

South Carolina State Transfer and Articulation Action Plan

February 2023

Prepared by the South Carolina State Transfer Task Force and facilitated by the John N. Gardner Institute for Excellence in Undergraduate Education, the South Carolina Commission on Higher Education, and the State Higher Education Executive Officers Association.



EXECUTIVE SUMMARY

THE GOVERNOR AND GENERAL ASSEMBLY OF SOUTH CAROLINA ARE LEADING A COHESIVE, UNIFIED WORKFORCE DEVELOPMENT APPROACH THAT WILL BOOST THE STATE'S RAPIDLY GROWING ECONOMY. HIGHER EDUCATION IS A CRITICAL SYSTEM AND COMPONENT FOR TRAINING, EDUCATING, AND UPSKILLING SOUTH CAROLINIANS, SO THEY MAY EARN SUSTAINABLE SALARIES AND WAGES FOR THEMSELVES, THEIR FAMILIES, AND THE STATE. EFFECTIVE, USER-FRIENDLY TRANSFER POLICIES BOLSTER WORKFORCE DEVELOPMENT WITH STRENGTHENED CAREER PIPELINES AND INCREASED STUDENT DEGREE COMPLETION, WHILE MINIMIZING TIME TO DEGREE COMPLETION.

Transfer policies and articulation agreements provide clear and accessible transitions between and across technical or community colleges and four-year institutions. Transfer impacts students' abilities to persist and complete college on time, so they can more rapidly enter the workforce, earn a living wage to support their families and communities, and meet the economic needs of the state. Statewide credit transfer requirements ensure all students can transition successfully to work and life. Statewide transfer initiatives are especially helpful for highly mobile students who may move among multiple two- and four-year institutions before degree completion.

Introduced on January 18, 2023, H. 3726 aims to enact the Statewide Education and Workforce Development Act, reaching the workforce potential of the state by coordinating publicly funded workforce development services and ensuring a customer-centric workforce system that is easy to use, highly effective, and simple to understand. Higher education is critical to meeting the state's demand for skilled and educated employees. An effective, efficient statewide transfer policy and system directly impacts students' ability to persist and earn on-time degrees and credentials. Strong transfer practices support the burgeoning economy and the economic well-being of South Carolinians.

Without state-level guidance, coordination, and investment in the process, transferring earned credits can be resource consuming, unclear, and complicated for students and institutions. Students alone are often not capable of navigating the complex process of inter-institutional mobility. There is a lack of personnel who focus specifically on transfer student needs at the institutional level. Often, students are unable to apply all credits earned from the sending institution to the receiving institution, increasing the cost of school, and delaying their achievement of career and workforce objectives.

SHEEO/GARDNER INSTITUTE STATE TRANSFER INITIATIVE

South Carolina is one of four states participating in a national pilot initiative to develop models for educational excellence in state systems of transfer across all sectors of post-secondary education. This initiative is funded by the Educational Credit Management Corporation (ECMC) Foundation, and is

being delivered to South Carolina, North Carolina, Colorado, and Washington by two national non-profit organizations: the State Higher Education Executive Officers Association (SHEEO) and the John N. Gardner Institute for Excellence in Undergraduate Education (JNGI). This brief summarizes the work of the South Carolina State Transfer Task Force (“ad hoc task force”), including findings and recommendations. This document is the beginning of a long-needed statewide actionable plan that creates a robust transfer, articulation, and general education structure that facilitates student success and completions for the students and industry.

In August 2021, all higher education institutions in South Carolina were invited to join the ad hoc task force. The South Carolina Commission on Higher Education (CHE), SHEEO and the JNGI, facilitated the ad hoc task force, with more than 30 key South Carolina transfer-related personnel from the state’s two-year technical colleges, public four-year colleges and universities, and independent colleges (see Table 1). The task force used an evaluation model comprised of a set of aspirational principles for nearly a year to analyze the transfer and articulation systems and policies in the state, resulting in a statewide action plan. Transfer excellence will improve on-time college completion rates and reduce the time and monetary commitment required to complete a four-year degree. Increased transfer excellence will facilitate student success and support the CHE’s *Ascend 60X30* strategy to increase higher education attainment in the state, which was initially developed and endorsed by a diverse group of state leaders prior to the pandemic.

The focused work of the ad hoc task force resulted in a set of practices to maximize transfer student success for South Carolinians. The composition of the ad hoc task force represented the state’s higher education faculty and transfer professionals. Priorities were determined by the alignment of 2019 *Ascend 60X30* strategy to increase higher education attainment to 60 percent by 2030. The CHE’s commitment to attainment is reinforced by the recent support of our state leaders to determine, measure, and achieve an attainment rate driven by recent workforce development legislation and state agency commitments.

The CHE’s commitment to transfer work remains resolute and unwavering. The CHE and staff collaborated closely with the task force by committing agency and staff resources to support the process and recommendations.

The recommendations presented in this action plan represent the higher education community’s commitment to boost comprehensive and fair educational attainment options that will lead to more economic opportunity for all South Carolinians.

Recommendation 1

SOLICIT AND APPOINT INSTITUTIONAL TRANSFER LIAISONS AT EACH PARTICIPATING INSTITUTION AND CONVENE REGULAR STATEWIDE MEETINGS FOR TRANSFER POLICY DEVELOPMENT, COLLABORATION, AND PROFESSIONAL DEVELOPMENT.

Due to the sheer volume of current, state residents, who are transfer students, additional funding is needed to secure higher education personnel who will prioritize and work with transfer students, and associated programs and policies. Best practice sharing and relationship development should be coordinated through regular statewide meetings directed by the CHE. Ongoing financial support will be needed from the state to coordinate these essential strategies for institutional and student support.

Higher Education Institution Action: Institutions should designate and appoint staff member(s) to serve on the state group. Staff member(s) must be committed to actively engage with the group and represent their institution.

Legislative Action: No direct legislative action is required.

Implementation Timeline: The CHE will request institutions submit liaisons immediately, and the group will be established by June 30, 2023.

Recommendation 2

DEVELOP, MANAGE, AND CURATE A ROBUST STATEWIDE DATA SYSTEM AND DASHBOARD, AND PROVIDE THE CHE WITH THE AUTHORITY TO COLLECT DATA FROM ALL PARTICIPATING HIGHER EDUCATION INSTITUTIONS.

There is a dearth of comprehensive transfer data, which is critical to making evidence-based decisions. The CHE will need statutory authority to request, collect, and analyze data provided. Without disaggregated data on South Carolina transfer student trends, enrollment pathways, demographics, GPA metrics, and degree progress, it is impossible to identify impediments to statewide transfer success. By partnering with the Gardner Institute, the CHE has begun to develop data visualization capacity, which visually clarifies transfer trends, progress, and pathways to increase understanding for the public and decision makers of South Carolina. Providing support for the CHE to develop intensive and interactive transfer student dashboards using data from institutions, the National Student Clearinghouse, and other sources would allow for research leading to insights that improve the transfer experience throughout the state.

Higher Education Institution Action: Upon further guidance from the CHE, participating institutions shall commit to submitting the needed data variables consistently and accurately for the data system.

Legislative Action: Statutory or regulatory action may be required to grant the CHE authority to collect additional data. Collaborations with other state agencies such as the Department of

Education (SCDE) and the South Carolina Revenue and Fiscal Affairs Office (RFA) may be required with legislative action.

Implementation Timeline: Implementation will begin immediately after proper authority is granted to the CHE, and the publishing of variables are presented to participating institutions. Sufficient time should be given for institutions to update data systems to allow for streamlined submission.

