



# RUTGERS UNIVERSITY–NEW BRUNSWICK

Committee on Transfer Policies and Practices

Self-Study Final Report  
May 2023

# EXECUTIVE SUMMARY

Convened in November 2022, the Committee on Transfer Policies and Practices conducted a self-study of existing Rutgers University–New Brunswick transfer policies and practices. The goal was to develop recommendations and strategies to better meet the evolving needs of Rutgers–NB’s transfer student population, working to improve transfer persistence, retention, and graduation, as well as connection to our beloved community. The self-study aligns with the recent Middle States Commission for Higher Education (MSCHE) “Substantive Review” on the [Transfer of Credit, Prior Learning, and Articulation Agreements Policies, Guidelines, and Procedures](#), which took effect July 1, 2022.

## Recommendations

### **1. Develop a public-facing version of RU Transfer as a pre-matriculation resource for student self-assessment of credit review.**

- 1.1 A joint convening of faculty with this Committee for ongoing discussion (1) to share evaluation processes and (2) to understand the review and decision-making of credit applied.
- 1.2 Deploy a Pre-Transfer advising model, which should include a dedicated Credit Evaluation Team for transfer evaluation completed prior to orientation, advising, and registration.
- 1.3 RU-NB should review and record academic departments’ determination of specific equivalents of elective major or minor credits, or general degree credits.
- 1.4 Provide a self-service credit evaluation for prospective, applied, and admitted transfers to aid in decision-making as an online tool for non-NJCC (out-of-state transfer-in) beyond NJ Transfer to select transferable coursework at current institutions.
- 1.5 Streamlining our internal RU–NB school-to-school transfer processes within the RU Transfer portal and updating the web-based RU School-To-School Transfer Application Tool.
- 1.6 Examine localized, disaggregate trends of transfer-in cohorts and sending institutions.
- 1.7 Alignment with the Big Ten Academic Alliance to create a Peer-Group would work to “share best practices, build trust, and develop innovative solutions to (shared) challenges.”

#### Justification

- Developing coordinated, evidence-based, standardized transfer policies and consistent metrics for credit review across NB schools will allow for greater student access and alleviate some administrative burden, streamlining time and effort in the transfer evaluation process.
- Consistent with MSCHE updates and the existing Lampitt legislation, RU–NB must continue to ensure policies and practices align with continuous improvement of transfer and credit mobility.
- To leverage and position RU–NB for the anticipated increased volume of transfer enrollment, a public-facing enterprise would increase access and transparency for credit equivalency review.
- To align with NCAA Transfer Portal traffic, which operates with advanced and real-time aspects.
- Increased information-sharing between curricular and service units to improve degree completion service practices.
- Assessing credit mobility allows data review and an intrinsic lens of inequitable transfer intersections.
- Aligns with BTAA’s serving the common good through shared expertise and leveraging resources.

### **2. Increase the available direct transfer-in resources to increase transfer access and affordability.**

- 2.1 Establish a stronger scholarship marketing, anticipating increased transfer enrollment.
- 2.2 Provide a fixed, at scale number of guaranteed housing allocations for transfer-in cohort would align with sustaining transfer community and engagement.
- 2.3 Examine footprint capacity to allocate a dedicated transfer space(s).
- 2.4 Expand the existing RU-NB Admissions Transfer Student Handout, parallel to the Big Ten Academic Alliance Undergraduate Admissions Info for Students.
- 2.5 Increase fiscal support and visibility for Tau Sigma (Gamma Xi Chapter - Transfer) National Transfer Honor Society.

## Justification

- Addresses affordability, given the increase of tuition/fees related to transfer from a 2- to 4-Year.
- Based on two consecutive years of RU–NB record transfer enrollment, there is an increased volume of financial need to attract students and minimize attrition and lateral or reverse transfer.
- Increased visibility and merit competitiveness, while championing RU–NB’s transfer receptivity.
- Only 33% of the Fall 2022 RU–NB transfer-in cohort submitted on-campus-housing applications.
- Currently, the Tau Sigma Gamma Xi Chapter is for SAS only; expanding support for non-SAS to offset chapter costs would increase chapter visibility and [membership eligible](#) RU–NB transfer-ins.

### **3. Expand the SAS Students in Transition Seminar to make it available as an optional offering for all first-year RU–NB transfers.**

## Justification

- STS (01:090:220) has been noted as a NACADA ‘Model of Excellence’ for transfer success.
- STS assists in students’ adjustment to RU–NB and to facilitate successful first-term academic performance and transition, helping students to navigate the complexities of a large R-1.
- Despite STS successes, there are opportunities to support improved course facilitation.

## Action Items

The Committee endeavored (1) a completion of a Rutgers–New Brunswick “Campus-Wide Transfer Policies and Practices Inventory”, (2) drafting a Rutgers–NB Transfer Credit and Mobility Data Needs-Assessment, (3) an audit of the New Jersey Transfer data-information system, (4) comparative research amongst our Big Ten Academic Alliance, AAU-Association of American Universities and Aspirant Peer Institutions, and (5) review of ongoing promising and best practice research trends aligned with transfer success – the goal to identify Rutgers–NB specific policies and practices with a broader lens to help frame the Self-Study Recommendations. Clear, concise, and visible processes for credit review are key in RU–NB’s stakeholder outreach and communication. Research implores institutions to “build strategic plans focused on transfer and credit mobility that demonstrate the consistency of plans”<sup>1</sup>, of which the recommendations align with Rutgers–NB’s mission, informed through the Academic Master Plan and MSCHE policy expectations. An important first step is to convene Rutgers–NB faculty to examine and acknowledge the impacts of transfer mobility and ensure transfer practices are equitable and supportive of student success. With nominations from the School Deans, this faculty committee will formalize discussions about transfer credit evaluation, ensuring policies and practices align with continuous improvement of transfer and credit mobility for sustaining accessible pathways and retaining RU–NB transfer-in populations post-matriculation. Accordingly, action items for Rutgers–NB include to:

- Work with OIT to start the development of an external-facing transfer and explore mechanisms for providing pre-transfer advising.
- Amplify the realities and relevancy of ‘transfer shock’, defined by John R. Hills as a tendency of transfer students to experience a temporary, initial decline during transition, and a subsequent recovery and improved experience.
- Interrogate short- and long-term financial gains concurrently, which includes RU–NB reputational incentives for improving transfer and credit mobility.
- Strengthen internal transition processes related to school-to-school transfer policies.
- Utilize transfer data-needs assessment to increase infrastructure, design, and delivery of transitional and mobility support adapted to the competing needs of students and further examine the intersecting identities of RU–NB’s transfer-in cohorts.

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<sup>1</sup> Couturier, L. (2023). [Unpacking Financial Disincentives: Why and How they Stymie Degree-Applicable Credit Mobility and Equitable Transfer Outcomes](#). Beyond Transfer Policy Advisory Board. White Paper Series.

# BACKGROUND/CONTEXT OF SELF-STUDY

## Committee Charge

The charge of the Committee on Transfer Policies and Practices was to conduct a self-study of existing Rutgers University–New Brunswick transfer policies and practices and develop recommendations and strategies to better meet the evolving needs of our transfer student population with the goal of improving transfer persistence, retention, and graduation, as well as connection to our beloved community. The self-study aligns with the recent Middle States Commission for Higher Education (MSCHE) “Substantive Review” on the [Transfer of Credit, Prior Learning, and Articulation Agreements Policies, Guidelines, and Procedures](#), which took effect July 1, 2022. The Commission’s purpose in this Substantive Review was (a) to outline expectations for member institutions related to transfer of credit, (b) to standardize equitable educational practice in transfer decision-making, and (c) to provide institutional transparency to students and the public. Upon completion of this internal examination, the Committee has drafted recommendations and strategies to better meet the evolving needs of Rutgers–NB’s transfer student population, with the goal of improving transfer persistence, retention, and graduation, as well as connection to our beloved community. The Committee work has brought forth three major recommendations that include 12 Subpart recommendations.

## Prior Committee, Working Group, and Task Forces

### Infrastructure for Navigable Pathways Working Group

Motivated by initial and preliminary discussions regarding the Rutgers–NB Academic Master Plan (AMP), as well as by the New Jersey State Plan for Higher Education, in Spring 2022, Undergraduate Education at Rutgers University–New Brunswick identified the need to “Develop infrastructure to recruit and retain transfer students, degree completion students, and non-traditional adult learners” as a key priority in strengthening the undergraduate experience. As a plan of action aligned with AMP, as well as a review of recent RU–NB efforts related to the transfer student experience, a Working Group was convened in February 2022 to identify key ‘pain points’ for these populations and make recommendations for actions to take in the short- and long-term. The purpose was two-fold: (1) To address current transfer and community college students experiencing challenges transferring previously earned credits, and (2) Examine competing priorities and perceived and actualized systemic roadblocks that deter re-enrollment and/or persistence to degree completion. Historically, the challenges have contributed to delayed time to degree completion, increased student debt, and frustration with the college-going process. Through a detailed Work Plan, SWOT Analysis, and Self-Study, the Working Group, with cross-divisional representation, drafted recommendations in alignment with the AMP Pillars, Goals, and Objectives.

