

CREATING STATEWIDE TRANSFER GOALS

Lessons from Minnesota, Texas, and Virginia

A TACKLING TRANSFER REPORT | 2021



Creating Statewide Transfer Goals:

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TACKLING TRANSFER

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

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

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

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

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

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Overview

Every year, millions of undergraduate students across the country transfer from one college to another. In doing so, they typically lose large numbers of hard-earned college credits, and fewer than half ever attain a bachelor's degree.¹ Most undergraduates who transfer begin at community college, a frequent starting point in higher education for Black, Hispanic, and Native American students and students from low-income backgrounds. For this reason, improving transfer student success is a critical equity issue, central to efforts to close persistent inequities in who attains a bachelor's degree and who has access to a well-paying job, which in most cases requires such credentials.

Unfortunately—at the state and national level—too little attention is paid to transfer student outcomes. Federal and state policies and data systems overwhelmingly put a priority on the experience of students who enroll at a single institution. Most student data are reported in cohorts by colleges based on when a student first entered higher education. Few state performance funding formulas reward transfer student success significantly, if at all.

The focus among leaders and practitioners on university and community college campuses, too, tends to be on students who started at their institution in the first year. Compared to retention and graduation rates for first-time students, relatively little attention is paid to key transfer student outcomes: how many students transfer to a four-year institution, how long it takes them to transfer with an associate degree, how many credits are lost when students transfer, how many transfer students attain a bachelor's degree and over what period of time. With this lack of attention to transfer students comes a failure to account for longstanding equity gaps among transfers by race, ethnicity, and socioeconomic status.

Improving transfer student outcomes requires change at many levels of practice and policy. The endeavor cannot succeed at scale if transfer students remain uncoun­ted and their challenges invisible.

As part of the national Tackling Transfer project, higher education leaders in three states—Minnesota, Texas, and Virginia—made a commitment in 2018 to improve transfer student success and close equity gaps. Each saw the need to pursue a comprehensive approach to improving transfer student outcomes that included practice, leadership, policy, and communications. All agreed on the importance of making transfer student success more visible through concrete goals.

That leads to the premise of this brief: Setting quantitative goals around transfer student success and equity—within states as well as institutions—should be a vital part of scaled transfer reform. We share lessons from recent efforts in three states to set statewide transfer goals as well as reflections on how these goals had (or could have had) an impact on colleges themselves. We hope this will inspire and inform other state-level efforts to set and monitor transfer student goals as a way to increase transfer student visibility, elevate the challenges transfer students currently face, and ultimately improve transfer student success and close equity gaps in bachelor's attainment.

¹ According to the [National Student Clearinghouse](#), 17 percent of students who first enrolled at a two-year public in fall 2014 had earned a bachelor's degree from a four-year institution six years later.

Goal Setting in Three States

In 2018 and 2019, higher education system leaders in Minnesota, Texas, and Virginia met in their states to adopt goals for improving transfer student success and equity. Because each state had its own governance system, different entities in each state led the goal-setting process:

The Minnesota State system office, which governs seven universities and 30 community and technical colleges, conducted the goal-setting process. Together, these institutions educate nearly 60 percent of all students enrolled in a public institution in Minnesota. The system's Senior Vice Chancellor for Academic and Student Affairs convened the group that set goals, which included college presidents and provosts as well as staff from the system office expert in student data and transfer policy. Then the system's bargaining units reviewed and approved the goals.

In Texas, a group of senior leaders from multiple higher education systems set goals. Organizing under the name the Texas Transfer Alliance (TTA), the group included representatives from the Texas Association of Community Colleges as well as vice chancellors from four of the six major public systems in the state: the University of Texas, Texas A&M, Texas State, and North Texas. The Charles A. Dana Center at the University of Texas at Austin led the group, which received advisory support from Educate Texas.²

In Virginia, leaders and staff from two entities carried out the goal setting: the centralized Virginia Community College system (VCCS), which governs the Commonwealth's 23 community colleges, and the State Council for Higher Education of Virginia (SCHEV), a coordinating board that implements policy for 15 independent public universities and, with VCCS, for the 23 community colleges.

