



Policy Concept Form

All policy proposals including new policy concepts, recommendations to revise, or requests to repeal must be submitted via this form to the University Secretary. The Secretary will forward completed concept forms to the President's Policy Advisory Council for consideration pursuant to I.03.01 Policy on University Policies. When submitting a policy concept form, please keep the following university definition of "policy" in mind:

A University Policy ("Policy") is a policy that (1) has broad application or impact throughout the University community, (2) must be implemented to ensure compliance with state or federal law, (3) is necessary to enhance the University's mission, to ensure institutional consistency and operational efficiency, or to mitigate institutional risks; or (4) is otherwise designated by the Board or the President as a University Policy subject to the Policy- Making Process authorized in section 4. A policy establishes rights, requirements or responsibilities. Excluded from this definition are things such as, but not limited to, implementation guides, operating guidelines, internal procedures, and similar management controls and tools.

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Policy Subject Matter (please included existing policy number(s) if available)

OUS 51 Transfer and Articulation (1998)

Statement of Need and Desired Result (please describe what we accomplish with the proposed action)

This particular policy is no longer relevant in current form. The UO faculty have policies in place for transfer students available in the catalog and UO actively recruits transfer students.

Affected Policy Stakeholders (please list all known impacted stakeholders and the nature of those impacts)

Registrar's Office-responsible for posting transfer work to individual student records and maintaining the degree audit system
Admissions Office-responsible for recruiting new transfer students

Proposed Action (i.e., new, revision, repeal)

Repeal

REASON FOR POLICY

ENTITIES AFFECTED BY THIS POLICY

WEB SITE ADDRESS FOR THIS POLICY

RESPONSIBLE OFFICE

Office of Enrollment Management at (541) 346-9386, vpem@uoregon.edu

ENACTMENT & REVISION HISTORY

Became a UO policy by operation of law on July 1, 2014.

Adopted by the SBHE in 1998.

POLICY

Introduction

What do we know about transfer and articulation? First, that they're not the same thing. Transfer is defined as the process for reviewing and admitting applicants to undergraduate programs who have previous college work. Articulation is the process whereby two or more institutions align courses and/or programs. Second, these are not just Oregon issues, but are receiving widespread national attention. According to a 1996 report by the National Center for Education Statistics, only about 37 percent of the students who earn a baccalaureate degree do so from the school at which they first matriculated. Third, student movement between and among institutions is not necessarily linear (e.g., two years at a community college followed by two years at a university). Several recent studies document the multiple patterns of student movement in their pursuit of higher education (e.g., Kearney et al., at a large public Midwestern university, 1995; Kinnick et al., at PSU, 1997). Fourth, an increasing array of postsecondary educational providers and delivery modes further challenges our ability to provide for the smooth movement of students through their postsecondary experience.

And, finally, educational reform (both nationally and in Oregon) and higher expectations by prospective employers are moving higher education away from traditional evaluation by course credits and contact hours to evaluation based on proficiency and specific outcomes.

Direction of State Leadership

The Oregon State Board of Higher Education, Governor Kitzhaber, and the Oregon Legislature have all targeted improved transfer and articulation as key educational priorities. Following is a summary of recent actions.

Board of Higher Education. In late 1996, the Board formed a Solution Team on Access, Transfer, and Community Colleges. As part of its Systemwide strategic planning, it was charged with developing a barrier-free admission and transfer process to enable students to achieve their academic goals, and partnering with the community colleges to provide baccalaureate capacity and access. The Solution Team recommended action in several areas: credit acceptance; student access strategies; transfer; communication; and comprehensive, collaborative students services.

Governor Kitzhaber. The Governor's Task Force on Higher Education and the Economy report (December 1997) encouraged "all Oregon institutions of higher learning to form alliances to serve the needs of Oregon learners." The Governor's Task Force on College Access report (8/97) called for a "level of transfer much more general than that offered by the Associate of Arts/Oregon Transfer degree" (AA/OT); a Web site and toll-free phone number to increase communication; and transfer agreements. In December 1997, Governor Kitzhaber reiterated to the Board his strong commitment to higher education access, stating that no Oregonian should be "left out by reason of geography, economic, racial or ethnic background, time constraints, or avoidable logistical problems." His goal is to achieve "complete program transferability among community colleges and universities, as well as facilitating transferability issues with private and out-of-state schools."

Oregon Legislature. During the last legislative session, two bills in particular address the need for intersector progress toward solving transfer and articulation problems. House Bill 2387 directs the Board of Education and the Board of Higher Education to "jointly develop a plan for the transfer of credits between community colleges and state institutions of higher education" and to submit this plan for approval at the next legislative session. Senate Bill 919 directs the two boards "to develop policies and procedures that ensure maximum transfer of credits between community colleges and state institutions of higher education."