### Transfer Process Improvement Initiative

In Spring 2019, a joint proposal from the Vice Chancellors of Enrolment Management and Undergraduate Academic Affairs was submitted to the RU–NB Office of the Chancellor in response to repeated themes raised by the leadership of Rutgers University–New Brunswick’s top 5 feeder institutions, focused on issues of consistency and transparency throughout the transfer process. Presented as an opportunity to examine current practices to eliminate potential barriers to entry, and yield increased efficiencies and a better transfer experience. The proposal focused on investment in dedicated personnel and technological solutions (1) to support streamlining the existing efforts in the transfer equivalencies review process, and (2) to communicate those equivalencies to prospective students and in a timeframe that will inform their enrollment decision, ensuring they are communicated consistently and clearly across all stakeholders, and bringing increased coordination and consistency to how those equivalencies are determined.

### Report of the Task Force on Transfer Students

In June 2016, this Task Force provided a report considered the first comprehensive overview of the status of transfer students at Rutgers–NB. The structure of the Task Force report was meant to trace the

“Transfer Pathway” of an individual student—from (1) Admission to (2) Transfer Credits and (3) Curriculum matters, to (4) Orientation, and finally to becoming part of an (5) RU Community, which centered its five major recommendations. Further, the report represented the work of two groups of administrators and faculty, who (1) evaluated policies and programming that support transfer students, (2) provided recommendations to improve the transition from other institutions to Rutgers, and (3) identified major challenges facing key stakeholders throughout Rutgers–NB. The first major recommendation spoke to a Chancellor’s Committee on Transfer Students, with the Task Force strongly recommending a Chancellor-level standing committee (or Council) with representatives from different schools to coordinate all transfer student policies and programming, noting, “This body will make recommendations regarding transfer policies, clear descriptions of curricular opportunities for all transfer students, high impact programming so that students may familiarize themselves with the structure of the University and its many schools.”

## **Middle States Commission for Higher Education Substantive Policy Review**

In July 2022, the Middle States Commission for Higher Education (MSCHE) completed its Substantive Policy Review (initiated in January 2022) on the [Transfer of Credit, Prior Learning, and Articulation Agreements Policies, Guidelines, and Procedures](#). In review of the UE Infrastructure Working Group Report, as well as the newly drafted MSCHE policies, guidelines, and procedures, Rutgers University–New Brunswick decided to move forward in conducting an internal self-study evaluation, convening a campus committee<sup>2</sup> to review transfer policies and practices to better ensure consistency between and amongst the schools at Rutgers University–New Brunswick. Specifically, MSCHE introduced two priority expectations which center our Committee work, including:

1. *Guidelines* setting institutional priorities for “best practices for development, enhancement, and implementation of policies related to transfer of credit, prior learning, and articulation”, and
2. Within the *Procedures* implementation, “The institution will develop a transfer of credit policy and/or procedures that align with student learning outcomes, academic goals, and strategic priorities, are fair and equitable to students, and take into consideration new and innovative methods or sources for learning and alternative assessment methods.”

It is an institutional responsibility to examine and acknowledge if practices are equitable and in support of student success. Rutgers University–New Brunswick must address the realities of students for continuous improvement. We must shift our understanding of equity-mindedness in the transfer landscape, including the credit review process and its degree attainment role. This is an opportunity to dismantle systemic barriers to degree completion. The efforts of the Committee have centered on MSCHE Standard IV – Support of the Student Experience.

### **Middle States Standard IV – Support of the Student Experience**

Across all educational experiences, settings, levels, and instructional modalities, the institution recruits and admits students whose interests, abilities, experiences, and goals are congruent with its mission and educational offerings. The institution commits to student retention, persistence, completion, and success through a coherent and effective support system sustained by qualified professionals, which enhances the quality of the learning environment, contributes to the educational experience, and fosters student success.

#### **Criteria**

An accredited institution possesses and demonstrates the following attributes or activities:

1. Clearly stated, ethical policies and processes to admit, retain, and facilitate the success of students whose interests, abilities, experiences, and goals provide a reasonable expectation for success and are compatible with institutional mission, including:

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<sup>2</sup> Major Recommendation I, Rutgers University–New Brunswick Report of the Task Force on Transfer Students, June 2016.

- a. Accurate and comprehensive information regarding expenses, financial aid, scholarships, grants, loans, repayment, and refunds;
  - b. A process by which students who are not adequately prepared for study at the level for which they have been admitted are identified, placed, and supported in attaining appropriate educational goals;
  - c. Orientation, advisement, and counseling programs to enhance retention and guide students throughout their educational experience;
  - d. Processes designed to enhance the successful achievement of students' educational goals including certificate and degree completion, transfer to other institutions, and post-completion placement;
- 2. Policies and procedures regarding evaluation and acceptance of transfer credits and credits awarded through experiential learning, prior non-academic learning, competency-based assessment, and other alternative learning approaches;**
3. Policies and procedures for the safe and secure maintenance and appropriate release of student information and records;
  4. If offered, athletic, student life, and other extracurricular activities that are regulated by the same academic, fiscal, and administrative principles and procedures that govern all other programs;
  5. If applicable, adequate and appropriate institutional review and approval of student support services designed, delivered, or assessed by third-party providers; and
  6. Periodic assessment of the effectiveness of programs supporting the student experience.

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Aligned with MSCHÉ's policy review, an Inquiry Guide: Equitable Transfer and Credit Mobility (Appendix F) is published and made available by the Beyond Transfer Advisory Board at <https://sova.org/wp-content/uploads/2023/01/Beyond-Transfer-Inquiry-Guide-Jan-2023.pdf>, as a part of its White Paper Series: Leveraging Accreditation and Its Influence on Transfer and Credit Mobility.

## RECOMMENDATIONS

In the context of higher education, transfer reflects those who move across institutions. As articulated by Melanie Gottlieb, Executive Director of the American Association of Collegiate Registrars and Admission Officers, "With nearly 40% of all learners porting credits from other institutions into their degree programs and the recent rise in interest in and focus on non-credit-bearing learning opportunities, the number of learners who enter the institutional transfer labyrinth will only increase" (Couturier, 2023). Upon completion of this internal examination, the Committee has drafted recommendations and strategies to better meet the evolving needs of our transfer student population, with the goal of improving transfer persistence, retention, and graduation, as well as connection to our beloved community. Accordingly, the Recommendations align with sustaining an asset-based, long-term mindset of creating accessible and equitable transfer and credit mobility practices, and a student-centered, transfer-receptive culture and community for Rutgers–New Brunswick.

Adapted from the Student Success Network's "Transfer Services Discovery Inventory" within the California State University System, an initial and ongoing action task of the Committee was to complete a Rutgers–New Brunswick "Campus-Wide Transfer Policies and Practices Inventory". The goal was to help identify Rutgers–NB specific policies and practices with a broader lens to help frame the Self-Study Recommendations. The inventory may not be exhaustive but was designed to assist in providing a comprehensive snapshot of key findings within the respective Rutgers–NB undergraduate schools, units, and departments, and at the campus-level. The inventory (Table 1A/B samples on Pages 7-8) targeted Rutgers–NB transfer-oriented institutional policies and practices. For the purposes of the inventory:

- **Institutional policies** are broad-based, codified approaches to improving transfer outcomes, such as articulation agreements or guaranteed fee waivers. Policies often shape what is and is not possible and are important context. Examples may include articulation agreements, transfer credit, budgetary allocations for transfer students, financial aid policies, transfer-focused data use, impaction.
- **Institutional practices** are programs, services, or other strategies used to support transfer student success. Practices are more immediately actionable, although they may not reach all students who could benefit from them. The Institutional Practices are separated by potential success pathways, but is only an

adapted guide, and may not represent all phases of the transfer student life cycle. Categories and examples include:

1. **Admissions & Outreach** – Activities with New Jersey Community Colleges (NJCC) or feeder 4-year, Out-of-State (OOS) institutions.
2. **Targeted Financial Aid** – Dedicated transfer scholarships, institutional gap-funding for students close to graduating.
3. **Communications & Marketing** – Recruitment practices, websites to convey transfer information, presentation of transfer requirements.
4. **Academic Programming** – Orientation courses, transfer-specific placement practices, e-portfolios.
5. **Student Success & High Impact Practices** – Advising, transfer-focused pre-matric orientation, honor societies, mentoring, Living Learning Communities, dedicated space(s).
6. **Training** – Faculty, peer leaders, staff advising.