In each state, the goal-setting process was facilitated by three national partners in the Tackling Transfer project: The Aspen Institute, HCM Strategists, and Sova. Virginia was the first state partner to set goals over the course of two meetings in the spring and fall of 2018. As part of an initial half-day transfer strategy meeting with SCHEV and VCCS, stakeholders engaged to identify a framework of key transfer outcomes. SCHEV's Policy Analytics Director used the framework to propose metrics and goals. Then the senior leadership from SCHEV and VCCS adjusted and approved the goals.

The national partners shared Virginia's framework with stakeholders in Minnesota and Texas and invited leaders from both states to develop their own frameworks. Then the national partners facilitated a second meeting with each state to finalize goals. That involved reviewing state-level baseline data and proposed sample targets to address four key questions:

- » **Is the goal ambitious based on past trends and baseline data?**
- » **Is the goal realistic in light of what it would take to achieve it?**
- » **What specific equity goals should be included?**
- » **What are examples of key performance indicators (KPIs)?**

Interestingly, while the specific measures and the numeric goals adopted by the states differ, all three states shared five common categories of goals:

² As of the writing of this publication, the Texas Transfer Alliance plans to launch a next phase of its work, which will include expanding its membership to more public universities and systems in the state and deepening the community college voice on the Alliance.

FIVE COMMON CATEGORIES OF GOALS

- 1. Increasing the number and rate at which community college students transfer to four-year institutions.** Especially given the large number of community college students with bachelor's degree aspirations, each state set aggressive goals to increase the number of students who advanced to a four-year institution.
- 2. Increasing graduation rates among those who transfer.** In each state, graduation rates among community college students who transferred to a four-year institution were comparable to direct-entry four-year students, reflecting strong preparation at the community college level. Still, as with direct-entry four-year students, each state concluded that it could improve bachelor's completion rates among transfers and set goals accordingly.
- 3. Improving efficiency (and affordability).** Delays in the transfer journey are costly in time and money or—worse—can prevent students from ever completing their degrees. Each state adopted goals to substantially reduce the total number of credits earned by transfer students who attain bachelor's degrees. Also, Texas adopted a goal of reducing by more than a year the total amount of time it takes for transfer students to complete a bachelor's degree. Virginia set goals for how quickly students transfer from community college to a four-year institution and how quickly they earn bachelor's degrees after transferring.
- 4. Building early momentum among more students.** Evidence suggests that community colleges can take early steps to support longer-term success of their students, such as ensuring they enroll in enough college-level credit-bearing courses and supporting them to earn passing grades in fundamental courses.³ For that reason, each state adopted goals for how many students complete credit-bearing math and English in their first year of community college. In addition, Minnesota set a goal for credit accumulation in the first year of community college.
- 5. Advancing racial and socioeconomic equity through transfer.** Consistently, state's goal-setting groups found substantial equity gaps by race and income. These gaps reflect the disproportionate impact of barriers to completion on students from Black, Hispanic, Native American, and lower-income backgrounds. Every state set concrete goals to substantially close or completely eliminate equity gaps in each metric adopted for which disaggregated data are available.⁴

In [Appendix A](#), we include a chart summarizing the goals adopted by each of the three states.

3 Clive R. Belfield, Davis Jenkins, and John Fink, "Early Momentum Metrics Leading Indicators for Community College Improvement," Community College Research Center, July 2019.

4 As addressed later in this memorandum, some student-level data needed to track progress on equity goals was not available from statewide data systems, but state goal-setting teams did not let that dissuade them from adopting equity goals.

The Value of Creating Goals

Setting goals cannot transform the academic and bureaucratic policies, processes, and systems needed to improve transfer student outcomes. But it can increase the visibility of those outcomes and support the cultural conditions for change. Across the Tackling Transfer states, this came through in three ways:

1. Creating a shared sense of urgency. During the goal-setting process, participants in each state showed greater understanding of transfer outcomes and increased urgency for improving them. That change began as participants examined and discussed baseline data, establishing a shared appreciation for weaknesses in transfer student outcomes, how those outcomes compared to those of non-transfer students, and the inequities experienced by Black, Hispanic, and Native American students and students from low-income backgrounds. The same sentiments arose in each state: deep concerns about transfer student success and equity and an eagerness to accelerate progress.

This shared urgency motivated participants to set assertive goals rather than incremental goals. In each state, the data revealed unacceptably large equity gaps across the measures of success. In response, the states set goals to entirely eliminate inequities or, at least, to cut equity gaps in half.

