HOW FACULTY MEMBERS INFLUENCE CREDIT TRANSFER AT FOUR-YEAR INSTITUTIONS

Building Knowledge to Improve Transfer Student Outcomes

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BUILDING KNOWLEDGE TO IMPROVE SOCIAL POLICY

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OVERVIEW

Transferring credits from a community college to a four-year institution remains a crucial strategy many students must use to obtain a bachelor's degree. However, effectively implementing this strategy can be difficult. Despite state policies intended to streamline credit transfer, students face significant barriers to having their credits accepted and, more importantly, applied to degree requirements at four-year institutions.

Faculty members in teaching, research, and administrative positions play a pivotal role in decisions about whether and how credits transfer, yet little research has examined how they approach these decisions or what factors influence their judgment. This mixed-methods study, funded by Ascendium Education Group and conducted by MDRC, addresses this knowledge gap by exploring faculty members' decision-making within a large and complex transfer landscape.

The study involved three University of Texas System institutions: the University of Texas at Arlington, the University of Texas at El Paso, and the University of Texas at Tyler. MDRC researchers conducted interviews and focus groups with faculty and staff members, analyzed institutional data on transfer student outcomes, and reviewed state and institutional transfer policies and documentation on credit evaluation processes. The main findings of the report are summarized below.

- **The distinction between credit transfer and credit application matters.** This analysis found that, at some institutions, over 40 percent of transferred credits did not apply to degree requirements at the time of graduation. The disconnect between credit transfer and application often leads to excess credits and extended time to graduation.
- **Data systems can affect and inform transfer student success.** Institutions vary considerably in what kinds of transfer student data they track. The lack of centralized and standardized data collection across institutions makes it challenging to identify where students encounter barriers and to respond with evidence-based improvements.
- **Faculty members often make significant decisions within large, complex institutional systems.** At some institutions, faculty members exercise substantial discretion in credit evaluation decisions, particularly regarding major requirements. However, these decisions occur within complicated institutional processes involving multiple stakeholders and competing priorities, and this environment can undermine efforts to implement consistent credit evaluation practices.
- **Disciplinary context shapes decisions about credit transfer and transfer pathways.** Different academic disciplines approach transfer credit evaluation in different ways, based on their unique contexts and requirements. There is also disciplinary variation in the nature of the challenges encountered in aligning curricula to create seamless transfer pathways to a bachelor's degree. These nuances reflect the need for field-specific approaches to improving transfer student outcomes.
- **Departmental leadership approaches, along with faculty members' perceptions of community college coursework and transfer students' academic preparation, influence credit evaluations.** Department chairs and program leaders significantly influence transfer credit practices through both formal policies and informal departmental culture. Also, while some faculty members expressed concerns about transfer student preparation, institutional data show many transfer students perform well academically—with 41 percent increasing their grade point average in their first semester after transfer—highlighting the importance of using evidence to inform departmental practices and policies.

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ACKNOWLEDGMENTS

This report would not have been possible without the contributions of many individuals and organizations. We extend our deepest gratitude to the University of Texas System, particularly the University of Texas at Arlington, the University of Texas at El Paso, and the University of Texas at Tyler, whose collaboration made this work possible. We are especially grateful to Rebecca Karoff and Kevin Lemoine for representing the university system and Amber Smallwood, Kimberly Tate, Gabriela Rodriguez, Heather Smith, Colleen Swain, and Lance Williams for serving as their campus site leaders. We appreciate the additional support from Amanda Vasquez-Vicario. Additionally, we extend our gratitude to the staff of the institutional research offices at each partner institution. Special thanks to Funda Karapinar-Reilly, Sundararajan Usha Kilasevalpatti, Denise Carrejo, Elsa Martin, and Cindy Strawn. Their support was crucial in ensuring the comprehensiveness and accuracy of the data used in this study.

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We are extremely appreciative of Ascendium Education Group for its financial support and guidance. Its investment in this research made it possible to explore and address the critical issue of transfer in postsecondary education. Thank you to Carolynn Lee and Valerie Crespin-Trujillo for their ongoing support of this work.

Several staff members at MDRC worked tirelessly over several years to ensure the successful execution of this study and report. Tiffany Morton and Melissa Boynton served as adept resource managers from project conception to completion. We are grateful to Alex Mayer, Barbara Condliffe, Joshua Malbin, Caitlin Anzelone, Amy Perry, and John Diamond, who reviewed early drafts and provided editorial support, enhancing the clarity and coherence of the report. Thank you to Carolyn Thomas for preparing the design and layout of the report.

The Authors

1

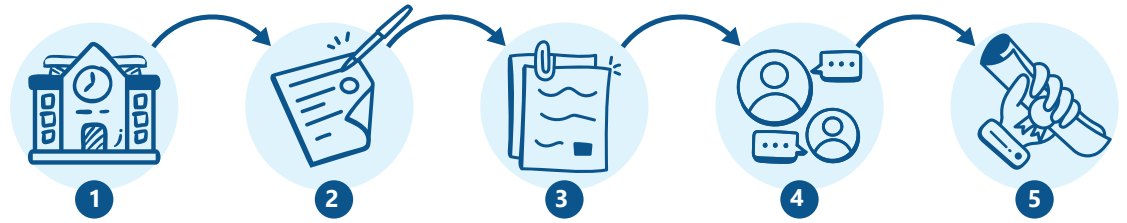
Introduction

The path to a bachelor's degree via transfer from a community college to a four-year institution, as seen in Figure 1.1, remains a critical but challenging one for many students.[1] For transfer students, the process of having prior credits evaluated by the new institution and applied toward degree requirements (Step 3 in Figure 1.1) often seems like a black box. Institutions evaluating transfer credits can reject them for several reasons; for example, a course might be outside degree requirements or a repeated course, or the student might not have met the minimum grade requirement. Moreover, the credits that do transfer might not count toward the specific degree a student has chosen. This disconnect between credit transfer and credit application can lead to significant disruptions in students' transfer plans, often forcing students to retake similar courses or to take additional classes to satisfy program requirements.[2]

In taking extra courses, transfer students must invest even more time and money than peers who have not transferred to complete the requirements of their degree program. The impact on students in terms of lost time and money, and the deferment or abandonment of educational plans, is significant.[3] The scale of this problem can be described in terms of excess credits, or credits earned beyond the total number required for a bachelor's degree. Among students who graduated from a Texas public four-year institution with a bachelor's degree in 2023, transfer students had 17 excess credits, in comparison with 7 excess credits for those who graduated from the institution at which they started.[4] Completion data further illustrate the challenges involved in transferring. Texas students who transferred into four-year institutions took nearly two more years to complete their degree and graduated at a rate almost 20 percentage points below the rate of nontransfer students (68 percent compared with 86 percent).[5]

1. Diamond, Barman, O'Donoghue, and Alonzo (2024); Sutcliffe and Condliffe (2020).
2. Texas Higher Education Coordinating Board (2025a).
3. Public Agenda (2024).
4. Texas Higher Education Coordinating Board (2025b).
5. THECB DataBridge (2024).

Figure 1.1 Milestones in the Transfer Student Journey



1	2	3	4	5
Enroll in Courses	**Apply to Transfer**	**Transfer Credit Evaluation**	**Complete Enrollment**	**Complete Degree Program Requirements**
Take and pass college-level course(s).	Submit application for admission along with transcripts to prospective schools.	Wait to receive transfer credit evaluation and provide additional course information (syllabi, coursework, etc.) as requested.	Accept admissions offer and meet with advisor to discuss degree plan. Register for courses to take first semester after transfer.	Complete course requirements of chosen degree program and appeal credit evaluations as necessary.

Transfer credit evaluation is a complicated process. Staff and faculty members evaluate incoming credits from different institutions while applying departmental, institutional, and state-level policies to the application of that credit. It requires coordination among multiple levels and units of faculty, staff, and administrators within and between postsecondary institutions. This report focuses specifically on the role of faculty members, which has not been closely examined in the research literature. As the primary decision-makers about academic content requirements within their disciplines, faculty members exercise discretion in determining how transfer credits apply to degree programs, even within the framework of state and institutional transfer policies.

Within the Texas postsecondary education landscape exist multiple layers of complexity. It is a large, decentralized system in which students are transferring from and between two- and four-year institutions — each with its own transfer process, practices, and policies. Given the broad scope of transfer activities and context within the state, this study focused solely on vertical transfer (transfer from a two-year institution to a four-year institution).

This report examines the role of faculty members in transfer credit evaluation and curricular alignment at three University of Texas System institutions serving diverse geographic areas and student populations, focusing on how faculty make decisions about transfer credits and how departmental and institutional contexts shape these decisions. As a term, “faculty” (or “faculty members”) can refer to a broad group of individuals at an institution with primary responsibilities in teaching, research, and service. In the context of this study, it specifies individuals who are employed full-time at an institution with a faculty appointment, including

faculty members whose current roles may be administratively focused, such as academic deans or provosts. It also includes administrators, such as directors of student support units, who may have part-time faculty teaching roles. The following chapters provide background on the Texas transfer policy context, describe the study's methodology, analyze faculty decision-making processes and their implications, and conclude with recommendations for improving transfer credit evaluation practices.

2

Texas Transfer Policy and Context

The landscape of transfer policy and practice in Texas reflects both the complexity of implementing effective transfer systems and the state's commitment to improving transfer student outcomes.[1] As the second-most populous state with the fastest-growing population, Texas has a large, diverse, relatively decentralized, and complex higher education context, including 50 independent community college districts.[2] The state currently has six distinct public university systems and aims to add a seventh in the near future.[3] In addition, Texas has technical and trade schools as well as independent and private colleges and universities.[4]

The Texas Association of Community Colleges estimates that excess transfer credits for students who earn or attempt credit at a community college in the state before earning a bachelor's degree at a Texas public institution cost $350 million annually — a cost shared by students, states, and institutions.[5] Through the Texas Higher Education Coordinating Board (THECB), Texas has attempted to develop a more organized and efficient approach to transfer policies at colleges and universities.[6] While these efforts evidence a desire to improve transfer processes and transfer students' outcomes, barriers and challenges remain. This agency oversees and promotes several key statewide legislative and institutional initiatives designed to facilitate transfer between institutions, including:

- **Academic Course Guide Manual (ACGM):** According to the THECB, the ACGM is "a list of general academic transfer courses that may be offered for state funding by public community and technical colleges in Texas and are transferable among all public institutions of higher education in the state."[7] All ACGM courses are lower division.

1. Texas Association of Community Colleges (2021b).
2. United States Census Bureau (2023); Texas Association of Community Colleges (2021b).
3. Whitford (2021).
4. Texas Higher Education Data (n.d.-a.).
5. Texas Association of Community Colleges (2021a).
6. Texas Higher Education Coordinating Board (2025c).
7. Texas Higher Education Coordinating Board (2025a).

- **Texas Core Curriculum (TCC):** The TCC is a statewide core curriculum consisting of 42 semester credit hours of lower-division courses that all undergraduate students in Texas are required to complete.[8]

- **Field of Study Curricula (FOSC):** FOSCs are sequences of lower-division courses for popular fields of study that allow students to move into upper-division coursework immediately upon transferring. Completion of an FOSC is required to transfer to any public college or university in Texas.[9] FOSCs, which reflect efforts to establish statewide academic pathways, are designed for students to complete all the lower-division requirements for their major within their first two years (or four semesters) and receive a block of transfer credit for these courses. Students whose transcripts indicate they completed their FOSC cannot be required by individual institutions to take any additional lower-level courses to fulfill a major requirement.[10]

- **Texas Common Course Numbering System (TCCNS):** To facilitate the credit transfer and transcription of lower-division courses, Texas higher education institutions are encouraged to use this shared, uniform set of course designations. This system allows students and advisors to more easily identify course equivalencies and applicability of transfer credits, because courses with a TCCNS designation have the same course number in the catalogs of both sending and receiving institutions. The THECB advises and promotes the TCCNS but does not directly oversee it.[11]

- **Statewide reverse transfer:** Statewide reverse transfer applies when students complete at least 30 credit hours at a community college and then complete the other 30 credit hours required for an associate's degree after their transfer to a four-year institution. Reverse transfer legislation requires that the four-year institution follow a process to ensure students are awarded an associate's degree.[12]

- **Senate Bill (SB) 25, 86th Texas Legislature:** To hold institutions accountable to the above policies designed to facilitate transfer, Texas lawmakers passed this comprehensive legislation, which requires reporting of nontransferable coursework (including rationale for why credits cannot transfer), along with documentation of curricular changes and reviews.[13] All Texas public colleges and universities are required to provide the THECB an annual report on nontransferable credit that describes "(1) courses in the Lower-Division Academic Course Guide Manual that are not granted credit at a receiving general aca-

8. Texas Higher Education Coordinating Board (2025c).
9. Texas Higher Education Coordinating Board (2025c).
10. Texas Association of Community Colleges (2021b).
11. Texas Common Course Numbering System (n.d.).
12. Texas Association of Community Colleges (2021b).
13. Texas Association of Community Colleges (2021b). Curricular components of the reporting requirements include recommended course sequences for each degree plan, published changes to course sequencing, and a study on meta-majors and the Texas Core Curriculum.

demic teaching institution and (2) the number of courses taken by students at each public two-year college (referred to as a 'junior college' in statute) who either transferred to a general academic teaching institution or earned an associate degree at the college."[14]

INSTITUTION PROFILES

This report draws on analysis of transfer credit policies and procedures at the following Texas institutions.

