Transfer Access

Self-Assessment Inventory:

Two-Year College Version

Names of Individuals completing the inventory:

Name _____
Title _____
Email _____
College _____

Name _____
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Two-Year College Version

Section Guide

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The Transfer Access Self-Assessment Inventory was designed by Dr. Alicia C. Dowd, Dr. Estela Mara Bensimon, Dr. Glenn Gabbard with assistance from Brad Arndt and Thara Fuller of the New England Resource Center for Higher Education at the University of Massachusetts Boston, Lindsey Malcolm of the Center for Urban Education at the University of Southern California, and Dr. Elsa Macias of the Tomas Rivera Policy Institute at the University of Southern California. Development of the inventory was supported by funding from the Jack Kent Cooke Foundation, the Lumina Foundation for Education, and the Nellie Mae Education Foundation.

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1. Transfer Counseling Services for Students

Name: _____
Title: _____
Institution: _____

Institutional Coding
☐☐

In this section, please indicate the types of services your institution offers for transfer students who are considering applying to selective four-year colleges and universities. At the bottom of the table please indicate the extent to which this level of service is sufficient to facilitate transfer from your institution to a selective college and university.

Service Offered	**Frequency**						**NOTES**
	Never	***Less than once a year***	***Once a year***	***Each semester***	***Monthly***	***Weekly***	
1.1 Brochures or other forms of literature are available addressing specific needs of students seeking to transfer to selective institutions.	❑	❑	❑	❑	❑	❑	
1.2 Informational material on selective institutions (i.e. view books, catalogs and transfer applications) are available.	❑	❑	❑	❑	❑	❑	
1.3 Transfer personnel and/or faculty inform students about transfer opportunities to selective four year institutions during freshman orientation and other workshops and meetings for incoming students	❑	❑	❑	❑	❑	❑	
1.4 Secondary students invited to college to meet with faculty/staff and learn about transfer options	❑	❑	❑	❑	❑	❑	
1.5 Workshops scheduled at various times to inform students about transfer possibilities to selective institutions	❑	❑	❑	❑	❑	❑	

(Please continue to the next page.)

1. Transfer Counseling Services for Students

In this section (continued from above) please indicate the types of services your institution offers for transfer students who are considering applying to selective four-year colleges and universities. At the bottom of the table please indicate the extent to which this level of service is sufficient to facilitate transfer from your institution to a selective college and university.

Service Offered	Frequency						NOTES
	Never	*Less than once a year*	*Once a year*	*Each semester*	*Monthly*	*Weekly*	
1.6 Special programs scheduled to help students to plan for admission to selective institutions (e.g., a summer program)	❑	❑	❑	❑	❑	❑	
1.7 Dedicated web-based information related to transferring to selective institutions available	❑	❑	❑	❑	❑	❑	
1.8 Workshops for students planning to transfer to selective institutions focus on emotional challenges of attending selective institutions, including issues of changes in social and cultural norms, challenges to self-esteem, being away from family, etc.	❑	❑	❑	❑	❑	❑	
1.9 Faculty plan workshops for students planning to transfer to selective institutions dealing with academic concerns	❑	❑	❑	❑	❑	❑	
1.10 Students accepted into special honors program or college providing an environment and support putting them on track to being accepted to a selective college or university	❑	❑	❑	❑	❑	❑	

1. 11 ***How effective are these services in facilitating successful transfer to selective institutions?***

❑ Not at all ❑ Minimally ❑ Moderately ❑ Extremely ❑ Don't Know

END OF SECTION 1

2. Financial Support for Students Seeking to Transfer to Selective Four-Year Institutions

Name: _____
Title: _____
Institution: _____

Institutional Code ☐☐

In this section, indicate the types of services provided to help deal with financial concerns of students seeking to transfer to selective institutions. At the bottom of the table, indicate the extent to which this level of services is sufficient in helping to facilitate successful transfer to selective colleges and universities.