Recommendation 3

CONVENE A STAKEHOLDER GROUP, COMPRISED OF REPRESENTATIVES FROM TWO- AND FOUR-YEAR SOUTH CAROLINA INSTITUTIONS, TO REVIEW AND ADDRESS TRANSFER ARTICULATION RESOURCES AND NEEDS, TO INCLUDE:

- A. EVALUATING AND ASSESSING CURRENT TRANSFER AND ARTICULATION PLATFORMS AND PORTALS, INCLUDING SOUTH CAROLINA TRANSFER AND ARTICULATION CENTER (SC TRAC) IN ORDER TO MEET THE NEEDS OF TRANSFER STUDENTS
- B. DEVELOPING A MATRIX TO STANDARDIZE COURSES FOR EQUIVALENT, TRANSFERABLE, DEGREE-BENEFITING CREDIT
- C. DEVELOPING A PROCESS TO USE COMMON GENERAL EDUCATION LEARNING OUTCOMES TO SUPERSEDE COURSE EQUIVALENCIES
- D. ESTABLISHING COMMON STANDARDS TO EVALUATE AND AWARD CREDIT CONSISTENTLY AND WITH MAXIMUM APPLICABILITY TO DEGREES; AND
- E. NEGOTIATING A STATEWIDE ARTICULATION AMONG THE SOUTH CAROLINA TECHNICAL COLLEGE SYSTEM (SCTCS), FOUR-YEAR PUBLIC INSTITUTIONS, AND PARTICIPATING INSTITUTIONS OF THE SOUTH CAROLINA INDEPENDENT COLLEGES AND UNIVERSITIES (SCICU) TO RECOGNIZE THE ASSOCIATE IN ARTS (A.A.) AND ASSOCIATE IN SCIENCE DEGREES (A.S.) AS FULFILLING BACCALAUREATE GENERAL EDUCATION REQUIREMENTS.

The task force determined further review of the entire online transfer platform, SC TRAC, is essential to a high-functioning, statewide transfer system. Consistently prioritizing the management of SC TRAC will ensure students and institutions are maximizing the components of the system. Additionally, a stakeholder group should be tasked with determining needs and means for reconstructing or replacing the core list of 86 transferable courses housed in SC TRAC; ensuring common or general education learning outcomes exist; ensuring applicability of transfer courses to general education and degree requirements; and recognizing A.A. and A.S. as satisfying general education requirements towards baccalaureate degree programs.

Higher Education Institution Action: Public and participating independent institutions shall commit to active contribution to and cooperation with the resulting transfer information resources.

Legislative Action: Possible actions could include a budget request to fund and implement new or revised state resources, and/or legislation to recognize the A.A. and A.S. degrees as satisfying public and participating independent institutions' general baccalaureate education requirements. Additional legislative action could be needed to amend or suspend current state legislation that prevents independent colleges and universities from participating in existing resources due to state funding source.

Implementation Timeline: The stakeholder group should be convened immediately to begin the review of existing resources and determine recommended courses of development.

Recommendation 4

REQUEST PUBLIC AND PARTICIPATING INDEPENDENT INSTITUTIONS INFORM STUDENTS ABOUT TRANSFER OPTIONS AND RESOURCES THAT PROVIDE ADDITIONAL TRANSFER INFORMATION.

To increase support for transfer students and to optimize transfer processes and systems within and among institutions, the CHE should drive ongoing professional learning and communications among institutions. Professional capacity building will improve the transfer student experience, which may include ongoing convenings, learning communities, and technical assistance. Increased state funding for transfer professionals is needed to strengthen practices and procedures, which will result in higher completion rates and more students prepared to enter the workforce.

Higher Education Institution Action: In collaboration with the state council, the CHE should develop a set of best practices for advising transfer students.

Legislative Action: Appropriate funding necessary to provide sufficient advising services.

Implementation Timeline: The CHE will develop the set of best practices by June 30, 2023. Institutions shall implement within the next academic year.

Recommendation 5

DEVELOP A PLAN TO FACILITATE, IMPLEMENT, AND INCENTIVIZE REVERSE TRANSFER.

The seamless transfer of academic credits from one institution to another requires a chief entity or agency to spearhead statewide transfer efforts. In collaboration with institutions and an advisory committee, the CHE should commit to developing policies, procedures and curriculum on a reverse transfer system, acknowledging and awarding student progress. Such efforts will allow students who transfer to another South Carolina institution to have additional options for earning credentials. Implementing a statewide process will directly contribute to the state's educational attainment rate.

Higher Education Institution Action: In collaboration with an advisory committee, it is the intent of the task force that the CHE should develop policies and procedures for reverse transfer. Public and

participating independent institutions shall commit to participation in the system, including the necessary staff resources.

Legislative Action: Possible actions could include a budget request to fund and implement a system to facilitate reverse transfer.

Implementation Timeline: Ongoing.

Recommendation 6

REQUEST STATE FUNDING TO ESTABLISH STUDENT TRANSFER SCHOLARSHIPS AND A STATEWIDE AWARENESS CAMPAIGN FOR TRANSFER.

The task force discovered multiple examples of individual institutions implementing exemplary new transfer pathways for students; however, transfer opportunity awareness is particularly minimal for first-generation and low-income students. Additional funding should be provided to institutions to support a statewide awareness campaign to engage students on transfer opportunities and to supplement current institutional aid available to transfer students.

Higher Education Institution Action: Accept state transfer scholarships as a supplement to current institutional transfer aid and promote aid availability in recruitment efforts. Participate in state awareness campaign by providing the necessary information.

Legislative Action: Appropriate funding necessary to support a new state transfer scholarship and statewide awareness campaign.

Implementation Timeline: The legislative timeline should be considered, and a budget request needs to be developed.

TABLE 1:

SOUTH CAROLINA STATE TRANSFER TASK FORCE LEADERSHIP TEAM

John N. Gardner	Founder and Executive Chair	John N. Gardner Institute for Excellence in Undergraduate Education
Stephanie Davidson	Independent Consultant	State Higher Education Executive Officers (SHEEO)
John Lane	Vice President of Academic Affairs and Equity Initiatives	State Higher Education Executive Officers (SHEEO)
Rosline Sumter	Vice President—Academics, Student Affairs, and Research	SC Technical College System
Kelli Fellows	Dean, Online and Graduate Programs	Newberry College
Eric Skipper	Provost	University of South Carolina Beaufort
Sid Parrish	Vice President for Academic Affairs	Newberry College
Jesulon Gibbs-Brown	Professor	South Carolina State University
Michael Igbonagwam	Program Manager, Strategic Initiatives and Engagement (CHE Project Lead)	South Carolina Commission on Higher Education
Bunnie Ward	Director, Strategic Initiatives and Engagement	South Carolina Commission on Higher Education
Monica Goodwin	Director, Office of Data-Research and IT	South Carolina Commission on Higher Education
Argentini Anderson	Assistant Director, Office of Academic Affairs and Licensing	South Carolina Commission on Higher Education
Samuel Grubbs	Assistant Director, Office of Academic Affairs and Licensing	South Carolina Commission on Higher Education
Christopher Robinson	Senior Program Manager, Office of Data-Research and IT	South Carolina Commission on Higher Education

SOUTH CAROLINA STATE TRANSFER TASK FORCE MEMBERS

Aimeé Carter	Associate Vice President for Academic Affairs	South Carolina Technical College System
Lillian Hunter	Assistant Registrar	Tri-County Technical College
Kristen Gerhardt	Director of Bridge Programs & Education Partnerships	Tri-County Technical College
Donna Zeek	Director of Curriculum, Dean of School of Interdisciplinary Studies	Midlands Technical College
Heather Hoppe	Registrar	Horry-Georgetown Technical College
Donna Foster	Associate Vice President for Institutional Effectiveness and Compliance	Piedmont Technical College
A. Clifton Myles	Executive Vice President for Administration and Innovation / Chief Strategy Officer	Denmark Technical College

