



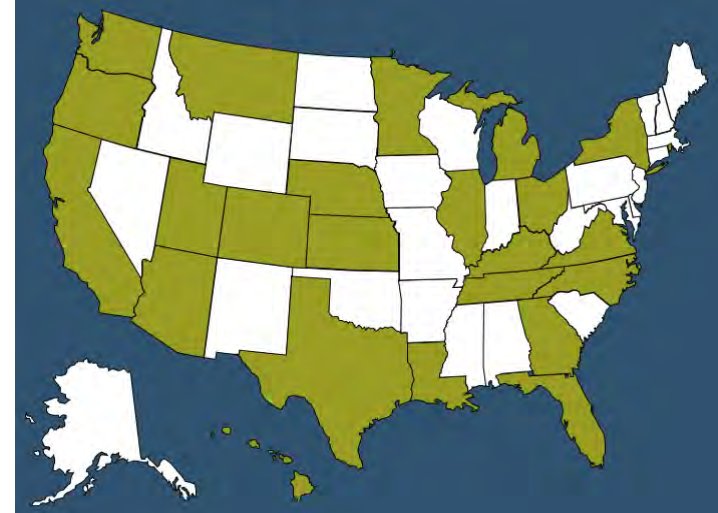
Widening the Lens, Connecting the Dots, Accelerating Transfer Success

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Sova's Work on Credit Mobility, Transfer, and Recognition of Learning

- Support systems and institutions in more than a dozen states working to achieve systemic improvements
- Coordinate the Beyond Transfer Policy Advisory Board
- Facilitate the Texas Transfer Alliance
- Curate the Beyond Transfer blog in *Inside Higher Ed* and partner with IHE on transfer-focused webcasts
- Partnership with AACRAO on the Learning Evaluation and Recognition for the Next Generation (LEARN) Commission
- Coordinate the multi-state AI in Transfer and Articulation Infrastructure Network (ATAIN) project in partnership with APLU, AACC, and the nation's leading researchers at UC Berkeley



The National Picture & Florida's Place In It



Nationally, 1 in 5 entering students at public four-year institutions is a community college transfer, **in Florida it's 1 in 3.**

Florida leads the nation in the % of transfer students who complete an associate degree before transfer (60% vs 44% nationally for all students, 62% vs 45% for low-income students).

Florida is 1 of only 8 states performing above the national average for community college transfer-in bachelor's completion 63% vs 57% for all students, 62% vs 52% for low-income students.

Well Done!



Florida's Policy Foundation is a Difference Maker

- ✓ Statewide Articulation Agreement
- ✓ General Education Core
- ✓ Common Prerequisite Manual
- ✓ 30-Hour Advising
- ✓ Statewide Course Numbering
- ✓ Articulation Coordinating Committee

The right mix of policies are truly important (and never quite right) but improvements in student experiences and outcomes isn't the result of policy: it's the humans working in collaboration across multiple levels (amid a lot of disincentives) that make the difference.

The Wider Stakes

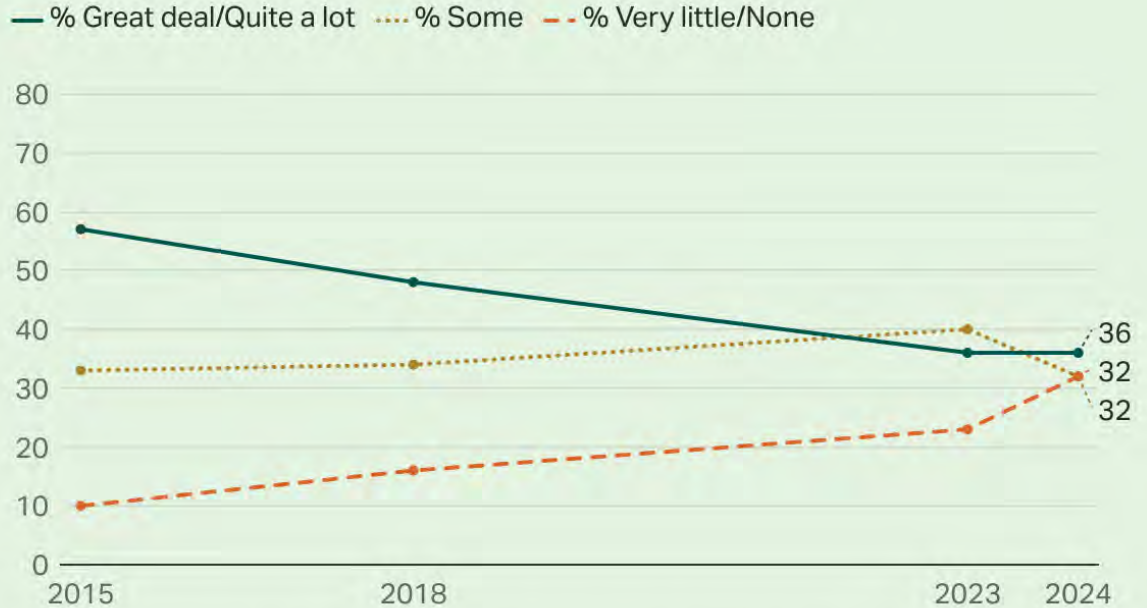
Public confidence in higher education continues to decline

- Concerns about affordability and ROI (relevance)
- Concerns about universities as businesses
- Concerns about university's political agendas

Gallup 2023, Public Agenda 2022

Confidence in U.S. Higher Education

Please tell me how much confidence you, yourself, have in higher education -- a great deal, quite a lot, some or very little?



"None" is a volunteered response. No opinion percentages are not shown.

Evolving the Conversation About Transfer

Despite decline of public confidence in higher education, and despite the move toward eliminating credential requirements for some employers, educational attainment (including bachelor's degrees) continues to be the best opportunity for today's learners to achieve upward mobility.

As the demand for an educated and skilled workforce increases, so will pressure on policymakers to deliver real opportunity and not just low unemployment.

See the *Good Jobs Project* at Georgetown Center on Education and the Workforce



Georgetown Center on Education and the Workforce, 2023
<https://cew.georgetown.edu/wp-content/uploads/Projections2031-National-Report.pdf>

The Wider Stakes

- The number of good jobs for workers with bachelor's degrees will grow by 15 million net new jobs between 2024 and 2031
- The largest share of good jobs in every major sector of the economy will increasingly require a bachelor's degree
- If we stay on the current trajectory, we'll be short roughly 7 million bachelor's degrees by 2031

What's a "Good Job"?

Good jobs pay at least 43K (and a median of 74K) for 25-44 yr olds and at least 55K for 45-64 yr olds

<https://cew.georgetown.edu/cew-reports/goodjobsprojections2031/>

Hot Off the Presses

New Insights from a 2024 General Public Survey

Areas of Exploration

- Prevalence of attempts to transfer postsecondary credit
- Outcomes and experiences of transfer attempts
- Support for or opposition to transfer policies & practices
- Confidence or skepticism about the value of higher ed
- Perceptions of problems & obstacles in earning a degree

Representative survey of 3,077 adults fielded by SSRS in May 2024. Survey developed by Public Agenda with areas of inquiry provided by Sova based on gaps in the existing research base

Key Insights

The prevalence of transfer is high

42%

have tried to transfer some type of credit towards earning an associate degree, bachelor's degree or certificate. A majority have sought to transfer credit toward earning a bachelor's degree

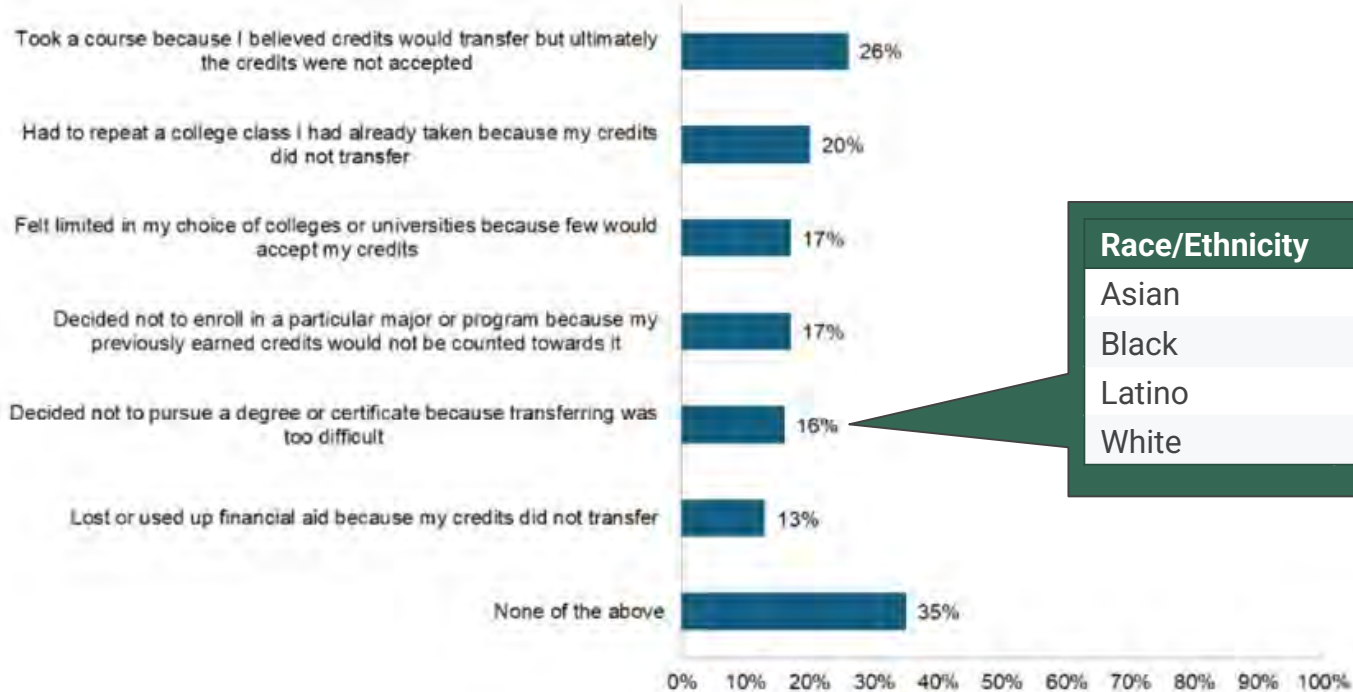
Key Insights

Over half of those who have tried to transfer experienced credit loss.

58%

experienced some credit loss, with 34% indicating “most” of their credits were accepted, 19% indicating “few” of their credits were accepted, and 5% indicating “none” of their credits were accepted

65% of those who have tried to transfer credits report at least one negative experience when transferring, including 16% who decided not to pursue a credential because transferring was too difficult.



Race/Ethnicity	%
Asian	20
Black	23
Latino	20
White	13

Key Insights

Those who attempted to transfer have negative perceptions of higher education overall.