The Oregon Context

Current Perspective. Myriad postsecondary educational choices currently exist, creating a staggering number of possible educational pathways for students. OUS and its partners need to be prepared to receive these students. In 1995-96, there were 3,706 postsecondary education institutions in the United States (Andersen, 1997). OUS currently offers 321 baccalaureate degree programs. In 1996-97, more than 3,000 new students were admitted to OUS undergraduate programs from Oregon community colleges alone, and an additional 2,258 students were admitted from 742 different out-of-state institutions.

OUS and its partners have tackled transfer and articulation problems through a number of avenues. Among the most notable are the AA/OT degree; common course numbering; the development of comprehensive course equivalency tables that are accessible on the Web; the K-16 Web page "ONE"; and numerous OUS-community college partnership arrangements, such as the University Center in Bend.

Issues regarding credit transfer continue to be at the heart of higher education's challenge. Non-application of credit may occur for any number of reasons, such as:

- The receiving institution limits the number of professional-technical courses it accepts;
- The course in question is college preparatory (i.e., remedial);
- The credit was granted on the basis of prior learning (experiential) and not considered equivalent to offerings at the receiving institution;
- The course was taken at a non-accredited institution; or
- The student received an unsatisfactory grade.

Realistically, some problems will always be beyond the ability of higher education to address (e.g., additional coursework required due to a student changing his/her major).

Future Perspective. Education is changing, throughout the nation and in Oregon. As a result, the transfer/articulation picture is growing in both scope and complexity. Some important elements of the new context follow.

As more out-of-state providers enter the Oregon educational market, placebound students will be able to "attend" non-Oregon institutions. Electronically delivered coursework will provide time-bound and placebound students with more educational opportunities from a variety of providers. As a result, student transcripts for transfer will become more varied and complicated.

One of the biggest changes underway in education in the nation is the concerted move to outcomes-based education. Educational sectors are being asked to define learning goals, standards, and outcomes of courses, programs, and degrees.

The educational emphasis on outcomes extends to performance indicators approved by the Board (November 1997). An access indicator calls for measuring the effectiveness of transfer programs (e.g., the proportion of transfers of total enrollment, the graduation rate of transfer students) and will produce data to track the progress made.

Students no longer move lockstep through a predetermined high school curriculum, but have opportunities for more individualized and accelerated academic programs. Articulation strategies such as co-enrollment and early admission will demand increased attention from higher education providers.

Public accountability and "customer" expectations will continue to grow in importance in this state, as elsewhere. Oregonians want to see evidence that the public sector exhibits a market orientation and works effectively with other sectors in providing students a rich array of programs and services.

Next Steps

Although the scope and complexity of transfer and articulation issues are daunting, OUS and its partners are resolved to create the most seamless process possible. Changes in the future context -- and others yet to be identified -- suggest that transfer and articulation initiatives need to foster a "co-evolving" of the educational sectors and economy to meet the needs of higher education's varied customers. The following proposed policy and strategic actions affirm the System's commitment to advance transfer and articulation initiatives within current and emerging contexts, with an emphasis on relationships between OUS and the community colleges.

Policy and Principles

The goal of the Oregon State Board of Higher Education is for Oregonians to have maximum academic program articulation and transferability.

To that end, the Board endorses the following assumptions and guiding principles:

1. Responsibility for successful student transfer and articulation is shared among OUS, community colleges, K-12, students, and independent and other educational providers; cooperation and collaboration are essential.
2. Broad curricular diversity among the OUS institutions and community colleges creates a dynamic tension when trying to resolve problems of articulation.
3. OUS institutions, as well as intersector groups (e.g., Joint Boards Articulation Commission) are actively addressing problems that arise in transfer and articulation processes.
4. Communication is fundamental, both among educational providers and with students.
5. Transfer and articulation agreements may be constructed at many levels (e.g., system to system, institution to institution, program to program) and for any number of reasons (e.g., regional partnerships, workforce needs).
6. Transfer and articulation initiatives must be structured enough to guide action, yet flexible enough to allow for student, societal, and educational change and evolution.
7. Initiatives should be informed by sound research.
8. Initiatives should reflect the increasing move by all levels and sectors of education to outcomes- and proficiency-based learning and admissions processes.
9. Transfer and articulation initiatives are not limited to curricular alignment alone and, consequently, should be responsive to student service needs (e.g., timely and accurate advising, financial aid).

Strategic Actions

To implement the policy and principles, the Board of Higher Education directs the Chancellor's Office and the System campuses to take specific action in the following areas:

1. ***Co-admission/co-enrollment programs.*** Develop additional co-admission and co-enrollment programs for eligible students who begin their postsecondary education on community college campuses and who plan to complete their baccalaureate program at the partnering OUS institution. By enabling timely relationships with students through such programs, degree completion has a better chance of success.
2. ***Articulation agreements.*** Support the development of articulation agreements between individual institutions within the array of educational service providers in the state. As the explosion of distance education, alternative format, and Web-based courses and programs from multiple

educational service providers continues, formalized arrangements will facilitate an orderly flow of students from campus to campus. The new major regional partnerships have strong potential for meeting educational access needs.