UT Arlington

The University of Texas at Arlington (UTA) serves the Dallas-Fort Worth metroplex with almost 30,000 undergraduates and receives transfer students from a variety of institutions. According to sample data — specifically, administrative data on students transferring to the institution between August 2016 and August 2022 — over half of transfer students entered as part of the nursing program and the proportions of female students and older students were higher relative to UT El Paso's transfer student population. UTA is designated as a Hispanic-Serving Institution and an Asian American Native American Pacific Islander-Serving Institution.[15] The university ranked sixth in a list of the most ethnically diverse undergraduate student populations in the nation by U.S. News & World Report.[16]

UT El Paso

With 84 percent of its over 20,000 undergraduate students identifying as Hispanic, the University of Texas at El Paso (UTEP) is a leading Hispanic-Serving Institution and reports having "one of the lowest out-of-pocket costs of any doctoral research university in the United States."[17] According to the sample data, UTEP's transfer student population is younger in comparison to UTA's transfer student population, with only one-third of UTEP transfer students over 24 years old. Only slightly less than half of transfer students are male. In addition, in contrast with UTA's transfer student population, nearly 70 percent of the transfer student population at UTEP comes from the local community college, El Paso Community College. Given El Paso's location along the U.S.-Mexico border, UTEP often enrolls international students from Mexico, including some who commute from Mexico.[18]

14. Texas Higher Education Coordinating Board (2025a).
15. The University of Texas at Arlington (2023, 2024).
16. U.S. News & World Report. (n.d.).
17. The University of Texas at El Paso (n.d.-a, n.d.-c).
18. The University of Texas at El Paso (n.d.-a).

UT Tyler

The University of Texas at Tyler (UTT), with the smallest undergraduate enrollment of the three participating institutions at around 7,000 students, also has a very strong partnership with its primary sending institution, Tyler Junior College. In fact, UT Tyler was founded as the first state university in the region, serving as an upper-level college for students from two-year institutions within the region.[19] In this regard, serving transfer students has been embedded in the institutional mission from inception. UT Tyler has a strong focus on regional economic and workforce development in East Texas and recently merged with the UT Health Science Center in 2021.[20] The newly named University of Texas at Tyler Health Science Center is the only academic medical center in the region.[21] Institutional student data for UT Tyler were unavailable for this study.

TRANSFER STUDENT OUTCOMES

As summarized in Table 2.1, each university in this study serves different communities of transfer students with varying lived experiences and educational trajectories. Therefore, transfer students' course-taking patterns and needs across these institutions vary, as do the institutions' approaches to serving transfer students, despite the fact that the institutions are operating under the same state policies. For example, the study sample of transfer students at UTA graduated with an average of 151 credit hours. At UTEP, meanwhile, graduating transfer students completed an average of 140 credit hours. In the first two years after transferring, only 18 percent of these UTA transfer students and 7 percent of UTEP transfer students earned a bachelor's degree. While these rates improved substantially by the third year, rising to 37 percent at UTA and 22 percent at UTEP, the extended time-to-degree after completing courses at a community college has significant implications for students' academic and financial trajectories.

The importance of institutional context is reinforced by prior research that finds that transfer student outcomes vary by institution type. According to a study by the Community College Research Center and Aspen Institute, "first-time-in-college" (FTIC) students in Texas who began their education at community colleges have varied degrees of success when transferring to four-year institutions. Community college transfer students are retained for a second year at 83 percent at public institutions but only 76 percent at private nonprofit institutions. Furthermore, within four years of transferring in, 55 percent of transfer students at public institutions and 45 percent at private nonprofit institutions have earned a bachelor's degree.[22]

19. The University of Texas at Tyler (n.d.-b, n.d.-c).
20. The University of Texas at Tyler (n.d.-a, n.d.-d).
21. The University of Texas at Tyler (n.d.-d).
22. Velasco, Fink, Bedoya, Jenkins, and LaViolet (2024).

Table 2.1 Participating Institutions and Their Transfer Populations

	UTA	UTEP	UTT
Location	North Texas, Dallas–Fort Worth region	Westernmost corner of Texas, bordering Mexico	East Texas, midway between Dallas and Shreveport, Louisiana
Average annual undergraduate enrollment[a]	28,040	20,986	7,197
Four-year graduation rate for first-time, full-time students (%)[a]	33	21	37
Six-year graduation rate for first-time, full-time students (%)[a]	55	48	48
Average annual transfer student enrollment[a]	4,132	1,605	1,076
Four-year graduation rate for community college transfers (%)[a]	50	44	61
Transfer student demographic snapshot			
Female (%)	70	56	57[a]
Over 24 years old (%)	57	33	
Hispanic/Latino (%)	31	78	23[a]
Pell Grant recipient (%)	36	57	
First-generation (%)	52	26	
Number of sending institutions[b]	66	1	18
Percentage of transfer students by top sending institution(s)[c]	Tarrant County College (24) Dallas College (14)	El Paso Community College (68)	NA
Most popular majors for transfer students and percentage of transfer population	Nursing (53) Business or marketing (11) Engineering (10) Social sciences (6)	Social sciences (19) Business or marketing (14) Engineering (13) Nursing (12)	NA

(continued)

Table 2.1 (continued)

SOURCES: Enrollment and graduation data, along with UTT demographic data, are calculations using publicly available data on the University of Texas system website (University of Texas, n.d.-b).

Data on number of sending institutions are from publicly available reports on the Texas Higher Education Data website for fall 2022 (Texas Higher Education Data, n.d.-b, n.d.-c, n.d.-d).

Demographic, major, and sending institution statistics for UTA and UTEP are MDRC calculations using administrative data provided by the colleges. More information on the sample and a full table of transfer student characteristics can be found in Appendix A.

NOTES: Average annual enrollment was calculated for incoming cohorts from fall 2016 through fall 2021.

Four-year graduation rates and UTT demographic statistics were calculated for incoming cohorts from fall 2016 through fall 2020. Six-year graduation rates were calculated for incoming cohorts from fall 2016 through fall 2018. Data on the number of sending institutions include two-year institutions from which first-time students transferred in fall 2022. Those coded as first-time transfer students in the prior summer (summer 2022) who returned to the same institution in fall 2022 are included in the cohort. Students who accumulated 30 semester credit hours at more than one community and/or technical college and institutions that sent fewer than five students to the four-year university were not included.

NA = Not applicable.

[a]Data are from the University of Texas System website.

[b]Data are from the Texas Higher Education Data website.

[c]Only institutions accounting for greater than 5 percent of the transfer student population are included.

Student outcomes also vary by demographic. Students from low-income backgrounds, adult learners over the age of 25, and students who are Black, Hispanic, or Native Hawaiian/Pacific Islander showed lower rates of bachelor's degree completion in Texas compared with their peers.[23]

23. Velasco, Fink, Bedoya, Jenkins, and LaViolet (2024).

3

Study Design

This study examined the role of faculty members in transfer credit evaluation at three University of Texas System institutions as part of a larger research agenda investigating faculty involvement in transfer processes. A parallel strand of this broader research agenda engaged the State University of New York system to explore how technology can assist faculty with and potentially automate aspects of transfer credit evaluation.

The present study employed a mixed-methods approach informed by critical participatory action research methodology.[1] The mixed-methods approach allowed researchers to document credit evaluation processes and practices while also examining how these may have influenced student outcomes. Qualitative data provided rich context for understanding faculty members' roles in credit transfer and how they approach decision-making, while the quantitative data allowed for analysis of how these decisions have potentially shaped different student populations.

Throughout this collaborative process, institutional partners helped formulate questions, interpret findings within their local contexts, and identify implications for practice. This participatory approach helped ensure the research strategies used were appropriate for institutional contexts while promoting inquiry and changes in practice that better meet the needs of all transfer students, and not just those who have the knowledge and resources to navigate this complex system. One way in which institutions engaged directly with the research findings and data was through their facilitation of transfer-focused design sessions and collaborative workspaces that engaged faculty and staff involved with transfer activities across the institution. At UTA and UTEP these sessions contributed to planning that resulted in immediate changes or programmatic additions to improve transfer student outcomes.

1. Critical participatory action research (CPAR) is conducted in a way in which the "responsibility for the research is taken collectively by people who act and research together." Two defining features of this approach include "the recognition of the capacity of people living and working in particular settings to participate actively in all aspects of the research process; and the research conducted by participants is oriented to improving practices and their settings by the participants themselves." Kemmis, McTaggart, and Nixon (2014).

RESEARCH QUESTIONS

The following research questions guided this study:

1. What is the role of faculty members in institutional credit evaluation processes?

2. How do decisions about transfer credits shape outcomes across diverse student populations?

3. How do departmental, institutional, and state policies shape faculty members' decision-making?

QUALITATIVE METHODOLOGY

Qualitative methods investigated workflow practices, communication habits, and policy implementation differences across the three institutions. Working closely with institutional partners, the qualitative component included document analysis (a review of web and print materials used in the transfer enrollment process at each campus), interviews, and focus groups. Additional details about the interview and focus group participants can be found in Table 3.1.

Table 3.1 Qualitative Data Collection

Method	Participant Role	Number of Participants
Interviews	Advising	4
	Academic leadership	6
	Registrar	4
	Enrollment management	3
Focus groups	Teaching faculty (full-time academic faculty)	11
	Administrative faculty (deans, department chairs, campus administrators)	19
Total participants		44

NOTE: Three people participated in both an interview and a focus group. They are listed under the appropriate participant role for both interviews and focus groups but are counted only once for the total participant metric.

Individual interviews focused on understanding the transfer student enrollment process, with particular attention to transfer credit evaluation and course record management from administrators' perspectives. The semi-structured protocol allowed interviewers to adapt their questioning based on each stakeholder's role and responsibilities. Focus groups explored how faculty members approach manual review of transfer credits and discussed their perceptions of the implications of these decisions for students from diverse backgrounds. While findings gained from focus groups may not be generalizable to all campus settings, they can offer useful insights into issues that may be common to faculty across four-year postsecondary institutions.

QUANTITATIVE METHODOLOGY

The quantitative analysis drew on administrative data provided by the University of Texas at Arlington and El Paso. The institutions shared de-identified data files on all students who transferred to their campuses between August 2016 and August 2022. All references to quantitative findings in this report pertain to this sample of students unless otherwise indicated. These files contained data on student demographics, coursework taken at the most recent sending and receiving institutions, degrees conferred at receiving institutions, and other student outcomes. Students who had no record of transfer coursework from their most recent sending institution were excluded from the sample and analysis due to the primary focus being transfer credit.

Due to inconsistencies with the collection, storage, and use of transfer data across institutions, figures should not be directly compared between campuses. The data provided can be used to understand relative transfer student outcomes *within* each institution but should not be compared *between* institutions. Additional details on data collection and reporting by institution can be found in Appendix A.

4

Introduction to Findings

The findings from this study reveal the multifaceted ways faculty members can influence transfer student outcomes through both direct decisions in transfer credit evaluation and broader curriculum development. Faculty members serve as key decision-makers in determining how transfer credits are assessed and applied toward degree requirements while shaping the overall academic pathways available to transfer students through their role in curriculum design. These interconnected responsibilities demonstrate faculty members' central role and influence over transfer students' experiences and success.

Chapters 5 through 7 present findings across three main aspects of the faculty's role in transfer.