Financial Aid Offered	***No***	***Yes***	**If Yes, award amounts compared to freshmen with comparable need:**			**NOTES**
			Less Than	***About the Same***	***More Than***	
2.1 Financial packages/ scholarships designed to specifically support students transferring to selective four-year institutions are available from your college	❑	❑	❑	❑	❑	
2.2 Information provided about grants/scholarships available from the state, colleges, or the private sector for community college graduates planning to transfer to selective institutions	❑	❑	❑	❑	❑	
2.3 Financial aid personnel available to assist students seeking to transfer to selective institutions	❑	❑	❑	❑	❑	
2.4 Phi Theta Kappa chapter on campus providing support and scholarships for students seeing to transfer to selective institutions	❑	❑	❑	❑	❑	

2.5 ***How effective is this level of financial aid in helping to facilitate successful transfer to selective institutions?***

❑ Not at all ❑ Minimally ❑ Moderately ❑ Extremely ❑ Don't Know

END OF SECTION 2

3. Personnel

Name: _____
Title: _____
Institution: _____

Institutional Code
☐☐

In this section indicate the number of people with responsibility for recruiting, admitting and advising students who may desire to transfer to selective institutions.

Institutional Staff	**Function**			**NOTES**
	Financial Aid	***Student Life Advising***	***Academic Advising***	
3.1 Transfer personnel with a part-time focus on transfer students seeking to transfer to selective institutions				
3.2 Transfer personnel with a full-time focus on transfer students seeking to transfer to selective institutions				
3.3 Faculty member(s) with responsibility for assisting students seeking to transfer to selective institutions				
3.4 Executive administrator(s) with responsibility with helping to facilitate transfer to selective institutions				

3.8 How adequate is this staffing level in facilitating successful transfer to selective institutions?

❑ Not at all ❑ Minimally Staffed ❑ Well-Staffed ❑ Extremely Well-Staffed ❑ Don't Know

END OF SECTION 3

4. Publicity and Public Statements

Name: _____
Title: _____
Institution: _____

Institutional Code
☐☐

In this section, indicate to what extent various forms of college media featured students planning to transfer or who have already transferred to selective colleges or universities in the past year. At the bottom of the table, estimate the extent to which these publicity features have created a supportive environment for transfer to selective institutions.

Type of Publication or Media:	***Not at all***	***Slightly***	***Moderately***	***Extremely***	**NOTES**
4.1 Admission brochures/view book/college catalog	❑	❑	❑	❑	
4.2 Websites	❑	❑	❑	❑	
4.3 Press releases	❑	❑	❑	❑	
4.4 Public speeches and statements by administrators/other staff	❑	❑	❑	❑	
4.5 Alumni material	❑	❑	❑	❑	
4.6 Institutional communication mat	❑	❑	❑	❑	
4.7 Online higher education clearing houses	❑	❑	❑	❑	
4.8 Television or radio	❑	❑	❑	❑	

4. 9. To what extent does the level of publicity contribute to promoting the institution's commitment to student transfer to selective institutions?

❑ Not at all ❑ Minimally ❑ Moderately ❑ Strongly ❑ Don't Know

END OF SECTION 4

5. Institutional Transfer Policies and Practices

Name: _____
Title: _____
Institution: _____

Institutional Code ☐☐

In this section indicate whether or not your institution had the following types of articulation policies in place during the past academic year. At the bottom of the table, characterize the effectiveness of these policies in facilitating successful transfer.

Policy:	***No***	***Yes***	
5.1 Formal articulation agreements with selective colleges and universities.	❑	❑	If Yes, please list the name(s) of the institutions (attach page if needed):
			NOTES
5.2 Alignment and transferability of general education courses	❑	❑	
5.3 Curriculum alignment (e.g. sequenced course numbering, course content, etc.)	❑	❑	
5.4 Guaranteed admission for qualified associate degree holders	❑	❑	
5.5 Guaranteed admission for qualified degree holders for specific programs (e.g. engineering, pre-med, etc.). Please specify.	❑	❑	
5.6 Articulation agreements with secondary schools to accept high achieving students into honors program (or college) on track to being accepted to a selective four year college or university	❑	❑	

(Please continue to the next page.)

