weeks.

- Benchmarking and Measuring Survey will be sent to you on **Monday, April 25th, 2022**. Please ensure that staff is available to complete. The deadline for the survey is **May 3rd at 9 am**.



University Transfer Office | transfer.iu.edu

Thursday, April 28th, 2022

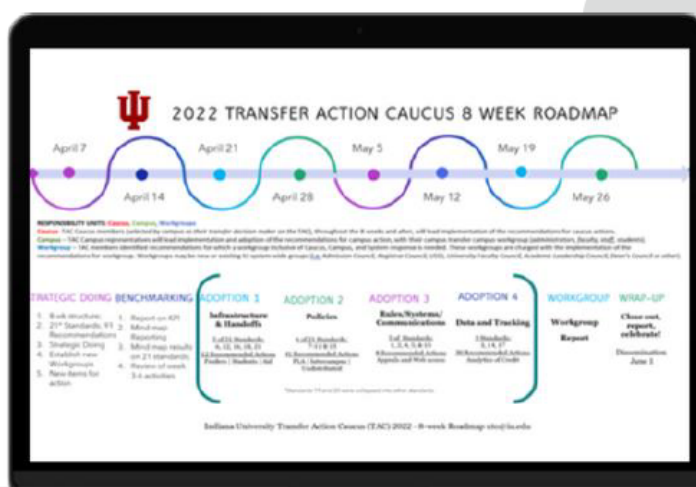


Transfer Action caucus

Memo:

Adoption Area 3: Rules, Systems, and Communication presented. Recommendations focused on: Infrastructure, Appeals, Web access and exposure of degree maps. Links for detail information below:

- [Web access audit](#)
- [Design Review: IU Credit Explorer](#)



What Happened?

We are at the midpoint of the caucus. A lot has been accomplished. In this week's Adoption 3 Rules, Systems, and Communication. Recommendations:

- 1) Improve credit transfer services to provide prospective and enrolled students with insight into credit articulations.
- 2) Use IU Credit Explorer (a *centralized tool to appeal transfer credit*) has capability to replace current systems.
- 3) Provide provide feedback to proposed user interface design with initial launch in August.
- 4) Develop consistent process to appeal transfer course rules and generate systematic definition of "appeals" by next year's caucus.
- 5) Use the IU Credit Explorer project as an opportunity to identify and review IU's transfer-related content across system.

What's Next?

A lot of movement. Important to support the process with active campus engagement.

We must continue to assess the current state of barriers within the campuses and use strategic doing as a process.

Adopt fast to see immediate gains. Offer suggestions, share what aspects are still leaks in the pipeline, and aid us in affecting the long-term change for effective student success. Let's make real-time changes during the 8 weeks.

Make it happen Steps for leaders:

- We acknowledge your plate is full and so are your staff and leaders. Therefore, we humbly ask your help in sharing the ways you are measuring this work in the Benchmarking and Measuring Survey sent out on **April 25th, 2022** with a return deadline of **May 3rd at 9 am**.



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MEMO:

- Articulations
- Prior Learning
- Procedures and Processes
- Intercampus Transfer



- Establish separate website to respond to prior learning and display all information in one place.
- Continue to improve processing of undistributed courses and identifying best practices for review among campuses.
- Consider prior learning credit and assessment as all credit earned/learned before attending an IU campus.
- Develop a process for evaluation of credits (and rules) which value advisor-input.
- Establish a mini caucus to examine intercampus transfer infrastructure. Goal to is to identify and addresses the unique challenges facing enrollment and movement of students.

WHAT'S NEXT?

Within the next two weeks, the recommendations from the caucus findings will be sent to the workgroups on the campus level.

MAKE IT HAPPEN STEPS FOR LEADERS:

-

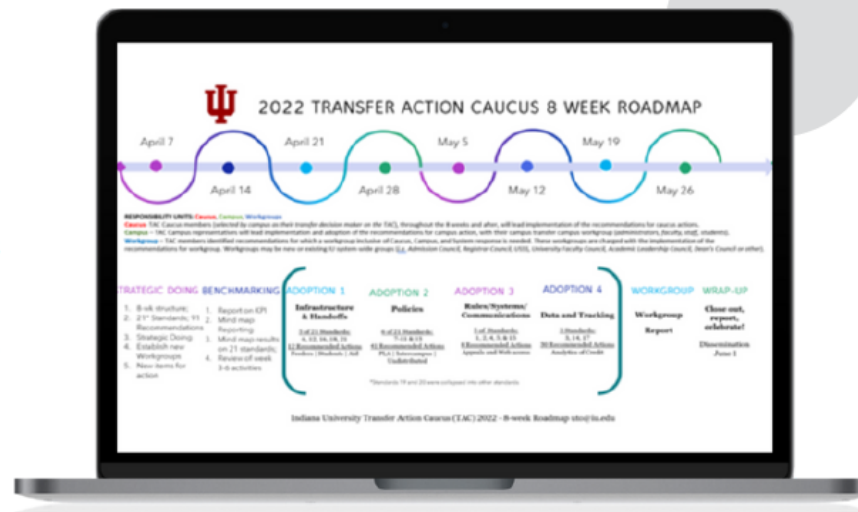
Thursday, May 12, 2022



TRANSFER ACTION CAUCUS

MEMO:

TAC group presentations concluded this week with Data and Tracking (DT) proposing a full restructure of IU's 21 Transfer Friendly Standards. DT recommended that all standards include tracking and assessment elements to monitor process towards attainment of the standard.



WHAT HAPPENED?

This week Data and Tracking developed the following recommendations based on the Benchmarking and Measuring Survey results:

1. Form a taskforce to revise IU's 21 Transfer Friendly Standards and create assessment for new standards
2. Achieve Phi Theta Kappa Transfer Honor Roll within 4 years
3. Develop a diverse transfer benchmarking workgroup to analyze factors impacting transfer student success
4. Create university benchmarks, measurements, and best practices and dashboards to track them

WHAT'S NEXT?

Next week we will focus on campus recommendations from the 2021 TAC. Our goal is for each campus representative to have a pathway towards completion on recommended item. Throughout the interactions and discussion with each campus, we hope that campuses will be able to collaboratively work to help each other and IU tackle transfer related barriers.

MAKE IT HAPPEN STEPS FOR LEADERS:

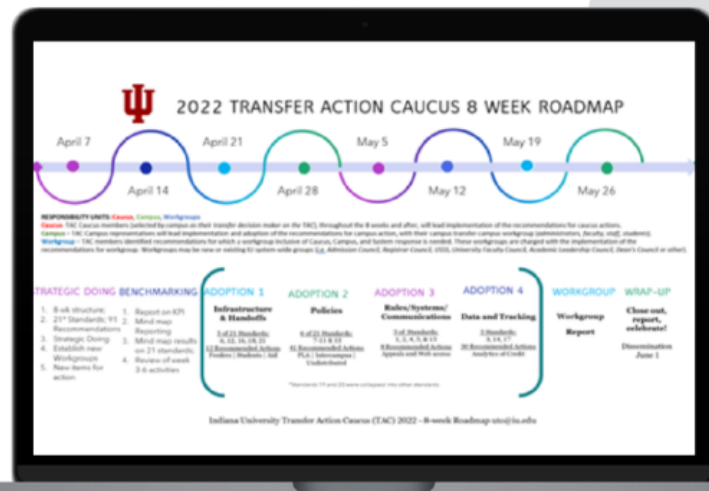
- Please support the campus representatives in reviewing and implementing the Campus Focused Recommendations Document.
- For campuses that have not completed the Benchmarking and Measuring Survey, we request that you continue the work on completing it no later than May 20th at 9:00 a.m.



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MEMO:

TAC Members gave a brief report of each campus current state in relation to the campus recommendations from 2021 TAC.



During week 7 each campus provided a brief report out on the 9 campus focused recommendations from the 2021 TAC. Each campus has its own challenges and bottlenecks to address to advance transfer, but some of the common barriers were, PLA processes (who accepts? How? Required material?), informing and involving faculty of the importance of keeping transfer at the forefront, and creating a dedicated space for transfer students and staff, however that may look on your campus. Quick solutions to some of the barriers were, potential adoption of general education course fulfillment, creating more partnerships with external institutions, paying closer attention to the data and how it can inform and prioritize the creation of articulation rules. Campuses have indicated that this year's caucus has unveiled many transfer related issues.

Next week's meeting is a celebration! VP of Regional Campuses and Online Recruitment, Susan Sciame-Giesecke will join the meeting to thank everyone for their hard work and efforts to increase transfer enrollment at Indiana University.

In the upcoming weeks, please be on the lookout for more information regarding the creation of workgroups proposed from this year's caucus, Prior Learning Assessment and Intercampus Transfer/Enrollment. In addition, the Data and Tracking group along with other TAC member will aid in reducing the 21 standards. As we cross the finish line of the caucus, please know that the work does not stop here and UTO is here to help in any way we can. We appreciate the momentum of progress that each campus has made during this short time expand.

- Please continue to inform and involve faculty of the importance of keeping transfer at the forefront.
- Thank you, for the support of the TAC initiative to spotlight transfer while responding to leaks in the pipeline.