Chapter 5, "Institutional Credit Transfer Processes," examines how faculty members participate in institutional transfer processes, mainly through their involvement in evaluating individual transfer credits. This chapter describes the multiple steps and actors involved in transfer credit evaluation and the challenges involved in managing and streamlining this process. The findings highlight the mechanisms underlying a persistent challenge in closing gaps in transfer student outcomes: the fact that credits may successfully transfer without ultimately being applied to fulfill requirements in a student's degree plan.

Chapter 6, "Faculty Members' Role in Transfer: Course Equivalency Decisions and Curricular Alignment," explores factors that influence how faculty members make decisions involving transfer credits. This analysis reveals the criteria faculty members use when assessing transfer courses to determine whether course content aligns with local curricula and whether students have gained the foundational knowledge needed for success in subsequent courses. It also examines faculty members' perceptions of efforts to improve transfer and curricular alignment statewide. The findings highlight how two key barriers — administrative challenges in sharing course and curricular information, and concerns about academic rigor and transfer students' academic preparation — influence decisions that affect transfer students' paths to degree completion. The chapter ends with recommendations and promising practices for system and institutional leaders to consider for overcoming these barriers.

Chapter 7, "Disciplinary and Departmental Variations," presents an analysis of how departmental contexts and discipline-specific considerations create variation in transfer practices

and may contribute to differences in transfer student outcomes. Different academic fields approach transfer evaluation and curriculum alignment in distinct ways, reflecting their unique content, pedagogical approaches, and external requirements. Understanding these nuanced differences is crucial for developing effective transfer policies and practices.

While data collection occurred within the context of three four-year institutions in Texas, the findings and recommendations from this study can be applied to the national transfer context. Study findings offer a more detailed understanding of faculty members' central role in transfer student success while highlighting opportunities to improve current practices across institutional units (including admissions, registrar, and advising teams) and systems.

5

Institutional Credit Transfer Processes

The process of evaluating transfer credits involves multiple steps and actors. To understand the role of full-time faculty members within the broader transfer credit evaluation process, MDRC researchers engaged with institutional partners to develop detailed process maps of each institution's transfer credit evaluation procedures. This section discusses the findings from this process map development. It begins by outlining the important distinction between credit transfer and credit application, and then provides a step-by-step look at the institutional processes used to transfer credits to a student's local academic record. It concludes with a description of some of the challenges faced by the institution and various actors involved in implementing the process.

CREDIT TRANSFER VERSUS CREDIT APPLICATION

While developing process maps, the research team identified the need to establish a shared vocabulary for the different components of the transfer credit evaluation process. In particular, there are two related but distinct outcomes: credit transfer and credit application.

- **Credit transfer** is only the first step in the evaluation process. It refers to when a receiving institution awards academic credit for a course completed at another institution. Credit transfer decisions involve determining whether a course is eligible to receive credit at the receiving institution and how many credit hours that course translates to on a student's record.

- **Credit application** refers to the use of a transfer course (or credit hours) to fulfill the course requirements or learning outcomes of a student's chosen degree program at the receiving institution. Credits that cannot be applied to an unfulfilled degree requirement become excess credits.

The distinction between credit transfer and credit application has significant implications for transfer policy, procedure, and partnerships. As an enrollment administrator explained, "A student might come in with 80 credit hours and 40 are applying. . . . [T]he applicability really matters because that's what's going to determine the time to degree for a student."

This administrator's example is consistent with the data analysis on credit transfer and credit application depicted in Figure 5.1.

The data available do not allow for a direct examination of the differences between the number of transfer credits sent from a student's sending institution, the number of transfer credits accepted by an institution, and the number of transfer credits applied to a student's degree plan. However, some inferences about the loss of credits at these points in the transfer process can be made. For the sample of UTA students in this study, over 94 percent of transfer credits from sending institutions were accepted for transfer, as Figure 5.1 shows (see Boxes A and B). However, applicability data available from UTEP show that an average of 52 percent of accepted transfer credits were applied to a student's degree at the time of transfer (see Boxes B and C) and only an average of 58 percent were applied at the time of graduation (see Boxes B and D). In summary, the data suggest that, on average, 42 percent of a student's credits that were accepted for transfer did not apply toward the student's degree. Ultimately, when transfer credits do not apply to degree requirements, students may need to take additional courses, which can result in financial aid challenges, extended time to graduation, and overall frustration with the transfer process and higher education itself.

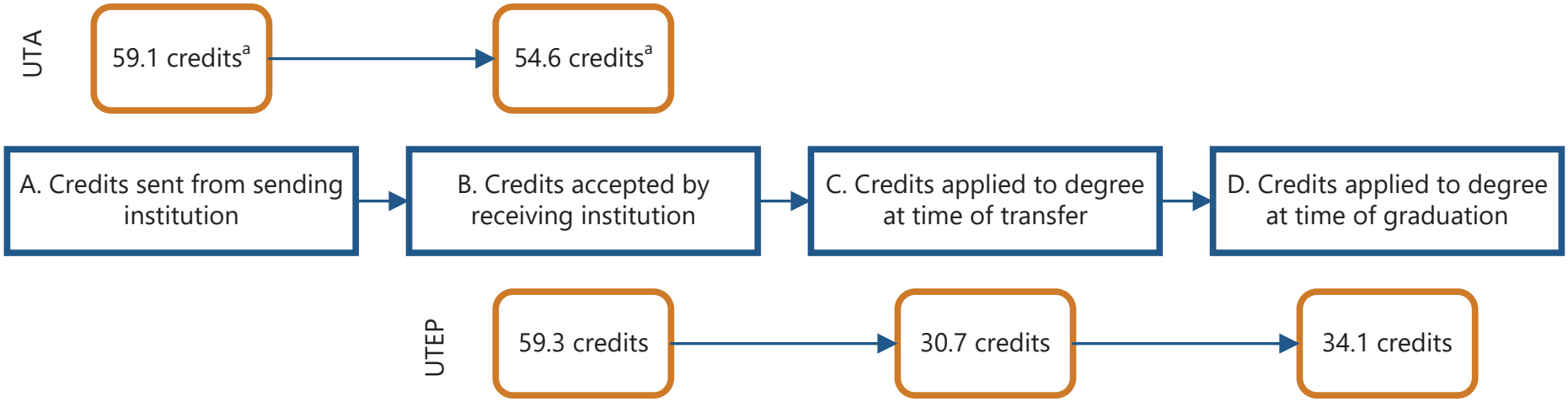
This disparity between credits accepted for transfer and credits applied to degree requirements is not unique to the three institutions studied. In fall 2023, over half of the reports of instances of rejected credits received by the Texas Higher Education Coordinating Board were issues of credit applicability.[1] (For comparison, 21 percent of credits were rejected because students had not met the minimum grade requirement — a primary factor in credit transfer decisions — and another 9 percent were rejected because the course was repetitive of another course on their record.)

TRANSFER CREDIT EVALUATION PROCESS

MDRC researchers developed a detailed process map of the transfer credit evaluation process based on the study's qualitative data. The full transfer enrollment process map, which was reviewed for accuracy by institutional partners before being shared with larger groups of stakeholders at each institution, can be found in MDRC's publication *Transfer-Ready Systems: Assessment and Action-Planning Toolkit*.[2] A condensed version is presented in Figure 5.2.

1. Texas Higher Education Coordinating Board (2025a); Texas Legislature Online (2019). As required by Texas legislation, four-year institutions must annually report data about Academic Course Guide Manual (ACGM) courses for which students who transferred from two-year Texas institutions were not granted transfer credit or the application of credit toward their degree (if the student's major was not changed). It is important to note that the rationale for credits not transferring is based on self-reports by institutions. The subsection "Difficulty Tracking and Analyzing Credit Transfer and Application Data" discusses the challenges associated with using student data collected from institutions.
2. The Sample Transfer Enrollment Process Map included in the toolkit developed through this project visualizes a common set of transfer enrollment procedures observed through in-depth qualitative research at multiple institutions. See Sutcliffe, Ozley, and Saunier (2025).

Figure 5.1 Number of Credits Sent, Accepted for Transfer, and Applied to Degree at UTA and UTEP

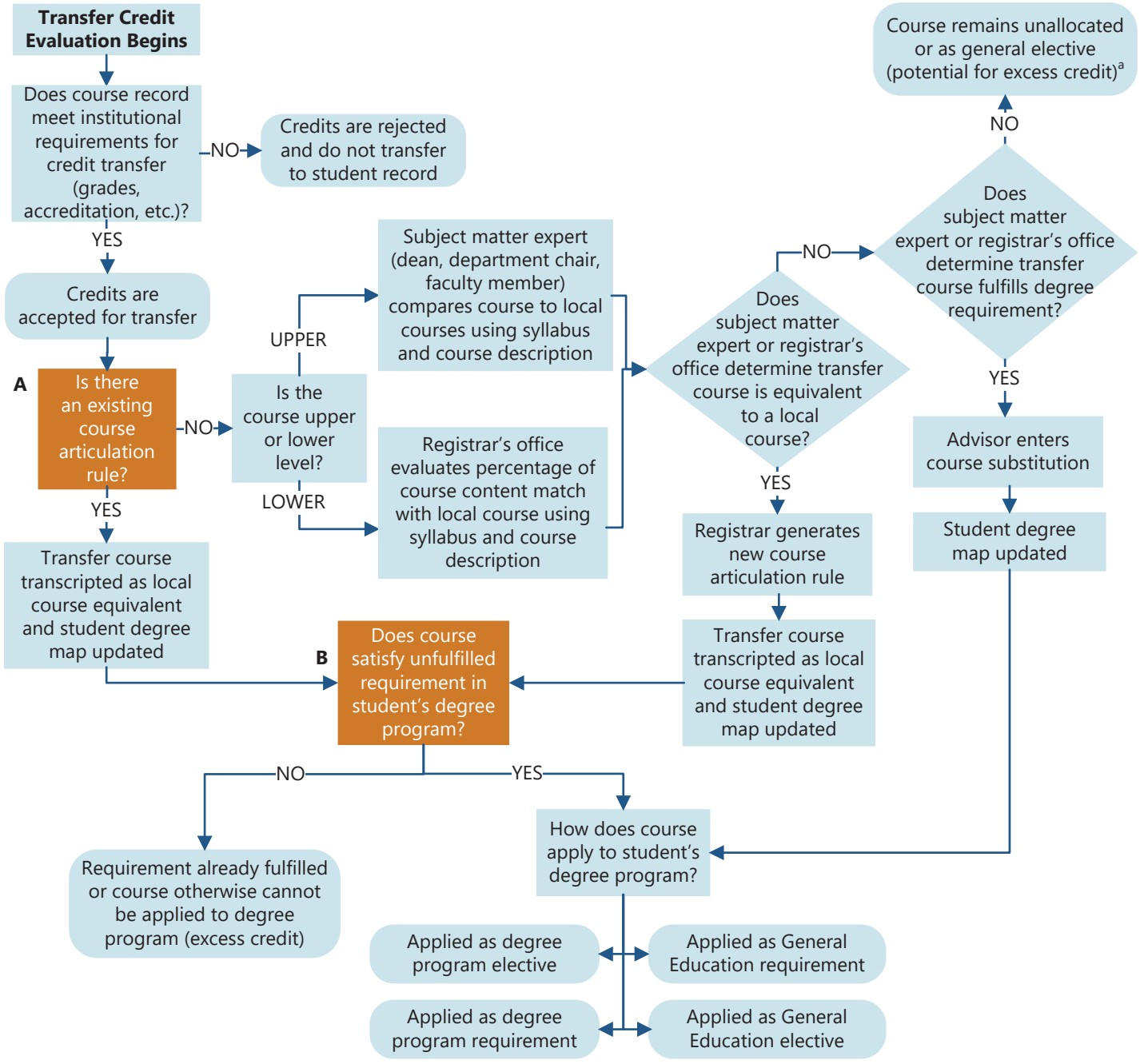


SOURCE: Data are MDRC calculations using administrative records from UTA and UTEP for students who transferred to each institution from fall 2016 through summer 2022.

NOTES: Numbers of credits are averages per transfer student. The increase in credits applied from time of transfer to time of graduation could result from a number of scenarios such as students completing additional courses at a sending institution after transferring to their receiving institution, students or their advisors appealing for the application of previously unapplied transfer courses after the student's initial transfer credit evaluation, or students changing their major to a degree that allows them to apply more of their transfer credits to their degree requirements. These scenarios demonstrate the complexity and variety of pathways and strategies that transfer students use to increase the number of credits that not only transfer but also apply to their degree requirements.