Table 1A: Sample Inventory of Rutgers–New Brunswick Transfer Institutional Policies

Description	School
Courses from all NJ Community Colleges are articulated to all RU/NB schools on njtransfer.org	SAS
Limit of 60 transfer credits from NJCC (can extend to 62 based on course combinations)	SAS
Limit of 90 credits from 4 year or combination 2 year and 4-year schools	SAS
Equivalents from 4-year schools are faculty decisions, as is transferability	SAS
Core classes CC and Wcr must be completed at RUNB if student does not have an accepted AA/AS degree	SAS
Students may not go back to the CC post 60 credit transfer and swap in new credits.	SAS
Students with degrees compliant with the NJSWTA have the Core waived and transfer 60 credits	SAS
SAS holds space in popular classes for incoming transfer students	SAS
<a href="https://smlr.rutgers.edu/academic-programs/undergraduate-programs/bachelors-degrees-labor-employment-relations/transferring-0">https://smlr.rutgers.edu/academic-programs/undergraduate-programs/bachelors-degrees-labor-employment-relations/transferring-0</a>	SMLR
Each undergraduate program has allowances for maximum transfer credits toward major requirements	SC&I

Table 1B: Sample Inventory of Rutgers–New Brunswick Transfer Institutional Practices

Description	Admissions & Outreach	Financial Aid	Comm & Marketing	Academic Programming	Student Success	Training
SAS full time transfer students are required to enroll in STS courses				x	x	
SAS transfer students can be nominated to joint Tau Sigma Honor Society				x	x	
SAS and SOE provide a peer transfer mentor program					x	x
SAS has transfer dedicated Instagram and Facebook groups			x		x	
All transfer students can access dedicated NSO sessions					x	
SAS has dedicated transfer@sas email address			x			
SAS has dedicated transfersyllabus@sas email (for faculty evaluations)				x		
SAS offers remote and in person STAR Days (remote to serve OOS students)				x		
SAS offers dedicated Live Chat hours post summer STAR Days				x		
All schools participate in EM Webinars for Accepted Transfer Students	x					

All schools participate in EM Open House with dedicated transfer sessions	x					
SC&I performs transfer credit evaluations for courses in COM, JMS, ITI, and DCIM					x	
SC&I reserves seats for incoming transfer enrollments					x	
SC&I permits new, incoming transfer students to apply to undergraduate majors if admission requirements satisfied	x					
SC&I participates as Living-Learning Transfer Knights section				x	x	
SC&I participation in NB units' transfer advising and orientation events				x	x	
SC&I Host undergraduate info sessions (include events in STS passport)	x		x	x	x	
SMLR holds seats for incoming transfer students					x	
SMLR participates in SAS STAR days for incoming transfer students				x	x	
SMLR has targeted financial aid for out of state students		x				
SMLR has virtual evening advising hours & evening STAR sessions					x	
SMLR's degree program is a degree-completion program focused on transfer student success					x	

## Major Recommendation I: Develop a public-facing version of RU Transfer as a pre-matriculation resource for student self-assessment of credit review.

*A joint convening of faculty with this Committee for an open and ongoing discussion (1) to share transfer evaluation processes and (2) to understand the review and decision-making of credit applied, should become a common institutional practice*, in the context of the Academic Master Plan. It is our responsibility to create visible, written, and consistent transfer review processes for Rutgers–New Brunswick. Developing coordinated, evidence-based, standardized transfer policies and consistent metrics for credit review across NB schools will allow for greater student access and alleviate some administrative burden, streamlining time and effort in the transfer evaluation process. As [RU Transfer](#) requires a Rutgers NetID and currently only supports admitted, enrolling, and current Rutgers–New Brunswick students, a public-facing version of the database can help to facilitate an expedited, pre-matriculation snapshot of credit mobility - defined as students being able to carry or transfer credit from a collective of high impact practices and experiences, not limited to digital badging, military training, and workforce and/or work-based learning (Couturier, 2023). While the portal would include course equivalencies, it should also include student-facing baseline data (e.g., admissions requirements, cost, financial aid, academic advising). Leveraging the automated processes of RU Transfer will also increase efficiency and likely decrease completion time for the credit evaluation process, which allows students to make accelerated, informed decisions (learner agency) about course scheduling, etc. For example, for the School of Engineering (SOE), about 95-99% of its NJ Transfer course requests for evaluation are non-engineering courses. An automated update of non-SOE applied credits would mitigate time and effort of SOE's Office of Academic Services for review of these courses; however, RU-NB would need to ensure capacity to support efforts to map out how new and expanded technologies interact with the existing RU Transfer. Similarly, while a NJCC transfer-in student would have core courses completed (see more in Lampitt Law below), a 4-4 or Out-Of-State transfer is often 9-12 credits short of completing the core, even if the sending institution is an AAU or Big Ten peer, which not only delays graduation, but potentially penalizes non-NJCC transfers, both in- and out-of-state.

## Lampitt Law – New Jersey Comprehensive State-Wide Transfer Agreement

Streamlined transfer information accessibility reiterates the alignment with the 2008 Lampitt Law enacted legislation via the [NJ State-Wide Transfer Agreement](#) adopted by the New Jersey Presidents' Council, which its purpose states, "Seamless transition from public associate to public baccalaureate degree programs and supporting the successful acquisition of baccalaureate degrees by transfer students." Further, there is some misperception that exists between transfers that have earned an A.A. or A.S. degree (Subpart A) versus those students that may be transferring credit only (Subpart B) – an assumption that the general principles do not apply to the latter; however, **Subpart B. TRANSFER – without an A.A. or A.S. degree**, *Corollary Principle B. 4* states, "Corollary Principles A. 3. through A. 10 above shall apply." Specifically, the A Principles state,

"4. 100 and 200 level courses at the community college that deal with the same subject matter as 100 and 200 level courses at the four-year institutions will be accepted as equivalent.

9. All decisions made with respect to the transfer process shall be based on the principle of equivalence of expectations and requirements for native and transfer students."

With updated transfer policy recommendations from MSCHE, and the existing policies articulated through the Lampitt legislation, RU–NB must continue to ensure its policies and practices align with continuous improvement of transfer and credit mobility. This also mitigates any contestation from NJCC's or requests to convene a President's Council "Special Transfer Agreement Panel," as outlined in **Subpart G. – Institutional Resolution of Disputes Regarding the Agreement**. Related to MSCHE Policies, Guidelines, and Procedures for Transfer of Credit, providing evidence-based rationale for any rejection of credits is a key step in elevating transparent institutional data for improved transfer outcomes and credit mobility. Directly related to Major Recommendation #1 – Subparts A, B, C, D, and F in the **Executive Summary**, recommended practices from the Beyond Transfer Policy Advisory Board (PAB) to improve credit evaluation that benefit both institutional and student stakeholders include assessing:

- How long does credit evaluation take from start to finish, and in relation to when students use this information for course registration? Does delayed evaluation impact course availability?
- Are the reasons for specific non-transferrable credit applicability documented and communicated back to prospective students? Are there significant differences when reviewed by sending institution?

## New Jersey Transfer

To date, Rutgers University–New Brunswick, with nine NB school drop-down options, relies on NJ Transfer. This is a web-based, data-information system designed to facilitate the course transfer process of transferring courses from a community college to a four-year college or university in New Jersey (defined as vertical transfer). It works to promote transfer success by taking the "guesswork" out of transfer course review, generating an unofficial self-analysis of their previously earned credit. Funded by the New Jersey Presidents' Council and maintained by the New Jersey Statewide Transfer Initiative, NJ Transfer facilitates an unofficial course equivalency review for: (1) a prospective student that is enrolled or planning on enrolling in a community college before transferring to a New Jersey four-year college or university; and/or (2) an individual that advises or counsels potential or current community college students. However, there are some limitations of NJ Transfer that decrease opportunities direct to Rutgers–New Brunswick <sup>3</sup>as 'Transfer-To' institutions. First, there is no opportunity for lateral transfer analysis (e.g., 4-Year to 4-Year), and is only reflective of the traditional, vertical transfer from a 2-Year NJCC (NJ Community Colleges) to 4-Year NJ institution; as a result, neither out-of-state students, nor 4-Year enrolled NJ undergraduates, have a tool to initiate a self-analysis of transfer courses to Rutgers–New Brunswick. Even some current NB transfers have expressed difficulty in general correspondence about campus-specific queries after navigating the NJ Transfer portal, suggesting it may be more

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<sup>3</sup> As of Spring 2023, neither Princeton University, nor Stevens Institute of Technology are aligned with NJ Transfer.

beneficial to see what requirements are necessary for program transfer to make the credit input process more specific, and potentially less overwhelming, prior to the evaluation result. Also, as a third-party platform, there is some essential information linked to Rutgers sites that is outdated on the NJ Transfer site. For example, in outlining the [Transfer Credit Appeal Process](#) for NJ institutions, the access links for SEBS, SMLR, and EJB have “404 Error – Non-Working Page” codes. Published, visible access to this information is required per **Subpart F. – Student Appeal Process** of the NJ Comprehensive State-Wide Transfer Agreement, which is also hosted on the NJ Transfer website. Lastly, while NJ Transfer has streamlined its Annual Program Review Process, effective June 2022, it still heavily relies on manual processes to be input by RU–NB school-level advising staff. Despite NB school requests to automate some processes, NJ Transfer has acknowledged that there are capacity and infrastructure limitations, and even had to expand its servers in Fall 2021 to continue to accommodate data warehouse storage for both Rutgers–New Brunswick and Rutgers–Newark. As a manual process, for example, NJ Transfer currently houses Rutgers–New Brunswick update and change requests as publicly accessible information via a Shared Google Drive — a folder stores *Transfer Program (RTP) Review*, *Catalog Changes Report*, and *Course Equivalency Change Request documents* (Appendix C). As an automated best practice consider Rowan University’s Transfer Equivalency Self-Service Report (Appendix D), which allows student self-analysis up to five academic terms in advance of prospective enrollment and generates a full Degree Audit to with distribution of credit organized, as applicable, in relation to its General Education Core and Seminar/Intensive Requirements, Major Requirements, Non-Program Requirements, Free Electives, and Optional Minor. The last section of the Rowan Audit includes a “Course Equivalencies” section, organized parallel to transcript format, and indicating the number of credit hours to be applied to each equivalency. Comparably, Degree Navigator, Rutgers’ degree audit and advising system, would not be able to handle the volume that would be generated with parallel permissions.