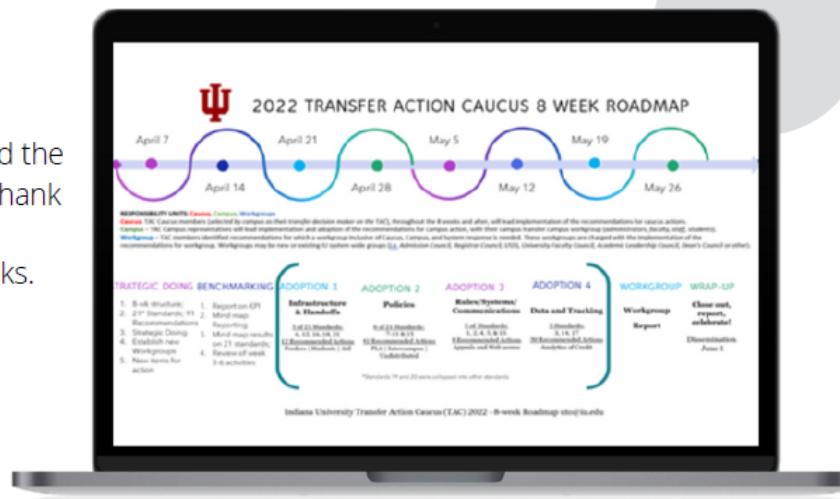
Thursday, May 26, 2022



TRANSFER ACTION CAUCUS

MEMO:

Celebration! We have concluded the 2022 Transfer Action Caucus. Thank you to TAC members for an engaging and productive 8 weeks.



WHAT HAPPENED?

This week's meeting included thank you remarks, overview of data presentation and accomplishments. Some highlights were:

- 3 Workgroups will emerge to move the dial in intercampus transfer, intercampus enrollment, and the restructuring of 21 Standards.
- 21 standards were reviewed to identify common themes.
- UTO will offer added attention to revising other transfer practices and data processes

WHAT'S NEXT?

1. Final Transfer Action Report will be available June 1st.
2. TAC members and other staff will be added to workgroups as needed.

MAKE IT HAPPEN STEPS FOR LEADERS:

- The work does not stop here, please continue to support and advance transfer at IU.



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IU 21 Transfer Standards

To demonstrate a commitment to transfer and transfer friendliness IU adopted 21 standards. These standards align with our policies, practices, and standard operating procedures all cross all IU campuses. They serve as a seal of our commitment to our students, their credits, and student success.

The **21 standards** can be categorized in one of three areas: transfer systems, application of transfer credit, and services for transfer students. Please indicate your campus' current status (met or unmet) for each of the 21 items below using the following criterion:

Met = all five areas must be enacted to be considered "met"

- f) **Data** – utilizes official data points, preferably from UIRR, in relation to standard
- g) **Contact person/workgroup** – At least one contact person is assigned to respond to this standard
- h) **Support** – At least one group has been identified to support contact person in responding to this standard
- i) **Report out** – A reporting stream on this standard is currently in effect
- j) **Alignment** – continuous response to mission and purpose

Additionally, in your response, please describe your campus' current status related to the five "met" criterion: a) data, b) contact person/workgroup, c) support, d) report out, e) alignment.

STANDARD 1 – TRANSFER SYSTEMS: Transfer system resources will support timely and accurate information on credit transfer and the application of transfer credits in a manner that is supportive of students' academic objectives and consistent with the academic expectations of the institution. (*Measurability: informational consistency; processing time, volume, and specificity; level of process automation*)

Operational Principles:

- 1) General rules for credit transfer (*e.g., accreditation, state and federal statutes, University Policies*) are readily accessible to prospective and enrolled students.
- 2) Prospective and current students can readily gain access to current and authoritative information concerning the transferability (in general and as credit toward a degree) of all courses, tests, military credit, etc. proposed for transfer. In addition, equivalencies, and pre-requisites are readily available
- 3) Transfer student success is tracked and compared against campus and University benchmarks with an analysis of aids and obstacles to success.
- 4) Evaluation for transfer of individual courses that are not in the database occurs within a week of receipt of a request with the required information.
- 5) The appeal process for transfer decisions is easily located, transparent, and renders decisions within two weeks of the appeal being filed.
- 6) Back-office transfer systems that support the recording of articulation rules; including coursework, test scores, credit-by-credential, etc.; are as efficient, transparent, and as automated as possible.