2. Strengthening alignment. As a next step, each of the state partners approached the various constituencies responsible for transfer reform efforts to share the state goals and build alignment. For example:

Minnesota State presented its transfer goals to college presidents and provosts, engaging them in a conversation about the support they need to advance toward these goals on their own campuses.

Texas Transfer Alliance (TTA) members shared statewide goals at the system level. Additionally, the goals were used to develop common understanding and inform the agendas for two major transfer practice reform efforts. The first was the TTA's Transfer Partnership Strategy, which brought together 26 teams from two- and four-year colleges and universities to advance transfer outcomes across regional partner institutions. The second was a Texas Success Center series for two-year teams that focused on integrating transfer into guided pathways across 47 of the state's 50 community college districts.

Virginia's higher education systems shared the statewide goals at multiple convenings of institutional leaders, faculty, and practitioners. This began with a statewide Call-to-Action convening, where goals were presented to 257 transfer stakeholders from every public and private institution in Virginia, and institutional teams took time to identify challenges and opportunities associated with meeting them. Following that convening, a road map was crafted for future institutional engagement and a comprehensive, statewide plan on transfer was developed. As part of those efforts, statewide transfer goals were presented to a State Committee on Transfer, who were then charged with identifying transfer practices to achieve those goals and making recommendations on state transfer policy to support those practices. The goals helped inform the Committee's recommendations on legislatively mandated state transfer policies on transfer agreements, pathway maps, and other practices.

3. Defining data. Minnesota State has a centralized data system that supports consistency in institutional transfer student outcomes reporting. Transfer data reporting in Texas and Virginia is more complex. There, the goals provided a framework to develop

standardized two- and four-year institution-level data reports that benchmark state- and institution-level performance against statewide goals. (See [Appendix B](#) for sample reports.)

Additionally, both of these states hosted teams from community colleges and universities for workshops to examine their data reports and consider practices to advance those outcomes. Workshop participants reported that the data provided insights that helped guide practice reform efforts, especially when combined with reflections on practice and the transfer student experience.

Above all, at the institution level, the data sharing and goal benchmarks prompted a clearer sense of direction and a greater demand for transfer student outcomes data—especially data disaggregated by race and ethnicity, income, and academic program. Previously, transfer data were available from state and system sources in all three states. But data use was accelerated by sharing transfer data and statewide goals in institutional convenings where leaders and practitioners could grapple with the data, consider how their transfer practices contributed to student challenges, and devise 90-day and longer-term plans of action. This shift to data-driven decision making, still in the early phase for most institutions, is a hallmark of institutional culture that supports student success. This is especially important for transfer reform efforts, which often lack visibility into data and benchmarking.⁵

⁵ For more direction on data collection to evaluate transfer student outcomes, see William Carroll and Tania LaViolet, *Evaluating Transfer Student Success and Equity: A Primer on Quantitative Data for Two- and Four-Year Institutions*, (Washington, DC: The Aspen Institute, 2021).

Future Outlook

Often it takes years to reform transfer and produce better and more equitable student outcomes. Over that time, transfer goals can help leaders remain focused on transfer student outcomes, elevate and resolve data limitations, and maintain momentum through examples of success. Through such efforts, transfer goals can help set the pace for reform. Examples of how that is unfolding in the Tackling Transfer states include:

- **Assessing annual progress toward transfer goals to inform strategy.** Having set goals in 2018 and 2019, state partners will have data to compare progress for the first time during the 2021-22 academic year. To fulfill the goals it is vital that, every year state partners track progress on goals, assessing the extent to which their institutional engagement, practice reform, and policy efforts have supported progress. They need to discuss those outcomes with institutional leaders and other key stakeholders. Where the data indicate areas for improvement, they should ask questions about what more can be done—and what can be done differently—to move institutions and the state in the right direction.

In Minnesota, the Minnesota State leadership team has incorporated and is tracking their transfer-improvement metrics in alignment to the metrics of the system's broader [Equity 2030](#) initiative. As a result, the Minnesota State leadership team is poised to use data to connect transfer improvement efforts to other large-scale, equity-minded reforms, including multiple measures placement, math pathways, and guided pathways. In Virginia, SCHEV is working toward annual state- and institution-level transfer student outcomes benchmarking reports. The Virginia team aims to bring together institutional teams annually to revisit their transfer student outcomes data and discuss how they relate to their practice reform efforts. Similarly, in Texas, the national partners developed a goal tracker that they aim

to update each year. The TTA members will continue to analyze the data to adjust state- and system-level strategies to keep the state on pace to meet the goals.