74%

of those who have higher education experience and tried to transfer agree that colleges care more about making money than they do about educating students.

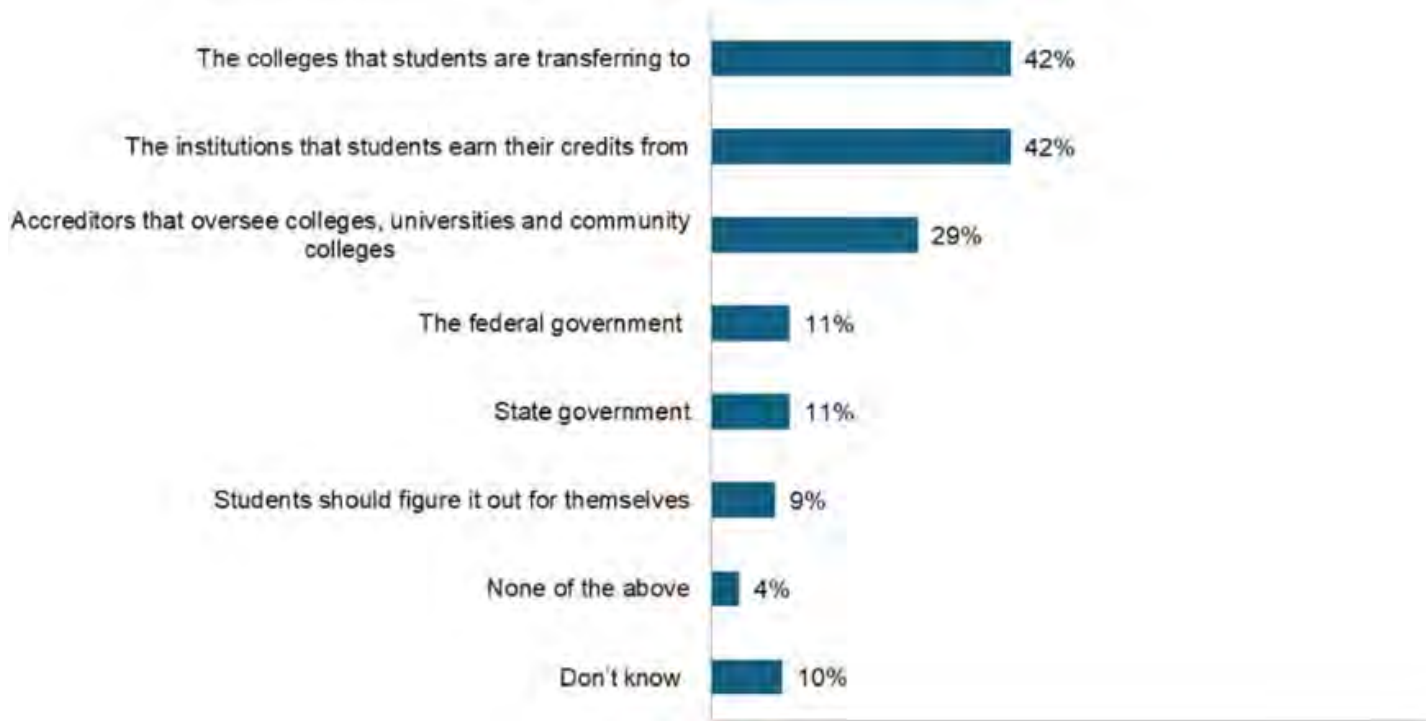
Key Insights

Strong belief there should be greater accountability for improving transfer.

84%

believe that sending and receiving institutions should be primarily responsible for making credit transfer easier

Most believe that sending and receiving institutions should be primarily responsible for making credit transfer easier than believe that students should have to figure out credit transfer for themselves.



Most agree that community colleges and 4-year colleges and universities should accept transfer credit from other higher education institution, military, and work experiences.

■ Strongly agree
 ■ Somewhat agree
 ■ Somewhat disagree
 ■ Strongly disagree
 ■ Don't know

All community colleges should accept transfer credits earned from 4-year colleges and universities



73%

All community colleges should accept credits earned from work experience



76%

All community colleges should accept credits earned from military experience



All 4-year colleges and universities should accept transfer credits from community colleges



72%

All 4-year colleges and universities should accept credits earned from work experience

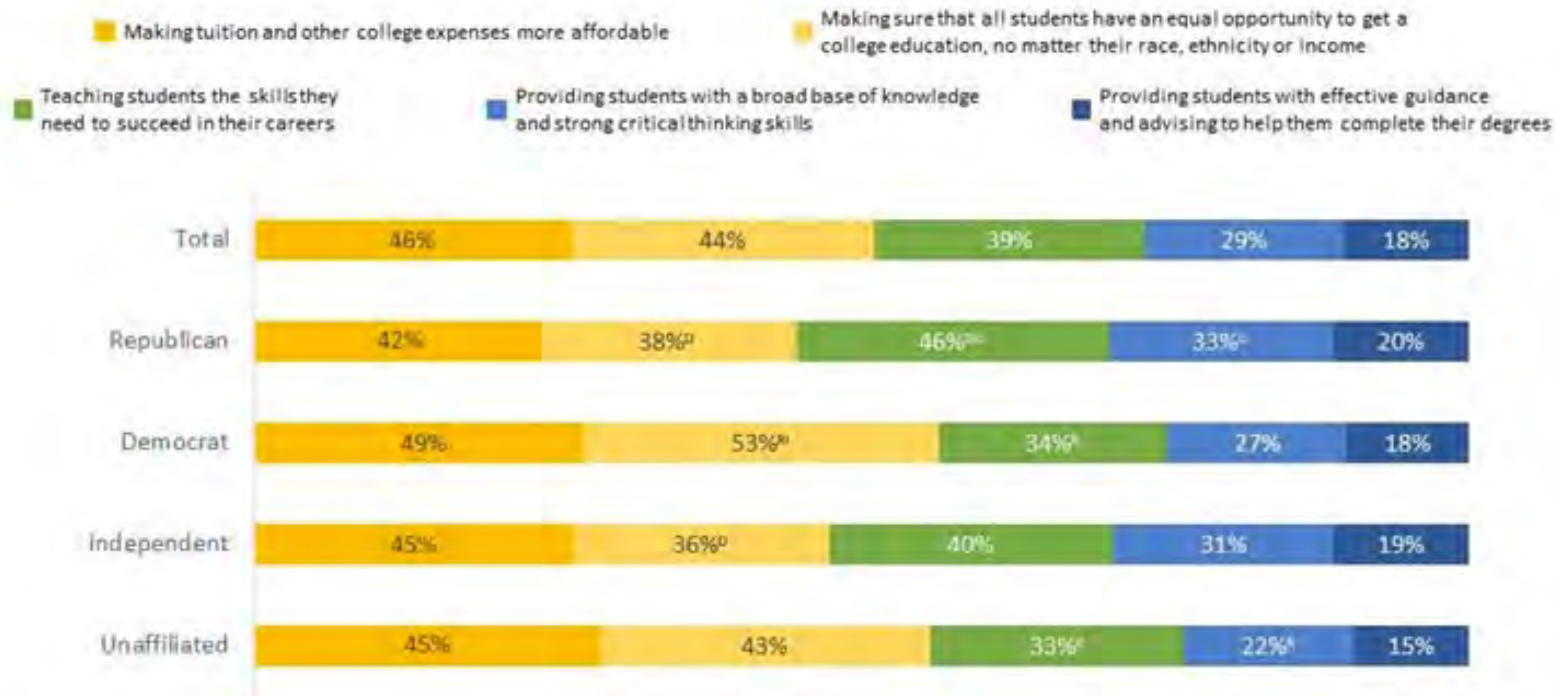


75%

All 4-year colleges and universities should accept credits earned from military experience



Despite sharp differences along party lines on nearly every public issue, there is hidden common ground among Americans when it comes to what people think higher education should prioritize.



Key Insights

In a time of increasing partisanship, Americans of all political backgrounds show strong support for transfer policy reform.

73%

Support “mandating that if students pay for a course at one college, university, or community college, they should not have to pay to take it again at another college”

Across all political identities, there is broad support for reform & accountability

- Requiring institutions provide students clear, easy access to transcripts, credentials, and degrees
- Creating public databases that make it easy for prospective students to understand which credits will transfer between schools
- Requiring institutions to quickly tell students who want to transfer how many of their credits will be accepted so that they have time to register for the classes they need
- Requiring institutions to publicly report how many credits students are able to transfer to and from their institution
- Requiring institutions to provide students with the opportunity to gain credits toward a credential based on demonstrations of learning and mastery
- Creating financial aid programs and scholarships specifically for transfer students

The Moral(s) of the Story



- Frustration related to transfer, credit mobility, and recognition of learning is a piece of the public confidence puzzle
- A growing desire for accountability and improvement represents powerful common ground in an increasingly divided society (but it raises the stakes and increases the pressure on institutions)
- Only joint responsibility on the part of sending and receiving institutions will result in sustainable gains
- Policy is important, but collaboration is everything
- Leadership at every level matters



The Universities & College that Will Thrive in the Future Will Prioritize

- Clarity & Transparency
- Recognition & Applicability
- Agency & Asset Mindedness
- Outcomes & ROI
- Honesty & Courage

Owning Your Power

- Florida is a field leader, and your institutions are doing the right work, but there's a lot still to be done
- Universities and community colleges share responsibility for the problems and solutions
- Improving communication and collaboration across many areas and at many levels will always be the most important work
- You have a more power than you think
- Knowing who your students are (or could be) and what's happening to them across their educational journey is key