Jeff Perez	President and CEO	South Carolina Independent Colleges/Universities
Amy Gutzmer	Director of Marketing/Communications for Online/Continuous Learning	Anderson University
Jen Booth	Registrar	Columbia International University
Karl Wright	Provost	Clafin University
Susan Henderson	Provost	Coker University
Lloyd Willis	Interim Dean, College of Graduate and Online Studies	Lander University
Jessica Berry	Professor and Chair of the Department of Speech Pathology and Audiology	South Carolina State University
Casey Woodling	Director of Academic Outreach and Continuing Education	Coastal Carolina University
Kelly Brennan	Associate Provost for Enrollment Management	The Citadel
Brian Mallory	Director of Institutional Effectiveness and Research	University of South Carolina Beaufort
Ann Williams	Registrar	Francis Marion University
Dawn Bare	Associate Registrar for Transfer Evaluations	College of Charleston
Lisa Chestney	Director of Transfer Resources Center and Interim Registrar	College of Charleston
Ron Cox	Dean	University of South Carolina-Palmetto College
Kim Purdy	Assistant Vice Chancellor for Academic Affairs	University of South Carolina Upstate
Greg Oakes	Dean for Graduate Online and Extended Education	Winthrop University
Aaron Marterer	Assistant Vice President and University Registrar	University of South Carolina Columbia
Trena Houp	Director of Academic Programs	University of South Carolina Columbia
Lauren Gellar	Director of Healthcare Studies; Professor, College of Health Professions	Medical University of South Carolina
David Kuskowski	Associate VP for Enrollment Management	Clemson University
Mary Von Kaenel	Director, Bridge to Clemson and Transfer Academic Programs	Clemson University
Antonia Hill	Student	University of South Carolina Columbia

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Support for this project was provided by the State Higher Education Executive Officers Association (SHEEO) and the John N. Gardner Institute (JNGI) through a grant from the Educational Credit Management Corporation (ECMC) Foundation. The South Carolina Commission on Higher Education (CHE) would especially like to thank the project's transfer task force members and South Carolina's higher education institutions for supporting this project. It is the hope that together, we can create a seamless transfer ecosystem for all South Carolinians.

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(This document was last revised on February 22, 2023)

PROJECT OVERVIEW

South Carolina is one of four states participating in a national pilot initiative to develop models for educational excellence in state systems of transfer across all sectors of postsecondary education. This initiative is funded by the ECMC Foundation and is being delivered to South Carolina, North Carolina, Colorado, and Washington by two national, non-profit organizations: the SHEEO and the John N. Gardner Institute for Excellence in Undergraduate Education (JNGI).

The South Carolina task force for this project, facilitated by the CHE, SHEEO, and the JNGI, is comprised of more than 40 key transfer-related personnel from all sectors of higher education in the state. Task force members committed nearly a year of their time to the improvement of South Carolina’s transfer system. Key responsibilities of the CHE, the project leadership team, and the task force include the following:

CHE	PROJECT LEADERSHIP TEAM	TASK FORCE
Provide vision and commitment from state-level leadership as approving body of work	Provide policy / subject-matter expertise and lead development of state transfer action plan with recommendations and data analysis	Review existing policies for effectiveness and equity, collect / analyze data, generate state policy standards and recommendations

Specific activities of this project include a state review and comparison using a national transfer framework, surveys to institutions’ staff and students, and an analysis of existing transfer data. The focused work of the task force resulted in recommendations that support equitable practices to maximize transfer student success for South Carolinians. Implementation priorities were determined by the alignment of CHE’s *Ascend 60X30* strategy to increase higher education attainment by 2030. After nearly a year of analysis across multiple dimensions, the task force presents this final report with findings and recommendations to facilitate transfer excellence within the state.

BACKGROUND

Student transfer is a significant topic of concern for higher education. As colleges and universities across the nation are challenged by declining enrollment, as governments and businesses seek to ensure sustained economic vitality, and as economic disparities have sharpened, the need to improve educational outcomes is greater than ever. Nationally, students seeking to transfer often encounter challenges resulting from ineffective transfer pathways. These difficulties can result in unnecessary loss of credit, which costs students both time and money. Traditionally, underserved populations are disproportionately negatively impacted.

Consider the following statistics:

- Thirty eight percent of all students entering college for the first-time transfer at least once.¹
- Students lose an estimated 43 percent of college credits when they transfer, or an estimated 13 credits, on average. The average credits lost during transfer is equivalent to about four courses, which is almost one semester of full-time enrollment.²
- Lower-income students are nearly half as likely as their higher-income peers to transfer to a four-year institution (25 percent vs. 41 percent) and fully half as likely to obtain a bachelor’s degree within six years (11 percent vs. 22 percent).³
- Colleges and universities lost about 191,500 transfer students in the 2020–21 academic year, representing a loss almost three times greater than the previous year’s decline of 69,300 students.⁴

South Carolina Student Transfer Vision for Higher Education

South Carolina will have an excellent and justly designed transfer system that provides educational attainment for all students. It will be a comprehensive, visionary transfer ecosystem, equipped with appropriate infrastructure, policy and resources.

According to the Community College Research Center, “The current system, underperforming as it is, works twice as well for white students as it does for Black and Latinx students, and twice as well for higher-income students as for lower-income students.”⁵

In South Carolina, 447,000 residents out of 5.2 million have some college but no degree.⁶ The CHE’s Public Agenda aims for sixty percent of the state’s working-age population to hold a high-quality, workforce-relevant credential by 2030. To meet this goal, reform of the state’s transfer ecosystem is required. A statewide comprehensive transfer policy will improve achievement gaps by increasing transfer and completion for underrepresented student populations resulting in a population that is ready to meet the ongoing workforce needs of the state.

CHE STATUTORY AUTHORITY

The General Assembly required the CHE to establish standards and procedures for the transferability of courses at the undergraduate level between two-year and four-year institutions or schools” (S.C. Code of Laws Title 59, Chapter 103, Section 45).

CHE REGULATORY AUTHORITY

The CHE also promulgates regulations to provide further directions and structure regarding

[More Than 1 Million Community College Students Transferred With a Credential, Research Center’s Transfer and Mobility Report Reveals.](#)

² National Student Clearinghouse. [The Challenge of Transferring College Credits.](#)

³ National Student Clearinghouse. [Tracking Transfer.](#)

⁴ Higher Ed Dive. [Nearly 200,000 fewer transfer students enrolled in college last year, report finds.](#)

⁵ Community College Research Center. [Don’t Blame Students for Institutional Barriers to Equitable Transfer Success.](#)

⁶ National Student Clearinghouse. [Some College, No Degree.](#)

transferability. Proviso 117.152 of the 2021–22 Fiscal Year Appropriations Act required the CHE to work in consultation with the South Carolina Technical College System (SCTCS) and the public four-year institutions of higher learning to develop policies to guarantee students who have earned an A.A. or A.S. degree from a public two-year institution of higher learning shall receive a minimum of 60 transfer credit hours at a public four-year college or university and shall be given a junior status at the college or university. At this time, each public four-year institution has incorporated into its transfer policy that each transfer applicant who has earned an Associate of Arts or Associate of Science degree will receive 60 credit hours in transfer and be granted junior status in keeping with the language of Proviso 117.152.

MILITARY TRANSFER TASK FORCE INITIATIVE

According to the Report on the Economic Impact of South Carolina’s Military Community (June 22, 2022), South Carolina is home to eight major military installations and other military facilities supporting 68,493 Department of Defense personnel of all branches of service and components. Sixty-nine percent are active duty and 31 percent are Reserve Components (National Guard and Army Reserve). South Carolina has three branches of the military where servicemembers start their military journey, in addition to the Navy’s Nuclear Training Center. South Carolina has the 10th highest density of service members in the nation. There are another 17,579 service members who serve just across the border at Fort Gordon, Georgia, with many living in South Carolina. The military community’s presence in South Carolina serves as a reminder of its substantial postsecondary impact. Creating transfer mobility and recognizing experiential learning that can translate military training, experience, and expertise into academic credit will assist service members who plan to pursue postsecondary education and workforce credentials. To support a seamless transfer credit experience for military service members, the CHE established a statewide Military Credit Mobility Task Force in the fall of 2022. Their work will yield high-priority recommendations that support standard practices on evaluating skills and competencies gained during military service and training.