#### Comparative Evaluation Processes: Big Ten Academic Alliance

As Big Ten parallels, Indiana, Michigan, and Michigan State (Transfer MSU and the MI Transfer Network) use state-wide commissions, comparable to the NJ Transfer portal, but the systems are more automated. Similarly, Illinois, Ohio, Minnesota, and Wisconsin all have [state-wide licensing agreements](#) with Transferology, an equivalency database system that engages both students earning two-year degrees OOS, as well as the students attending a 4-year in another state. Other Big Ten users of Transferology include Iowa, Iowa State, Ohio State, Minnesota, Nebraska, Wisconsin, with the UW System using Transferology via [Transfer Wisconsin](#). Further, Wisconsin’s Transfer Transition Programs has a Credit Evaluation Services Team in its the Office of the Registrar for official UG transfer eval, completed prior to orientation, advising, and registration (SAS’ dedicated e-mail for transfer syllabus review developed during pandemic is a parallel practice). For Northwestern credit evaluation is initiated once admitted, by their Office of the Registrar; only their McCormick School of Engineering & Applied Science requires STEM review by respective academic department (available via Credit Policies & Exclusions/Non-Transferrable). Similarly, while Illinois uses Transferology, Illinois’ [Transfer Handbook](#) links all its individual School/College transfer guides to its Admissions website, as well its [Transfer Guide](#) a planning tool that allows students to discover pre-requisite course and GPA requirements, necessary application materials and term availability for each program of study. Maryland ([Transfer Course Database Services](#)), Penn State ([LionPATH](#)), and Purdue ([Purdue - Interpreting Transfer Credit](#)) all use homegrown database systems that serve as models for transitioning RU Transfer public-facing. Further, at Purdue, its homegrown system provides a Transfer Credit Report to Transfer Applicants when they are admitted, published as a “Decision” in its Admissions Application Portal. Applicants can use this information prior to their acceptance of offer of admission, which processes transcript evaluations within days of receipt, and at peak times, within two weeks.

### Comparative Evaluation Processes: AAU-Association of American Universities

[ASSIST - California State-Wide Student Transfer Info System](#) – is the official repository for California state-wide course articulation. Review of its structure presents *an opportunity for RU-NB units to record academic departments' determination of specific equivalents of elective major or minor credits, or general degree credits*. There is also an opportunity to *provide a self-service credit evaluation for prospective, applied, and admitted transfers to aid in decision-making as an online tool for non-NJCC (out-of-state transfer-in) beyond NJ Transfer to select transferable coursework at current institutions*.

### Comparative Evaluation Processes: Aspirant Peer Institutions

Kansas State has its [K-State Transfer Equivalency](#). The Transfer Pathways portal automates course equivalency evaluations. This includes DirectLink, an initiative with Kansas community colleges where students receive recognition for achievements made while completing AA/AAS and provided with curriculum sequence information to guide them through the most efficient and effective timeline to bachelor's degree attainment). The K-State Transfer Credit Policy also clearly outlines the process for the awarding of credit, course equivalencies already posted by its Office of Recruitment and Admissions, limitations of transferability, credit appeals processes, and additional credit-awarding options. K-State also provides a K-State Step-By-Step Transfer Guide. The University of Houston's Adult Admissions Program provides but an accessible [UH Transfer Credit Estimator](#) and [UH Undergraduate Transfer Credit Petition Form](#). Further, UH is a participant in the [Texas Course Common Numbering System](#) (TCCNS), a state-wide cooperative effort to facilitate transfer of freshman- and sophomore-level general academic courses. TCCNS facilitates a shared, uniform set of course designations for students and advisors to determine transfer equivalency and degree applicability. Lastly, the University of Georgia hosts a [UGA Transfer Equivalency Search](#), but only includes a database for previously evaluated and admitted credits. <https://www.k-state.edu/admissions/undergrad/manhattan/apply/transfer/guide.html>

In review against other comparable systems, and to ensure we leverage and position RU–NB for anticipated increased volume of transfer enrollment, a public-facing enterprise would increase access and transparency for credit equivalency review and allow Rutgers University–New Brunswick to remain preeminent in its recruitment and retention of students. A retention strategy includes *streamlining our internal Rutgers school-to-school transfer processes within the RU Transfer portal*. Managed by University Enterprise Services (UES), there is a web-based [RU School-To-School Transfer Application Tool](#) that directs prospective transfers to the respective New Brunswick schools' transfer advising sites; however, the RU–NB School of Arts and Sciences, School of Environmental and Biological Sciences, School of Management and Labor Relations, Rutgers Business School, and Edward J. Bloustein School of Planning and Public Policy all redirect back to the UES RU School-To-School Transfer Tool in a cyclical process. Expansion of RU Transfer also presents an opportunity to align with the traffic against the NCAA Transfer Portal needs, which operates with continued advanced and real-time aspects (e.g., data, notifications, etc.); with a delayed response, a continued lag in review exists as a barrier for student-athlete recruitment and retention (post-matriculation), especially Out-Of-State (OOS) student-athletes, in relation to NCAA *40/60/80 Progress Towards Degree and Academic Progress Rate (APR) Benchmarks*; this contributes to student-athlete attrition, which may increase lateral transfer from Rutgers–NB

### Pre-Transfer Advising: Big Ten Academic Alliance

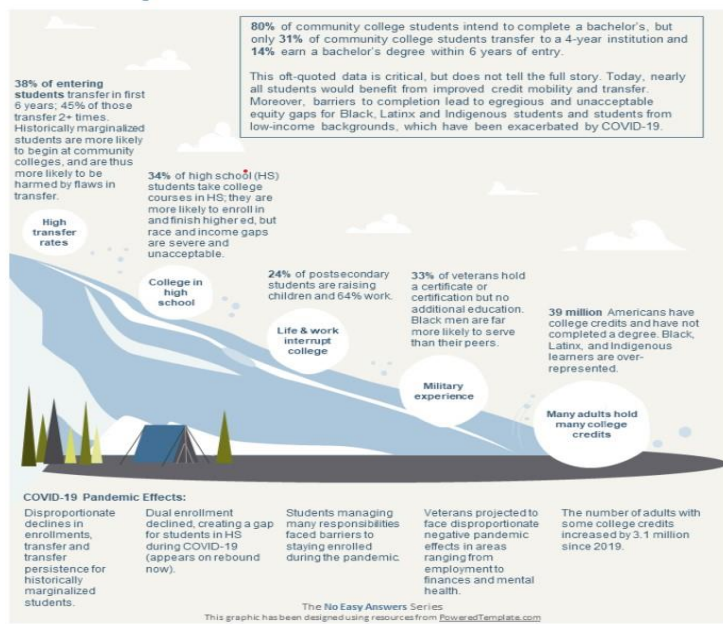
To date, SAS, SOE, SEBS, and RBS review some same 2-year courses differently, making it difficult for prospective transfer-in (or sending institution advising staff) to know degree-applicability prior to enrollment; however, some SAS departments (e.g., Math, Computer Science, and Writing) have equivalencies that could be scaled. Aligned with a public-facing portal, Rutgers University–New Brunswick has an opportunity to *deploy a Pre-Transfer advising model to assist with earlier review*. As a Big Ten comparison, the University [of Maryland's Pre-Transfer Advising](#) is structured as a dedicated effort for pre-transfer support, including prospective student advising appointments, information sessions, drop-in

advising, and social media engagement via its [@umdpretransfer](#) handle. As another Big Ten example, while Wisconsin does not pre-equate courses (but relies on Transferology), it does disseminate Pre-Transfer Advising Resources information for its 11 respective schools and colleges, to include any school-specific process. UW also has an [Undergraduate Transfer Credit Advisory Group](#) (UTCAG) to assist in some of this review. The UTCAG, which meets monthly, has representation from all its schools and the Office of the Registrar (like RU–NB’s Transfer Advisory Council), but also includes Institutional Research, Academic Planning, First Year Experience, and its General Education Committee. Its purpose is to increase information sharing between the curricular units on its campus and the business service units around the articulation of undergraduate transfer credits, including how they meet degree requirements, process improvement efforts, and other administrative practices. The intended goal is for the UTCAG’s efforts to (1) improve service and communication to the UW-Madison community, (2) increase efficiency in granting equivalencies for test scores and prior coursework, and (3) improve academic planning tools for prospective students that help support student progress in timely undergraduate degree completion.

Our goal for all Rutgers students is degree completion, but related to transfer, students who transfer with fewer credits are less likely to persist and achieve degree completion. Consider this Policy Advisory Board data point illustrated in Figure 1 – nationally, 38% of all first-time students transfer institutions within their first six years of enrollment; of those that transfer, 45% change institutions at least two or more times, thus, Rutgers–New Brunswick should consider relying on internal data with consideration of federal or state-level requirements to guide reporting of transfer outcomes, and must *examine localized, disaggregate trends (upward/vertical, lateral, reverse) related to its “transfer-in” cohorts and the sending institutions* – with Middlesex College, Raritan Valley (RVCC), Brookdale, Union County, and Bergen Community College as RU–NB’s top five sending institutions for Fall 2022, but also including significant in-state lateral transfer from Montclair State, Rowan, Stockton, the College of New Jersey, Kean, and NJIT. Post-COVID student mobility and engagement is different than what pre-COVID data trends may illustrate, including the precipitous drop in national community college enrollments over the last 3-5 years, and varies between the undergraduate schools at RU–NB.