Owning Your Power

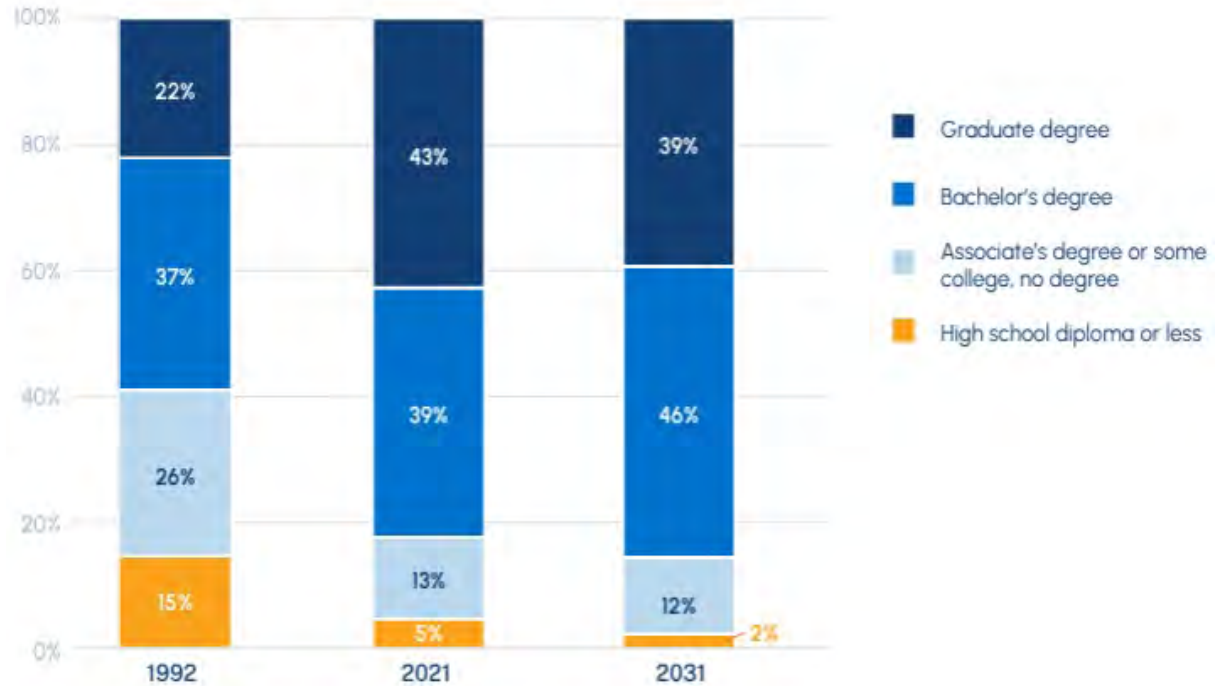
- Improve collaboration by practicing it
- Keep building your data culture and data agency
- Understand your students' experiences & include them as partners
- Use the pursuit of grant funding to build momentum and skills
- Prioritize internal silo-spanning alongside transfer partnership efforts
- Prioritize relationships, build trust, create space for courage
- Become a part of bigger conversations, help your colleagues take a wider view

The SOVA logo is displayed in white text on a yellow rectangular background. The letter 'O' is replaced by a stylized bird icon. The background of the slide features a faint, repeating pattern of paper boats and a circular design with the letters 'W' and 'E'.

Thank you!

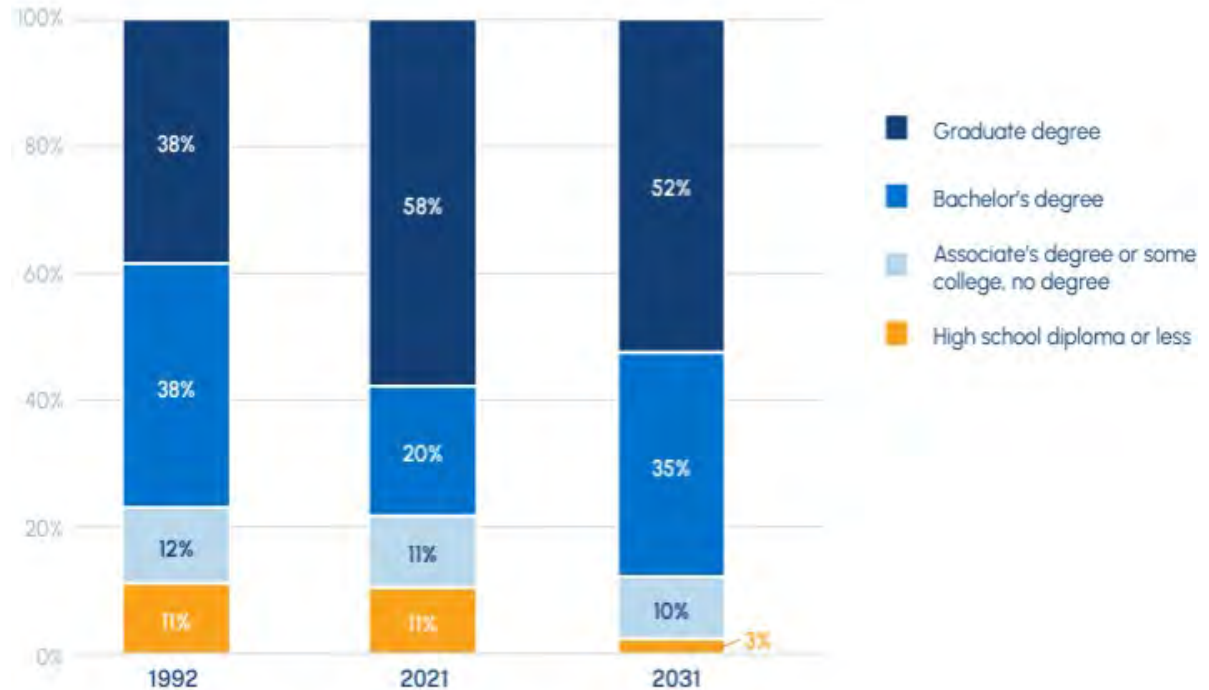
Alison.Kadlec@sova.org

The share of STEM and social sciences jobs will increase the most through 2031 for workers with bachelor's degrees.



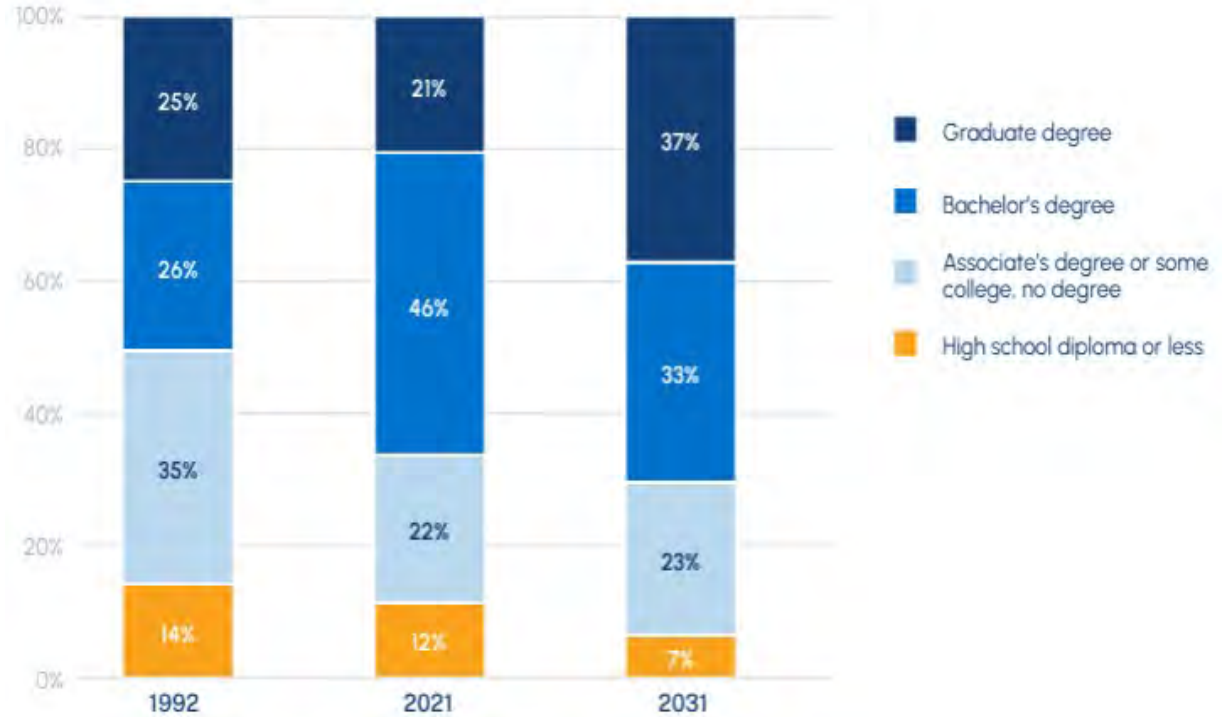
Source: Georgetown University Center on Education and the Workforce forecast using data from the US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS); US Census Bureau, American Community Survey (ACS); US Bureau of Labor Statistics; IHS Markit; Lightcast; and US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS)

Workers with a bachelor's degree will gain the largest share of education jobs from 2021 to 2031



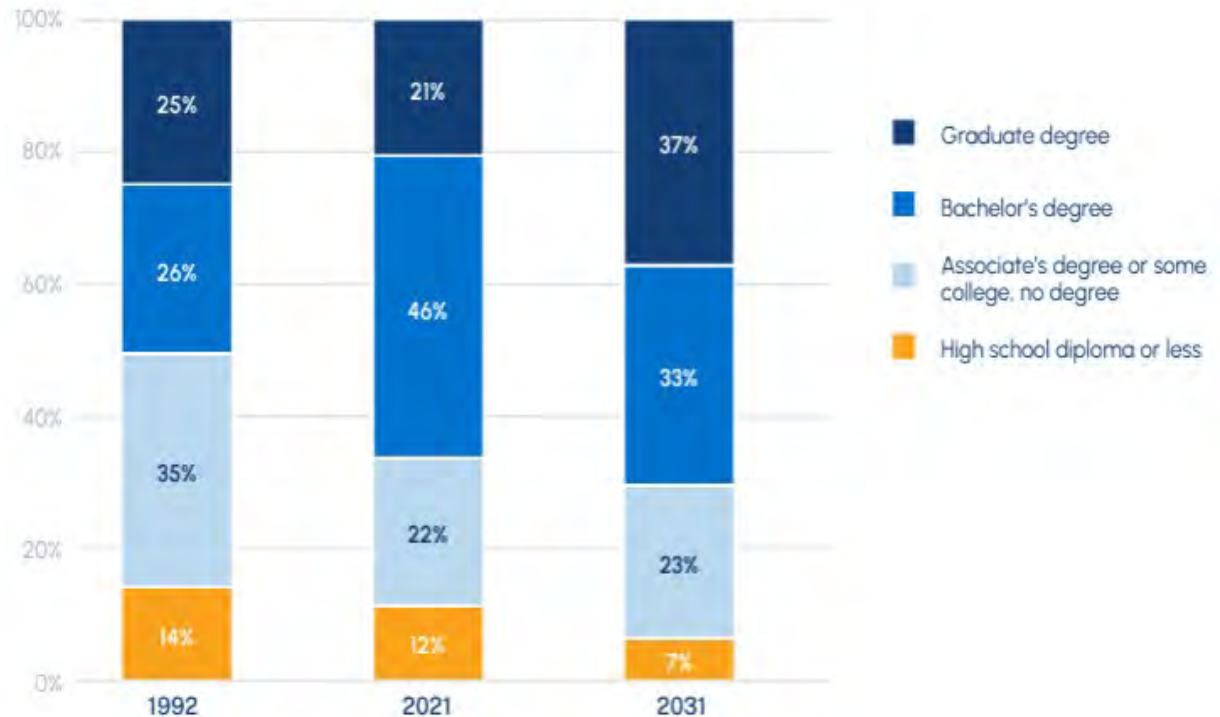
Source: Georgetown University Center on Education and the Workforce forecast using data from the US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS); US Census Bureau, American Community Survey (ACS); US Bureau of Labor Statistics; IHS Markit; Lightcast; and US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS), 1992.