ELECTRONIC TRANSFER AND ARTICULATION DATABASE

The CHE sought a course articulation and transfer system to facilitate student transitions between and among South Carolina’s institutions of higher education. In 2009, the CHE contracted with AcademyOne to develop and implement SC TRAC. Funded by the Education and Economic Development Act of 2005 (EEDA), the Commission established and integrated the web-based portal to meet the course articulation and transfer needs of the state. Initially, when the CHE established SC TRAC, it was envisioned to be a clearinghouse for South Carolina institutions of higher learning to support shared processes, formats, and content, and provide the integration services needed to link institutional-based tools and data, so a customized report could be developed with a user-friendly interface. This approach would help the state avoid implementing a one-size-fits all solution for degree audit and advising and enable institutions to support a common set of transfer functions.

DATA CONSIDERED BY THE TASK FORCE

The State Transfer Task Force was formed to gain new knowledge about the transfer student experience, to explore transfer pathways between institutions in South Carolina, and to gather valuable information (policies, institutional processes, available resources, etc.) from key stakeholders in the state. The Gardner Institute’s Foundation of Excellence examines the transfer process through six broad dimensions: philosophy/rationale, transfer equity, learning and curriculum pathways, organization, transfer receptive culture/receptivity, and data, accountability and improvement. As part of the evaluation process, the task force reviewed student and staff survey data, statewide transfer data, and data from the administration questionnaire. Using the provided data and other sources of evidence, the

task force evaluated the ways South Carolina institutions support the overall transition and experiences of transfer students across the state.

STUDENT AND INSTITUTIONAL SURVEYS

The task force explored the topic of transfer through a series of survey instruments created by the Gardner Institute as part of a larger project. Each institution in South Carolina was asked to deploy two surveys: one for the transfer students currently enrolled at their institution, and one for the faculty and staff who work regularly with transfer students in some capacity (advising, student engagement, campus life, and other relevant areas). The overarching goal of each survey instrument was to gather new or additional details about the transfer student life cycle, available campus resources, and to learn of institutional or campus efforts to improve the transfer process through grants and other funding. Additionally, learning more about the overall success rates for transfer students across the state would help inform the continued work of the task force committees. Please see Appendix D for additional information pertaining to survey data.

STATE LEVEL DATA

Another component of the work of the task force was to evaluate the transfer data provided by the state. As a state agency, the CHE collects a crude amount of institutional data related to transfer. In collaboration with the Gardner Institute, visual diagrams were created to better analyze the transfer patterns across the state. All data visualizations provided a dropdown filter to select cohort year and institution. The data visualizations can also be filtered by the student demographic characteristics of gender and race/ethnicity. Access to the visualizations were made available to the task force and specific institutional staff members. Please see Appendix D for additional information pertaining to visualizations.

TRANSFER INFORMATION 2022 QUESTIONNAIRE

While the Gardner Institute provided state, institution, and student-level surveys and data, the task force committees determined a need for additional survey questions and developed the Request for Transfer Information 2022 Questionnaire (“Transfer Questionnaire”) for institutions to complete. The questionnaire was designed to provide more detail, guidance, and descriptive information about the institutional policies and procedures. Capturing a greater nuance of detail provided a basis for additional insights to the institutional policies and practices. Please see Appendix D for additional information pertaining to questionnaire results.

RECOMMENDATIONS

Rectifying South Carolina’s systemic deficiencies regarding student transfer requires a willingness to challenge the status quo, upend ineffective paradigms and practices, and remove bureaucratic and institutional barriers that create unnecessary friction for transfer students. Furthermore, to meet the newly created student transfer vision for South Carolina higher education, the task force outlines several recommendations.

Success of the proceeding recommendations is contingent upon a centralized leadership model and designated authority for the state. Coordination of all aspects of transfer in the state would include oversight, coordination, data collection (from both public and participating independent colleges and universities), and reporting (i.e., creating data systems, dashboards, and other dynamic visuals to provide data on transfer activity statewide). The CHE is the logical agency to be empowered to lead in this endeavor. ***Therefore, it is recommended the CHE be empowered to lead the state in all matters related to transfer in the state, including the implementation of statewide policy on transfer and advocacy for the resources necessary to support a statewide system of transfer excellence.***

With the CHE as the transfer oversight entity for the state, the following recommendations are proposed for implementation.

1. Solicit and appoint institutional transfer liaisons at each participating institution, and convene regular statewide meetings for transfer policy development, collaboration, and professional learning.
2. Develop, manage, and curate a robust statewide data system, and provide the CHE with the authority to request data from all participating higher education institutions.
3. Convene a stakeholder group to review and address transfer articulation resources and needs, to include:
 - a. Improving or replacing of the SC TRAC resource.
 - b. Developing a matrix to standardize courses for equivalent, transferable, degree-benefiting credit.
 - c. Developing a process for using common general education learning outcomes to supersede course equivalencies.
 - d. Establishing common standards for evaluating and awarding credit consistently and with maximum applicability to degrees.
 - e. Negotiating a statewide articulation among the SCTCS, four-year public institutions, and participating institutions of the SCICU to recognize the A.A. and A.S. degrees as fulfilling baccalaureate general education requirements.
4. Require public and participating independent institutions to ensure students are adequately informed of transfer options and the transfer resources available to them.
5. Develop a plan to facilitate and incentivize reverse transfer.
6. Request state funding to establish student transfer scholarships and statewide awareness campaign for transfer.

RECOMMENDATION 1:

Solicit and appoint institutional transfer liaisons at each participating institution and convene regular statewide meetings for transfer policy development, collaboration, and professional development.

Many institutions have a reactive response to transfer in which a person or committee evaluates requests from students for credit for courses that do not already have an established equivalency for that institution. However, some institutions are proactive and evaluate courses at state and regional institutions for equivalency. Responses to the transfer questionnaire administered during the project found 65 percent of institutions have a senior institutional officer who serves as a primary advocate for advancing transfer student attention and support. In addition, 45 percent have a committee focused on transfer and transfer students dedicated to improving transfer. For example, University of South Carolina Columbia has a team that meets monthly to discuss existing and potential articulation agreements and any issues or challenges that arise for transfer and transfer students.

The establishment of a state transfer group would ensure communication regarding state transfer initiatives and the sharing of best practices is done consistently. This group would convene at least once a year. Four regional councils would also be established to further the efforts of this action plan, aid in the overall improvement of the state's transfer ecosystem and promote workforce development. A state transfer group would also encourage individual and institutional membership in transfer-related professional organizations and participation in regional and national meetings and conferences.

Higher Education Institution Action: Institutions should designate and appoint institution staff member(s) to serve on a state group. Staff member(s) must be committed to actively engage in the group and represent their institution.

Legislative Action: No direct legislative action is required.

Implementation Timeline: The CHE will request institutions submit liaisons immediately and the group will be established by June 30, 2023.

RECOMMENDATION 2:

Develop, manage, and curate a robust statewide data system and dashboard, and provide the CHE with the authority to request, collect, and analyze data from all participating higher education institutions.

The task force was limited by the availability of data on student transfer within the state. Limited data on statewide transfer (aggregated transfer headcounts by institution for the Fall semester only) are published annually by the CHE. It is possible for the CHE to disaggregate transfer students by race/ethnicity and gender, but this information is not part of standard reporting. Course level and student performance information, such as courses transferred, transfer credits awarded, course grades, and progress towards degree are not reported to the CHE. The CHE does collect credit hours attempted by students at each institution; however, the CHE does not collect data on credits earned, so it is not possible to calculate how many credits a student earned prior to transfer, received through transfer, or earned after transfer.

The National Student Clearinghouse is a data platform, providing key information on student movement at 3,600 postsecondary institutions nationwide. The CHE is currently working to ensure all state institutions participate in the National Student Clearinghouse, so the state will have access to system-wide data. Participation in this platform would provide invaluable data for numerous programs and provide context for recommendations that are state-wide and impact large numbers of postsecondary students in the transfer path.

Information collected through the initial survey found nearly half (47 percent) of reporting South Carolina institutions either occasionally or never obtain data on students transferring into their institutions.

Additionally, institution personnel often do not know or are not informed about 1) transfer student demographics, 2) data that is disaggregated by institutions, to include disaggregated by student demographic characteristics, 3) measures of success such as GPA, degree progress or graduation rates, and retention of transfer students. Without these disaggregated data, identifying impediments to transfer success statewide is impossible.