Figure 1: Beyond Transfer Policy Advisory Board Credit Mobility, Transfer, and Equity Trajectory

**If the traditional, full-time, uninterrupted approach to postsecondary education can’t change enough to work for today’s students, improvements in credit mobility and transfer must step in to fill the void.**



(Data Sources: National Student Clearinghouse, US Department of Education, Community College Research Center, Monaghan and Attewell, and Aspen Institute)

"Leaders need to invest their time, influence, and resources to enable the necessary internal processes, infrastructure and capacity to get this fundamental information" (LaViolet, 2021), and allow for stakeholder data engagement for continuous improvement. Consider the nationally recognized [ADVANCE](#) partnership between George Mason University and Northern Virginia Community College (NOVA) with NOVA having the third largest community college enrollment in the U.S. with over 80,000 students. Since 2017, with Mason as its top transfer institution (3,474 upward transfers in 2021-22), the two institutions worked to engage in their transfer work by building a transfer model with cost and revenue projections to mitigate any financial disincentives and build their service to the Northern Virginia community. Parallel to NJ's Comprehensive State-Wide Transfer Agreement, 60 credits are the transfer-in maximum for ADVANCE. Per GMU ADVANCE data, success outcomes include 92% of ADVANCE transfers graduate from Mason in less than two years, two semesters earlier than Mason's non-ADVANCE transfer-in, with an 83% retention rate noted for Fall 2020, compared to a 61% national average. In relation to the Scarlet Guarantee, 39% of ADVANCE transfer-in are Pell-eligible, with 60% first-generation (compared to 40% for the RU-NB Fall 2022 transfer-in cohort).

Further, qualitative assessment is key to analyzing data outcomes and relation to transfer policy and practices and strengthening transfer receptive and inclusive culture.<sup>i</sup> It is important to understand the identities of our transfer students. Disaggregate transfer data of key performance indicators (e.g., Demographics, Degree Completion, Mobility) to ensure an equitable transfer lens. For example, outlined in Figure 1, Beyond Transfer highlights approximately 80% of students that enter a community college express their intent towards vertical transfer (4-Year), but only 14% of those students earn a bachelor's within six years; however, this is only a preliminary, aggregate-level analysis that could skew the inequities that exist. Examining that same 14% subset of degree-completing students by race and ethnicity, Black students account for 10% and Latinx 13%. By income, lower-income students only account for 9% of degree attainment (Couturier, 2023). Specific to Rutgers–New Brunswick, Enrollment Management data shows increased successive enrollment of Underrepresented Minority (URM) transfers over the last four academic years, with URM accounting for 24.1% of the transfer-in cohort in 2019 and continued increase at 29.2% for Fall 2022, with 33% Pell-eligible. Taking a deeper dive (Tables 2A/B/C on Page 14) into our institutional data over this same Fall 2019 to Fall 2022 period, our URM transfer-in percentages exceed our incoming, first-year enrollment of URM students. Comparably, consider access and student service delivery; Pell-eligible transfer-in enrollment is outpacing first-year Pell-eligible, with transfer-in reflecting 32.95% versus first-year rates at 24.81% for Fall 2022. The One Stop Student Services Center, which coordinates frontline service of financial aid, student accounting, registration, and admissions functions, reports that the percentage of transfer service needs (24%) exceed the percentage of transfer enrollment (19%), when compared to Rutgers–New Brunswick enrollment overall in Fall 2022. Streamlined and aligned efforts and communication position the institution to continue to support non-academic transfer needs, especially in review of 5-Year trend data and projected enrollment increase for transfer-in populations. As the Clearinghouse *Transfer Progress Report* summarizes, "Institutions and policymakers must focus on the needs of lower students and the barriers they face if higher education is to increase equity in [transfer] student access and success."

Table 2A: Rutgers–New Brunswick Enrollment Management Data: Incoming First-Year URM Cohort

Rutgers–New Brunswick Incoming First-Years  
by URM Status, Fall 2018 to Fall 2022

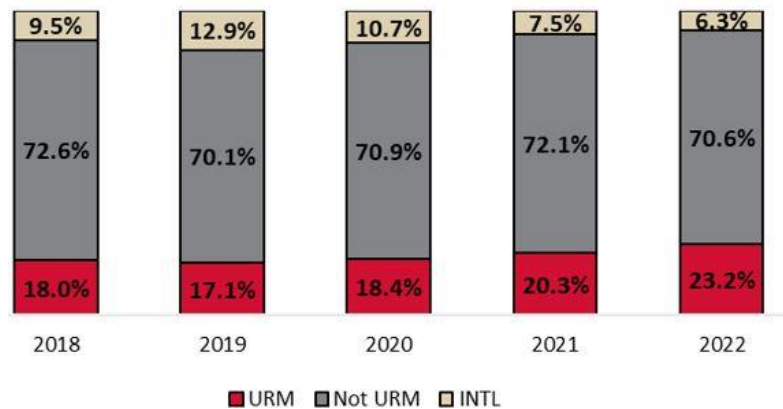


Table 2B: Rutgers–New Brunswick Enrollment Management Data: Incoming Transfer-In URM Cohort

Rutgers–New Brunswick Incoming Transfers  
by URM Status, Fall 2018 to Fall 2022

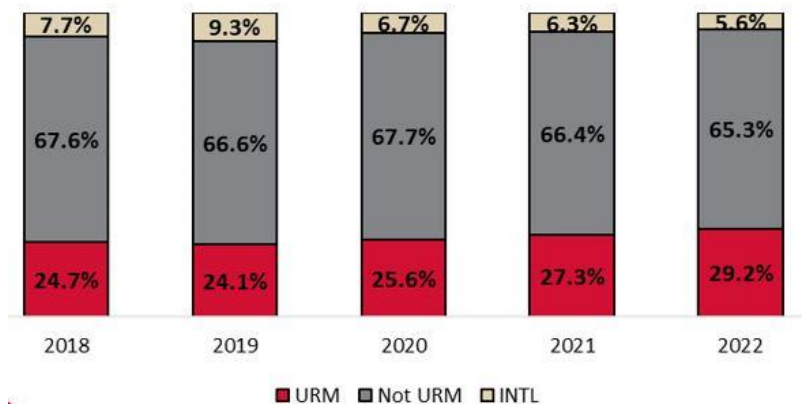
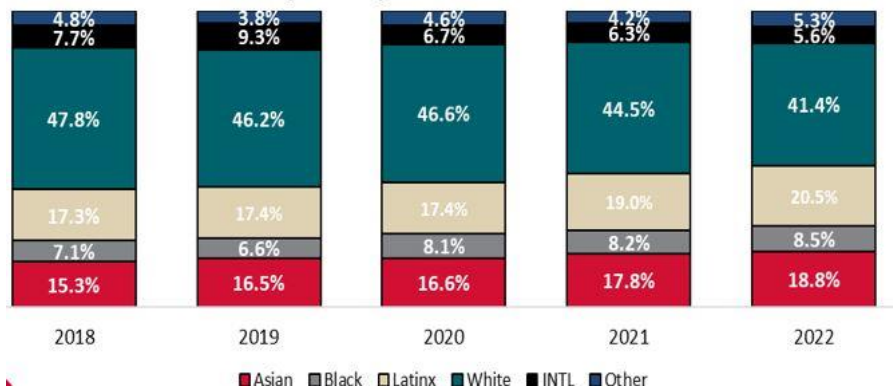


Table 2C: Rutgers–New Brunswick Enrollment Management Data: Incoming Transfers by Ethnicity

Rutgers–New Brunswick Incoming Transfers  
by Ethnicity, Fall 2018 to Fall 2022



Utilizing the transfer data-needs assessment (Table 3, Pages 15-17), Rutgers–New Brunswick has the opportunity to increase its infrastructure, design, and delivery of transitional support adapted to competing needs of transfer students and streamline resource visibility and information, and further examining the intersecting identities of our transfer-in cohort. Identifying transfer and credit mobility needs through data assessment allows the institution to better measure its student outcomes related to transfer success and have a more intrinsic lens of transfer intersections that may not be equitably supported through completion pathways. “The most successful transfer partnerships often rely on data to make a case for investment, set strategic direction, and create a culture of continuous improvement” (LaViolet, 2021). Illustrating degree progress to our stakeholders highlights transfer success aligned with our institutional mission.