Almost all healthcare professional and technical jobs will require at least some postsecondary education and training by 2031.



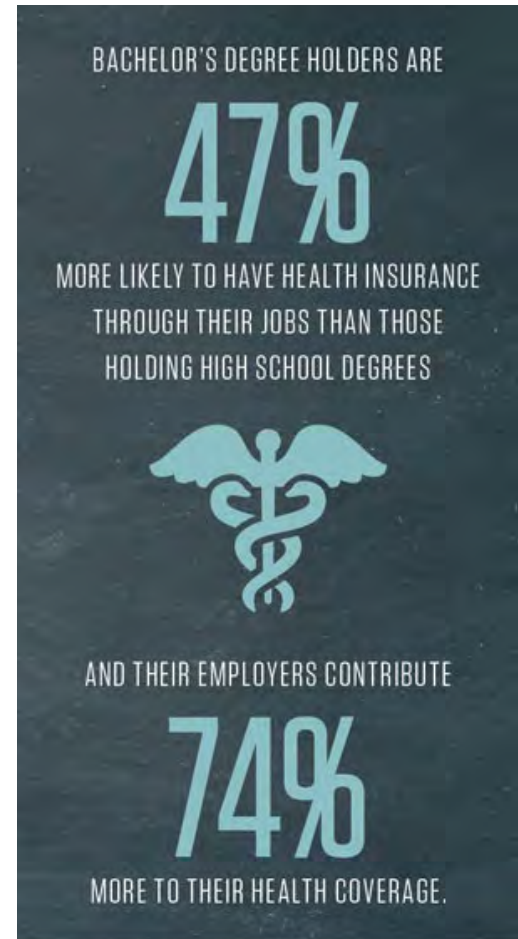
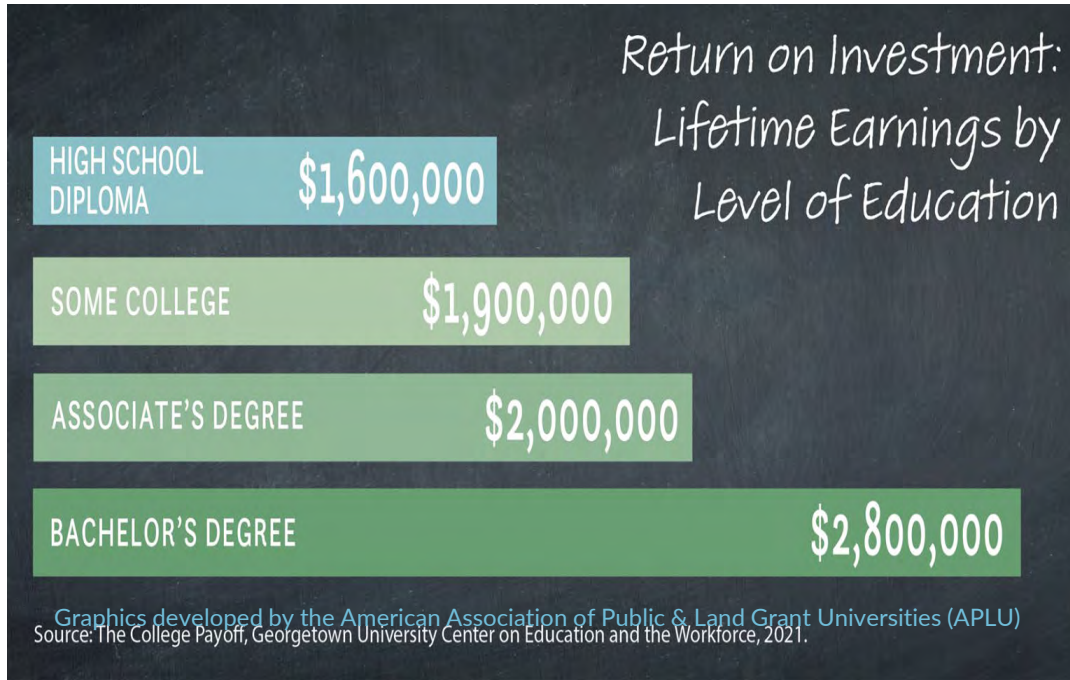
Source: Georgetown University Center on Education and the Workforce forecast using data from the US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS); US Census Bureau, American Community Survey (ACS); US Bureau of Labor Statistics; IHS Markit; Lightcast; and US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS), 1992.

Almost three-quarters of workers in managerial and professional office occupations will have a bachelor's degree or above in 2031



Source: Georgetown University Center on Education and the Workforce forecast using data from the US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS); US Census Bureau, American Community Survey (ACS); US Bureau of Labor Statistics; IHS Markit; Lightcast; and US Census Bureau and Bureau of Labor Statistics, Current Population Survey (CPS), 1992.

The ROI of Postsecondary Attainment



Using Short-Term Action Plans to Accelerate Progress on Complex Work



Using Short-Term Action Plans to Accelerate Progress on Complex Work

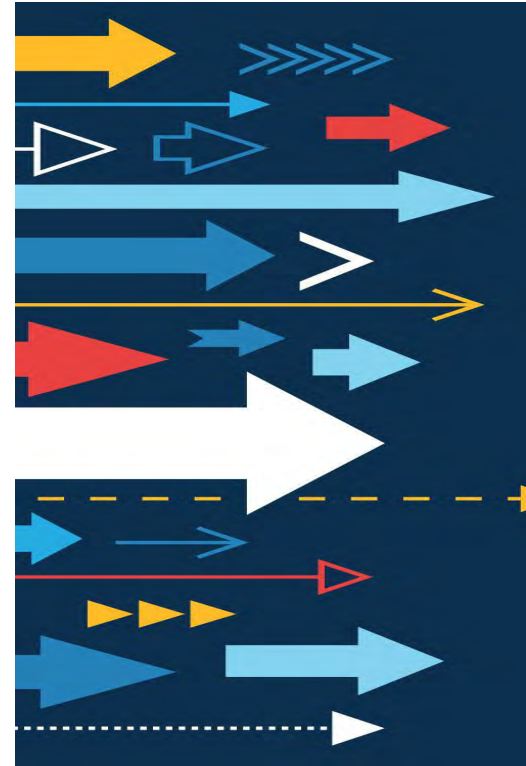


Why Use an “Improvement” Approach?

- Large, complex probably can (and must) be broken down into ‘bite-sized’ pieces
- Adopting key improvement strategies can make work doable, build shared will for progress, improve team health & function

Core Elements

- Using **driver discussion** to structure a conversation about the most important challenges and opportunities for collaborative work can help teams go deeper faster into real work
- Using **90-day plans** to turn driver diagrams into action plans provides a structure and light project management ethos to push work forward and keep teams on the same page



What are 90-Day Cycles?

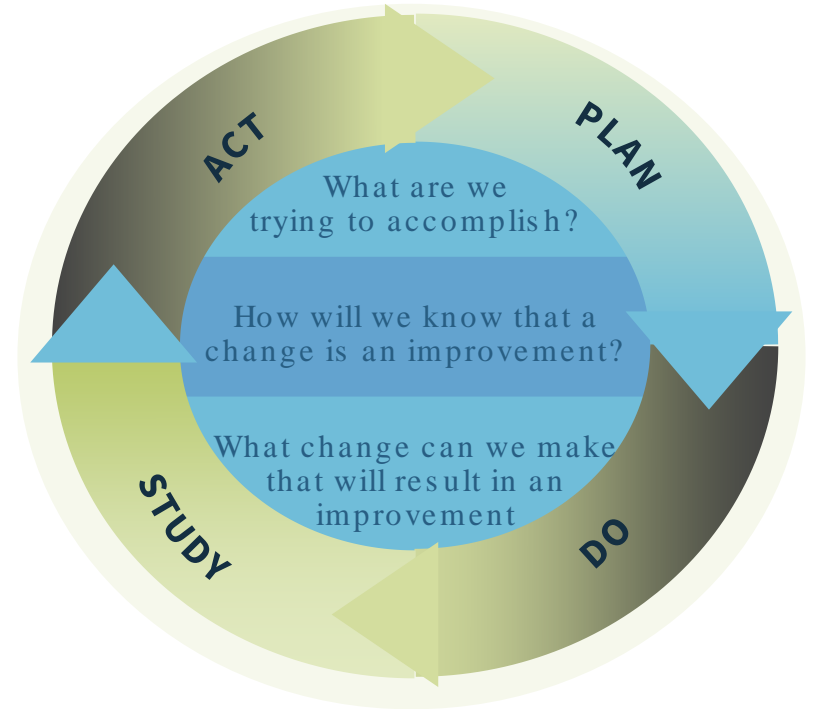
90-day cycles...

...provide a structure for learning, doing and improving. They also provide a project management ethos, intentionality, and accountability for project teams

...work best when they're kept simple, with manageable/realistic charters, and run on an ongoing basis with 1-2 weeks between cycles

...accelerate complex work by forcing early learning and allowing for, and encouraging comfort with, mid-course corrections

(...are a facilitator's friend, because their creation forces and enables goal-driven collaboration)



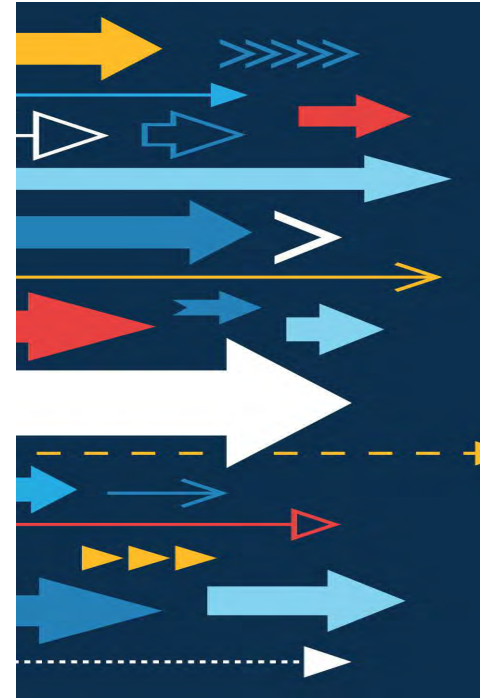
The Elements of an Improvement Cycle

Facilitating Driver Diagram & Charter Creation

Help participants collaboratively articulate the driving challenges, focusing on where there is room for action & co-ownership, and articulate both SMART goal and near-term action priorities.

Facilitating Creation of a 90-Day Plan

Help participants outline tasks, responsibilities, needs, dependencies, timeline, and cadence of collaboration on a 3-month workplan that will contribute to progress on the SMART goal.



A Good Driver Diagram...