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

STANDARD 2 – APPLICATION OF TRANSFER CREDIT: Transfer credits will be applied across the University in a consistent manner as mandated by the Master Course Inventory and articulation policy, and without differentiation by mode of instruction or delivery. (*Measurability: minimize credit loss and reassessment; alignment with and completion of milestone credit blocks*)

Operational Principles:

- 7) Once accepted in transfer, a course from a regionally accredited institution is treated in the same way as the comparable course at the campus without regard to source (community college, private non-profit, private for-profit, etc.)
- 8) Once accepted in transfer, a course is treated in the same way as the comparable course at the campus without regard to modality.
- 9) Once accepted in transfer, courses based on prior learning assessment (PLA) or demonstrated competency (CBE) are treated in the same way as the comparable courses at the campus.
- 10) Courses accepted for undistributed credit receive full consideration w/in degree programs. Wherever possible, faculty and departments work in advance with students to determine applicability of undistributed credit to degree.
- 11) Movement of credit among IU campuses should be equivalent, per the policies of Indiana University.
- 12) The campus maintains partnerships and collaborations with institutions, especially 2-year institutions, whose students frequently transfer to IU, to ensure that students intending to transfer have as much information as possible about baccalaureate programs as early as possible, building 2+2's whenever possible.
- 13) The campus and university assure that IU academic standards and integrity in transfer and articulation are maintained.

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

☐ Met ☐ Un-Met

STANDARD 3 – SERVICES FOR TRANSFER STUDENTS: Transfer information and services for students are easily accessible and support students in their academic decisions and objectives. (*Measurability: Informational consistency; student performance metrics*)

Operational Principles:

- 14) Transfer information and opportunities is conveniently accessible in one place on campus and university websites.
- 15) Prospective students can obtain full information about transferability before applying to the campus, including how transfer credit will apply to degree programs.

16) Transfer student advising and orientation is tailored to transfer needs, including an understanding of the Statewide General Education Core (STGEC), the Core Transfer Library (CTL), the Transfer Single Articulation Pathways (TSAP) and the transfer of military credit.	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met
17) The accuracy of the CTL is maintained along with regular inter-institutional discussions about TSAP Degrees and the STGEC. Students are also tracked to monitor successful completion of a baccalaureate degree after attaining a STGEC from an institution other than IU or attaining a TSAP degree from ITCC or VU.	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met
18) A clear explanation and application process for any financial aid reserved for transfer students will be readily available.	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met
19) Financial aid advising is coordinated with transfer students as early in the process as possible, even before students have committed to transfer when possible and appropriate.	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met
20) Programs and student organizations aimed at transfer students, such as the Tau Sigma National Honor Society, will be prominently displayed in web and printed materials provided to transfer students.	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met
21) Explicit explanations available for students with regard to the difference in the way coursework transfers into Indiana University campuses and from one campus to another within IU, especially within degree programs.	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met
	<input type="checkbox"/> Met <input type="checkbox"/> Un-Met

TRANSFER FRIENDLY STANDARDS MET/UN-MET STATUS

21 TRANSFER STANDARDS MET AND UN-MET STATUS

Transfer System

Standards	Response Count		Response Percent	
	2021 # Met Status	2022 # Met Status	2021 % Met Status	2022 % Met Status
1: Accessible Rule	8	8	89%	89%
2: Public Access to Equivalences	7.5	7	83%	78%
3: Track and Compare Student Success	5.5	5	61%	56%
4: Credit Evaluations in 1-Wk	5	4	56%	44%
5: Transparent Appeal Process	3.5	4	39%	44%
6: Efficient Recording of Articulations	6.5	5	72%	56%

Application of Transfer Credit

Standards	Response Count		Response Percent	
	2021 # Met Status	2022 # Met Status	2021 % Met	2022 % Met Status
7: Regional accreditation course same as campus course	8	7	89%	78%
8: Modality Agnostic	9	8	100%	89%
9: PLA same as Native Courses	6.5	7	72%	78%
10: Undistributed review for Comparability	6.5	6	72%	67%
11: Credit across IU same	7.5	6	83%	67%
12: Partnership with 2yrs institutions	7	8	78%	89%
13: Academic Integrity maintained	8.5	8	94%	89%

Services for Transfer Students

Standards	Response Count		Response Percent	
	2021 # Met Status	2022 # Met Status	2021 % Met Status	2022 % Met Status
14: Transfer info in One Location	7	7	78%	78%
15: Credit Evaluation before Application	5.5	5	61%	56%
16: Orientation for Transfers	8	7	89%	78%
17: Maintain accurate CTL	6	8	67%	89%
18: Access clear Financial aid info	7	7	78%	78%
19: Early access to Financial Aid	6	7	67%	78%
20: Access to Student Programming	3	3	33%	33%
21: Explain Coursework Acceptance	4.5	4	50%	44%

* The **21 standards** can be categorized in one of three areas: transfer systems, application of transfer credit, and services for transfer students. Please indicate your campus' current status (met or unmet) for each of the 21 items below using the following criterion:

Met = all five areas must be enacted to be considered "met"

- Data** – utilizes official data points, preferably from UIRR, in relation to standard
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- Alignment** – continuous response to mission and purpose

Additionally, in your response, please describe your campus' current status related to the five "met" criterion: a) data, b) contact person/workgroup, c) support, d) report out, e) alignment.