5. Institutional Transfer Policies and Practices

In this section (continued from above) indicate whether or not your institution had the following types of articulation policies in place during the past academic year. At the bottom of the table, characterize the effectiveness of these policies in facilitating successful transfer.

Practice:	***No***	***Yes***	**NOTES**
5.7 Transfer course and credit (?) equivalencies are available online	❑	❑	
5.8 Regularly scheduled workshops for personnel to enable them to assist students to follow transfer requirements	❑	❑	
5.9 Transfer credit evaluations are conducted by designated trained personnel to work with selective college partners to assist in transfer policies and procedures	❑	❑	
5.10 Baseline data collected on transfer and transfer performance to help in planning and facilitating transfers to selected institutions	❑	❑	
5.11 Professional development opportunities available to faculty/staff to help them to assist students who are seeking to transfer to a selective college or university	❑	❑	
5.12 Board of Trustee involvement in promoting or assisting student transfer to selective institutions	❑	❑	
5.13 Alumni involvement in promoting or assisting student transfer to selective institutions	❑	❑	

5.14 ***To what extent are these policies effective in facilitating successful transfer?***

❑ Not at all ❑ Minimally ❑ Moderately ❑ Extremely ❑ Don't Know

5. Institutional Transfer Policies and Practices

END OF SECTION 5

6. Partnerships and Collaboration with Selective Four-Year Institutions

Name: _____
Title: _____
Institution: _____

Institutional Code
☐☐

In this section indicate whether or not your institution has had the following types of collaborative joint partnerships with selective four-year colleges and universities during the past academic year, and if any, indicate the names of the collaborating institution. At the bottom of the table, describe the effectiveness of these partnerships in facilitating relationships that foster successful transfer.

Policy	***No***	***Yes***	**If Yes, please list the name(s) of collaborating institution(s)**	**NOTES**
6.1 Joint research projects	❑	❑		
6.2 Joint workshop activities, or projects, focused on pedagogy or the improvement of teaching	❑	❑		
6.3 Joint community service projects or committees	❑	❑		
6.4 Jointly received external funding	❑	❑		
6.5 Joint curriculum or program development projects	❑	❑		
6.6 Jointly sponsored academic programs, i.e., honors programs	❑	❑		
6.7 Jointly sponsored admissions	❑	❑		

(Please continue to the next page.)

6. Partnerships and Collaboration with Selective Four-Year Institutions

In this section (continued from above) indicate whether or not your institution has had the following types of collaborative joint partnerships with selective four-year colleges and universities during the past academic year, and if any, indicate the names of the collaborating institution. At the bottom of the table, describe the effectiveness of these partnerships in facilitating relationships that foster successful transfer.

Policy	***No***	***Yes***	**If Yes, please list the name(s) of collaborating institution(s)**	**NOTES**
6.8 Jointly sponsored scholarship programs	❑	❑		
6.9 Four-year college/university faculty or administrators serve on institutional committees	❑	❑		
6.10 Four-year college/university host activities or events on your campus	❑	❑		
6.11 Residency programs at selective institutions allowing students to gain exposure to extracurricular and co-curricular environment at such schools	❑	❑		
6.12 Programs at selective institutions allowing students to gain experience with academic expectations at such schools.	❑	❑		
6.13 Transfer personnel meet with secondary school staff and students to inform them of selective college/university transfer opportunities	❑	❑		
6.14 Informational material on your college and its programs mailed to selective colleges and universities	❑	❑		
6.15 Transfer personnel visit four-year selective institutions to provide information on the college and its students and programs to faculty/staff	❑	❑		

6. 16 To what extent do these collaborations foster relationships that facilitate successful transfer?