... forces delineated articulation of key challenges

... serves as the theory of action to guide the creation of an effective short-term (90-day) work plan

... helps translate a high-level goal into a logical set of underpinning activities or projects

... captures the scope of leading challenges in a snapshot

... helps teams establish shared understanding about the work to be done

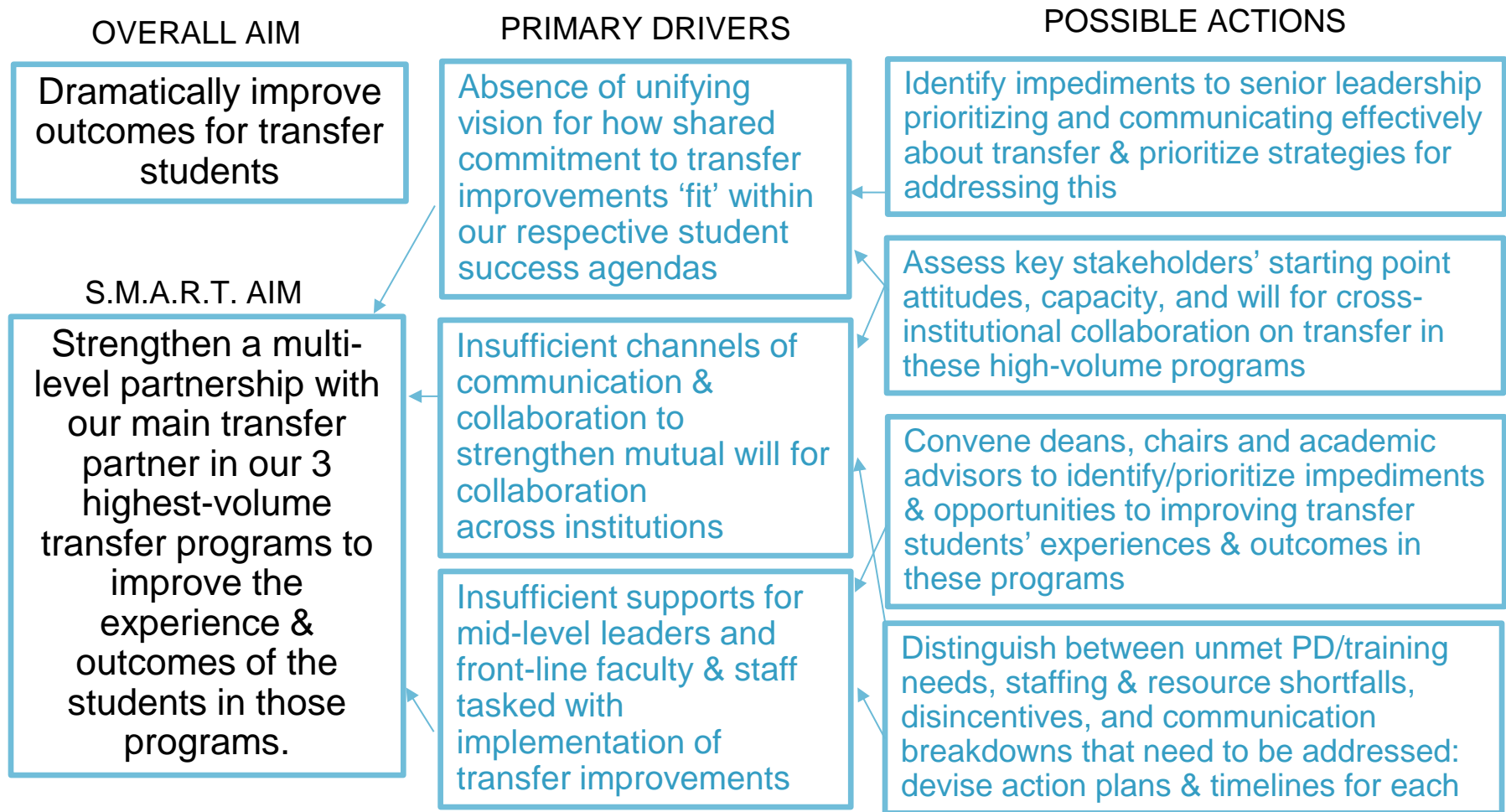
Guiding Questions

1. What is the existing condition that needs to be improved?
2. Why does it need improvement/ what's the evidence?
3. What are the root causes or core drivers of the specific challenge we want to make progress on?
4. What is our role & long-term goal?
5. What is the "SMART" (specific, measurable, attainable, relevant, timely) goal that we could achieve in 3 years?
6. What are the possible concrete actions that we could take that would help us make progress on our SMART goal?

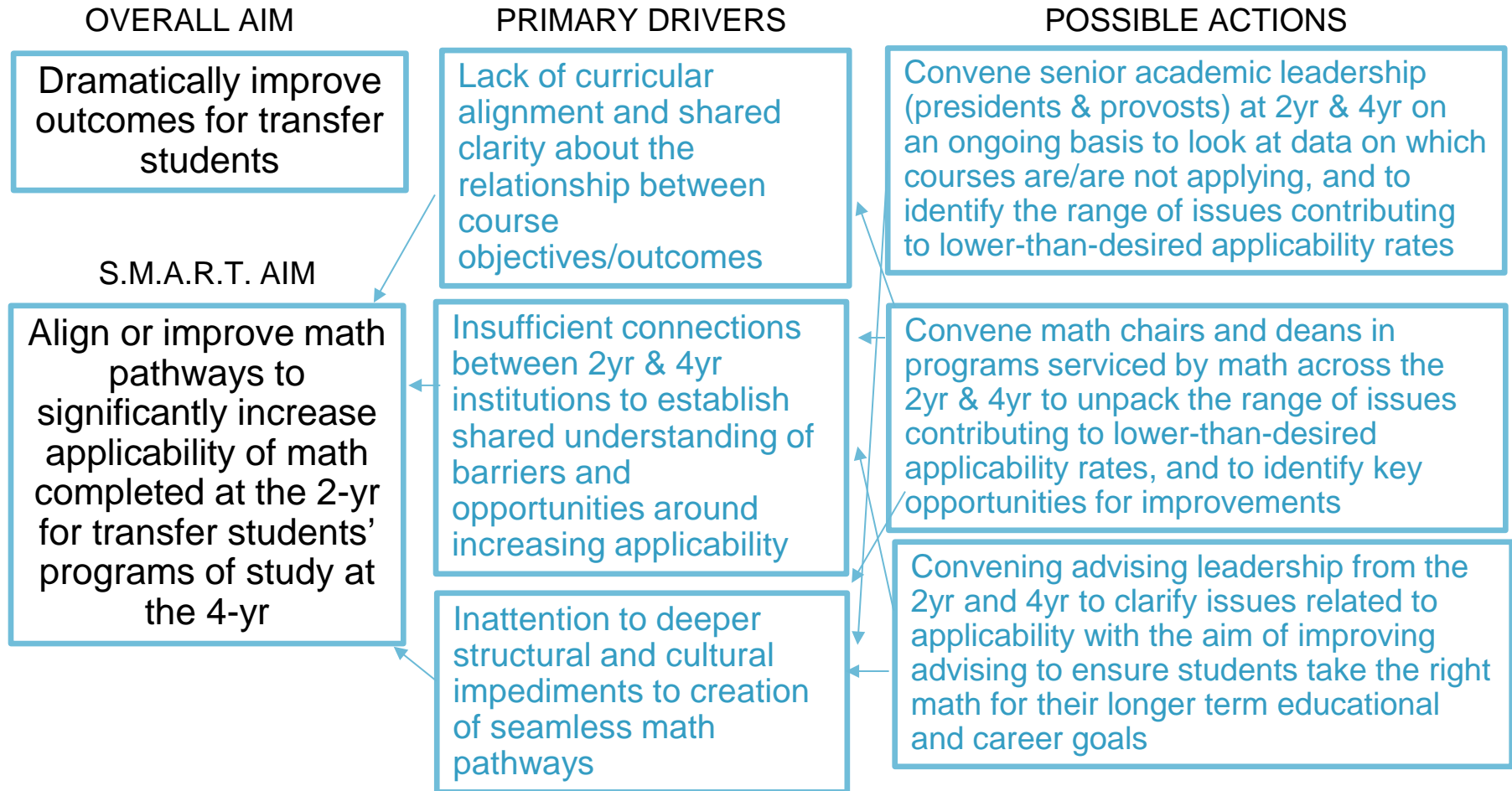
Questions to Guide the Creation of a Driver Diagram

- 1) What is the existing condition that needs to be improved? Why does it need to be improved? What are the root causes and what can/needs to be owned by the institution?
- 2) What is the evidence that it needs improvement?
- 3) What is our long-term goal? (5-10 years)
- 4) What is nearer term “SMART” goal that could help us get there? (2-3 years)
- 5) What are the most important actions we need to be taking / things we need to be accomplishing over the next year?

Driver Diagram Example #1



Driver Diagram Example #2



Learn Fast, Fail Fast, Improve Quickly

Elements of 90 -day Cycles

For 30, 60, and 90 day intervals and evaluated every 30 days



WHAT?

What are your near-term goals?
What are the activities to reach your goals?



WHO?

Who is accountable for each goal and activity?



HOW?

How will you know when you have met your goal?



WHEN?

When will you complete each goal and activity?

Create new cycle every 90 days, with ~2 weeks in between for reflection & reset

A Good 90-Day Plan...

...forces articulation of the relationship between the S.M.A.R.T goal & the near-term goal (requires next steps)

...is clear-eyed but ambitious, grounded in data, focused on *the most important* work (not just good work)

...includes careful consideration of both technical & adaptive dimensions of improvement

...includes deadlines, responsibilities, and owners of tasks

..helps teams establish shared understanding about the work to be done and hold each other accountable for progress

- 1) What do we want to accomplish in the next 3 months?
- 2) How will this contribute to our S.M.A.R.T goal?
- 3) How will we know if we're successful?

	Activities	Owners	2-Yr Needs / Implications	4-yr Needs / Implications	Due Date	Status
30						
60						
90						

90-Day Cycle Action Planning Worksheet

What is our charter for this 90-day cycle? (What are we going to accomplish?)

How will this accelerate progress on our SMART goal? How will we know?

	Activities	Owners	2-Yr Needs / Implications	4-yr Needs / Implications	Due Date	Status
30						
	Activities	Owners	2-Yr Needs / Implications	4-yr Needs / Implications	Due Date	Status
60						
	Activities	Owners	2-Yr Needs / Implications	4-yr Needs / Implications	Due Date	Status
90						

Finalizing 90-Day Plans: Key Questions that Need Good Answers

- 1) Are we clear about what specifically we want to accomplish in the next three months?
- 2) Are we sure that what we're seeking to do is the most important thing we can be doing to make progress on our shared SMART goal? (Is it ambitious enough? Can it be done in 3 months?)
- 3) Whose input & support is essential for our progress? (have we captured that in the 'needs & implications' section of the 90-day plan?)
- 4) Do we have people assigned to action items and a plan for engaging our wider teams and individuals implicated in the 90-day plan?
- 5) Have we agreed on when/how the teams will come back together? (Are meetings scheduled?)

