Chapter 8

Transfer Success and Accountability: A Texas Perspective
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Evaluation and accountability play increasingly important roles in public higher education. They ensure that public funds are used as efficiently and effectively as possible, provide valuable information about successful (and unsuccessful) practices, and enable policy makers to identify programs or services that produce positive and potentially replicable results. Both evaluation and accountability are critical components of informed decision making at all levels of higher education.

Transfer, and more specifically the effectiveness of transfer policies, was not at the forefront of the early discussions about accountability. However, as states enhance their data collection systems and develop and/or expand their accountability systems, transfer is playing a more prominent role. Historically, transfer rates from the traditional pathway (i.e., two-year colleges to a four-year institution) have been generally low. In an effort to better understand the effect of transfer policies and transfer patterns, institutions and state agencies need to ask a number of critical questions:

- How does a state use data and an accountability system to understand transfer patterns?
- What are the completion rates of transfer students who have already earned certain blocks of credit (e.g., core curriculum, discipline-specific transfer curricula, associate degree)?
- Are there any differences in completion rates by major or student characteristics for those who complete the aforementioned outcomes and then transfer?
- How are swirling and other nonlinear student migration patterns interpreted?
- How are swirlers tracked?
- How are reverse transfers tracked?
- How effective are local articulation agreements versus statewide transfer initiatives?

This chapter addresses the importance of effective data use as part of a comprehensive evaluation of transfer policies and practices to help answer questions such as these and to ensure the greatest success of transfer students. The chapter begins with an overview of the Texas Higher Education Accountability System and the reporting of transfer measures within the state's extensive accountability framework. Several additional transfer-related reports are then discussed, including a detailed state- and institutional-level report of transfer student performance in Texas, and an example of how student flow data can be used to show transfer movement across institution types (i.e., two- and four-year institutions). Next, a multistate comparison of two-year college data developed by the Cross-State Data Work Group, which includes transfer information, is presented with emphasis on the Texas results followed by a discussion of the challenges of tracking student swirl activity and some thoughts on the importance of data alignment across segments of the educational pipeline. The chapter concludes with a discussion of how data can be useful in the evaluation of statewide transfer policies and local transfer agreements.
Statewide Accountability System and Transfer Students

In 2000, the Texas Higher Education Coordinating Board (THECB), the state agency charged with institutional oversight, adopted a statewide plan for higher education entitled Closing the Gaps by 2015 (THECB, 2009a). The plan calls for each public higher education institution to engage in an ongoing pursuit of excellence. A strategy for carrying out that goal relies on the selection of institutional peers and benchmarks of performance against which progress can be measured. Closing the Gaps by 2015 has been enthusiastically supported by the state’s executive and legislative branches, but when it was developed it did not encompass an accountability process.

In January 2004, the governor issued an executive order requiring implementation of an accountability system for public institutions by the following year. Community colleges were not subject to the governor’s order, but they chose to participate in spring 2005. THECB took the lead on the accountability system project and collaborated extensively with public universities, health-related institutions, two-year institutions, and legislative and executive office staffs on the selection, definition, and calculation of measures.

The Closing the Gaps (CTG) state plan became the structure around which accountability measures were organized. CTG calls for improvement in Texas higher education in the areas of participation (e.g., enrollment), success (e.g., award completion), and research. These became the cornerstones of the accountability system, along with institutional efficiency and effectiveness. One reason often cited for the support of CTG was the plan’s understandability. It has a limited number of explicit goals and targets. For similar reasons, the accountability system was designed to have a limited number of key measures in each of the primary areas, plus a more extensive set of contextual measures to inform the data reflected in the key measures. The measures are not static; they can be, and have been, changed as needed when more appropriate measures have been identified.

Because comparisons among institutions are inevitable when data on many schools are presented, colleges and universities were sensitive as to how the accountability system would be used. They emphasized that their uniqueness made comparisons invalid. While conceding that Texas has a wide variety of institutions, the state developed an approach that acknowledges institutional differences but stresses that some institutions are more similar than others. To assist with making comparisons among the most similar institutions, universities have been grouped according to general academic mission and certain key academic indicators, such as size, number of graduate programs, and research expenditures. The groupings are intended to be neither permanent nor prescriptive. Rather, they are considered to be subject to revision as institutions evolve. These groupings are reviewed biennially with appropriate full participation by institutional leaders. The university peer groups are (a) Research, (b) Emerging Research, (c) Doctoral, (d) Comprehensive, and (e) Master’s. Community colleges are clumped into four groups based primarily on institution size: very large, large, medium, and small. In addition, health-related institutions form a separate peer group, as do two-year state technical colleges.

Besides being useful for appropriate data comparisons, the peer groups are at the heart of the second major function of the accountability system—institutional improvement. The accountability process is not used to penalize institutions but instead is designed to help institutions share best practices and discuss pertinent issues, including transfer. The grouping of institutions in the accountability system allows colleges and universities to compare their transfer results with those of both individual institutions and groups of institutions. In addition to the indicators that directly address student transfer, the system includes several measures that track graduation and persistence rates. These measures are calculated for first-time undergraduate cohorts with outcomes for students who persist and graduate from any Texas public or private institution attributed to the initial institution of enrollment and disaggregated to show results for students who remain at the home
institution and those who moved to other institutions. Thus, a more complete picture of student performance is available. An institution can identify how many of its students who leave are non-completers and how many remain in college but transfer to another institution, and policy makers can better understand institutional performance rates and student movement across institutions.