[a]Estimate calculated assuming an average of 3 credit hours per course.

Figure 5.2 Path of a Course Record Evaluated for Transfer Credit



(continued)

Figure 5.2 (continued)

SOURCES: Document analysis and interviews and focus groups with administrators, staff members, and faculty members.

NOTES: Beginning in the top left corner, this figure depicts how a transfer student's previous credits are evaluated for transfer to the student's degree plan at the receiving institution. The rectangles represent steps and important branching points in the transfer credit evaluation process. The diamonds represent where a decision made by a faculty or staff member determines the transferability and/or applicability of a course to a student's degree plan. The rounded rectangles reflect the credit transfer and applicability outcomes that result from the credit evaluation process.

This figure depicts the evaluation of transfer credits in a context where the institution has technology to automate course-to-course articulation rules and is required to follow statewide articulation agreements for common lower-level curricular requirements.

[a]This outcome could result in excess credit, but this process is individualized so the actual outcomes vary by student. Subject matter experts can determine that a course is not equivalent to a local course, but the student's prior learning still partially or fully satisfies a degree requirement.

Automated Course Review

As Figure 5.2 shows, the transfer credit evaluation process starts when admissions or registrar office staff members enter a student's course history data into the Student Information System.[3] The steps that follow depend on whether the transfer course name and number match an existing course articulation rule (Point A in the figure). These course articulation rules document course equivalencies established either previously through the transfer credit evaluation process or, more commonly, in an articulation agreement.[4]

Credits for courses with existing articulation rules automatically transfer to a student's record as the local equivalent course. As indicated at Point B in Figure 5.2, applicability of those credits once they are transferred is determined based on if and how that course can be used to satisfy an unfulfilled requirement in the student's degree plan.

In Texas, many courses students transfer with are processed through the course equivalency rules established through state policy. As one transfer credit evaluator in the registrar's office explained: "If it's a course that we've transferred in before and it's in state, and we have entered the data for the equivalency rule, then it will autopopulate. And that's, I would say,

3. Some institutions have technology that automates or assists staff in data entry. For example, UTEP has set up a process and partnership agreement that leverages the Electronic Data Interchange functionality of Banner (free of charge) to transfer student records directly from UTEP's primary sending institution, El Paso Community College.
4. The creation of articulation agreements is the primary method used by institutions, systems, and states to manage the transfer of academic credits between schools. See LaViolet and Wyner, 2020. For example, Texas's Academic Course Guide Manual (ACGM) and the Texas Core Curriculum (TCC) are articulation agreements that dictate the transferability of lower-division courses between any Texas public college or university. See Texas Association of Community Colleges, 2021b.

70 percent to 75 percent of in-state coursework [for which] we have course equivalencies rules already in place."

Transfer courses without an existing course equivalency rule go through a manual review process, as described below.

Manual Course Review

Courses that require a manual review tend to be either upper-division courses or courses taken outside the state. Manual course reviews are also conducted if a student or advisor appeals an initial credit evaluation decision. In the manual course review process, a transfer credit evaluator (typically within the registrar's office) first determines if the course is eligible to transfer based on factors that affect institutional accreditation, such as the kind of institution that offered the course (college, workforce training, or high school) and the student's grade in the course (typically a C or higher). If the course is accepted for transfer, the registrar enters these credits into the student's course records according to the institution's transcription policies.[5] The credits appear as unallocated transfer credits (not applied to a degree requirement) on a student's record until course content is reviewed.

The procedures that follow differ slightly based on whether the course is lower-level or upper-level. For lower-level courses that fall outside the state-approved list of funded courses (the ACGM), the evaluator in the registrar's office will initially assess the course description to identify whether it matches a local course or fulfills a component of the statewide general education requirements (the TCC). This might occur for a lower-level course taken at an out-of-state institution, for example.

However, for the evaluation of upper-level courses and any major-specific courses for which greater subject matter expertise may be required, the relevant academic department is assigned to conduct the review. The reviewer in these cases is typically the academic department chair, the program coordinator, or a faculty member who teaches similar courses or material. As part of the manual evaluation of these courses, reviewers examine course descriptions and syllabi to determine whether there is sufficient course content overlap with a local course. Chapter 6 covers in greater detail how faculty reviewers and subject matter experts approach these decisions.

Once faculty reviewers make a determination, they share the outcome of their evaluation. If reviewers determine a transfer course is directly equivalent to a local course, the registrar's office will add a new course articulation rule, such that the review sets a precedent for any transfer student coming in with that course. However, a direct course equivalency is not the only possible outcome in a transfer credit evaluation. If a direct equivalency is not found, the course can be reviewed to determine whether it can be used to fulfill a degree program requirement.

5. For example, a 3000-level English course might be transcribed as ENG TRAN 3000.

Manual Review of Transfer Courses Without a Direct Course Equivalency

If a course has been accepted for transfer, but a subject matter expert finds that the transfer course is not directly equivalent to a local course, the credits may still be applicable to the student's degree requirements. The faculty reviewer initially assigned to evaluate the course might conduct this kind of review after recognizing that a direct equivalency is not possible. Alternatively, an advisor specialized in the student's chosen degree program will identify transfer credits that are unallocated and initiate another round of review. The advisor typically will talk to the student and collect additional information about the course, and then make a recommendation to course subject-matter experts about how that course may be applied to the student's degree program's requirements. If the reviewers determine that the course fulfills degree program requirements, the advisor will apply a course substitution to the transfer course record; the student's degree audit will reflect that the transfer course is being used to fulfill a specific requirement.

Courses that are not applied at this stage remain unallocated, unless a student initiates a reevaluation appeal with additional evidence or changes to a major for which the course can be applied.

The Role of Technology

To address the complexity of the transfer process, institutions are increasingly moving toward automated systems for transfer credit evaluation. The registrar's office typically leads these efforts, establishing and maintaining electronic systems to track course articulation rules and automate the transfer of credits covered by those articulations. In addition to formal transfer credit evaluations, this kind of technology can be used to enable tools for prospective transfer students to estimate how their courses will transfer.

Technology can play an important role in making transfer credit evaluations more efficient. For example, at least one of the three universities involved in the project pays to subscribe to workflow management tools in CollegeSource's Transfer Evaluation System (TES), a widely used software service, to manage course equivalency records and the transfer credit evaluation workflows across all the different offices and actors involved. Unfortunately, there are perceived limitations of the technology system and its ability to record or learn from case-by-case decisions. An enrollment administrator shared, "I do believe there are some issues where our system doesn't allow for as much flexibility as the faculty are asking for." TES also hosts a national database of course descriptions, a function all three participating institutions referenced.

CHALLENGES

There is a great deal of complexity involved in evaluating and transferring credits from courses taken at another institution to a student's local record. This complexity contributes to common challenges institutions and faculty members face in managing and streamlining transfer credit evaluation processes and providing transfer students timely information about how their credits transfer.

Frictions in Interdepartmental Coordination and Communication

As seen in Figure 5.2 and the above discussion, the transfer credit evaluation process involves multiple institutional actors working within numerous procedures and systems. This study finds that not all actors are aware of the larger process they are contributing to. As one faculty member observed, "When I was department chair . . . it was kind of a black box. I didn't really understand. I sort-of had the impression that there were things that were happening that were automatic, and so then I didn't see those. And then the problem children came to me. But I didn't really feel like I knew, nor did I really need to know what that automatic process was."

The complex and cross-functional nature of the transfer credit evaluation process introduces the potential for lapses in communication and unclear division of responsibilities. While faculty are often the final decision-makers in new course-to-course articulations, particularly for upper-level courses, these decisions require coordination with staff members in the registrar and academic advising offices to initiate a course review, collect and share materials that will inform the decision, record the decision, and inform students of it. Each of these steps takes time to complete, and each transition in the workflow creates potential for delays. Through examining their transfer credit evaluations on this project, one university found transfer credit evaluations took an average of 15 weeks to complete. While these decisions are being processed, transfer students and their advisors are missing important information needed to register for courses and plan for degree completion.

The differing roles and priorities of faculty members compared with those of advisors can also lead to conflicting perspectives and decisions. Across the institutions, advisors are the primary point of contact for students, and responsive and proactive advising was commonly mentioned as key to transfer student success. As one faculty member noted, there is a need for more advisors who can "integrate [transfer students] into the curriculum in our department [and who will] take a lot more time to try and understand where they are." A major advising responsibility is describing how students' transfer credits and prior learning apply to the program's curriculum. In addition to helping students interpret their transfer credit evaluation, advisors have some tools to influence how transfer credits are applied to the requirements of an individual student's degree plan. These include making formal appeals of transfer credit evaluation decisions or submitting a course substitution request

in order to have a transfer course substitute for one of the local courses required by the department's curriculum.

In describing the difference between a faculty member's responsibilities and those of an advisor, one administrator explained: "Faculty members are generally involved in articulation of the credit, not necessarily the applicability of the credit. . . . Once they've made a determination, though, this course is coming in as [local course] . . . at that point it goes to the advisor, and the advisor can look at the degree plan . . . and make sure that it's fulfilling the correct requirement." In other words, while faculty members make decisions about individual course-to-course articulations, they are often not involved in working directly with students to determine how the application of those credits meets their degree plan. However, these lines of responsibility might not feel as clear in practice, as illustrated by another faculty member's frustrated comment: "[I]n our department [what] we still see is that just because I deny it in the system doesn't mean the advisor can't pick it up and override that decision. . . . And so, then we have to have a conversation with the advisor or their higher-up, usually a dean in that department and say, 'Hey, this course was denied. Why did you use it as a directive for graduation?'" As reflected in this quote, developing organizational capacity for cross-functional coordination and conflict resolution is essential to managing the complexity and interconnectedness of decisions involved in transfer credit evaluation.

Varying Perspectives on Establishing Course Equivalencies Based on Role

As described above, when a transfer student's transcript has courses that have not yet been articulated (or a transfer student appeals the initial evaluation), the registrar's office or the student's advisor will notify the relevant academic department that a course requires a manual review. During this manual review, faculty members and advisors often work together to find a local course that can be considered equivalent to the transfer course, a process known as course-to-course articulation.[6]

This research revealed potential tensions in this process, particularly regarding different stakeholder priorities. The registrar's office often prioritizes building standardized course equivalencies that can be applied consistently for all students.[7] Meanwhile, faculty tend to be more resistant to this approach. As one faculty member explained, "Something that I think needs to get to the heart of some of this discussion [is] the once-and-always transfer pattern. . . . Institutions will go through changes in courses or policies where it will make

6. These decisions also serve to identify the need for updates to existing articulation agreements.

7. The second principle offered in a joint statement by the American Association of Collegiate Registrars and Admissions Officers, the Council for Higher Education Accreditation, and the American Council on Education (2021) states: "Credit award decisions must be applied consistently and equitably for all students. The process for evaluating and awarding credit for prior learning should be standardized, to the maximum extent practicable, across the receiving institution. Also, in general, policies for how credit award decisions are made should be consistent across the institution, regardless of the particular school, college, department, or program of study."

it no longer equivalent because they changed their approach. . . . I get we're trying to save labor and make this faster for students, but in some ways, it's really dangerous to go about setting up transfer that way." Several faculty members expressed similar concerns about permanently establishing course equivalencies that might not remain appropriate as the curriculum evolves, in spite of the delays often caused by the current manual process.

Differences in the organizational structures and priorities of registrar offices compared with those of academic departments are reflected in different approaches to creating course equivalencies. Each registrar's office involved in this study reported using a standard to make these determinations: a certain percentage of course content in the transfer course and the local course must match, as determined by the available transfer course documents (course descriptions and syllabi). Two universities use a standard of 70 percent, as recommended by the American Association of Collegiate Registrars and Admissions Officers, while one university has an institutional policy developed by faculty which set a standard of 85 to 90 percent.[8] In contrast, faculty members did not report a standard for how closely content should match for courses to be deemed equivalent.

Difficulty Tracking and Analyzing Credit Transfer and Application Data

The ability to collect and analyze credit transfer and application data is critical to improving outcomes for transfer students. Unfortunately, accessing these data — especially credit application data — is not an easy task. Institutional student data, which are overseen at a university by the office of institutional research, and student records data, which are managed by the university registrar, are both needed to assess credit applicability and its relationship to transfer student outcomes overall. However, at the universities studied, information is rarely shared between these two systems. In addition, the measurement of credit applicability is difficult to standardize across degree programs, as are methods for capturing the varying transfer patterns and academic trajectories of transfer students.