3. *Additional block transfer degree.* Work with the community colleges to develop a block transfer Associate of Science (AS) degree that would better fit students whose goals are to transfer to OUS programs in the sciences, health sciences, engineering, and other technical fields (and where the current AA/OT degree does not align with the baccalaureate major requirements).
4. *Baccalaureate degree outcomes.* Establish the learning outcomes expected of a student graduating with a baccalaureate degree. Ease of transfer should eventually result if the focus is on the learning outcomes a student is able to demonstrate, rather than the course credits accumulated. Building on the work of PASS and other outcomes-based initiatives, a Systemwide task force, with participation from the community colleges, will be charged with identifying baccalaureate degree outcomes and their application to the transfer process.
5. *Course equivalency information systems.*
 - Uniformly compile, regularly update, and widely distribute information regarding course equivalencies (between OUS institution courses and community college courses). Those System institutions presently lacking this capability should make it a priority for the next admission cycle. Publishing information on the World Wide Web, with a user-friendly interface, is the preferred distribution method. Contact persons at each institution should be identified for students, advisors, counselors, or others needing assistance in finding and interpreting the equivalency information as published.
 - At the System level, a standard course-equivalency information system should be created that builds on the efforts already in place at the campus level. Such a comprehensive data system would enable students and advisors to determine the relationship between all community college courses and similar courses offered at OUS institutions. Resources to accomplish this strategic action should be sought.
6. *Discipline-based problem solving.* Convene and conduct periodic meetings among faculty in the same disciplines in community colleges and OUS institutions to discuss issues of mutual concern and to resolve problems. The Joint Boards Articulation Commission (JBAC), the Academic Council (OUS), and/or the Council of Instructional Administrators (community colleges) should sponsor such faculty forums. For example, faculty must resolve transfer issues related to similar (or the same) courses offered at the upper-division level in OUS institutions that are offered at the lower-division level in community colleges. Resolutions are required that do not disadvantage (e.g., with respect to upper-division credit requirements) transfer students who have earned credits in the community college courses.
7. *Professional-technical courses.* Reach agreement between OUS institutions and the community colleges about how professional-technical courses and programs are defined and then operationalize transfer policies and procedures consistent with those definitions. Further, expand institutional policies and practices that facilitate student transfer from professional-technical programs into compatible and/or complementary baccalaureate programs.

8. *Research agenda.* Establish a focused research agenda to inform the transfer and articulation policy agenda, and current and future strategic directions. Examples of such research questions should include (but are not limited to): (1) What happens to the large number of AA/OT graduates who apparently do not transfer to an OUS institution? (2) What are the highest-demand programs for students transferring into OUS institutions? (3) How much time do students transferring in with an AA/OT, and/or other associate degree take to earn a baccalaureate degree? (4) What are the comparative success rates of students with different patterns of pursuits of the baccalaureate degree?
9. *Institutional responsibilities.* Recognize that every institution bears an administrative responsibility for implementation and oversight of matters affecting transfer students. Each campus should review its capacity to respond to student problems and concerns, and make improvements as needed. (The Web-based JBAC Articulation Hotline provides links to the campus contacts who are responsible for transfer student issues.)
10. *Communication, course sharing, and articulation.* Develop, in cooperation with the ONE (Oregon Network for Education) project, a Web-based common college catalog of distance education courses available from Oregon and partner institutions. Establish a "Common Course Marketplace" comprised of those distance education courses for which credit would be accepted at any participating Oregon institution. Resources to accomplish this strategic action should be sought.
11. *Early options programs.* Develop, with the Joint Boards, policies that support new and/or expanded partnerships among OUS, community colleges, and high schools to better serve "college-ready" high school students in early college programs and expedite student progress toward a college degree.
12. *Intrasystem transfer issues.* Resolve "internal" (OUS institution to OUS institution) programmatic transfer issues. For example, students transferring upper-division credits from a System program that is not professionally accredited are sometimes required to repeat courses when moving to a program that is professionally accredited. Professionally accredited programs should work with "sending" programs to develop learning outcome-based ways to assure that transfer credits meet the specifications of their curriculum. Where this is unacceptable to accreditation groups, work to accommodate the demonstrated learning outcomes of transfer students.
13. *Intersector transfer plan.* Work with the JBAC and its action teams to respond to the requirements of House Bill 2387, presenting an effective intersector transfer plan to the 1999 Legislature.

RELATED RESOURCES

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