An Example of Excellence

From an Enrollment Manager at a Regional Public University:

Our College of Business (COB) had recent analysis on CC transfer applicants, which showed that students were meeting and exceeding the minimum GPA required for admission, but they were not completing prerequisites prior to transfer. The completion of prerequisites is critical to progression in upper-level courses and minimizes the risk of students graduating with excess credit hours

The reviewing team also reviewed key resources such as transfer guides, brochures, and websites, and noticed dated information.

5 Collaborative Achievements in 90-Days:

1. Redesigned & offered a COB transition workshop for community college advisors;
2. Designed & delivered a COB transition workshop for students at the 2-yr
3. Updated all resources available to advisors and students
4. Designed a 1-page business advising guide with transfer tips and milestones
5. Resolved a key pain point by advocating for a computer competency exam at the 2-yr to satisfy the 4-yr's COB microcomputer prerequisite course.

OVERALL AIM

PRIMARY DRIVERS

POSSIBLE ACTIONS

Dramatically improve outcomes for transfer students & eliminate equity gaps

Insufficient information & communication of transfer requirements

Redesign a College of Business transition workshop for community college advisors

S.M.A.R.T aim

Failure to truly prioritize the interests of students

Design & deliver a College of Business B transition workshop for students at the 2-yr

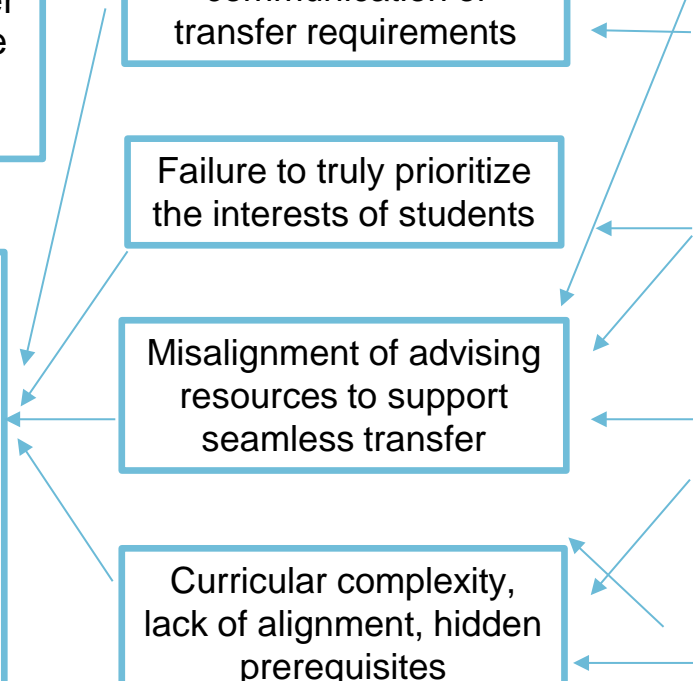
Significantly reduce the # of students accumulating excess credits while not completing prereqs in our highest-volume transfer program

Misalignment of advising resources to support seamless transfer

Update all information to advisors, faculty, and students in the College of Business

Curricular complexity, lack of alignment, hidden prerequisites

Design a 1-pger College of Business advising guide with transfer tips and milestones.



Keys to Success

Institutional Responses to Improvement Cycle Approach

- Having the right people at the table is essential – and starting with the real, albeit short-term commitment to executing & learning from two 90-day cycles
- Within the 90-day cycle, the check-in at 30-60-90 days provide the mutual accountability needed to drive the work and keep teams on track, while allowing for fluidity as challenges arise. *“Always set your next meeting before ending any meeting. Schedule as many check-ins in advance as possible, and have someone on the team responsible for helping the team prioritize and honor those check-ins.”*
- View and treat the work of the 90-day plan as an extended exercise in goal-focused relationship building and take the time to engage as humans. *“Developing the relationship was key, this is just the beginning of all the work we’ll do together.”*
- Focus on prioritizing near-term work while gaining clarity about the longer-term work (each discrete problem, when addressed purposefully, reveals a host of other challenges/opportunities).
- Use this work to deepen cross-silo collaboration: *“Rather than just trading email updates, there are now collaborative planning calls that allow us to be much more strategic about the work.”*

Building Your Own Short-Term Action Plan

1. What is the most important work you need to accomplish before fall semester?
2. What do you need to accomplish before the end of July?
3. Can you envision using this process May-July to make progress?
4. How would you describe the 'charter' for the 90-day plan?
"By August 1, we will have accomplished X, Y, and Z. We know that this is the most important next work for us to do because..."
5. Who needs to be at the table to build the best possible 90-day action plan?

Team Time Goals

- Give teams time to discuss the use of the concepts / tools
- Determine conditions for effectively carrying out one short-term improvement cycle before the next workshop
- Begin considering communication and engagement implications of building a short-term action plan

Communications & Engagement: Understanding the Differences



Communications

- ▶ What is your ‘elevator pitch’ or core message about the why of the work?
- ▶ Who are the most important audiences for your message and why?
- ▶ What is the likely starting point of your audiences (threatened, supportive, confused, enthusiastic)?
- ▶ How do you cut through the static and frenzy of the day-to-day to connect dots for people?
- ▶ How well do your existing communication structures and practices currently work with respect to providing clarity about the purpose of Pathways and the expectations of faculty & staff therein?

Engagement

- ▶ Which groups and individuals will need to be active, direct participants in the design or implementation of your project?
- ▶ How will you and others need to change how you work and think about your work if you’re going to be successful?
- ▶ To what extent do critical individuals & groups perceive threat or risk in what you’re trying to accomplish? Are those perceptions justified?
- ▶ How well does the premise of the reform fit with the values of make-or-break implementers?
- ▶ What tradeoffs require “working through”?

Communications & Engagement: Understanding the Differences



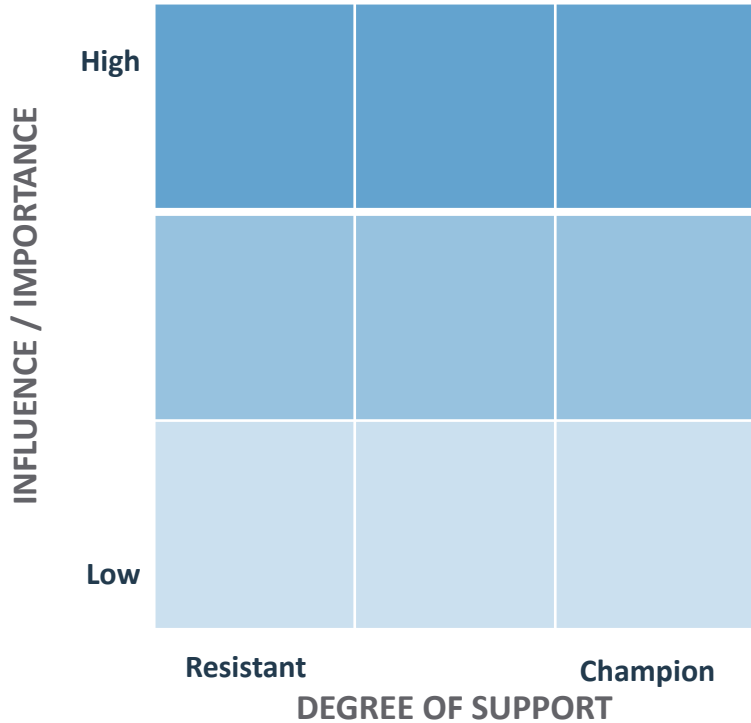
When communicating...

- ✓ Anchor in values and vision
- ✓ Be clear about your core messages and practice delivery
- ✓ Know your audiences
- ✓ Honor and acknowledge the expertise of practitioners
- ✓ Express openness, but have answers for hard questions
- ✓ Model transparency
- ✓ Ask for opinions to improve communications, and follow up

When engaging...

- ✓ Know why you're engaging and practice listening
- ✓ Be clear about the difference between consensus conversations & those with a necessary outcome
- ✓ Be transparent about decisions already made, and about what is unknown or yet to be determined
- ✓ Honor the expertise of those you engage, and be driven to show how it's included in the work
- ✓ Don't feel (or act) like you need to have all the answers, and own your biases
- ✓ Be relentlessly open to learning more, while being crystal clear about your goals
- ✓ Prioritize capturing all major open questions and honor all requests for follow-up

Communications & Engagement for Change Management: Assessing Your Starting Point



- Have we accounted for all our key groups/individuals? Who is directly impacted and/or indirectly affected? How complex are the relationships?
- Do we understand and agree about the sources of potential resistance?
- How does our core “why” of this work resonate with the motivations & interests of those implicated?
- Who needs to hear what? Who needs to be listened to?
- Do we have structures in place for both effective communication and effective engagement?
- What does our analysis suggest with respect to sequencing and timing of engagement activities? Who should be engaged when, in what ways and with what frequency?

Maintaining and Deepening Relationships to Accelerate Progress

Stakeholder / Stakeholder Group	Core Values & Professional Identities	Key Interests, issues, risks, and threats (what are the primary interests & fears?)	Communication Channels (Formal & Informal)	Level & Directionality of Influence	Silo-Spanning Notes (who do they need to be building relationships with?)

Improvement Tools are a Change Leader's Friend

- Provide structure for collaboration
- Allow teams to go deeper faster
- Help teams unpack complex problems
- Foster fresh perspectives
- Strengthen shared understanding
- Promote action-oriented planning