- **Strengthening data on transfer student success and equity.** In all three states, the goal-setting process revealed the need for statewide reporting of additional measures. For example, Minnesota's data system does not capture all attempted credits, making it difficult to track progress toward the goal of closing the gap between credits earned by transfer and other students. In Texas, disaggregated data by race and ethnicity are not readily available on some measures, including four-year bachelor's completion rates among community college transfers; that makes it difficult to track the state goal to eliminate race- and income-based equity gaps in completion. In Virginia, tracking goals for Black, Hispanic, and Pell students is difficult because those groups are aggregated with one another and adult students into a single category called "under-represented student populations." In each state, leaders who set transfer goals have been engaged in resolving these and other substantial data limitations so they can track progress. This conversation should extend to the federal level as well, where available measures of transfer student success and the quality of transfer student data lag far behind what is available in most states.
- **Highlighting success stories.** In coming years, the early accountability measures initiated by the three state partners will make it possible to celebrate progress and share colleges' success stories. In each state, multiple community colleges and universities already have advanced their transfer work impressively. To recognize these accomplishments, Sova produced a case study of transfer efforts at Minnesota's Metropolitan State University, and the TTA has elevated Texas exemplars through case

studies written by the Charles A. Dana Center. Virginia held a showcase of transfer practice advancements. As the numbers reveal which institutions have made substantial advancements toward state goals, the state partners can continue driving attention to exemplars so others can learn how to replicate their successes.

- **Linking transfer to other statewide goals and reporting.** Recognizing the role of transfer student success in improving equitable outcomes for all students, state partners are connecting their transfer goal to other statewide student success initiatives. As mentioned, Minnesota State has tied its transfer goals with its broader Equity 2030 initiative, which “aims to close the educational equity gaps across race and ethnicity, socioeconomic status, and geographic location by the end of the decade at every Minnesota State college and university.” Likewise, transfer goals in Texas will support the state’s 60 x 30 initiative, which aims for 60 percent of Texans ages 25-34 to hold a certificate or degree by 2030. In Virginia, one overarching goal has been to increase access and improve completion for transfer students of color. As such, Virginia’s transfer goals will feed into SCHEV’s Pathways to Opportunity, the state strategic plan for higher education. Pathways to Opportunity establishes three overarching goals for higher education in the Commonwealth: that it is equitable, affordable and transformative. The plan offers clear and achievable strategies for each goal; the transfer reform efforts are embedded in these strategies to sustain longer-term progress toward transfer and equity outcomes.

Conclusion

The experience of system leaders in three different states teaches us a key lesson: Adopting and monitoring statewide goals can bring much-needed visibility to transfer student outcomes while aiming a range of reform efforts in the same direction. Importantly, these goals also send a signal that states and systems will not accept the status quo, but instead will focus on transforming the experience of transfer students so that many more succeed.

States and systems committed to advancing transfer student success and equity cannot rely on a single strategy. Laws and regulations must be changed to alter current incentives. Institutional leaders and faculty need dedicated time and structures to devise transfer reforms and review progress. State and system leaders need to consistently communicate the importance of transfer student success. As leaders showed in Minnesota, Texas, and Virginia, setting goals can undergird those strategies. They can help everyone responsible for student success maintain a focus on objectives that have long been elusive: substantially improving the success of transfer students and, in the process, closing race- and income-based gaps in bachelor's attainment.