❑ Not at all ❑ Minimally ❑ Moderately ❑ Strongly ❑ Don't Know

END OF SECTION 6

7. *Barriers to Transfer Access* (multiple respondents)

Name: _____
Title: _____
Institution: _____

Institutional Code
☐☐

To complete this section, have four or more individuals on your campus (copy additional sheets as needed) evaluate the following factors according to whether they present a challenge to increasing transfer access from community colleges to selective university/colleges.

Recruitment and Admissions:	**Poses a challenge to increasing transfer access from community colleges:**				**NOTES**
	Not at All	***Slightly***	***Moderately***	***Strongly***	
7. 1. Emphasis on recruiting students for career programs	❑	❑	❑	❑	
7. 2 Diffused recruitment efforts aimed at reaching broad admissions targets	❑	❑	❑	❑	
7. 3 Student access to information about admissions standards for four-year institutions	❑	❑	❑	❑	
7. 4 Access to information about SAT preparation	❑	❑	❑	❑	
7. 5 Distance to four year institutions which are possible transfer sites	❑	❑	❑	❑	
7. 6 Quality of relationships with four year institutions	❑	❑	❑	❑	

Institutional Orientation to Transfer Options:	**Poses a challenge to increasing transfer access from community colleges:**				**NOTES**
	Not at All	***Slightly***	***Moderately***	***Strongly***	
7. 7 College provides information about tuition and other costs related to transfer to four-year institutions	❑	❑	❑	❑	
7. 8 College provides information about financial aid eligibility criteria for transfer to four-year institutions	❑	❑	❑	❑	

(Please continue to the next page.)

7. Barriers to Transfer Access (multiple respondents)

To complete this section (continued from above), have four or more individuals on your campus (copy additional sheets as needed) evaluate the following factors according to whether they present a challenge to increasing transfer access from community colleges to selective university/colleges.

Institutional Orientation to Transfer Options *(cont)*:	**Poses a challenge to increasing transfer access from community colleges:**				**NOTES**
7. 9 College guides students to identify various forms of institutional aid	❑	❑	❑	❑	
7. 10 Trustee priorities	❑	❑	❑	❑	
7. 11 Strategic plan	❑	❑	❑	❑	
7. 12 Institutional orientation to encourage transfer to limited range of four-year institutions	❑	❑	❑	❑	
7. 13 Orientation of college personnel to non-selective institutions as most likely transfer options	❑	❑	❑	❑	

Academic Standards:	**Poses a challenge to increasing transfer access from community colleges:**				**NOTES**
	Not at All	***Slightly***	***Moderately***	***Strongly***	
7. 14 Rigor of coursework	❑	❑	❑	❑	
7. 15 Curriculum prerequisites	❑	❑	❑	❑	
7. 16 Faculty expectations for student performance	❑	❑	❑	❑	
7. 17 Perceptions of student quality	❑	❑	❑	❑	

END OF SECTION 7

8. Institutional Mission

Name: _____
Title: _____
Institution: _____

Institutional Code
☐☐

To complete this section, have four or more respondents review your institutional mission statement and evaluate the extent to which your college's practices in support of transfer to selective four year college/universities demonstrate commitment to your mission.

Aspects of Institutional Mission:	**Mission expresses commitment to:**				**Transfer practices demonstrate commitment to:**				**NOTES**
	Not at All	***Slightly***	***Moderately***	***Strongly***	***Not at All***	***Slightly***	***Moderately***	***Strongly***	
8.1 Serving the public good/public service	❑	❑	❑	❑	❑	❑	❑	❑	
8.2 Serving low-income students	❑	❑	❑	❑	❑	❑	❑	❑	
8.3 Serving groups of students under-represented in higher education (racial-ethnic minority students)	❑	❑	❑	❑	❑	❑	❑	❑	
8.4 Promoting equitable access to higher education	❑	❑	❑	❑	❑	❑	❑	❑	
8.5 Creating a just society	❑	❑	❑	❑	❑	❑	❑	❑	
8.6 Developing civic leaders	❑	❑	❑	❑	❑	❑	❑	❑	

END OF SECTION 8