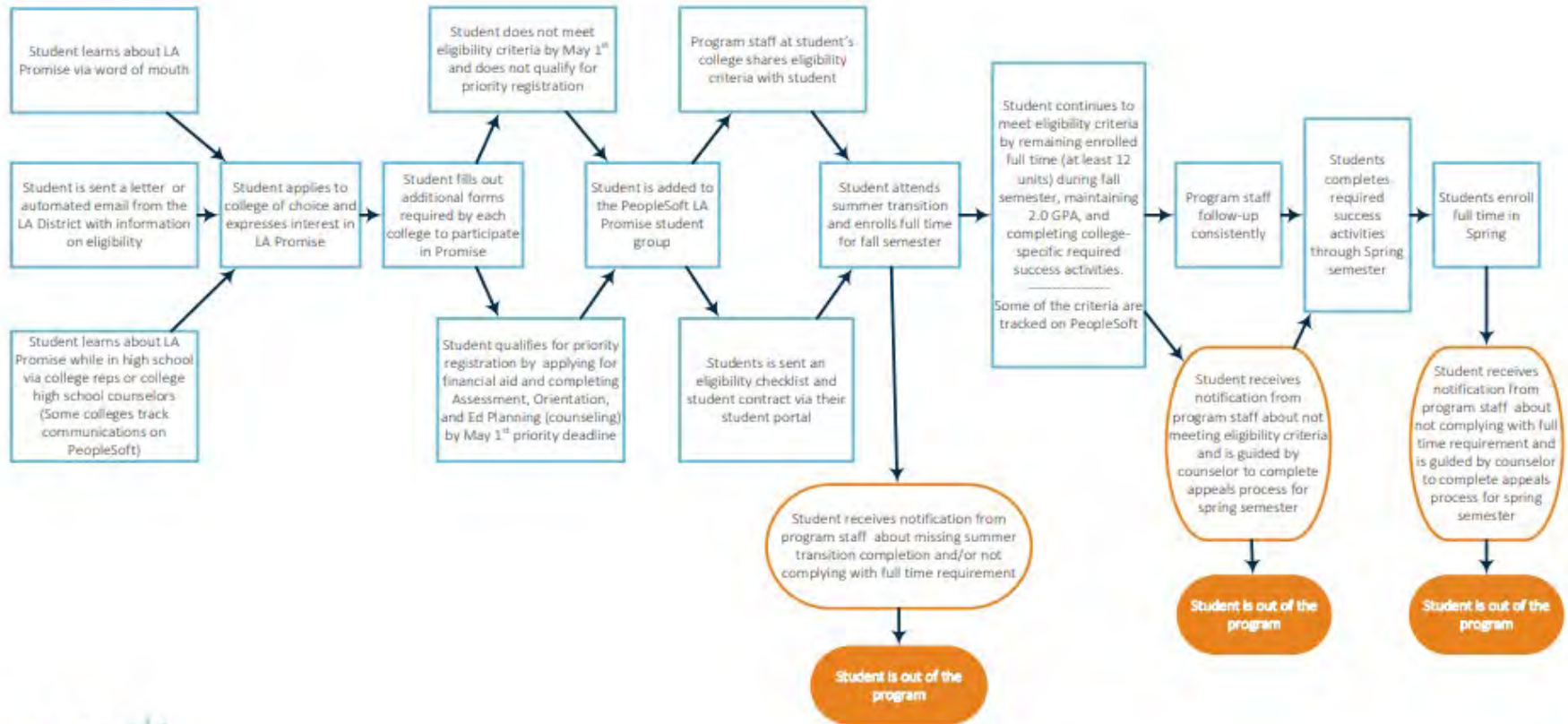
Process Mapping

Fishbone Analysis

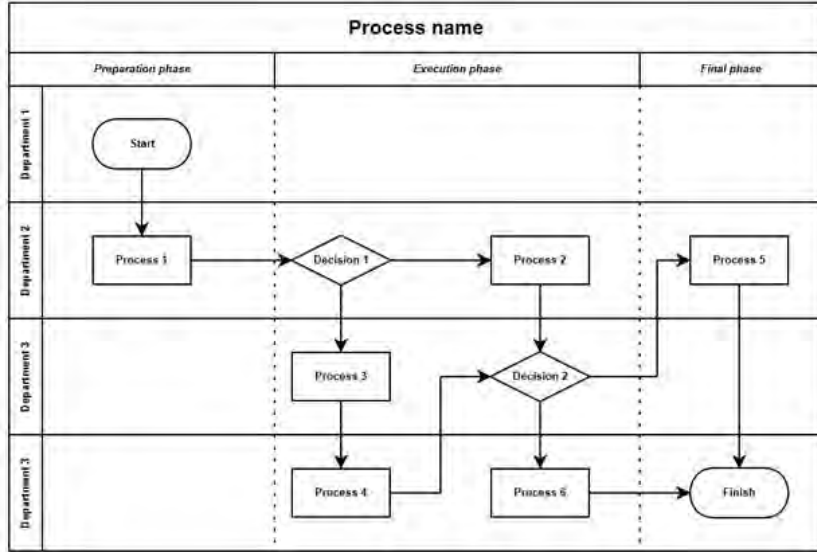
Driver Diagrams

Short-Term Action Plans

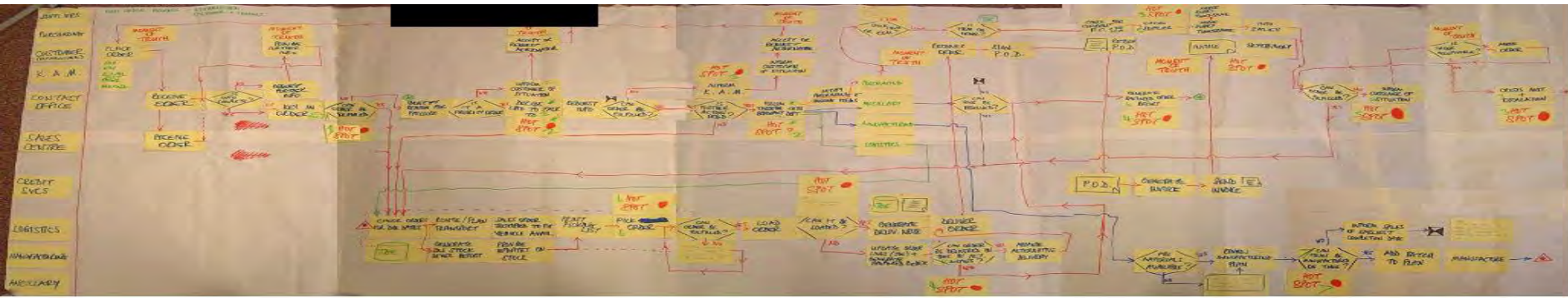
Student Experience Process Map Example: LA Community College District



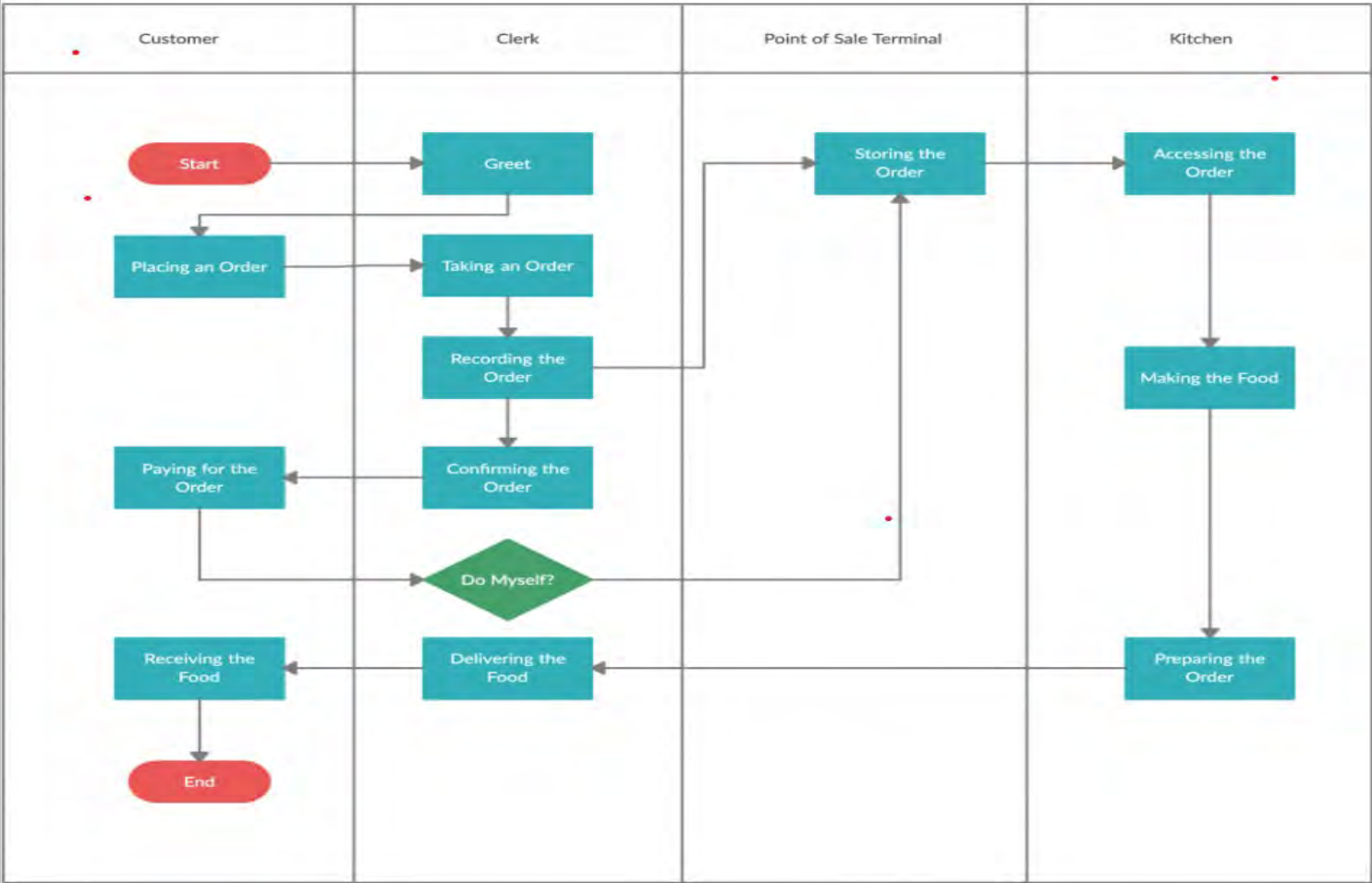
Swim Lane Process Mapping



- ✓ Includes cross-functional implications across a process
- ✓ Shows where and how challenges show up
- ✓ Points toward opportunities for both technical and adaptive improvements



Swim Lane Process Map Example



University Innovation Alliance Example

MSU wanted to map how the university was onboarding students from the day of matriculation to the day the students showed up on campus.

Stakeholders from several offices and units including Student Affairs, Admissions, Financial Aid, Advising, and the Registrar's office each got their own color sticky note and captured every example of a mass email they send to students over the course of the yearlong onboarding.

Stakeholders worked together to arrange these across the calendar

What they found:

- More than 400 emails sent to students from various departments
- More than 90 types of enrollment holds
- Clear (though unintentional) message sent to students: Don't Check Email!

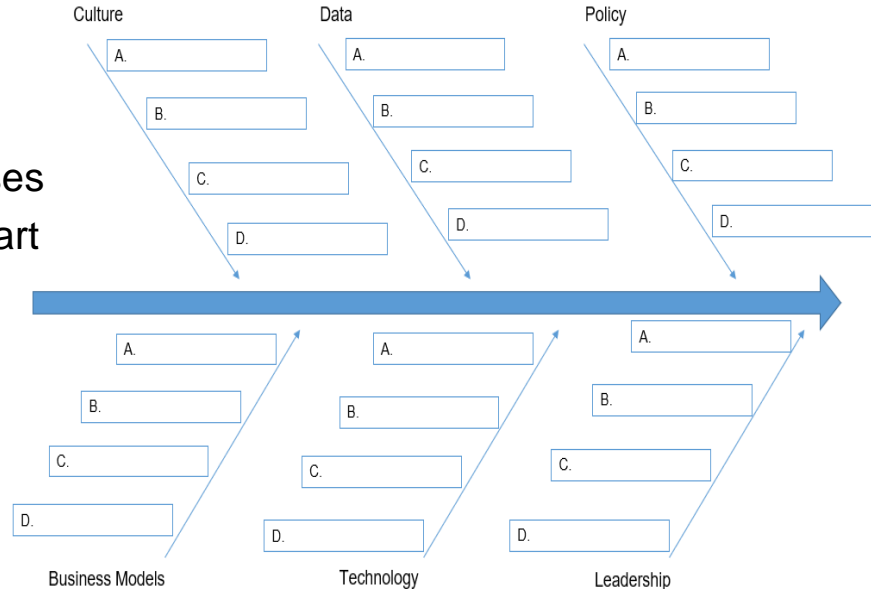


Facilitating a Fishbone Conversation

Helps teams unpack complex problems and think more deeply about the components.