As a result, institutions have difficulty tracking and analyzing transfer student data. This challenge is evidenced by the differing types of institutional data that partners could provide. As Figure 5.1 above shows, both UTEP and UTA were able to provide data on transfer coursework accepted by the receiving institution (Box B). However, data system and capacity differences between institutions resulted in variances in data availability at other points in the transfer pipeline.

At UTEP, for example, data on transfer coursework that was not accepted (for reasons such as not meeting the minimum grade requirement) was unavailable. Therefore, an examination of disparities between the number of transfer credits sent from a student's sending institution and the number of transfer credits accepted by the institution was not possible.

8. American Association of Collegiate Registrars and Admissions Officers (2017).

Similarly, due to the challenges in maintaining data on credit application in a centralized system, UTA could not provide data on credit application for transfer coursework. For additional information on the data collection at each institution, see Appendix A.

In summary, transfer data collection and availability across institutions are not standardized. As noted by the Texas Higher Education Coordinating Board, the most common ongoing challenge in data collection for the annual report on nontransferable credits in Texas is "differing interpretations of certain report parameters and definitions among institutions."[9] Without standard data collection, it is difficult to compare transfer student outcomes across institutions and identify holes in the transfer credit pipeline. These challenges and inconsistencies highlight the need for better data tracking, as well as improved communication and collaboration between institutions concerning student records and information.

RECOMMENDATIONS

This section highlights efforts and initiatives for institutional leaders, higher education system offices, and higher education coordinating or governing boards to consider in order to support the individual faculty and staff members directly serving transfer students.

Invest in cross-functional training. Faculty, staff, and administrators operating across departments and divisions have interconnected responsibilities in the transfer evaluation process. Coordinating across these units to establish clear processes can provide important clarity about individual roles, eliminate redundancies, and decrease the time required to complete a student's credit evaluation. For example, at UTA, after reviewing a map of the transfer credit evaluation processes at that institution, the interdepartmental team advising this project collaborated to develop shared expectations on process, documentation, and communication in a transfer credit evaluation guide. The toolkit developed through this project provides an editable process map that institutions and higher education systems can customize to their own context and use for their own process improvement and cross-functional training efforts.[10]

Establish processes to enable case-by-case decisions about credit application. This research highlighted that, while course-to-course articulation is the standard approach to transfer credit evaluation, faculty members can be hesitant to provide approval of course equivalencies that apply for the current student *and* all future students. An alternative to direct course equivalencies is to determine applicability of transfer courses on an individual level, such as through course substitutions. An alternative to direct course equivalencies is to treat credit transfer and applicability as separate decisions. The use of course substitutions allows advisors and program coordinators to allocate transfer courses or prior learning experiences that meet institutional requirements for transfer to a student's degree plan.

9. Texas Higher Education Coordinating Board (2024).
10. Sutcliffe, Ozley, and Saunier (2025).

Improve institutional infrastructure for data-informed decision-making practices. Systematic data collection and reporting on transfer student outcomes can inform decision-making at multiple levels within an institution. By increasing access to and use of institutional student-level data, organizations can engage in more targeted assessment and evaluation practices. This can, in turn, lead to more informed faculty members, improved information about student progress, and a foundation for better decision-making when determining credit transfer decisions.

Invest in transfer technology and infrastructure. In evaluating transfer credits, most institutions use a combination of manual and automated processes, which may not always be clearly connected to one another. Better integrated processes and more user-friendly technology could lead to improvements in the student experience. Interview and focus group participants frequently recommended the state invest in a unified technology system for all Texas higher education institutions, which could be used to look up courses and view recommendations or predictions of how they should transfer. A coordinated, multi-institution database of courses and curricula could reduce much of the manual effort and unknowns often involved in establishing articulation agreements, evaluating transfer credits, and academic planning for transfer students.

6

Faculty Members' Role in Transfer: Course Equivalency Decisions and Curricular Alignment

This chapter discusses considerations and challenges that faculty members must address when making decisions involving the articulation of individual courses and degree program curricula between community colleges and four-year universities. The chapter begins by considering faculty review practices and decision-making criteria used in the manual review of transfer courses in the transfer credit evaluation process. Next, the chapter describes commonly held perspectives that faculty members have about the challenges of aligning curriculum at one's own institution to that of other institutions.

FACULTY CONSIDERATIONS IN TRANSFER CREDIT EVALUATION

As discussed in Chapter 5, one role of faculty members at an institution conducting transfer credit evaluation is to review a course when there is no preexisting course equivalency or articulation rule. A faculty member might also review a course when a student appeals a prior transfer credit evaluation decision. This kind of review involves a complex process that extends beyond simply comparing course titles or catalog descriptions. Ultimately, the reviewer's aim is to determine whether course content aligns with local curriculum and degree program requirements and whether students have gained the foundational knowledge needed for success in subsequent courses.

As faculty members explained in focus groups, evaluating a transfer course involves examining the course description and syllabus from the semester the student took the course. Reviewers consider coverage of specific topics (as indicated by class session topics or required reading, for example), assignments and assessment methods, course prerequisites, and course objectives and learning outcomes to determine how well a course aligns with their local institution's degree program requirements. Some factors are specific to the discipline, such as whether the course involved a laboratory component or which kinds of software were

used for course assignments. Faculty members noted that in some situations, they will also request graded assignments or other examples of work to assess the level of work students were expected to produce. Some considerations faculty members reported are seemingly less demonstrative of course content or student learning, such as course modality (online or in-person, for example) and home discipline of the teaching faculty member.

TRANSFER CREDIT EVALUATIONS FOCUSED ON STUDENT LEARNING

As discussed in Chapter 5, the manual review of a course for transfer credit may identify a direct course equivalency (documented as a new course articulation rule); when a direct course equivalency is not possible, reviewers may pursue alternative ways of applying credits from the course to program requirements. As one faculty member explained, "Occasionally, we may take a combination of two or more classes that may together fulfill what I believe are the prerequisites necessary for the student to advance."

When instructors are conducting these kinds of reviews, they may talk to the student, review work samples, and reexamine the student's transcript more holistically to assess prior learning and how it might fulfill the learning objectives of a degree program's curriculum. For example, a computer science faculty member described assessing a student's prior knowledge in conversation with the student:

> One of the things I do with the students is talk to them. Especially for programming courses, I'll say, "Hey, what do you know about polymorphism?"
> . . . I'll quiz them a little and see if they learned the material when it's borderline whether the courses really should come in.

The methods used in these situations are similar to the individualized assessment methods used to award credit for prior learning from nonacademic settings (for example, through standardized exams, challenge exams, or portfolio assessments).[1] Evaluating transfer credits in this way typically requires more time and effort. However, through this kind of individualized assessment, faculty members can find ways to award credit for courses that would be denied in the automated transfer credit evaluation process.

1. Kilgore (2024).

CHALLENGES IN FACULTY MEMBERS' EVALUATION OF TRANSFER COURSES

Faculty members face multiple challenges when evaluating transfer courses. These can largely be attributed to a lack of clear standards, insufficient course information, and inadequate data and methods for use in assessing the academic preparation of transfer students.

Variations in Standards

At times, the process of transfer credit evaluation can be somewhat subjective. As one faculty member explained, "Once you've reviewed enough, you start to really get a sense of so many different criteria that are up for consideration. . . . Some of this is an art rather than a science." Therefore, the process naturally can lead to differing opinions. One faculty member who served as department chair shared an experience of disagreeing with a colleague's approach:

> Another chair in [a department at the institution] rejected it because it left out one clause. They said, "Well, we cover these 10 subjects in our course, and I don't see that it was covered there; therefore, we reject it." And I thought, well, that's really stupid, because course descriptions that are in the catalog are frequently ancient. They don't have a lot to do with what faculty are actually doing. It's more or less kind of a guideline.

As shown in this example, reviewers may have different standards for how much of a match in content they need to see to deem a course equivalent. These individual variations in how faculty members approach transfer credit evaluation can result in inconsistent evaluation decisions for transfer students.

Inconsistent or Incomplete Course Information

As discussed above, reviewers conducting an evaluation require detailed course information and materials from the relevant semester including the course name and catalog description and a sufficient syllabus (with details about the required texts, instructional approaches, and assessment methods, for example). While course descriptions can often be found online, faculty members reported that they alone do not provide sufficient information on which to base a review. Several faculty members also noted that the course syllabi they receive—when they receive them—are also often inadequate, and supplemental materials (such as graded assignments and content from course learning management systems) are required. Importantly, this documentation gap often results in an additional burden on students to provide supplemental materials and prolongs the transfer credit evaluation process. "Some of these syllabi are just really, really minimal," a faculty member said. "And so, then we go back and forth with the student to ask them to submit . . . something supplemental to make up for the fact that the syllabus had nothing in it." A few faculty reviewers and advisors in-

terviewed for this project shared that they will sometimes take on the onus of tracking down these supplemental materials through online research or by contacting the course instructor.

Missing materials can put faculty members in the difficult position of deciding whether to approve the course without sufficient information or to force students to endure significant delays while materials are obtained. As one faculty member observed:

> All of that takes time. And I don't want to hold a student up for graduation, but I don't want to rush these decisions either, because I think so many of the classes that they're trying to transfer in . . . are foundational. And so, if I accept it to try to help the student in the long run, I'm not doing them any favors.

Individual Perceptions of Students' Academic Preparation

Faculty members across all three institutions expressed significant concerns about transfer students having sufficient academic preparation to succeed in upper-level courses. One faculty member shared a common perspective: "[W]e do find that the transfer students struggle tremendously in their upper-level courses and adjusting to those courses." This study suggests that concerns about transfer students' academic preparation are driven in part by perceptions that community college courses are of lower quality and rigor, as noted by another participant:

> So, I would say the thing that hinders student success is the quality of the courses that they're transferring. We can check, you know, that they covered the same thing, but it's very difficult to check what they actually did in the class, and frankly how much they remember.

While faculty members anecdotally reported seeing transfer students struggle, many acknowledged they typically do not know which students in a class are transfer students; the information is not included, for example, on the class roster. This situation highlights the need to provide academic departments and individual faculty members with actionable data reflecting curricular design and transfer student performance so that they can make data-driven decisions.

This study's analysis of administrative data from UTA found that while some transfer students experienced an initial GPA drop, many had no substantial change in academic performance, and 41 percent of transfer students increased their GPA by at least 0.2 points in their first semester. These data are similar to findings in the research literature comparing the academic performance of transfer versus nontransfer students and the performance of transfer students before and after transfer.[2] Experiencing an initial academic adjustment period is commonly seen in other student populations, including first-year first-time stu-

2. Carlan and Byxbe (2000); Cejda, Kaylor, and Rewey (1998); Ivins, Copenhaver, and Koclanes (2017).

dents, suggesting the need for targeted support during this initial transition period rather than restrictive credit policies.[3]

ARTICULATION AGREEMENTS

A primary role faculty members play in facilitating transfer is partnering with faculty in their respective departments at other institutions. These partnerships traditionally focus on articulation agreements. As described in Chapter 5, the review and evaluation of an individual student's transfer credits can result in the creation of a new course equivalency rule, which is for internal use at the receiving institution. However, the bulk of course equivalencies are established through the creation and maintenance of articulation agreements.

An articulation agreement is a formal arrangement between sending and receiving institutions about the transferability of credits.[4] At the most basic level, these agreements identify which individual courses are equivalent to one another (course-to-course agreements). However, course-to-course agreements can only guarantee the transfer of credit; they do not address how students are advised to take courses or how credits are applied in order to guarantee timely completion of program requirements.[5] In contrast, program-to-program and major-to-major agreements further specify how equivalent courses count towards graduation requirements (specifically, major requirements, general education and core requirements, and electives).[6] Articulation agreements vary in scale; they may be enacted between two institutions that frequently send and receive transfer students, at the system level, or among all public institutions statewide.

State-Mandated Articulation Agreements

Several states have established articulation agreements guiding the transfer of credits across all public colleges and universities in the state.[7] The Texas Core Curriculum (TCC) and Field of Study Curricula (FOSCs), discussed in Chapter 2, are examples of these statewide articulation agreements. As noted earlier, the TCC aims to align general education requirements with a set of common general education courses for all Texas public institutions, while FOSCs aim to align major requirements by establishing a block of program-specific, lower-division courses legally required to be transferred and applied to a student's degree.