Additionally, responses from the survey point to an increased need for institutions to share transfer student data with key advisers, faculty, and staff. For example:

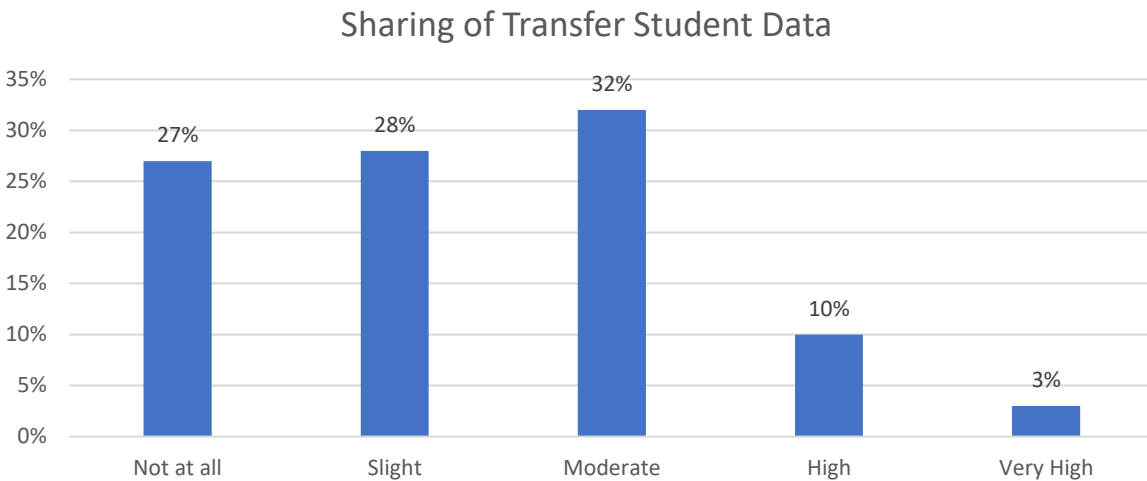
When asked if their institution shared transfer student data with the faculty and staff who work directly with transfer students, 55 percent of the respondents said the amount of transfer student data they were given was “slight” to “none at all.”

When asked about how effective transfer student programs were on their campus, in terms of promoting overall transfer student success, many of the respondents (44 percent), indicated “none at all” or “slight.” Without sufficient data on student learning outcomes after participating in a transfer student campus event, the success outcomes simply cannot be gauged, only estimated.

Data from the survey responses also pointed out areas of confidence in the level of success institution faculty and staff expected to see from new transfer students. In other words, exhibiting a strong belief their institution would provide a successful experience for new transfer students translated into higher retention and success rates.

When institutions were asked if they “believe transfer students are more or less successful at your institution than students who began at your institution,” 81 percent of the 475 respondents reported they believed transfer students were equally or more successful than those students who started at the institution.

The survey concluded by asking respondents to examine institutional policy and practice, and statewide policy and practices. More than 60 percent of the respondents indicated their institution strategic plan addressed the success of transfer students to a moderate to very high degree. Yet 56 percent of the respondents indicate data regarding transfer students is not shared with faculty and staff who work with transfer students. This acknowledgement suggests an area for improvement (Figure 1).

Figure 1. Sharing of Transfer Student Data

For these reasons, a robust statewide data system is needed to collect student information, cross reference the transfer student database(s) with student enrollment database(s) and provide access to disaggregated data for statewide tracking. Furthermore, to conduct these activities, the CHE needs to be granted the authority to request, collect, and analyze data from participating institutions. A statewide data system also provides a pathway into deeper collaborations with the SCDE. For example, the recommended data system should be robust enough to include the ability to disaggregate transfer student data by academic history to assess academic needs, such as the need for co-requisites, advising/career counseling, advanced course study offered via the honors program, internships, etc., for a diverse transfer student population. As a result of the available academic history data, institutions could address the identified needs of transfer students by having a required academic checklist of procedures and protocols developed by the registrar's office in conjunction with the Division of Academic Affairs to be completed at the time of enrollment and maintained for continuous advisement.

Furthermore, the utilization of existing state data resources, such as the RFA, could further enhance a data system by including student information that could inform support services. For example, the data system could be used to assess needs such as housing, financial aid, childcare, etc. for a diverse transfer student population. Implementation of a data system would allow the publishing of institutional information to a dashboard that would allow transfer students to make informed decisions about degree programs.

Higher Education Institution Action: Upon further guidance from the CHE, participating institutions should commit to submitting the needed data variables consistently and accurately for the data system and dashboard.

Legislative Action: Statutory or regulatory action may be required to grant the CHE authority to request, collect, and analyze additional data. Collaborations with other state agencies (e.g., SCDE, RFA) may be required with legislative action.

Implementation Timeline: Implementation is immediately after proper authority is granted to the CHE and publishing of variables are presented to participating institutions. Sufficient time should be given for institutions to update data systems to allow for streamlined submission.

RECOMMENDATION 3:

Convene a stakeholder group, comprised of representatives from two- and four-year South Carolina institutions, to review and address transfer articulation resources and needs, to include:

- Evaluating and assessing current transfer and articulation platforms and portals, including SC TRAC, in order to meet the needs of transfer students.
- Developing a matrix to standardize courses for equivalent, transferable, degree-benefiting credit.
- Developing a process for using common general education learning outcomes to supersede course equivalencies.
- Establishing common standards for evaluating and awarding credit consistently and with maximum applicability to degrees.
- Negotiating a statewide articulation among the SC Technical College System (SCTCS), four-year public institutions, and participating institutions of the South Carolina Independent Colleges and Universities (SCICU) to recognize the Associate in Arts and Associate in Science degrees as fulfilling baccalaureate general education requirements.

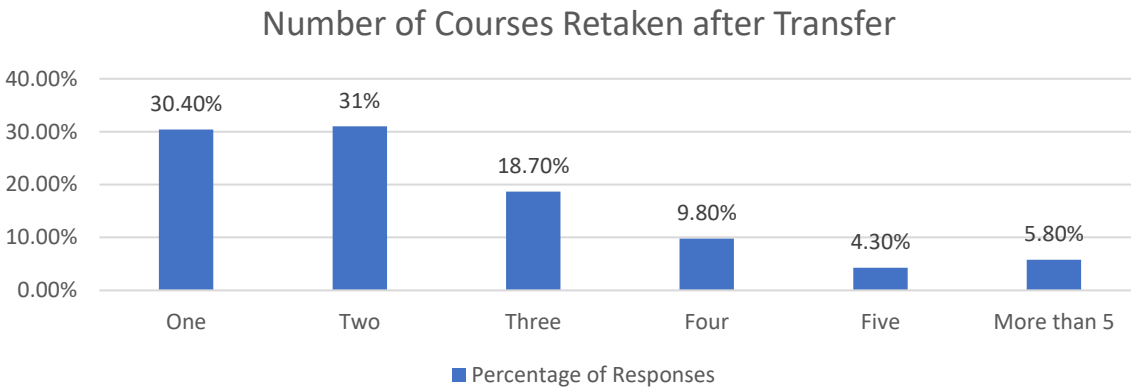
In South Carolina, systemic and long-standing barriers to effective transfer practices reflect nationwide transfer challenges, including inconsistent, unclear, or absent course equivalencies, institutional inflexibility on general education requirements, and a lack of block transfer of coursework. Past steps to improve transfer pathways in South Carolina include the [SC TRAC](#) and the 2021–22 Appropriations [Proviso 117.152](#)⁷. SC TRAC is intended as a one-stop shop, providing transfer students, administrators, and advisors/faculty with easy access to information they need for college transfer. However, many aspects of the SC TRAC are outdated, including the list of [Universally Transferable Courses in SC](#) (often referred to as the “list of 86”), [Transfer Agreements](#), institutional logos, contact information, and

⁷ **117.152.** (GP: Transfer Student Credits) *The Commission on Higher Education shall work in consultation with the State Board for Technical and Comprehensive Education and the public institutions of higher learning to develop policies by March 1, 2022, to guarantee students who have earned an Associate of Arts or Associate of Science degree from a public two-year institution of higher learning shall receive a minimum of sixty transfer credit hours at a public four-year college or university and shall be given a junior status at the college or university. Course Prerequisites and minimum credit requirements for awarding degrees shall still apply. Implementation of the provisions shall be effective beginning June 1, 2022.*

others. For example, regarding the “list of 86,” a recent audit across six institutions revealed that only 31 of the 86 courses could be coded as direct equivalents.