Appendix A | Statewide Transfer Goals in Minnesota, Texas, and Virginia

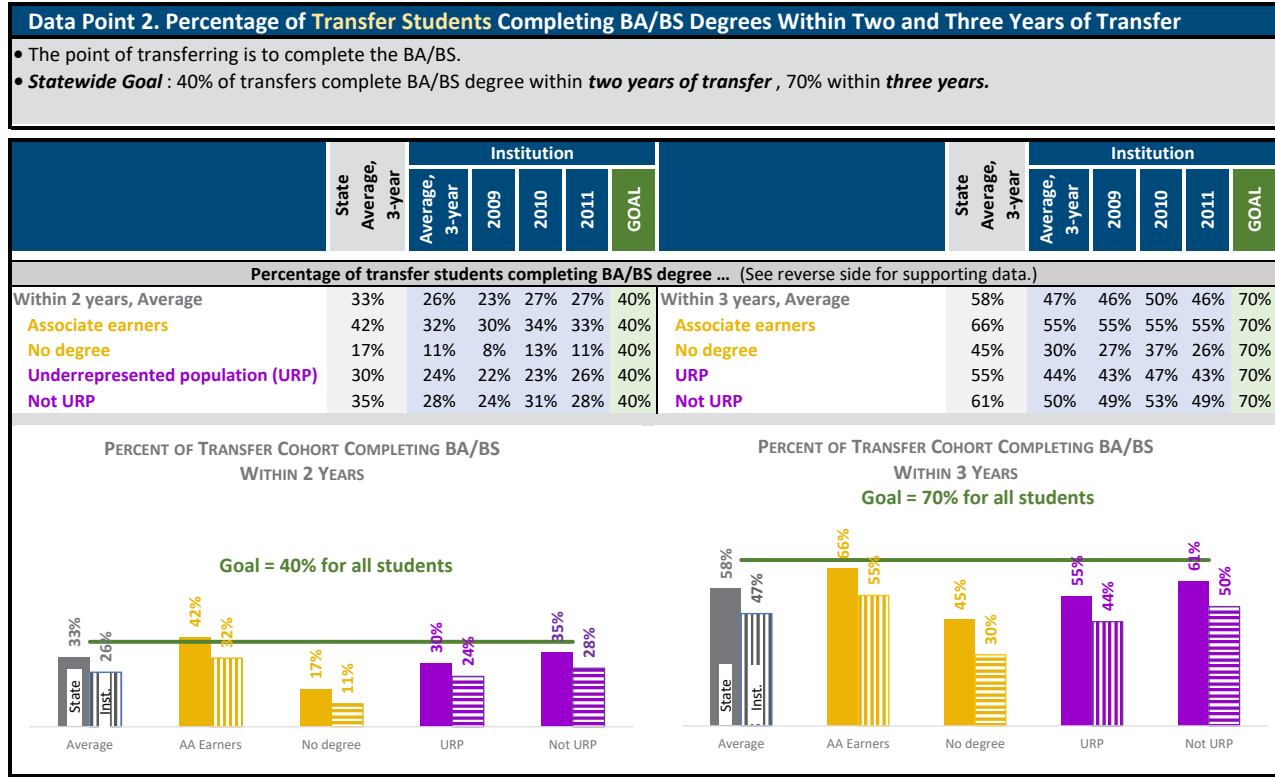
	MINNESOTA	TEXAS	VIRGINIA
State Actor	Minnesota State Colleges and Universities system	Texas Transfer Alliance	State Council of Higher Education for Virginia and the Virginia Community College System
Baccalaureate Completion Rate	<p>Increase the number of first time, full time students completing a baccalaureate degree in 6 years from college entry among credential-seeking college entrants.</p> <p>TARGET: From 12.5% (Fall 2010 cohort) to 18% (Fall 2017 cohort).</p> <p>Increase the number of first time, part time students completing a baccalaureate degree in 6 years from college entry among credential-seeking college entrants.</p> <p>TARGET: From 4.9% (Fall 2010 cohort) to 10% (Fall 2017 cohort).</p>	<p>Increase the four-year bachelor's completion rate of community college transfers from 58% to 67%, eliminating all gaps by race/ethnicity and Pell status.</p>	<p>Increase baccalaureate completion for transfer students, as well as the timely completion of baccalaureate degrees.</p> <p>TARGET 1: 85 percent [from 76 percent] of students who transfer within two years will complete their bachelor's degrees at any point post-transfer. Goals segmented by time-to-completion: 40 percent [from 26 percent] will do so within two years of transfer 70 percent [from 63 percent] will do so within three years 80 percent [from 75 percent] will do so within four years.</p> <p>TARGET 2: 85 percent [from 70 percent] of students who transfer within three years will complete their bachelor's degrees. Goals segmented by time-to-completion: 40 percent [from 26 percent] will do so within two years of transfer 65 percent [from 61 percent] will do so within three years 80 percent [from 69 percent] will do so within four years).</p>