3. Ivins, Copenhaver, and Koclanes (2017); Kainulainen and Zerpa (2020).
4. American Association of Collegiate Registrars and Admissions Officers (2019).
5. LaViolet and Wyner (2020).
6. Major-to-major agreements are distinguished from program-to-program agreements in the tighter curricular alignment achieved by ensuring program coursework at both institutions fulfills standards set by external accreditation standards. American Association of Collegiate Registrars and Admissions Officers (2019).
7. As of 2022, at least 38 states had policies mandating a transferable core of lower-division courses. Whinnery and Peisach (2022).

A recent study examined the effects of the TCC and FOSCs on excess credit accumulation, time to graduation, and cost for transfer students by analyzing data reported annually by institutions to the THECB. The study found that while students' completion of an FOSC is predictive of less credit loss, a student's completion of the TCC and an associate's degree before transfer is predictive of *more* credit loss.[8] These findings and the present research highlight the mixed influence that state policies and institutional practices can have on credit loss and the need for a multipronged approach.[9]

Part of the challenge of providing a cohesive academic experience to transfer students is that two-year and four-year institutions often have different missions and priorities, which contribute to differences in curriculum and academic policies set by their faculty governing bodies.[10] Hence, finding consensus about state articulation agreements can prove difficult. For example, faculty representatives from two- and four-year institutions serve on statewide committees and inform the THECB's decisions about which courses to include within an FOSC for individual majors.[11] However, a few faculty members in focus groups felt that the processes for developing FOSCs were not designed to adequately incorporate the perspectives of faculty representatives from receiving institutions. One faculty member described the experience of participating in FOSC meetings as follows:

> In the meetings where these decisions are being made, there's 20 community college representatives and 5 four-year school [representatives], and it's one vote per person. And so, the four-year schools really have no chance of saying, wait a minute, tap the brakes on anything. I mean, you can say whatever you want, but when it comes to voting, it's pretty overwhelming. . . . It would be nice, if we have to have Field of Study, [if] that would be evened out in some way so that the four-year schools had a fair shot at accomplishing their goals as well.

As emphasized throughout this report, the decisions and practices of receiving institutions and the academic departments can influence credit transfer and applicability outcomes in important ways. Establishing buy-in of institutional stakeholders for state policies intended to reduce credit loss is important to successful implementation of such policies.

8. Giani, Schudde, and Sultana (2024).
9. Giani, Schudde, and Sultana (2024).
10. Eckel (2008).
11. Texas Higher Education Coordinating Board (2021). The THECB website on FOSC implementation states that subcommittees for each field "consist of subject matter experts in each disciplinary area from Texas public higher education institutions, with equal representation from community colleges and universities."

CHALLENGES IN ARTICULATION AGREEMENTS

Discussions with faculty members highlighted a few challenges related to aligning curriculum across institutions. These challenges hinder the development and success of articulation agreements at both the local and state level.

Updating Agreements

Articulation agreements capture alignment between courses and program curricula for a particular academic year and must be regularly updated to account for curricular changes. It is best practice to involve in this process faculty members in academic leadership roles (dean or department chair) as well as teaching faculty, and administrators from both the sending and receiving institution.[12] As a result, the creation and maintenance of each articulation agreement is a time- and resource-intensive process. As described by an academic administrator involved in overseeing several articulation agreements:

> Sometimes we think, okay, yes, we have the transfer guides for [a major]. We're done. Put them on a shelf or up on a website, and six weeks later there is a proposed curriculum change that's going to wreck that. It's constant . . . and honestly, I think it's just a little bit hard to keep up.

Balancing Efficient Degree Completion with Perceptions of Quality of Instruction

A common concern faculty members shared in the discussion of statewide curricular policies was that they restrict their ability to maintain similar academic expectations for transfer and nontransfer students that graduate from their program. When transfer courses are required to be accepted and applied, faculty members do not have the opportunity to determine whether courses at other institutions adequately prepare transfer students for upper-division courses in their own programs. One faculty member shared, "[W]e used to consider the rigor of the course, but now we are not allowed to. If it looks equivalent . . . the credit hours are the same and the content delivery is close, then we will accept it whether it's from a community college or a four-year."

In response to state policies such as the FOSC that were designed to ensure transfer students do not need to retake lower-division courses, some departments at receiving four-year institutions have switched lower-division courses to upper-division courses. When discussing these changes, faculty members emphasized that their aim is to ensure students are academically prepared to succeed in upper-division courses. They also acknowledged that this is an imperfect strategy they have felt compelled to use in response to limited resources to address transfer student academic preparation. One faculty member described this tension:

12. American Association of Collegiate Registrars and Admissions Officers (2019).

> [W]e have so little time and we're stretched so thin that instead of thinking about how do we reach out to those who aren't here yet, because we don't have dedicated people, or space, or resources for that, we instead think, 'Okay. How can we manipulate the system we have to prevent students from not being adequately prepared for upper-level courses?'

There are real, foundational differences in institutional mission and access to resources between community colleges and bachelor's-degree-granting institutions which can contribute to negative perceptions from faculty members at four-year institutions.[13] As described by one faculty member: "Rigor . . . is not a word we're supposed to use, but it's very difficult to understand how a community college can afford to teach a lot of specialty courses with few students and have the same level of understanding of the course material."

However, in some cases, educators' perceptions of teaching quality and curriculum at community colleges may be the main cause of concerns that transfer students are unprepared, rather than actual evidence to that effect.[14] The perception that the quality of instruction at community colleges is low and that transfer students struggle academically is not unique to the faculty members interviewed for this project; these perceptions are commonly found in the literature and ultimately hinder the development of program-to-program articulation agreements.[15]

RECOMMENDATIONS

Recommendations for how institutional and departmental leadership can support faculty in their roles in course-to-course and program-to-program articulation are presented below.

Develop and review institutional course equivalency policies. Institutional policies regarding the review and acceptance of transfer credit can help reduce confusion and inconsistency in the transfer credit evaluation process. Consider course equivalency policy topics and best practices recommended by the American Association of Collegiate Registrars and Admissions Officers (AACRAO) in the development and revision of institutional course equivalency policy; these include minimum grade requirements, limits to the number of credits students can transfer, time limits on how long credits will be valid for, accreditation parameters, and guidelines on which types of credits are nontransferable and how decisions on credit applicability are made.[16] The development of institutional policies should incorporate representatives from different academic departments and identify where discipline-specific rules are needed. For rules that govern specific course content or disciplines, departmental colleagues (both within and outside the institution) should collaborate to establish clear, consistent criteria

13. Eckel (2008).
14. Logue, Gentsch, Oka, Wutchiett, and Abbeyquaye (2024); Logue (2023).
15. Bowker (2019).
16. American Association of Collegiate Registrars and Admissions Officers (2017).

for evaluating transfer courses that maintain academic standards of the field while reducing student barriers to success.

Standardize course record governance. As transfer courses are primarily evaluated based on course descriptions and syllabi, higher education systems and institutions must develop and implement templates and standards for these documents to ensure syllabi provide the information necessary for transfer credit decisions. Similarly, confirming that all syllabi are publicly available online (on an institutional webpage or platforms that host course information for multiple institutions, for example) can make transfer credit evaluation and course-to-course articulation efforts more efficient.

Use data to assess transfer student academic performance and provide additional support, as needed. Data analysis can be used to assess the quality of community college instruction and transfer student academic performance and to combat biases and unfounded perceptions that may negatively influence credit decisions. Effective approaches may involve using student-level data to assess transfer student performance in specific courses to make data-informed decisions about credit transfer and applicability. If the data show transfer students struggle in particular courses, department leadership and faculty can leverage existing academic support services and develop targeted, evidence-based interventions to address transfer student needs during the critical transition period while also maintaining academic standards. In one example of this approach, the accounting department at UTA analyzed transfer student performance data and identified a course in which transfer students tended to struggle. Rather than making all transfer students repeat the course's prerequisite, all students (transfer and nontransfer) complete an entrance exam to assess whether they are prepared to succeed in the intermediate accounting courses. Ensuring that transfer students have the necessary prerequisite knowledge to succeed in future courses can prevent transfer students from the additional time and expense that can result from not passing a course and ultimately needing to retake the prerequisite course. By explicitly examining transfer student data and outcomes, faculty can help transfer students acclimate to and succeed in a new institutional culture and climate more quickly.

Refocus transfer partnerships on student outcomes and success. When transfer partners are convened to establish and maintain articulation agreements, the focus of the discussion and partnership is often on negotiating and articulating academic policies and curriculum between institutions. Starting or framing these efforts as an opportunity for academic departments to discuss and problem-solve around clear and actionable data on transfer students' experiences and outcomes recenters transfer students and can promote shared responsibility in their success. These discussions might result in new or updated articulation agreements, but they may also lead to improved transfer experiences and processes that do not need to be formalized through the legal processes of both institutions (such as shared advising guides with clear course-by-course paths).[17]

17. LaViolet and Wyner (2020).

7

Disciplinary and Departmental Variations

Transfer practices and policies and the resulting outcomes can vary by academic discipline or academic department. This chapter compares student outcomes by academic major at the time of graduation, and reports on discipline-specific findings that might contribute to differences in transfer student outcomes. While numerous factors affect transfer student outcomes, understanding how the perspectives of decision-makers and the challenges they face vary across programs and majors can help inform future practice.

VARIATION IN TRANSFER STUDENT OUTCOMES BY DISCIPLINE

Discipline-specific variations and challenges in course-to-course articulation processes may affect the number of excess credits transfer students accumulate.[1] To investigate this possible relationship, the researchers analyzed administrative data sets from UTA and UTEP and found significant variation — by major and by institution — in the number of credits transfer students had earned by graduation, as shown in Table 7.1.[2]

For example, at both UTA and UTEP, engineering students graduated with slightly more than 150 credits on average, about 20 to 30 credits more than the 120 to 130 credits required for engineering majors.[3] Meanwhile, students majoring in natural sciences earned around 20 or more credits than the approximately 120 credits required, while social science majors at both institutions averaged just 11 to 15 credits above the typical 120-credit requirement. These associations between excess credits and area of study, which follow consistent trends across

1. While detailed data on each student's credit requirement were unavailable for calculating excess credits at graduation, the researchers were able to draw some conclusions about estimated excess credits based on general major requirements and total credits earned at graduation.
2. Each listed major includes students in a number of academic departments and specific majors. These meta-major groups were created using CIP codes.
3. The University of Texas at El Paso (n.d.-b); The University of Texas at Arlington (n.d.).

Table 7.1 Total Credits Earned at Graduation, by Major Subject Area

Total Credits Earned at Graduation	UTA		UTEP	
	Mean	Sample Size	Mean	Sample Size
Business or marketing	136	1,801	138	967
Communications	129	490	140	256
Education	140	259	138	359
Engineering	152	1,495	151	851
General or multi-interdisciplinary studies	132	739	138	553
Humanities	140	870	146	329
Natural sciences	144	657	147	585
Non-nursing health	137	722	141	566
Nursing	166	7,640	133	791
Social sciences	131	1,717	135	1,401

SOURCE: Data are MDRC calculations based on administrative records from UTA and UTEP for students who transferred to each institution from fall 2016 through summer 2022.

NOTES: Degree data are reported for only the first bachelor's degree earned by each student. Student majors at time of graduation were used for analysis.

Student majors were primarily grouped into subject area by two-digit CIP code (although some subject areas may contain majors from multiple two-digit CIP codes). Nursing and non-nursing health were separated into two subject areas.

the two institutions, may be attributable to the disciplines themselves and their unique benefits and challenges regarding curriculum standardization and accreditation requirements.

The disciplines of nursing and communications did not show consistent trends in total credits at both UTEP and UTA. Nursing showed the widest variation between institutions (166 at UTA compared with 133 at UTEP). However, this result is attributable in part to how UTEP logs credit for its "RN-to-BSN" program, for registered nurses earning a bachelor's of science degree in nursing.[4] Excluding these students, the average number of credits earned by nursing majors at UTEP rises to 150, consistent with UTA as one of the majors with the highest average number of credits earned at graduation. Communications majors at UTA accumulated relatively fewer credits than students in other majors (129 credits). In comparison, communications majors at UTEP graduated with a relatively high number of credits (140 credits). Differences across institutions in total credit outcomes for a major might be interpreted in terms of the unique context of the degree program at each institution — for example, differences in the size and makeup of the transfer student population and faculty, in how the

4. UTEP does not do course-to-course articulation for nursing students in the RN-to-BSN program since they are RNs who have earned an associate's degree and have professional work experience. This results in fewer total credits reported at the time of graduation than the typical bachelor's degree.

department manages decisions about credit transfer and applicability, or in partnerships and agreements with other institutions.