Proviso 117.152 mandates that students earning an A.A. or an A.S. from a public two-year institution of higher learning in South Carolina shall receive a minimum of 60 transfer credit hours to a public four-year institution. However, despite the 60-hour credit guarantee, many of those credits will not apply to a student’s general education or degree program. In a recent survey of transfer students, almost 71 percent of transfer student respondents reported some of the courses from their previous institution did not count towards their new major or degree program; 40 percent of respondents indicated that they had to retake three or more courses after transferring (Figure 2).

Figure 2. Number of Courses Retaken after Transfer.



Many institutions across the state are engaged in pathway refinement, such as the use of meta majors, guided pathways, direct transfer pathways, and curriculum maps. Approaches, however, vary across the state and largely localized between a technical college and their neighboring college or university. The SCTCS has 20 system-wide transfer agreements among 18 partner institutions. In all other cases, SCTCS transfer efforts are localized, resulting in dozens if not hundreds of articulation agreements between two-year and four-year institutions based on individual degree programs.

Institutions follow state policy by publishing their policies, the statewide policy, and transfer blocks in their bulletins/catalogs, but adherence to the spirit of policies and the acceptance of transfer credit varies by institution, because there is little state guidance for the award of credit transfer. Policies for accepting credit earned through dual enrollment, Advanced Placement, International Baccalaureate, military, prior learning assessments, etc. also vary by institution and can be restrictive.

Finally, while the SCTCS utilizes common course numbering, the state’s four-year institutions (public and private) do not have common course numbering, learning outcomes, or general education requirements.

The task force proposed that a stakeholder group be tasked with reducing these barriers in collaboration with the CHE and as supported by the State of South Carolina. Comprising representatives of public and participating independent institutions, this group should determine needs and means for the improvement or replacement of the existing SC TRAC system; reconstruct or replace a core list of commonly articulated courses and/or general education learning outcomes; ensure maximal applicability of transfer credits to general education and degree requirements, and establish recognition of the A.A. or A.S. degrees as satisfying baccalaureate general education requirements.

Higher Education Institution Action: Public and participating independent institutions should commit to active contribution to and cooperation with the resulting transfer information resources.

Legislative Action: Possible actions could include a budget request to fund and implement new or revised state resources, and/or legislation to recognize the A.A. and A.S. degrees as satisfying public and participating independent institutions' general baccalaureate education requirements. Additional legislative action could be needed to amend or suspend current state legislation that prevents independent colleges and universities from participating in existing resources due to state funding source.⁸

Implementation Timeline: The stakeholder group should be convened immediately to begin the review of existing resources and determine recommended courses of development.

RECOMMENDATION 4:

Request public and participating independent institutions inform students about transfer options and resources that provide additional information transfer.

Understanding the transfer process and obtaining accurate and timely advising is dependent upon having access to an advisor. Student survey responses indicate only 42 percent of students had "moderate to very high" opportunities to meet with an advisor or counselor at the institution to which they were considering transfer. When asked about the degree to which advisors or counselors assisted students with understanding the transfer process, 70 percent of students reported "not at all" or "slight." Student survey respondents indicated approximately 34 percent of advisors/counselors "frequently or occasionally" asked if they intended to transfer to another institution. Sixty-two percent of students indicated the level of assistance they received, regarding choosing the best college or university for them, based on their career goals, was only "slight."

Additionally, preventing credit loss begins with an understanding of how courses would be accepted toward degree requirements. Only 46 percent of students indicated advisors or counselors discussed how courses would be accepted toward their degree requirements at the transfer institution, while an almost equal percentage of respondents indicated that "none or only slight" was the discussion of application of course credit at the transfer institution. When asked about their awareness of "any services offered to assist with transfer at the institution(s) under consideration", only 25 percent of the students indicated a "high or very high" level of awareness. Approximately 37 percent of student respondents reported an awareness of the services designed for transfer students at their new institution.

Institutions that commit sufficient resources for advising will realize a return on investment in the form of enhanced retention and increased enrollment. Increased state funding for such advising will improve and accelerate the completion rate, resulting in more students prepared to enter the workforce.

⁸ For instance, the so-called Blaine Amendment to the SC Constitution, Article XI, Section 4: No money shall be paid from public funds nor shall the credit of the State or any of its political subdivisions be used for the direct benefit of any religious or other private educational institution. (1972 (57) 3193; 1973 (58) 44.)

Higher Education Institution Action: In collaboration with the state council, the CHE should develop a set of best practices for advising transfer students.

Legislative Action: Appropriate funding necessary to provide sufficient advising services.

Implementation Timeline: The CHE will develop the set of best practices by June 30, 2023. Institutions shall implement within the next academic year.

RECOMMENDATION 5:

Develop a plan to facilitate, implement, and incentivize reverse transfer.

Reverse transfer is the process by which a student is awarded an associate degree after transferring and completing degree requirements at another institution. A statewide reverse transfer system would allow students who transfer to another institution additional options for earning a credential. Reverse transfer acknowledges and awards student progress and ultimately contributes to the state's educational attainment rate. As emphasized in Recommendation 4, adequate advising is critical to the success of the transfer ecosystem. A reverse transfer system provides an additional tool for advisors to utilize in conversations with students. Implementing a systemic, statewide process for institutions to participate alleviates the burden of individual solutions and harnesses the state's resources responsibly.

Higher Education Institution Action: In collaboration with an advisory committee, it is the intent of the task force that the CHE should develop policies and procedures for reverse transfer. Public and participating independent institutions should commit to participation in the system including the necessary staff resources.

Legislative Action: Possible actions could include a budget request to fund and implement a system to facilitate reverse transfer.

Implementation Timeline: Ongoing.

RECOMMENDATION 6:

Request state funding to establish student transfer scholarships and a statewide awareness campaign for transfer.

Responses from the project's survey provided evidence for the development of additional resources to support transfer students and overall awareness of transfer opportunities. Survey respondents were asked about the degree to which financial aid or scholarships were available. Thirty-seven percent indicated "not at all" or "slightly." Fewer than 15 percent of the transfer students surveyed indicated aid or scholarships were available to a "very high" degree. More than 50 percent of the surveyed students indicated counselors did not help them understand the availability of financial aid after transfer. Institutions also had confidence transfer scholarships were effective in promoting transfer student success. Approximately 90 percent of institutions reported transfer scholarships were effective.

A state awareness campaign is not only good for students but also institutional staff. Institutional staff were asked to respond to questions about statewide transfer policy and practice. When asked to reflect on whether the state has a unified approach to transfer issues, 38 percent of those responding perceive the state to have a moderate to very high unified approach to transfer. When asked to provide their perspective on the current state transfer policies in terms of effectiveness in supporting successful student transfer, approximately 50 percent responded the effectiveness of these policies as moderate to very high. About a third of these respondents felt they had no knowledge of the effectiveness of state policy or its approach to transfer.

Additionally, awareness of transfer opportunities is particularly important for first-generation college students, students from low-income backgrounds, students from rural areas of the state, and other student populations who are traditionally underrepresented in state outcome metrics. Additionally, the state has a significant population of individuals with some college but no degree. An awareness campaign should target this population to reengage them and provide the supports necessary to facilitate them to completion.

Higher Education Institution Action: Accept state transfer scholarships as a supplement to current institutional transfer aid and promote aid availability in recruitment efforts. Participate in state awareness campaign by providing the necessary information.

Legislative Action: Appropriate funding necessary to support a new state transfer scholarship and statewide awareness campaign.

Implementation Timeline: The legislative timeline should be considered, and a budget request needs to be developed.