	MINNESOTA	TEXAS	VIRGINIA
Mobility/ Transfer-Out Rate	<p>Increase the number of first-time, full time college students who transfer to a university within 6 years of college entry without decreasing associate degree, diploma or certificate completion.</p> <p>TARGET: From 29% total (10.1% with award, 18.9% without for the Fall 2010 cohort) to 37% total (>10% with award, <19% without award for the Fall 2017 cohort).</p> <p>Increase the number of first time, full time college students who transfer to a Minnesota State university within 6 years of college entry without decreasing associate degree, diploma or certificate completion.</p> <p>TARGET: From 11.7% total (4.9% with award, 6.8% without award for the Fall 2010 cohort) to 18% total (>5% with award, <7% without award for the Fall 2017 cohort).</p>	<p>Increase the six-year transfer-out rate from 21% to 33%, eliminating all gaps by race/ethnicity and Pell status.</p>	<p>Increase timely transfer to four-year institution.</p> <p>TARGET: 40 percent [from 35 percent] of students in cohort will transfer to a four-year institution within two years of entry; 55 percent [from 48 percent] will transfer within three years of entry.</p>
Gateway Math and English Completion	<p>Increase the number of first time, full time students completing a college-level math course and college-level writing course in the first year of community college enrollment.</p> <p>TARGETS: From 20.9% (Fall 2017) to 30% (Fall 2023) for math and from 43.6% (Fall 2017) to 60% (Fall 2023) for English.</p>	<p>Increase the percent of Texas community college students completing college-level math and writing in the first year to 45% (from 19% and 33%, respectively) and eliminate all gaps by race/ethnicity and Pell status.</p>	<p>Increase successful completion of gateway courses (math and English).</p> <p>TARGET: 75 percent [from 43 percent] of all students in the entering cohort will complete both math and English in first year at community college.</p>
College and University Credit Momentum	<p>Increase the number of first-time students completing 20 and 30 credits in the first year of enrollment.</p> <p>TARGETS: In the first year of college, 25% [from 18.4% in 2017] will earn 30 credits and 55% [from 44.7% in 2017] will earn 20 credits; in the first year of university, 45% [from 33.7%] will earn 30 credits and 80% [from 70.8%] will earn 20 credits.</p>	<p>Decrease the average number of attempted credits to degree from 142.9 for transfer students and 136.4 for native students to 135 credits for both groups, while eliminating all gaps by race/ethnicity and Pell status.</p>	<p>Improve transfer efficiency by reducing the average earned credits and ensuring equity in earned credits (i.e., transfer students earn the same degrees as native students with the same number of credits). For example, if native students earn a biology degree at a college in 126 credits, then transfer students to that degree should also be able to earn that same degree in 126 credits.</p>

	MINNESOTA	TEXAS	VIRGINIA
Total Credits to Degree	<p>Reduce the number of degree credits earned by transfer students as compared to the number of credits earned by direct entry (DE) students who complete a baccalaureate degree program.</p> <p>TARGET: <i>Reduce the difference from 9.3 credits (143.4 credits for transfer vs. 134.1 credits for DE students in Fall 2017) to 5 credits.</i></p>	<p>Decrease the average time-to-degree for transfer students from 7.6 years to 6.5 years and eliminate all gaps by race/ethnicity and Pell status.</p>	<p>Improve transfer efficiency by reducing the average earned credits and ensuring equity in earned credits (i.e., transfer students earn the same degrees as native students with the same number of credits). For example, if native students earn a biology degree at a college in 126 credits, then transfer students to that degree should also be able to earn that same degree in 126 credits.</p>
Equity	<p>For all metrics, reduce gaps for Black, Latinx, Indigenous, and Pell-eligible students by half.</p>	<p>Equity is embedded in all goals, which specify eliminating gaps by race/ethnicity and Pell status.</p>	<p>Increase mobility and equity by increasing the transfer rates of students from under-represented populations (URPs) to match those of the traditional population. (Note: the Virginia URP population includes: non-white US citizens and permanent residents, students receiving Pell grants at any time during the last five years, students age 25 or older at entry, and students from Virginia localities in the lowest quintile of associate and baccalaureate attainment rates.)</p> <p>TARGET: <i>The gap between non-URP and URP students will be closed so that both have a transfer rate of 40 percent [from 32 percent for URP students] for those transferring within two years and a transfer rate of 55 percent [from 45 percent for URP students and 51 percent for non-URP students] for those transferring in three years.</i></p>

Appendix B | Sample Reports

SAMPLE REPORT FROM FOUR-YEAR INSTITUTION IN VIRGINIA



SAMPLE REPORT FROM TWO-YEAR INSTITUTION IN TEXAS