Using data available from UTEP, Table 7.2 presents the average number of transfer credits applied toward a degree requirement according to student major in the first semester after transferring and at the time of graduation. Changes in the average number of transfer credits applied to degree between the first semester and graduation could be driven by a number of factors such as a successful transfer credit appeal or additional courses taken at a community college.

Table 7.2 Average Number of Transfer Credits Applied to Degree, by Major Subject Area (UTEP)

	Applied at Transfer		Applied at Graduation	
Transfer Credits Applied to Degree	Mean	Sample Size	Mean	Sample Size
Business or marketing	30	1,030	32	966
Communications	28	256	33	256
Education	26	390	46	359
Engineering	23	858	29	851
General or multi-interdisciplinary studies	41	339	33	553
Humanities	26	347	35	329
Natural sciences	31	635	34	585
Non-nursing health	34	588	41	566
Nursing	30	850	28	791
Social sciences	35	1,350	37	1,401

SOURCE: Data are MDRC calculations using administrative records from UTEP for students who transferred to the institution from fall 2016 through summer 2022.

NOTE: Transfer credits applied to degree at transfer were analyzed by student major at time of application, while transfer credits applied to degree at graduation were analyzed by student major at time of graduation.

Student majors were primarily grouped into subject area by two-digit CIP code (although some subject areas may contain majors from multiple two-digit CIP codes). Nursing and non-nursing health were separated into two subject areas.

Student majors with the highest average number of credits earned also tended to have some of the fewest credits applied at transfer and/or graduation. In other words, students who had fewer transfer credits applied to their degree accumulated more excess credits in pursuit of a bachelor's degree. This emphasizes the importance of resolving challenges not just in retaining credits across institutions but in ensuring transfer credits can ultimately be applied toward a student's degree program requirements. For example, the UTEP data shows that transfer students who were engineering majors during their first semester tended to have

the fewest credits applied to their degree at time of transfer, compared to peers in other majors. This outcome might reflect the particular challenges this discipline faces in aligning curricula across institutions. Engineering curricula are highly sequential and make the task of designing a seamless vertical transfer pathway more challenging.[5]

Another important metric of success to consider alongside transfer credit and graduation outcomes is the retention of transfer students in a degree program. Retention rates reflect student behavior and characteristics, but are also influenced by the policies, practices, and culture of the department. For example, an increase in the number of transfer students in a program might suggest the program is relatively transfer-receptive and absorbing transfer students who left their initial major of choice.

VARIATION IN TRANSFER CREDIT EVALUATIONS BY DISCIPLINE

This study revealed significant variation in how disciplines approach credit evaluation due to fundamental differences in disciplinary content, external requirements, and pedagogical approaches. In some fields, such as physics and mathematics, the curriculum is highly standardized across institutions. In these disciplines, knowing the course name, number, description, and text used can often be sufficient for a faculty member to make an evaluation decision. As one physics faculty member explained:

> Physics, not only in the U.S. but worldwide, it's really uniform. . . . I mean, I've reviewed physics programs in Arab countries, and they use the same books. . . . So, for undergraduate transfer, there's basically nothing. If it just says Physics 101 with calculus, well, that's going to map to ours.

The curriculum and associated pedagogical approaches are relatively less standardized for majors in fields such as humanities and social sciences. According to one English faculty member, curricular approaches in these fields can vary widely: "[I]n the liberal arts, there's much more flexibility in what we would count [toward degree program requirements] . . . because there's tons of theories of how you could approach to teach that." As a result of this variation, transfer credit evaluations in these disciplines may involve finding ways to assess what students learned or did in the course and how it applies to the local curriculum. The same faculty member went on to describe their approach to transfer credit evaluations, saying: "What we really rely on is the student learning outcomes, right? So, when we open that syllabi and we look at the SLOs [student learning outcomes] . . . that's where we start to understand, is our objective for our students the same?" This example demonstrates how curricular coherence, or a relatively standardized approach to the teaching of a discipline, might influence the criteria faculty members use in their decision-making.

5. Grote, Knight, Lee, and Watford (2020).

Even when faculty members share common evaluation criteria for course-to-course articulations, the standards and thresholds they apply can vary significantly across departments and institutions. One striking example is the differences in how different departments handle course recency. Faculty members who participated in this study reported departments using anywhere from 10 years to 3 years as the limit on course recency, or having no such limitations at all. While different criteria for course recency may reflect disciplinary variation in how often course content changes due to advances in the field (for example, course content for computer science and other technology-based majors may change fairly quickly),[6] these variations might also reflect differences in department culture and the department chair.

Department chairs play a significant role in shaping the culture and practices that affect how faculty members in the department make transfer credit evaluation decisions.[7] For example, interviews revealed that department chair transitions can lead to shifts in how transfer-receptive a degree program is, as chairs are often the main points of contact for the evaluation of transfer credits. As one participant noted:

> [With a previous department chair, it] was rare for any of those [major-specific course requirements] to be accepted from any other institution, any university. The current leadership has been more generous. If the course has a similar title . . . and the course description looks pretty similar to ours, they are more apt to accept that towards our major area. So, it has changed over time.

PROGRAM-SPECIFIC ACCREDITATION STANDARDS

Accreditation requirements are another cause of variation in how disciplines and departments implement credit transfer processes. Professional degree programs (such as nursing and accounting) prescribe specific courses and minimum credit hours students must meet to qualify to take a professional certification exam upon graduation. For example, students must complete 21 credit hours of upper-level accounting courses and 24 credit hours of upper-level business courses from a college or university recognized by the Texas State Board of Public Accountancy.[8] In addition to these major requirements, the curriculum of these professional programs must fulfill general education requirements set by the institu-

6. A guide from the American Association of Collegiate Registrars and Admissions Officers (AACRAO) on awarding transfer credit recommends that institutional course equivalency policy clearly and publicly states how long credits are valid for, and how time limits differ for disciplines where content changes on a routine basis (for example, in computer science or other technology-based majors, biological or physical sciences, and international policy and law). American Association of Collegiate Registrars and Admissions Officers, 2017.
7. Garrett, Williams, and Carr (2023); Williams, Carr, and Garrett (2024).
8. Within the categories of business and accounting, there is an approved list of courses and limits to how many credits on a particular topic can be used to apply to course requirements. (Texas State Board of Public Accountancy, n.d.).

tion and state. This contributes to highly structured curriculum and course sequences for these programs.

Degree programs that are not preparing students for a licensure exam also have degree program accreditors, such as ABET for associate's, bachelor's, and master's programs in applied and natural science, computing, engineering, and engineering technology. While the disciplinary curricular standards are not as prescriptive as accounting and nursing, program accreditation serves as an external check to ensure program quality.[9] Due to some faculty members' concerns about upholding accreditation standards and requirements for graduating students' performance, programs will sometimes establish minimum grade requirements, which can lead to conflict with the state policy. It should be noted that minimum grade requirements are not explicitly included in accreditation standards.[10] For example, nursing accreditation agencies do not dictate transfer credit or minimum grade policies, but faculty members in nursing programs are likely to be more stringent in their review due to concerns about accreditation. An engineering faculty member shared:

> I'll be very frank with you. We also have the problem with junior colleges that allow Ds to count in a course grade. And if they've taken the course already, and they've gotten credit for it, and it's valued credit at the junior college level, we may in fact, need to take a D. But when we're looking at the grander scheme of engineering courses, there is a requirement that they have to get a C or better in all of their courses. Except for those courses that are transferred that are credit eligible with a D from the institution that gave them that course. And it really becomes difficult when a junior college doesn't require a C to be earned in all the core courses.

Curricular and transfer policies set independently by different institutional authorities interact with one another, resulting in a complex web of policies and incentives for academic departments to navigate. These differences contribute to some of the variations seen in departments and disciplines, particularly for those that have separate accreditors. One department chair described it as a balancing act: "[W]e have to not only answer to the university, we have to answer to our accrediting body. And if we don't meet certain metrics, we could risk losing our accreditation. If we don't follow university policy . . . I mean, it just becomes very tricky."

A number of participants named their institution's and degree program's accreditation standards as an important evaluation consideration and stated that greater flexibility from accreditation agencies could facilitate transfer student success. A recent survey of institutional accreditors suggests that this flexibility may already exist to an extent.[11]

9. ABET (n.d.).
10. Some programs set a minimum grade of C or higher for required major courses. However, state legislation mandates that students who complete their Texas Core Curriculum courses at one institution be considered "Core Complete" at their receiving institution, even if the student received a D grade in a core course and the receiving institution does not accept D grades.
11. Half of survey respondents indicated that institutions should "apply similar flexibility for students who

ESTABLISHING CURRICULAR COHERENCE

The design of a degree program's curriculum and course offerings can vary based on the expertise of faculty who make up that degree program. Faculty are trained to be disciplinary experts, and faculty members in a department collectively agree upon a coherent curriculum to teach students to represent a major or field. Establishing articulation agreements expands the number and diversity of faculty who need to decide on courses and curricular requirements. Faculty members reported that they had to compromise vital aspects of degree programs at their institutions because of the FOSC, which is designed to guide curricula of all Texas public institutions. As shared by one political science faculty member:

> [W]e require nine hours of a social science, and it could be any social science and it could be any level. And we do that because we think it's really important that students who get a political science degree understand their sister disciplines. Well, we can't do that anymore with Field of Study because not everybody thinks about a degree program that way.

Faculty at each institution shared similar sentiments about the difficulty in aligning teaching and learning priorities and approaches across institutions. However, these challenges are less pronounced in disciplines where curricula are relatively standardized, either due to the nature of the discipline (as described with the example of physics above) or because of external accreditation standards teaching toward a licensure exam (as described with the example of nursing and accounting above).

MAINTAINING PEDAGOGICALLY APPROPRIATE ACADEMIC PATHWAYS

The highly sequential nature of learning and curriculum in some disciplines, such as in STEM disciplines, can conflict with policies designed to streamline credit transfer.[12] Both the TCC and FOSCs lay out vertical transfer pathways in which students complete all the lower-division requirements within their first four semesters, and then complete the upper-division requirements after they transfer to a bachelor's degree institution. As a result, transfer students end up taking the bulk of their more challenging courses after transferring. One administrator described how this strategy toward curricular alignment for transfer plays out in different disciplines:

> It's very challenging to think that a student in some of these disciplines would take all of the [lower-division] credits that are needed for a certain degree and

transfer and/or have previous learning as they do for students in teach-out situations," where students are transferring credits from an institution that is closing. Couturier and Perfetti (2025).

12. Grote, Knight, Lee, and Watford (2020).

> then transfer to the institution and only have upper-division credits left to take. I was a political science major, and so for those of us in those types of fields, it makes perfect sense . . . but we do not advise mechanical engineering majors to be taking an upper-division physics, upper-division chemistry, differential equations, and an upper-division mechanical engineering class all in the same semester.

For students in these disciplines, well-intentioned policies and articulation agreements that aim to establish clear academic pathways may pose new challenges. The traditional "2 + 2 pathway" is not well-suited for every academic discipline, and it is important to examine which majors and student groups might benefit more from alternative pathways to a bachelor's degree in shaping program-to-program articulation.[13]

RECOMMENDATIONS FOR ACADEMIC DEPARTMENTS

As the discussion above highlights, there is disciplinary variation in the challenges involved in creating cohesive curriculum and seamless transfer pathways to a bachelor's degree. The following recommendations are based on innovative strategies faculty, staff, and academic administrators shared for how their academic departments have attempted to improve outcomes of students transferring into their degree programs.