CONCLUSION

South Carolina seeks a transfer ecosystem that allows citizens to achieve their educational goals regardless of circumstance. Recommendations outlined in this report align with several of the considerations jointly promoted by the American Association of Collegiate Registrars and Admissions Officers, The American Council on Education, and the Council for Higher Education Accreditation⁹. Specifically:

- Recognition of prior learning should be independent of source or instructional modality; Credit should be awarded consistently across all schools, departments, and programs of study within an institution to the extent possible.
- Credit should be awarded in such a way as to provide for maximum applicability to specific degree requirements.
- Policies and practices should facilitate institutional collaboration with centralized resources and infrastructure that are straight-forward and transparent for students.
- Policies and practices should ensure students can easily obtain and/or release official academic transcripts.

In sum, the health of South Carolina's student transfer ecosystem needs attention and action across multiple stakeholders and various levels. Fortunately, the state has increasing amounts of good will and a willingness to create a stronger, more equitable transfer system. Established transfer partnerships exist among many individual institutions along with a several statewide agreements with the SCTCS. These examples, along with the state's existing state infrastructures – the CHE, SCICU, the SCTCS – will provide valuable conduits of development. The extent and magnitude of change needed to realize a goal of transfer system excellence will require a strong call for motivation and resources provided by the highest level of state governance.

⁹ AACRAO, CHEA, and ACE Joint Statement on the Transfer and Award of Credit - <https://www.acenet.edu/Documents/2021-Joint-Statement-Award-of-Credit.pdf>

APPENDIX A: STATE PROJECT LEADERSHIP TEAM

- Michael Igbonagwam, Program Manager for the Office of Strategic Initiatives and Engagement, CHE (*Project Lead*)
- Bunnie Ward, Director of Strategic Initiatives and Engagement, CHE
- Samuel Grubbs, Program Manager for Academic Affairs and Licensing, CHE
- Argentina Anderson, Assistant Director of Academic Affairs and Licensing, CHE
- Christopher Robinson, Program Manager for the Office of Data-Research and IT, CHE
- Monica Goodwin, Director of the Office of Data-Research and IT, CHE
- Mariam Dittmann, Director of Academic Affairs and Licensing, CHE
- Rosline Sumpter, Vice President for Academics, Student Affairs and Research, South Carolina Technical College System
- Eric Skipper, Provost and Executive Vice Chancellor for Academic Affairs, University of South Carolina Beaufort
- Jesulon Gibbs-Brown, Professor, South Carolina State University
- Kelli Fellows, Dean of Online and Graduate Programs, Newberry College
- Sid Parish, Vice President of Academic Affairs, Newberry College

APPENDIX B: TASK FORCE MEMBERSHIP AND DIMENSIONS COMMITTEE ASSIGNMENTS

Philosophy/Rationale: An exemplary state transfer ecosystem will have an explicit, written statement of its rationale for equitable student transfer to guide consistent policy and practice across the state and its institutions. This rationale establishes transfer-student success as a priority for the state and its institutions, especially for low-income, first-generation, Black, Latinx, Indigenous, and nontraditional students. The rationale provides a basis for transfer policies, data analysis, practices, structures, leadership, department/unit rationales, and resource allocation, at both state and institutional levels. (Gardner Institute, 2021).

Name	Position	Institution
Aaron Marterer*	Registrar	University of South Carolina Columbia
Greg Oaks*	Dean for Graduate Online and Extended Education	Winthrop University
Antonia Hill	Student & CHE Consultant	University of South Carolina Columbia
Rosline Sumpster	Vice President	South Carolina Technical College System
Donna Zeek	Director of Curriculum, Dean of School of Interdisciplinary Studies	Midlands Technical College

*Committee Co-Chairs

Transfer Equity: Exemplary state transfer ecosystems ensure students from low-income, first-generation, Latinx, Black, Indigenous, and other student groups have equitable educational opportunities that support success and enable degree/credential completion. The process of anticipating, identifying, and addressing student needs is continuous and is subject to regular assessment and adjustment. State transfer ecosystems provide services with respect for the students’ abilities, lived experiences, prior academic history, academic goals, and current needs and interests. States and their institutions regularly assess their own cultures, policies, and processes to assure they are equitably and consistently meeting the needs of all transfer students (Gardner Institute, 2021).

Name	Position	Institution
Ron Cox*	Dean/Associate Dean for Diversity, Equity, & Inclusion	University of South Carolina - Palmetto College
Donna Foster*	Associate Vice President for Institutional Effectiveness and Compliance	Piedmont Technical College
Lauren Gellar	Director, Division of Healthcare Studies and Associate Professor, College of Health Professions	Medical University of South Carolina
Davis Kuskowski	Associate VP for Enrollment Management	Clemson University
Ann Williams	Registrar	Francis Marion University
Jesloun Gibbs-Brown	Professor	South Carolina State University

*Committee Co-Chairs

Learning Curricular Pathways: Exemplary state transfer ecosystems assure the seamless development of transfer students' knowledge, skills, and experiences that enable students to meet their personal goals and that are consistent with the desired outcomes of higher education, state goals, and institutional missions. They also assure equitable opportunities for transfer students to participate in enriching educational experiences (Gardner Institute, 2021).

Name	Position	Institution
Aimeé Carter*	Director of Academic Partnerships and Engagement	South Carolina Technical College System
Trena Houpp*	Director of Academic Programs	University of South Carolina (Columbia)
Jen Booth	Registrar	Columbia International University
Kelly Brennan	Associate Provost for Enrollment Management	The Citadel
Kristen Gerhardt	Director of Bridge Programs & Education Partnerships	Tri-County Technical College

*Committee Co-Chairs

Organizations: Exemplary state transfer ecosystems have organizational structures, personnel, and policies that provide oversight and coordination of the transfer experience at statewide and institutional levels. A coherent transfer experience is realized and maintained through effective partnerships between and among higher educational institutions and state oversight entities. State transfer ecosystems provide mechanisms for regular interactions between and among institutional and state-level personnel in multiple roles. Transfer leaders at the institutional level coordinate transfer initiatives between the academic and other administrative units of their institutions and with transfer partner institutions. Institutions ensure equitable application of transfer policies across all academic units. Adequate budgetary allocations at the state and institutional level support and reward the transfer mission (Gardner Institute, 2021).

Name	Position	Institution
A. Clifton Myles*	Executive Vice President for Administration and Innovation / Chief Strategy Officer	Denmark Technical College
Jeff Perez*	President and CEO	South Carolina Independent College and Universities
Dawn Bare	Interim Director of Transfer Resources Center and Interim Registrar	College of Charleston
Jessica Berry	Professor and Chair of the Department of Speech Pathology & Audiology	South Carolina State University
Kim Purdy	Assistant Vice Chancellor for Academic Affairs	University of South Carolina Upstate
Kelli Fellows	Dean/ Online and Graduate Programs	Newberry College

*Committee Co-Chairs

Transfer Receptive Culture: Exemplary state transfer ecosystems foster transfer receptive cultures in sending and receiving institutions. They facilitate shared responsibility for equitable transfer-student success with institutional academic administration, faculty, enrollment services, financial aid, and student affairs/success units. States provide financial support for transfer processes and expect institutions to offer appropriate pretransfer outreach. State transfer ecosystems advance collaboration between institutions to ensure transfer students are integrated both academically and socially. Exemplary transfer ecosystems create a culture of trust and respect as a basis for collaboration (Gardner Institute, 2021).

Name	Position	Institution
Susan Henderson*	Provost	Coker University
Heather Hoppe*	Registrar	Horry-Georgetown Technical College
Lloyd Willis	Interim Dean, College of Graduate and Online Studies	Lander University
Casey Woodling	Director of Academic Outreach and Continuing Education, (Coastal Carolina University)	Coastal Carolina University
Eric Skipper	Provost	University of South Carolina Beaufort

*Committee Co-Chairs

Data, Accountability, and Improvement: Exemplary state transfer ecosystems regularly assess transfer patterns, transfer student outcomes, and transfer culture. The state oversight entity(ies) provides comprehensive disaggregated transfer and non-transfer student data to ensure institutions fully understand transfer enrollment patterns and are equitably meeting the needs of all transfer students. In addition, they provide analytic tools to support the transfer information needs of their institutions. State transfer systems and institutions use this data to effectively plan, make decisions, and implement initiatives for student transfer. To achieve ongoing improvement, state ecosystems participate in relevant professional organizations, implement current transfer practices, and conduct research and scholarship on transfer students and the transfer process (Gardner Institute, 2021).