Table 3: Rutgers–New Brunswick Transfer Credit and Mobility Data Needs-Assessment

Key Performance Indicators

DEMOGRAPHICS
<ul style="list-style-type: none"> <li>Parallel to Integrated Postsecondary Education Data System (IPEDS) key data collection on annual student transfer survey components, disaggregate to include: <ul style="list-style-type: none"> <li>Census Count, n=</li> <li>Sending Institution Distribution <ul style="list-style-type: none"> <li>Also, what are the three highest transfer volume academic programs of intent?</li> </ul> </li> <li>Transfer-In Cohort Incoming GPA <ul style="list-style-type: none"> <li>Benchmark against First-Time In College (FTIC) post- 4-terms of completion (Junior status)</li> </ul> </li> <li>2-Year (upward) <i>versus</i> 4-Year Transfer (lateral)</li> <li>In-State <i>versus</i> Out-Of-State</li> <li>Residential <i>versus</i> Commuter</li> <li>NB School Distribution <ul style="list-style-type: none"> <li>Academic Program(s)</li> </ul> </li> <li>Matriculating Class Distribution</li> <li>Gender</li> <li>Intersecting Subpopulation % - Cross-tabulation <ul style="list-style-type: none"> <li>First-Generation</li> <li>Underrepresented Minorities (URM)</li> <li>Pell-Eligible, EOF (Educational Opportunity Fund)</li> <li>Student-Athlete</li> <li>Adult Learners, Non-Traditional<sup>4</sup></li> <li>Military-Affiliated</li> </ul> </li> </ul> </li> <li>How many incoming transfers are matriculating with an Associates <i>versus</i> credits only?</li> </ul>
ACADEMIC PROGRESS AND DEGREE COMPLETION
<ul style="list-style-type: none"> <li>Term and Cumulative GPA Average</li> <li>Term % “Good Academic Standing” – 2.0+ GPA</li> <li>Transfer Attendance Status: Non-First-Time Full-Time (NFTFT) <i>versus</i> Part-Time (NFTPT) Enrollment <ul style="list-style-type: none"> <li>% Non-Matriculating</li> </ul> </li> <li>Fall-To-Fall NFTFT Retention Rate</li> </ul>

<sup>4</sup> At Rutgers–New Brunswick, a nontraditional student is defined as an undergraduate student enrolled in a degree-granting school and met at least one of the following criteria: Has been out of HS for 4+ years at the time of first undergraduate registration; Has had at least a 2-year interruption in their undergraduate education; Is a veteran or active duty military service member; Is enrolled in a RUNB off-campus or online bachelor’s degree completion program; Is pursuing post-baccalaureate studies, primarily in undergraduate courses; Must take less than 12 credits due to significant non-academic commitments; Is a parent, pregnant or legal guardian; Is married or in a domestic partnership; Is financially emancipated.

<ul style="list-style-type: none"> <li>• Credit Momentum<sup>ii</sup>: Average Credit Hour Term Enrollment?</li> <li>• How are students performing in specific, subsequent courses following transfer-in? <ul style="list-style-type: none"> <li>◦ If struggling, have there been considerations to bridge gaps? For example, accept transfer credit while offering co-requisite support.</li> </ul> </li> <li>• Gateway/Core Math and English Completion <ul style="list-style-type: none"> <li>◦ Review of gateway/core courses with high percentage(s) of enrolled transfers with corresponding high DFWI.</li> </ul> </li> <li>• Graduation Rates (GR): How many NB transfer students graduate with a bachelors? <ul style="list-style-type: none"> <li>◦ IPEDS <a href="#">Outcome Measures</a> (OM) examines 4, 6, and 8-Year completion reporting<sup>iii</sup></li> <li>◦ By graduation rate, what are NB's top five sending institutions?</li> </ul> </li> <li>• Total Credits to Degree average? NB average Transfer time to degree completion? Mean average deviation? <ul style="list-style-type: none"> <li>◦ Benchmark against Direct Entry NB</li> </ul> </li> <li>• % in High Impact Practices (e.g., undergraduate research, internships, etc.)</li> </ul>
<b>MOBILITY AND TRANSFER OUT<sup>5</sup></b>
<ul style="list-style-type: none"> <li>• "Swirling Pathways" – How many Transfer-in (NB) initiate a reverse or lateral transfer <u>from</u> NB?</li> <li>• How many native NB students initiate a transfer? <ul style="list-style-type: none"> <li>◦ School-To-School <i>versus</i> Lateral/External</li> </ul> </li> </ul>
<b>AFFORDABILITY</b>
<ul style="list-style-type: none"> <li>• Income Distribution (e.g., Pell-Eligible vs Non-Pell, Scarlet Guarantee)</li> <li>• Average cost to degree completion? Mean average deviation? <ul style="list-style-type: none"> <li>◦ In-State <i>versus</i> Out-Of-State</li> </ul> </li> <li>• Beginning with AY (Academic Year) 22-23, what percentage of transfer students were Scarlet Guarantee eligible? <ul style="list-style-type: none"> <li>◦ Benchmark against 15+ To Finish credit momentum</li> </ul> </li> </ul>
<b>ANALYSIS</b>
<ul style="list-style-type: none"> <li>• What transfer student data is collected into CRM or SIS?</li> <li>• Are there quality control mechanisms in place to ensure transfer student data is being reliably captured?</li> <li>• What sources of data (e.g., Admissions, Financial Aid, Registrar) need to be accessed and/or integrated to perform desired assessments?</li> <li>• How many NB graduates rely on community college transfer pathways?</li> <li>• Are there inequities by race and ethnicity, income, or other student subpopulations?</li> <li>• What percentage of respective NB school enrollments and completions relies on transfer pathways?</li> <li>• Is NB committed to equitable acceptance and application of pass/fail grades for major program requirements?</li> <li>• What are the policies that lead students to not matriculate or persist at Rutgers-NB?</li> <li>• Is there state-wide enrollment data on transfer admits that each institution can review against where the student AC'd (Admit Coming) and enrolled if not their institution?</li> <li>• Opportunity to utilize all data to create an Info-graphic Snapshot, like the Tackling Transfer Report's <a href="#">Appendix B - Sample Report</a></li> <li>• In review of persistence, retention, and degree completion data, is there a way to identify transfer-receptive majors? For example, for dual credit, there is inconsistency in how RU–NB assigns credit/course equivalency. If the enrollment projections align with admittance of more out of state students, we can't hold those transfers to a different standard than a NJ student.</li> </ul>

<sup>5</sup> Per IPEDS-Integrated Postsecondary Education Data System, any entering student who does not earn an award (i.e., certificate, associate degree, or bachelor's degree), leaves the institution, and subsequently enrolls in another institution is reported as a transfer-out student).

- Foundation for dual admissions programs, to integrate transfer support practices and establish seamless transfer.
- American Association of Colleges & U [Campus Change Processes and Action Steps for Advancing Transfer Student Success<sup>iv</sup>](#)
- Website Traffic for <https://admissions.rutgers.edu/transfer-students>
- How do we convert student experiences into data?
  - Focus Groups, Surveys

### Big Ten Academic Alliance Peer-Group

*Alignment with the Big Ten Academic Alliance (BTAA) to create a Peer-Group would work to “share best practices, build trust, and develop innovative solutions to (shared) challenges,”* which aligns with the BTAA’s serving the common good through shared expertise and leveraging of campus resources. Work from the Peer-Group could lead to creating a Big Ten Transfer Equivalency Portal that could be hosted on the BTAA [Resources for - Students](#) site, which would help address some of the Rutgers–New Brunswick challenges of not having a breadth of pre-matriculation (self-) analysis credit review data for Out-Of-State students. For example, as a Big Ten promising practice for strengthening upward transfer pathways, we could explore Ohio State’s [Path2BSN Network](#), a network of seven partner 2-year institutions throughout Ohio working towards seamless transfer pathways to broaden access for degree attainment to OSU’s online Registered Nursing and Bachelor of Science in Nursing program.

## Major Recommendation II: Increase the available direct transfer-in resources to increase transfer access and affordability.

While the Rutgers–New Brunswick Scarlet Guarantee (SG) does provide last-dollar supplemental support for Pell-eligible transfer students, additional direct aid, including scholarships for non-eligible (SG) students would address issues of affordability, especially given the increase of tuition and fees related to upward transfer from a 2-Year to 4-Year institution. 31% of the Fall 2022 transfer-in cohort were Pell-eligible. Based on two consecutive years of record transfer enrollment for Rutgers University–New Brunswick, there is an increased volume of financial need to not only attract, but better minimize transfer attrition and lateral or reverse transfer. Further, *establishing a stronger scholarship marketing process, in anticipation of increased transfer student enrollment*, would increase visibility and merit competitiveness while also championing RU–NB’s receptivity for successful transfer pathways. Parallel to RU–NB’s Scarlet Guarantee, Duquesne University is launching a new Summer 2023 financial assistance initiative to attract and target transfer students. With an average transfer enrollment of approximately 250 students annually, the University program will match any funds a transfer receives from the Pennsylvania State Grant Program, which varies from \$500 to \$5,750 annually (Weismann, 2023), up to \$20,400. The [Duquesne University’s PA State Grant-Transfer Matching Program](#) is a broader transfer recruitment effort, led by Enrollment Management and its Offices of Admissions and Financial Aid, which also provides [Transfer Academic Scholarships](#) based on (1) credit evaluation completion, (2) program of study, and (3) GPA. As a Phi Theta Kappa (PTK) International College Honor Society: Transfer Honor Roll Institution, Duquesne is a nationally recognized leader in transfer support and success pathways, with its Senior Vice President for Enrollment Management noting, “Our PA State Grant-Matching Program offers a practical financial resource to help [transfer] students and families pursue that education at Duquesne University.”