Undertake data-driven curricular reviews for disciplines where transfer students struggle. Systems and states could invest in resources and technology needed to collect and distribute actionable data.[14] This would serve the dual purpose of monitoring implementation and effectiveness of state and system transfer policies and providing institutions with actionable data to prioritize and assess their own transfer partnerships and policies. For example, since 2022, the UT System Office's Exemplary Student Pathways Project has led 22 institutional projects across its academic institutions focused on putting actionable data into the hands of faculty and others who can use it to redesign curricula to improve student success and address gaps in outcomes across student populations. In several projects, the UT System worked with UTEP to identify departments where transfer students struggle to succeed and used machine learning to identify unnecessary prerequisites and gateway courses (foundational courses to upper-division program curriculum).[15]

Implement co-enrollment and cocurricular strategies. Co-enrollment and cocurricular strategies created in transfer partnerships can more effectively address issues of credit applicability, provide more cohesive advising and academic planning experiences for transfer students, and address concerns of transfer students' academic preparation. For example, engineering departments at UTT are establishing co-enrollment agreements with transfer partners that,

13. Wyner, Deane, Jenkins, and Fink (2016).
14. Schmidt, Houang, Cogan (2002).
15. The University of Texas System (n.d.-a).

in addition to aligning curricula between programs, arrange for full-time academic advisors and courses taught by UTT faculty on the campuses of sending institutions. Informed by the process and insights of this project, UTEP partnered with El Paso Community College (EPCC) to design and launch a co-enrollment program for prospective engineering majors. Through the ongoing collaborative efforts of administrators, faculty, and staff at EPCC and UTEP, Engineering Academy students concurrently enroll at both institutions and have access to comprehensive forms of student services focused on their academic and professional development throughout the program. Faculty members at EPCC and UTEP collaborated over the course of two years to align the curriculum and course schedules of both degree programs, and students are co-advised by a team of advisors from both institutions using a shared set of advising forms and degree planning tools.[16]

Establish degree programs in applied arts and sciences. Applied degrees have fewer general education requirements and thus allow more general transfer credits to be used toward degree completion. Establishing applied degree programs with this flexibility can be a useful option for transfer students whose prior coursework or learning does not align with prespecified course requirements of the institution or specific degree program. For example, the computer science program at UTA shared plans to establish a bachelor's degree program in applied computer science to better serve transfer students as well as other new students coming in with experience from coding bootcamps or nonacademic computer programming experience.

16. The University of Texas at El Paso (2024).

8

Conclusion

This study provides important insights into the complex dynamics of transfer credit evaluation across diverse institutional contexts within the University of Texas System. The findings reveal how faculty members make decisions about transfer credits within an intricate web of state policies, institutional processes, and departmental practices. Understanding these dynamics is essential for developing more effective transfer policies and practices that serve students while respecting faculty expertise and upholding academic standards.

Key findings from this research highlight several critical challenges as well as the importance of the role of faculty members in transfer credit evaluation. Although there are many factors outside of faculty control that influence transfer students' success, academic departments still play a crucial part in the overall transfer credit evaluation process. While this report focuses on the role of faculty, it also illustrates that any attempts to address and improve transfer students' experiences must consider the full transfer ecosystem including individuals, academic departments, administrative units, institutional partners, and state legislation and policy. Through a more nuanced understanding of faculty members' decision-making regarding transfer credit, this report offers a holistic set of recommendations for addressing transfer that focus on system-level changes.

DATA SYSTEMS AND DOCUMENTATION

The lack of centralized and standardized data collection across institutions creates significant challenges in understanding and improving transfer student experiences and outcomes. Institutions vary considerably in the kinds of transfer student data they can track and analyze — from credits accepted to degree applicability to student outcomes — and how these data are shared with their transfer partners. This fragmentation makes it difficult to identify where students lose credits in the transfer process and how they perform academically (both initially and after their first semester after transfer), limiting the ability to make evidence-based improvements to curriculum, transfer enrollment procedures, and partnership strategies.

STUDENT DATA TO ASSESS CONCERNS ABOUT ACADEMIC PREPARATION

While some faculty expressed concerns about transfer student readiness for upper-division coursework due to the rigor of courses at sending institutions, institutional data challenge these assumptions. An analysis of administrative data from participating institutions showed that 41 percent of transfer students increased their GPA by at least 0.2 points in their first semester. This finding surfaces a potential disconnect between perception and performance. The data highlight the importance of faculty members having access to and using evidence to inform their credit evaluation decisions as well as their efforts to support and onboard transfer students to a new environment more fully.

DISCIPLINARY VARIATIONS

Academic disciplines approach transfer credit evaluation differently based on their unique contexts and requirements. For some disciplines the primary challenge is a complex curriculum and highly structured course sequences that do not fit well into the design of a traditional vertical transfer articulation agreement. For other disciplines, the diversity of content and approaches to learning pose challenges to creating a cohesive curriculum for the field. These variations suggest the need for field-specific approaches to transfer pathways both at the local and state levels.

RECOMMENDATIONS

The study reinforces several common recommendations to advance transfer student success:

- Standardizing credit evaluation criteria and documentation requirements
- Implementing robust data collection and analysis practices
- Developing discipline-specific transfer pathways
- Fostering partnerships between the faculty at two-year and four-year institutions
- Creating flexible degree pathways that maintain academic standards

While individual institutions can improve transfer student experiences and outcomes, meaningful change requires a coordinated effort across multiple stakeholders — faculty, administrators, institutional leaders, and state policymakers. The experiences of these Texas institutions offer valuable lessons for other state systems working to improve transfer student success while respecting faculty expertise and maintaining academic quality. With strategic focus on evidence-based improvements, institutions can create more fair, unbiased, and efficient transfer pathways that meet the needs of all students while upholding academic standards.

APPENDIX

A

Transfer Data Collection and Analysis

DATA COLLECTION

Administrative data were collected from UTA and UTEP between December 2023 and July 2024. Both institutions provided course, credential, and student-level records for students who transferred to the college between August 1, 2016, and August 1, 2022. However, due to the varying nature of available data, data collection differed by institution and statistics are not directly comparable between institutions.

Important Differences Between Institutions

UTA

The data provider shared course records for all coursework sent from the institution most recently attended by all students in the sample before transfer to UTA. Transfer coursework taken at earlier institutions or institutions after initial transfer was not included in the sample.

- Due to how transfer records are retained in administrative systems, 90 percent of rejected transfer coursework did not include course-specific details including course name, subject, number, and credit hours.
- The sample included a variable indicator of whether a transfer course earned credit at UTA.
- Due to data on degree applicability residing in individual student plans, the sample did not include variable indicators of whether a transfer course was applied toward a student's degree at any point in time.

UTEP

The data provider shared course records for all coursework with a passing grade sent from the student's sending institution(s). Nonacademic courses (such as vocational coursework) and courses for which a student did not earn a high enough grade for transfer were not included in the sample.

- Transfer coursework earning credit, but no grade, was not included in the sample but could be counted toward a student's degree.
- Rejected transfer coursework (transfer courses that did not earn credit at UTEP) was not included in the sample. Thus, the sample did not include a variable indicator of whether a transfer course earned credit at UT El Paso.
- The sample included variable indicators of whether a transfer course was applied toward a student's degree at the time of transfer and at the time of graduation.

APPENDIX

B

Supplemental Tables

Appendix Table B.1 Transfer Student Characteristics

Characteristic (%)	UTA	UTEP
Gender		
Female	70.0	56.4
Male	30.0	43.6
Age		
Under 25 years old	43.1	67.4
25 years or older	56.9	32.6
Race/ethnicity		
Black or African American	17.5	3.9
Hispanic/Latino	30.5	78.3
White	35.2	8.9
Other race/ethnicity not listed	16.9	8.8
Pell Grant receipt		
Received Pell Grant	35.9	57.2
Did not receive Pell Grant	64.1	42.8
First-generation status		
First-generation	52.3	25.9
Not first-generation	47.7	52.5
Missing	0.0	21.6
Entering major subject area		
Business or marketing	10.6	14.0
Education	2.1	6.1
Engineering	9.6	13.3
General or multi-interdisciplinary studies	3.9	5.0
Nursing	53.0	11.6
Other major not listed	20.8	49.9
Sample size	48,927	16,138

SOURCE: Data are MDRC calculations using administrative records from UTA and UTEP of students who transferred to each institution from fall 2016 through summer 2022.

NOTES: Distributions may not add to 100 percent because of rounding.

Pell Grant receipt is defined as receiving a Pell disbursement in the semester of entry at the receiving institution.

First-generation status is defined as being the first in the family to attend college, including junior college.

Entering major is defined as the student's intended or declared major at the receiving institution at the time of application. Student majors were primarily grouped into subject areas by two-digit CIP code (although some subject areas may contain majors from multiple two-digit CIP codes). Nursing and non-nursing health were separated into two subject areas.

Appendix Table B.2 UTA Transfer Student Summary

Outcome	Mean	Sample Size
Enrolled after transfer (%)		
Semester 1	98.9	48,927
Semester 2	72.3	48,927
Semester 3	53.6	48,927
Semester 4	41.9	48,927
Semester 5	26.8	48,927
Semester 6	17.8	48,927
Earned bachelor's degree after transfer (%)		
Semester 1	0.0	30,658
Semester 2	1.3	30,658
Semester 3	6.8	30,658
Semester 4	17.9	30,658
Semester 5	27.6	30,658
Semester 6	36.7	30,658
Total credits		
Average number of credits earned upon graduation	151.2	16,390
GPA		
Average transfer GPA (all)	3.0	45,971
Average transfer GPA (graduating students only)	3.1	15,261
Average first-semester GPA after transfer (all)	2.8	48,927
Average first-semester GPA after transfer (graduating students only)	3.3	16,579
Average GPA upon graduation	3.4	16,579
Average GPA change between transfer and first semester (all)	-0.2	45,971
Average GPA change between transfer and first semester (graduating students only)	0.2	15,261
Average GPA change between first semester and graduation	0.1	16,579
Credit transfer (acceptance)		
Courses		
Average number of courses passed at sending institution	19.7	48,927
Average number of transfer courses that earned credit	18.6	48,917
Credit hours[a]		
Average number of transfer credits earned	54.6	48,917
Credit applicability[b]		
Average number of transfer credits applied at transfer	N/A	N/A
Average number of transfer credits applied at graduation	N/A	N/A
Sample size		48,927

(continued)

Appendix Table B.2 (continued)

SOURCE: Data are MDRC calculations using administrative records from UTA of students who transferred to the institution from fall 2016 through summer 2022.

NOTES: Rounding may cause slight discrepancies in sums and differences.

Sample sizes may vary because of missing values.

Data on enrollment and bachelor's-degree attainment include only students who enrolled at least six semesters before the last data collection period.

Only credit values of a student's first bachelor's degree were used when calculating the average number of credits earned upon graduation. If a student obtained a second degree, these credit values were not included in total credit calculations.

[a]Rejected transfer coursework did not contain data on credit hours.

[b]Credit applicability data were not available.

Appendix Table B.3 UTEP Transfer Student Summary

Outcome	Mean	Sample Size
Enrolled after transfer (%)		
Semester 1	98.2	16,138
Semester 2	78.9	16,138
Semester 3	70.3	16,138
Semester 4	63.5	16,138
Semester 5	53.0	16,138
Semester 6	36.6	16,138
Earned bachelor's degree after transfer (%)		
Semester 1	0.0	10,323
Semester 2	0.2	10,323
Semester 3	1.4	10,323
Semester 4	6.6	10,323
Semester 5	12.4	10,323
Semester 6	22.0	10,323
Total credits		
Average number of credits earned upon graduation	139.9	6,657
GPA		
Average first-semester GPA post-transfer	2.8	15,913
Average first-semester GPA after transfer (graduating students only)	3.2	6,644
Average GPA upon graduation	3.3	6,657
Average GPA change between first semester and graduation	0.1	6,644
Credit transfer (acceptance)		
Average number of transfer credits earned	59.3	16,138
Credit applicability		
Average number of transfer credits applied at transfer	30.7	16,138
Average number of transfer credits applied at graduation	34.1	6,657
Sample size		16,138

SOURCE: Data are MDRC calculations using administrative records from UTEP of students who transferred to the institution from fall 2016 through summer 2022.

NOTES: Rounding may cause slight discrepancies in sums and differences.

Sample sizes may vary because of missing values.

Data on enrollment and bachelor's-degree attainment numbers include only students who enrolled at least six semesters prior to the last data collection period.

Only credit values of a student's first bachelor's degree were used when calculating the average number of credits earned upon graduation. If a student obtained a second degree, these credit values were not included in total credit calculations.

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Founded in 1974, MDRC builds and applies evidence about changes in policy and practice that can improve the well-being of people who are economically disadvantaged. In service of this goal, we work alongside our programmatic partners and the people they serve to identify and design more effective and equitable approaches. We work with them to strengthen the impact of those approaches. And we work with them to evaluate policies or practices using the highest research standards. Our staff members have an unusual combination of research and organizational experience, with expertise in the latest qualitative and quantitative research methods, data science, behavioral science, culturally responsive practices, and collaborative design and program improvement processes. To disseminate what we learn, we actively engage with policymakers, practitioners, public and private funders, and others to apply the best evidence available to the decisions they are making.

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