Name	Position	Institution
Amy Gutzmer*	Director of Marketing and Communications for Online and Continuous Learning	Anderson University
Mary Von Kaenel*	Director, Bridge to Clemson and Transfer Academic Programs	Clemson University
Lillian Hunter	Advising	Tri-County Technical College
Brian Mallory	Director of Institutional Effectiveness and Research	University of South Carolina Beaufort
Christopher Robinson	Program Manager	South Carolina Commission on Higher Education

*Committee Co-Chairs

APPENDIX C: INSTITUTIONAL SURVEY LIAISONS

SHEEO/Gardner Institutional Survey Contacts

Name	Institution
Chris McNamara	Aiken Technical College
Bryan May	Central Carolina Technical College
A. Clifton Myles	Denmark Technical College
Gary Ancheta	Florence-Darlington Technical College
Rhodona Roddenberry	Greenville Technical College
Lori Heafner	Horry-Georgetown Technical College
Kevin Bray	Midlands Technical College
Karen English	Northeastern Technical College
Cleveland Wilson	Orangeburg-Calhoun Technical College
Donna Foster	Piedmont Technical College
Amanda Adams	Spartanburg Technical College
Camille Myers	Technical College of the Low Country
Chris Marino	Tri-County Technical College
Liz Rennick	Trident Technical College
Paige Brown	Williamsburg Technical College
Mary Beth Schwartz	York Technical College
Kate Flaherty	Coker University
Jamie Grant	Converse University
Jason Abreu	Furman University
Amy Gutzmer	Anderson University
Curt Laird	Spartanburg Methodist College
James Lanpher	Columbia International University
Damara Hightower Mitchell	Voorhees College
Lisa Long	Allen University
Lewis Graham	Morris College
Sandra McLendon	Southern Wesleyan University
Susanne Nelson	Newberry College
Doug Brady	Francis Marion University
Kelly Brennan	The Citadel
Timothy Drueke	Winthrop University
Amanda Karls	University of South Carolina Upstate
Brian Mallory	University of South Carolina Beaufort
Trena Houpp	University of South Carolina Columbia
Holly Legg	Coastal Carolina University
David Kuskowski	Clemson University
Mary Von Kaenel	Clemson University
Aimée Pfeifer	College of Charleston
Davion Petty	South Carolina State University

APPENDIX D: SURVEY/QUESTIONNAIRE OVERVIEW AND METHODOLOGY

INSTITUTIONAL STAFF AND STUDENT SURVEYS

One component of the work conducted by the task force was to explore the topic of transfer through a series of survey instruments created by the Gardner Institute as part of a larger project. Each institution in South Carolina was asked to deploy two surveys: one for the transfer students currently enrolled at their institution, and one for the faculty and staff who work regularly with transfer students in some capacity (advising, student engagement, campus life, and other relevant areas). The overarching goal of each survey instrument was to gather new or additional details about the transfer student life cycle, available campus resources, and to learn of institutional or campus efforts to improve the transfer process through grants and other funding. Additionally, learning more about the overall success rates for transfer students across the state would help inform the continued work of the task force committees.

Data collected at the end of the survey deployment period provided insight into a variety of topics associated with transfer students. Over 1,000 students from more than 25 institutions participated in the transfer student survey and represented all sectors of higher education in South Carolina (two-year and four-year public and private institutions were represented). Students responded to Likert scale, multiple choice, and open-ended questions related to their experiences as a transfer student.

Key areas of the transfer life cycle/transfer student experience were identified by transfer students as important or impactful for their success in college. These challenges include:

- Navigating the actual transfer process, which is often different at each institution.
- Obtaining accurate and timely academic advising, at both the “sending” and “receiving” institution.
- Difficulties with obtaining financial aid assistance at crucial times during the transfer process, or a lack of financial aid options/little or no funding support as a transfer student.
- Loss of credit hours when transferring between institutions, even within the same degree program.

TRANSFER QUESTIONNAIRE

While the Gardner Institute provided state, institution, and student-level surveys and data, the transfer task force committees determined a need for additional survey questions and developed the “Request for Transfer Information 2022 Questionnaire” for institutions to complete. The questionnaire revealed:

- All the responding institutions have a web page dedicated to transfer and 90 percent offer pathways or guides to improve academic advising and decision making for transfer students.
- All institutions have a policy for accepting College-Level Examination Program (CLEP), all but one have a policy for accepting military credit, and 70 percent have a policy for accepting prior learning assessment;
- Less than half (45 percent) have a policy for accepting competency-based assessments/credit.
- Less than half (43 percent) have transfer agreements with nearby institutions in bordering states.
- Approximately 60 percent have a reverse transfer policy or a process in place to facilitate reverse transfer.
- Approximately 60 percent have a credit appeal process if transfer credit is not awarded initially.

- Institutions cited direct transfer pathways and agreements, comprehensive transfer tables, transfer advisement, and transfer weeks or days as successful transfer processes and practices.
- Eighty five percent have degree program(s) designed specifically for transfer or bachelor's degrees with flexible curricular requirements to accommodate transfer students.
- Sixty five percent of institutional research offices track transfer student outcomes, characteristics, and experiences compared to non-transfer students (most common responses were tracking six-year graduation rates and successful completion of course sequences).
- Seventy five percent have specially assigned transfer academic advisors or counselors, and 80 percent provide training to faculty and staff on advising/guiding the transfer student population.
- Sixty five percent have a senior institutional officer who serves as a primary advocate for advancing transfer student attention and support.
- Fifteen percent provide priority registration for transfer students.
- Thirty percent offer special course sections for University 101/college success courses for transfer bound or incoming transfer students.
- Thirty percent offer designated scholarships for transfer students.
- Fifteen percent offer awards or special recognition to individual transfer students for academic achievements.
- Institutions gave SC TRAC a mean rating of 3.74 out of 5. Comments explaining this ranking noted its "ease of use," but noted "students need more awareness of it" and challenges related to keeping the information current.

DATA VISUALIZATIONS

STUDENT MOVEMENT

The student movement data demonstrate how students are moving between institutions in the state including outgoing and incoming students. Institutions can view several cohorts of students and their transfer patterns. Additionally, the state can identify institutions where the most movement occurs. Access to this data may be requested from Michael Igbonagwam, CHE, at migbonagwam@che.sc.gov.

STUDENT ENROLLMENTS

The student enrollments data indicate new student enrollments for transfer and non-transfer students at institutions. Several cohorts of data are available for institutions to compare enrollment patterns among each other and across years. Access to this data may be requested from Michael Igbonagwam, CHE, at migbonagwam@che.sc.gov.

MAJOR FLOWS

Individual institutions can explore the flow of students through majors. Indicators show students who continue in the major, move to a different major, transfer out of the institution, skip terms, stop out, or graduate. Additionally, institutions can filter the data by time to degree and retention status. Multiple years of data provide institutions the ability to identify patterns and compare majors. Access to this data may be requested from Michael Igbonagwam, CHE, at migbonagwam@che.sc.gov.

GRADUATION BY TRANSFER STATUS

The student graduation by transfer status data allows individual institutions to view a cohort's graduation status by their transfer/non-transfer student status. Multiple graduation points (i.e., 100 percent, 150 percent, 200 percent) are available for comparison. Access to this data may be requested from Michael Igbonagwam, CHE, at migbonagwam@che.sc.gov.

APPENDIX E: SOURCES

Joint Statement on the Transfer and Award of Credit. (2021). Retrieved from <https://www.acenet.edu/Documents/2021-Joint-Statement-Award-of-Credit.pdf>