Also, *providing a fixed, at scale number of guaranteed housing allocations for transfer-in cohort would align with sustaining transfer community and engagement*, as only 33% of the RU –NB transfer-in cohort even submitted an on-campus-housing application. In a recent *March 2023 Voices of Diversity: Transfer Student Stories* panel led by SAS, one RU–NB transfer commuter noted that she wanted the opportunity to engage and embed more in the campus community, specifically with student organizations; her travel back home is late night by NJ Transit, and her safety is a personal concern that negates opportunities to remain on campus. Another opportunity is to *examine footprint capacity to allocate a dedicated space(s) for transfer students*, parallel to the Commuter Lounge within the Busch Student Center. For example,

Portland State's Transfer & Returning Student Resource Center (TRSRC) is a robust entity that provides student advising, coordinates transfer-focused programming and events, and connects its prospective, returning, and enrolled transfer students to their respective pathway plan. Also, TRSRC partners with the [Self Enhancement Organization](#) to strengthen its pipeline for BIPOC adult learners, which includes the development of a system for financial access, relevant and accelerated curricula, and holistic student support. Similarly, Wisconsin's [Transfer Engagement Center](#) provides a dedicated space for transfer students, and includes GoPrint Stations, drop-in tutoring aligned with Tutoring Services, monthly lunches for specific communities (e.g., Returning Adult Students), and a coffee/tea/snack station. Comparably, UCLA's [Transfer Student Center](#) organizes campus-wide transfer programming, provides a UCLA Transfer Admission Guide outlining transfer success resources, social media communication, and alignment with UCLA's Registrar's Office and linked with academic advising offices, parallel to the aforementioned recommendations for RU Transfer. As a low-hanging opportunity, *Rutgers–New Brunswick can expand its existing RU-NB Admissions Transfer Student Handout, aligned with the Big Ten Academic Alliance Undergraduate Admissions Info for Students* for prospective transfer-in. Additional best practice design elements modeled by the University of Georgia's [UGA Transfer Planning Guide](#) could also be considered, which offers a [Degree Progress/Audit Report](#) linked with academic advising offices, parallel to the aforementioned recommendations for RU Transfer.

Lastly, a consideration is to *increase fiscal support and outreach visibility for Tau Sigma* ([Gamma Xi Chapter - Transfer](#)) National Honor Society, which recognizes and promotes the academic excellence and involvement of transfer students at their transfer-in institution. Currently, the Gamma Xi Chapter Charter is for SAS only, thus, RU–NB offers limited honors opportunities to incoming transfer students outside of SAS. Expanding financial support in a cost per student model for each non-SAS transfer to support chapter operating costs (e.g., mailings, induction ceremony, etc.) would increase chapter visibility and allow for an increase of [membership eligible](#) Rutgers–New Brunswick transfer-ins to participate in this distinctive, merit-based organization.

### **Major Recommendation III: Expand the School of Arts and Sciences (SAS) Students in Transition Seminar (STS) to make it available as an optional offering for all undergraduate, first-year Rutgers–New Brunswick transfers.**

SAS' Students in Transition Seminar (01:090:220) has been noted as a NACADA: The Global Community for Academic Advising 'Model of Excellence' for supporting transfer success for years. The course goal is to assist in students' adjustment to the University and to facilitate successful first-term academic performance during this transition, helping students to navigate the complexities and resources of a large research university. Currently, STS is focused on Design Thinking and charting one's own course at Rutgers, while building a Rutgers network and engaging in community. According to course data provided by SAS' Transfer Center within OAAS (See Tables 3A/B below), from Fall 2021 through Spring 2023 (in progress), 2,880 students successfully enrolled in and completed the STS Seminar. Fall terms saw an average of 1,249 students, while Spring terms had 393 students. Over those terms, 83% of students passed the course (PA grade) while 17% earned no credit (NC grade). These passing/failing rates were consistent across the board for the student population, i.e., those transferring from in-state 2-year, out-of-state 2-year, international, and all other 4-year institutions. Of those who passed the course, their first-term GPA was significantly higher than those who did not pass by 0.500 grade points or more.

Further, in terms of course management and logistics, the SAS Transfer Center has shared that course content is created and managed by the Deans in the SAS Transfer Center. STS is a 10-week course, instructed 100% in-person, limited to 25 students per section, currently staffed by SAS' Office of Advising and Academic Services (OAAS), as well as cross-divisional campus partners, to include 2<sup>nd</sup> Year College Student Affairs (CSA) graduate students, the Registrar, Rutgers Business School, the School of Communication and Information, Recreation, Residence Life, and Compliance & Title IX, and two faculty

teaching major-only sections. In Fall 2022, of 63 sections offered, OAAS taught only 11; staffing the STS is a community effort. Some summary course enrollment and progress data over the last four semesters is captured in Tables 3A/B. Despite STS successes, there are opportunities to support improved course facilitation. For example, while securing classroom space is not an issue, the spaces are often not conducive to the group work that is encouraged within the curriculum. Also, as learned through COVID instruction, a remote environment is not in alignment with the approved course learning goals, and remote synchronous was not effective.

Table 3A: Rutgers–NB SAS Students in Transition Seminar: Fall 2021-Fall 2022 Enrollment

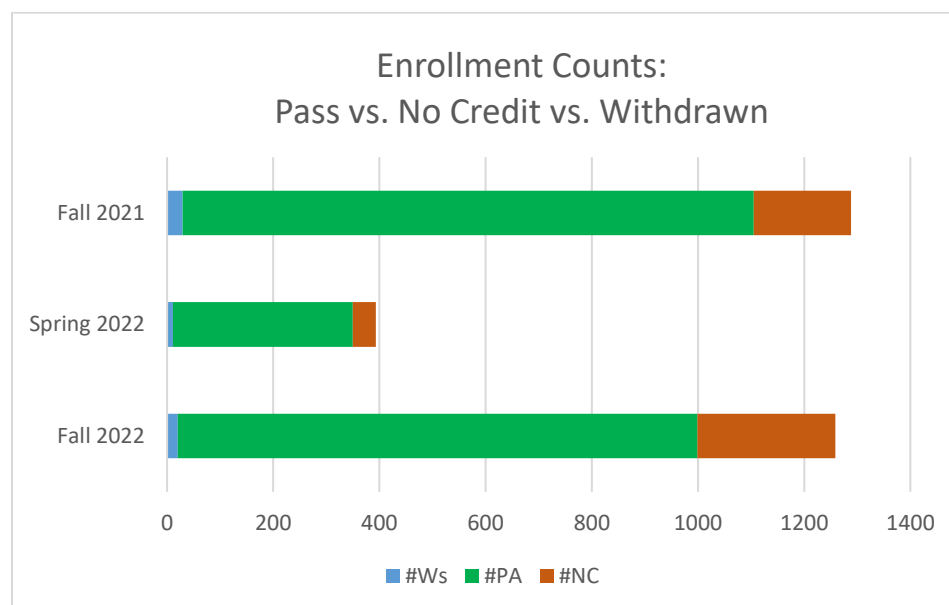
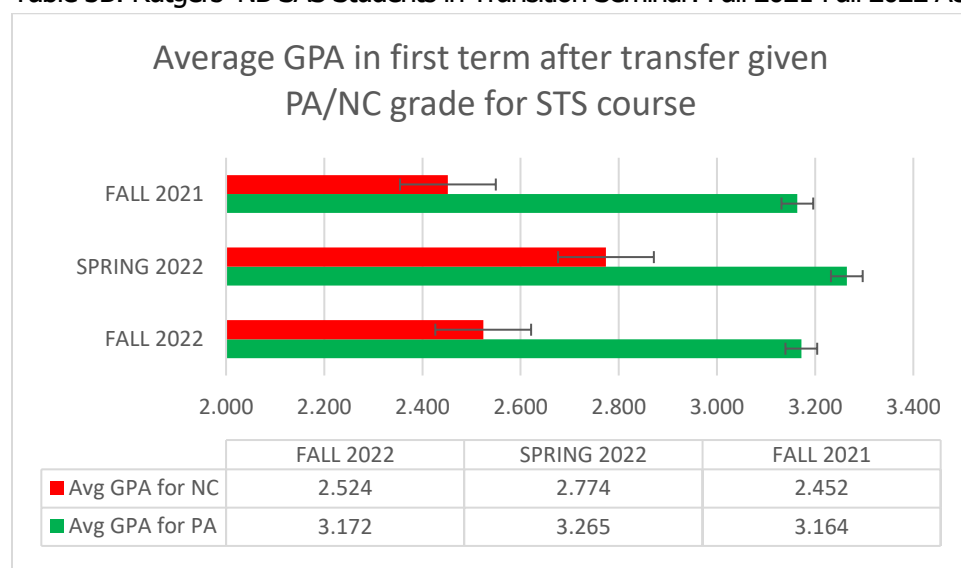


Table 3B: Rutgers–NB SAS Students in Transition Seminar: Fall 2021-Fall 2022 Academic Progress



## CONCLUSION

Transfer is a totality of purposeful experiences. A non-profit leader in advancing teaching, student learning, success, retention, and completion, [The Gardner Institute](#) echoes this thought. The Institute's Foundations of Excellence® (FOE) center on solutions to strengthen the transfer experience that enables institutional transformation to improve transfer-student success and retention through comprehensive, evidence-based, guided self-study, planning, and implementation. Two components of the Institute's FOE include:

1. Faculty, staff, and students engaged in task force assessment, structured planning, and improvement efforts to ensure an institutional plan will have broad support.
2. A "Current Practices Inventory" that provides each task force information about the institution's students, programs, and practices, serving as a source of evidence to evaluate the institution's achievement of each foundational dimensions.