Steps:

1. Craft a clear problem statement
2. Brainstorm the major categories of causes
3. Start asking why (e.g., why is policy a part of the problem?)
4. Ask “why?” again
5. Continue to ask “why?” and capture the answers to generate deeper levels of causes



A. Our students can't seamlessly take courses at multiple institutions within our system on their way to a degree

B. We haven't been able to create shared courses or programs

C. We are not able to scale our course-sharing efforts

Academic Culture & Policies

A.

B.

C.

D.

Advising & Student Supports

A.

B.

C.

D.

Leadership

A.

B.

C.

D.



A.

B.

C.

D.

Institutional Business Model

A.

B.

C.

D.

Belonging

A.

B.

C.

D.

Affordability

Our transfer students have worse outcomes and report less satisfaction with our institution than our students who begin with us

Driver Diagrams: A Simple Way to Take Conversations Deeper Faster

A Good Driver Diagram...

... forces delineated articulation of key challenges

... serves as the theory of action to guide the creation of an effective short-term (90-day) work plan

... helps translate a high-level goal into a logical set of underpinning activities or projects

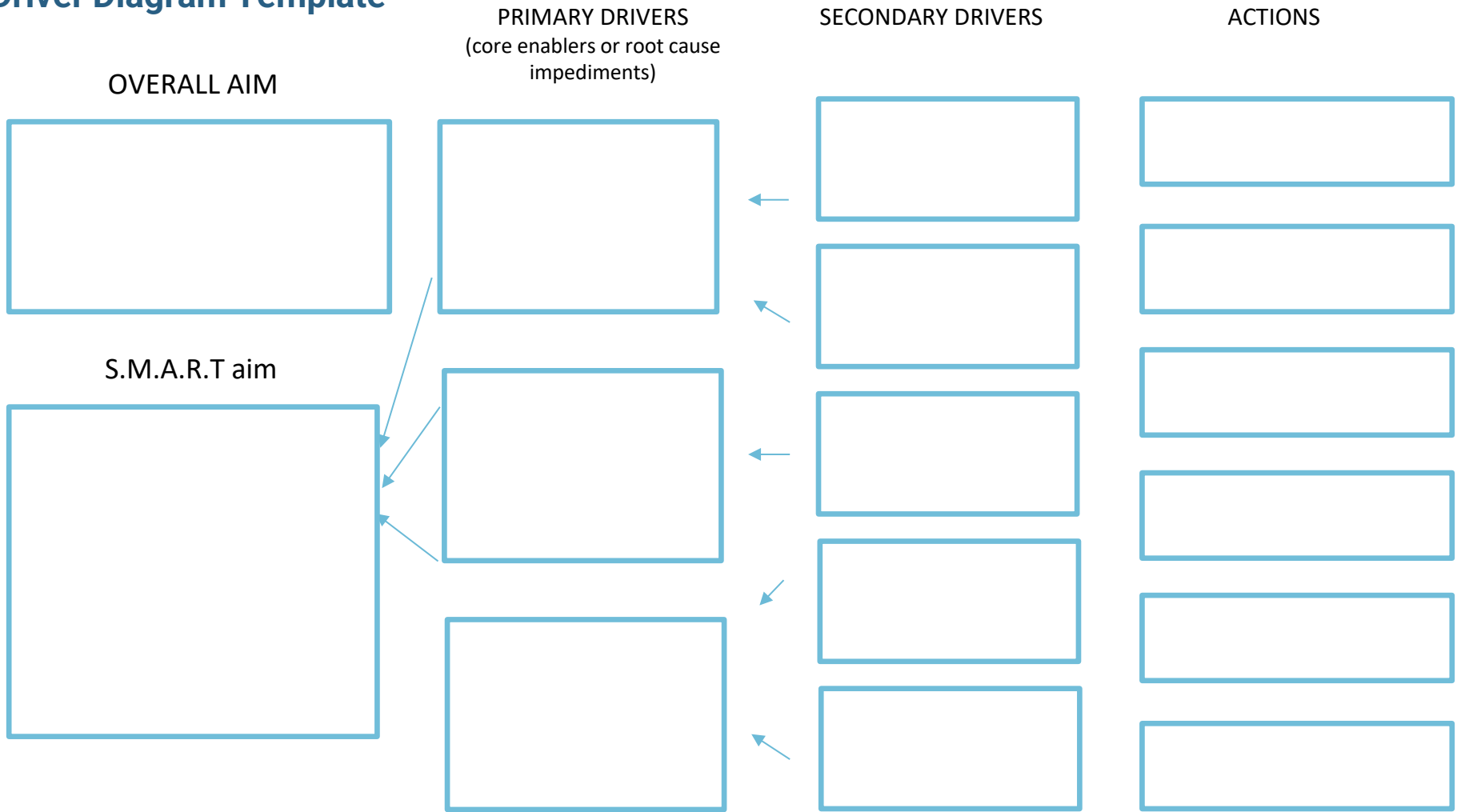
... captures the scope of leading challenges in a snapshot

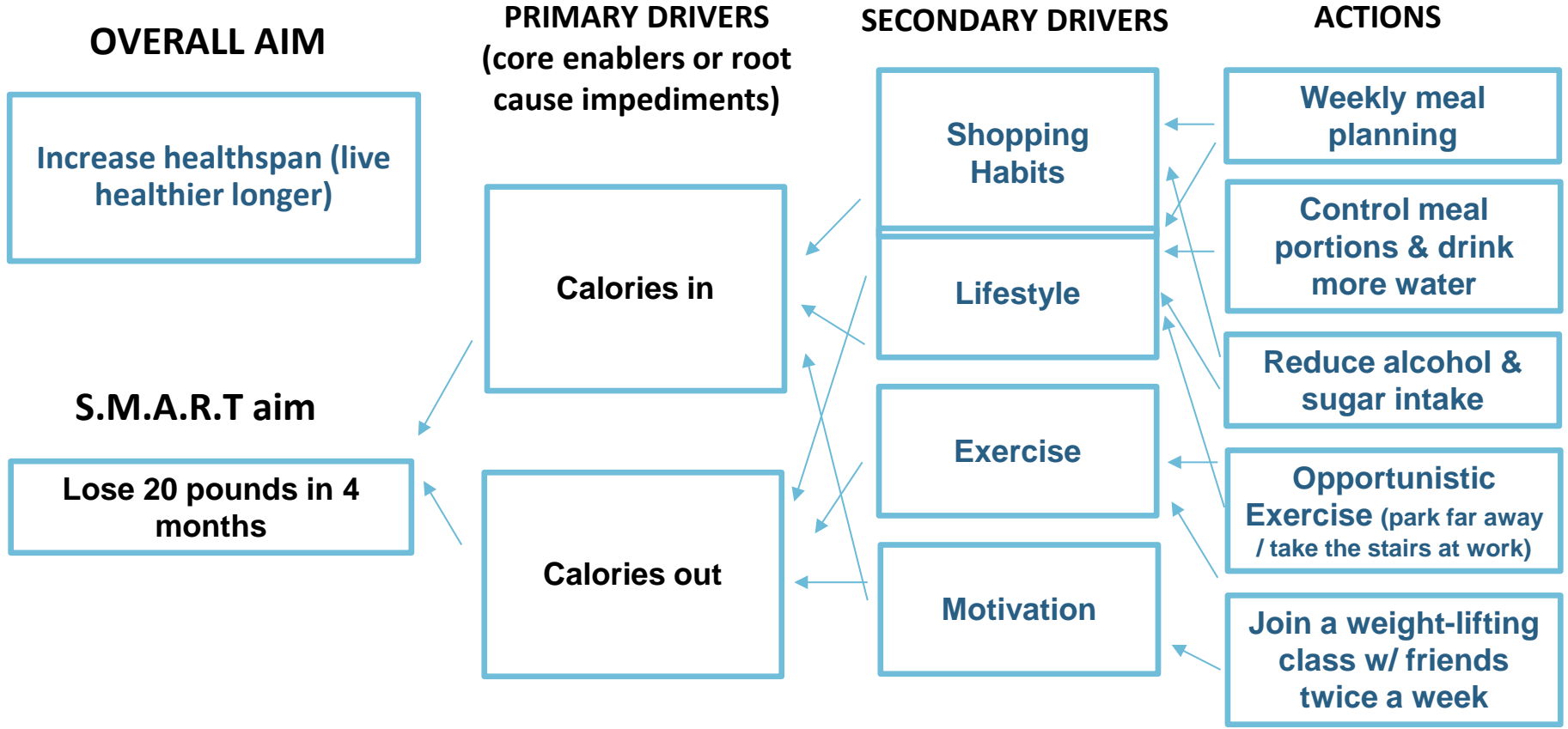
... helps teams establish shared understanding about the work to be done

Guiding Questions

1. What is the existing condition that needs to be improved/changed for you to be successful?
2. What are the root causes or core drivers of the specific challenge we want to make progress on?
3. What are the technical challenges, what are the human challenges?
4. What are the possible concrete actions that we could take that would help us make progress on our SMART goal?
5. How is our commitment to equity showing up in our driver diagram?


Driver Diagram Template






Driver Diagram Template

OVERALL AIM



S.M.A.R.T aim



PRIMARY DRIVERS
(core enablers or root cause impediments)



ACTIONS



First Rules of Facilitation: Know Your Starting Point

- What is your position with respect to the participants of the group you're facilitating, and what power dynamics does this position create?
- What do you know about the power dynamics and/or histories between participants in the dialogue you're facilitating?
- Are you crystal clear about *why you're facilitating* the meeting and *what you need to accomplish*?
- What challenges or hot spots can you anticipate?



Key Characteristics of an Effective Facilitator

- Manages the group well
- Models cooperative attitudes & skills
- Does not take on an “expert” role with the subject matter
- Keeps the deliberation focused and on track
- Intervenes *or* stands back as necessary
- Asks clarifying questions to encourage deeper dialogue
- Creates space for everyone to join in the conversation
- Helps participants find common ground and work through key tensions
- Encourages deeper, more honest reflection
- Asks probing questions to surface trade-offs & consequences of action ideas
- Helps people prioritize their ideas for action & take responsibility for next steps