The Institute cites a lack of aspirational strategic vision for an improved transfer experience as a barrier to transfer success. FOE focuses on all aspects of the transfer students' experiences, not just the initial recruitment and enrollment process, the goal to implement the action plan derived from the self-study process. In closing, as an institution, RU–NB's self-study parallels the Institute's model that notes, "inadequate use of assessment findings to promote improvement." Instead, we must leverage our findings to ensure we validate both the voices and experiences of our transfer students, ensuring we address student expectations of the transfer experience. During the *March 2023 Voices of Diversity: Transfer Student Stories*, some broad qualitative feedback provided by the five transfer student panelists about their RU–NB transfer experience includes:

- "It seems the process is heavy on the responsibility of the student and not the university."
- Related to sense of belonging, RU–NB should make transfer involvement and engagement more accessible for mid-year (Spring) and commuter transfers.
- While Rutgers is not overwhelming, the transfer application process **IS**, and is a scary process.
- While SAS has the most transfer-friendly site, it also dominates search engine results, and results in non-SAS transfers exploring SAS-specific transfer resources services they presume to be campus-wide, which raises a concern of how to deploy more equitable outreach and visibility.
- More asset-based language on transfer sites related to 4-year degree completion (Delossantos, et.al, 2023).

While the five aforementioned students represent less than 1% of NB transfers enrolled, consider the research phenomenon of 'transfer shock', coined by John R. Hills (Hills, 1965) as a tendency of transfer students to experience a temporary, initial decline during transition, and a subsequent recovery and improved experience. With transition as a period in-between moments of stability, amplifying the realities and relevancy of 'transfer shock' is an important next step for the Rutgers–New Brunswick campus community and amongst our faculty and staff. Further, the Beyond Transfer PAB challenges institutions to interrogate short-term and long-term financial gains concurrently, which includes institutional integrity and reputational (brand) incentives for improving transfer and credit mobility. Baccalaureate degree programs appear increasingly out of reach for community college students, particularly those enrolled in urban and suburban community colleges, and in transfer-focused community colleges; thus, it becomes increasingly import for RU–NB to continue to strengthen its NJCC partnerships and sustain navigable transfer pathways, as well as continuous improvement strategies for sustaining accessible pathways and retaining transfer-in populations post-matriculation, as Clearinghouse data indicates increased reverse and lateral 4 to 4-Year transfer mobility. Nationally, 90.5% of upward transfer-in and 88% of lateral transfers changed their major, with liberal arts majors accounting for 82% of the change initiation.

According to the most recent March 2023 National Student Clearinghouse Research Center *Transfer and Progress Report*, upward transfer enrollment was the only pathway that continued its decline in Fall 2022 (-7.5%) for students at all income levels, totaling a 14.5% decline since Fall 2020; however, while transfers from lower-income backgrounds (the lowest 40% of U.S. households) had the steepest decline at -10.8% between Fall 2019 and Fall 2022, they still accounted for 23.9% of total transfer enrollment per Fall 2022 data (Causey et.al, 2023). Further disaggregation in the *Transfer and Progress Report*

shows that in-state upward transfer declined at 5.4% nationally. Specific to the state of New Jersey, there was a 3% decrease from 79.7% to 76.7% over the three-year 2019-2022 period of in-state transfer enrollment; overall, NJ transfer enrollment declined 21.7% over this same period, decreasing from 24,562 in 2019, to 19,222 in 2022. This data suggests that RU–NB must continue to strengthen its school-to-school transfer policies. Further, clear, concise, and visible processes for credit review and analysis are a key factor in our outreach and communication to our stakeholders, as the enrollment trends suggest the increased competitiveness in the vertical transfer pipeline for upward mobility. Institutions must “build strategic plans focused on transfer and credit mobility that demonstrate the consistency of plans” (Couturier, 2023) which the recommendations align with institutional mission informed through the Rutgers–New Brunswick Academic Master Plan.

## APPENDIX A

### Members of the Committee on Transfer Policies and Practices

- Robert Ciervo, Assistant Dean, Undergraduate Education/Academic Services, School of Engineering
- Robin Diamond, Assistant Dean and Director of the Transfer Center, School of Arts & Sciences
- Daaimah Etheridge, Assistant Dean for Transfer Programs, School of Environmental and Biological Sciences
- Kevin Ewell, Assistant Dean for Student Services, School of Communication and Information
- Jason A. Moore, Director for Access and Academic Strategy, Undergraduate Education (Chair)
- Carlos Nazario, Director for Recruitment & Outreach, Undergraduate Admissions
- Felicia Norott, Assistant Dean for Juniors, Seniors and School to School Transfers, Rutgers Business School
- Christina Torian, Assistant Dean of Undergraduate Education, Edward J. Bloustein School of Planning and Public Policy
- Paula Voos, Director of Undergraduate Programs, Labor Studies and Employment Relations, School of Management and Labor Relations
- Scott Walker, Executive Director of Academic Services, Rutgers Athletics

## APPENDIX B

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## APPENDIX C

### New Jersey Transfer RTP Transfer Program (RTP) Review Document

Editing Key		NJ Transfer Program Sections	
Course	Strikethrough any removals (replacements can be added in the same cell as long as they are highlighted)	*A	General Requirements
Course	highlight any additions (add a row above or below any row in the appropriate section)	*B	Major Requirements
Course title	use red text to indicate a change in title, please strike through the old title (in the same cell)	*C	Elective Credits
Credit	use blue text to indicate a change in credits, please strike through the old credits (in the same cell)	*D	Graduation Requirements
Additional Requirements	Please review your Contact Person, GPA, and Additional Requirements Section if applicable and bold the text if any alterations are being made		
Programs Not Undergoing Changes	Highlight Spreadsheet Tab Orange		





# APPENDIX D

## Sample: Rowan U. Degree Works Transfer Equivalency Self-Service Report Rowan University DW Banner Environment

### Disclaimer

This audit should be used as a guide only, to help you understand how your transfer classes may equate to classes at Rowan University and how those classes may apply to Rowan University's degree requirements. Course equivalencies and degree requirements are subject to change prior to your first semester at Rowan University. This report is not a promise of admission; students must still apply and satisfy the admission requirements of the program to which they are applying. To receive a formal evaluation of your application and/or transfer credit, please apply through the Office of Admissions. For assistance in interpreting this audit or to report a missing course equivalency, please contact [transferhelp@rowan.edu](mailto:transferhelp@rowan.edu).

### Legend

 Complete	 Complete except for classes in-progress	(T) Transfer Class	* Pre-Requisite Required
 Not Complete	 Nearly complete - see advisor	@ Any course number	

### Degree Audit

Transfer Equivalency Self-Service Worksheet as of 02/07/2023 at 09:36

Level	Undergraduate
Degree	Bachelor of Science
Academic Year	2024-2025
Program	Accounting (BS)
Major	Accounting - UG

<input type="checkbox"/> <b>Degree in Bachelor of Science</b>	Catalog Year: 2024-2025	Credits Required: 120 Credits Applied To Degree: 10
<input type="checkbox"/> 120 Credits are required for this degree for graduation	Still Needed:	At least 120 credits are required. You currently have 10; you still need 110 more credits.
<input type="checkbox"/> Minimum 30 Credits Taken in Residence.	Still Needed:	A minimum of 30 credits must be taken in residence. You currently have 0; You still need 30 more credits.
<input type="checkbox"/> Minimum 2.0 GPA Requirement	Still Needed:	Minimum GPA unsatisfied
Your GPA is 0.000		
<input type="checkbox"/> Rowan Experience Requirements	Still Needed:	See <b>Rowan Experience</b> section
<input type="checkbox"/> Rowan Core Courses	Still Needed:	See <b>Rowan Core (General Education)</b> section
<input type="checkbox"/> Non-Program Electives	Still Needed:	See <b>Non-Program Requirements</b> section

## APPENDIX E

### Infographic Scenario: Beyond Transfer Policy Advisory Board Equity Benefit

#### Consider this scenario rooted in a focus on short-term rewards:

- ⌚ A student applies for transfer with 64 credits completed at another institution;
- ⌚ An evaluator at the receiving institution reviews the student's transcript with the current short-term mindset, leading the evaluator to reject five student courses, or the equivalent of a full semester of courses, potentially increasing course-taking and tuition revenue at the receiving institution;
- ⌚ That student enrolls at the receiving institution for one semester, pays tuition for five courses, then drops out;
- ⌚ The receiving institution gains one semester of tuition in the short-term, but loses additional semesters of tuition potential;
- ⌚ The student is let down by transfer and credit mobility, as is the community that the institution serves;
- ⌚ The receiving institution's student outcomes metrics reflect poorly in the areas of student persistence, retention, and completion; and
- ⌚ The receiving institution's reputation in the local community is marred by a story of a student who wanted a bachelor's degree, invested time and money to apply and transfer, but simultaneously lost time and money in the transfer process and made the rational decision that the bachelor's degree is out of reach.



## APPENDIX F

### Beyond Transfer Inquiry Guide: Equitable Transfer and Credit Mobility

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