Two- and four-year institutions have separate performance indicators in the accountability system. The difference in transfer measures for these types of institutions highlights the importance of understanding that two- and four-year institutions often have different perspectives on transfer issues and on what outcomes best reflect their missions. In general, community colleges are interested in (a) how many students transfer in a certain period of time; (b) how many credit hours students earn before they transfer; and (c) how successful students are once they transfer, including performance in courses (e.g., grade point average) and graduation rates as compared to native students. Like community colleges, universities are interested in the graduation rates of students who transfer to their institutions. However, they are also interested in the contributions that community colleges make towards helping the universities’ native students earn a bachelor’s degree (e.g., dual enrollment). This approach goes beyond the traditional definition of transfer student but is important to consider as more and more university students earn credits towards a degree at a community college while their primary enrollment remains at a four-year institution.

Other statewide transfer policies are reflected in the accountability system. Texas law requires institutions to allow students to substitute a completed series of core curriculum courses earned at a public, two-year college for the core curriculum courses required at the receiving four-year institution. Generally, core curriculum requirements include 42-48 credit hours of mainly lower-division coursework in various component areas. State law also allows students to substitute an individual core course earned at a community or state technical college for an equivalent course offered by the four-year institution. Because of this policy, more and more students transfer with a set of core courses completed or with the entire core curriculum fulfilled. For example, the percent of students who transferred with the core curriculum satisfied increased significantly from 2004 to 2008, (i.e., 1.6% to 4.5%) with the total student transfer rate remaining constant at about 20% (THECB, 2008a).

In the university section of the accountability system, two measures illustrate the performance of transfer students and the contribution community and technical colleges make toward baccalaureate degree attainment in Texas: (a) the number and percentage of undergraduate enrollments that are transfer students from Texas two-year colleges with a minimum of 30 semester credit hours in the six years prior to transferring and who graduated from the same Texas public university within four years and (b) the percent of baccalaureate graduates who completed at least 30 semester credit hours at a Texas two-year college before transferring to a public university. For example, in Texas overall, more than half of the community college students that transfer with 30 semester credit hours or more graduate with a bachelor’s degree four years after transferring. Furthermore, more than a third of all students who complete bachelor’s degrees earn at least 30 hours of their degree credit at community colleges in Texas (THECB, 2008b).

Transfer Student Performance Report

Texas institutions of higher education are required by law (i.e., Texas Education Code §51.403) to report on student performance during the first year enrolled after graduation from the respective outbound school (i.e., high school or two-year college). This report must include, but is not limited to, student test scores, developmental education courses taken, and students’ grade point averages (GPAs). Coordinating Board staff members have used this information, matching it with
student-level transfer data, to reflect the performance of public two-year college students in the first year after they transferred to a four-year institution, including student persistence to the second year of study. Aggregation of these data elements provides insight into the relationship between transfer patterns at the local, regional, and statewide levels and student academic performance.

The transfer student performance report provides a wealth of data about the performance of vertical transfer students (i.e., two-year to four-year) as measured by grade point average (GPA) in the first year after transfer. The report includes transfer student status related to developmental education work completed, whether a student met core completion requirements, and the type of degree or certificate earned (if any) at the two-year institution. For example, Table 8.1 compares GPA data for the fall 2007 statewide cohort of transfer students who were and were not required to take developmental education courses while attending two-year institutions.

Table 8.1
*Academic Preparation and Performance of 2007 Transfer Students With 30 Earned Credit Hours*

<table>
<thead>
<tr>
<th>GPA Range</th>
<th>% Requiring Developmental Education</th>
<th>% Not Requiring Developmental Education</th>
</tr>
</thead>
<tbody>
<tr>
<td>GPA higher than 3.0</td>
<td>38</td>
<td>48</td>
</tr>
<tr>
<td>GPA between 2.0-3.0</td>
<td>37</td>
<td>32</td>
</tr>
<tr>
<td>GPA lower than 2.0</td>
<td>23</td>
<td>17</td>
</tr>
</tbody>
</table>

Clearly, students who required developmental education at a community or technical college performed, on average, less well than those who did not. In terms of the type of degree earned at the two-year college, in the high GPA category, there is little difference between students who earned and transferred with an associate degree and those transferring with technical degrees (i.e., more than 50% of students in each degree type earned a GPA of 3.0 or higher); however, only 39% of students earned a GPA of 3.0 or higher if they did not earn a degree prior to transfer (THECB, 2009b).

**Data About Student Flow and Transfer Across Higher Education Levels**

As transfer students are tracked and their behavior analyzed, the data can be presented in different ways, using flowcharts in addition to the traditional transfer tables found in reports like the Transfer Student Performance Report (THECB, 2009b). Figure 8.1 provides an example of tracking transfer flow across institutional levels, including two-year to four-year transfers, four-year to two-year transfers, and multiple transfers across levels. This is referred to as across-level transfer or cross-level transfer. The data shown follow Texas public higher education students who were first-time undergraduates (FTUGs) in fall 2000 across six years of higher education enrollment. Cumulative transfer rates across levels are tabulated and shown at one, three, and six years from initial matriculation.
Figure 8.1. Student flow – fall 2000 cohorts of Texas first-time undergraduates (FTUGs).
Four cohorts of first-time undergraduate students enrolled in public colleges and universities are tracked in this analysis. The cohort is divided into two- and four-year enrollees and further disaggregated by the number of semester credit hours enrolled in the first year to help illustrate differences between students with full-time status and those who begin as part-time students. In this analysis, students who attempted 24 or more semester credit hours (24+) are considered to have completed the first year in college as a full-time student; students who attempted less than 24 semester credit hours (< 24) are tracked separately. Within-level lateral transfers (i.e., two-year to two-year or four-year to four-year transfers) are excluded, and students who were enrolled at two or more levels during a single semester were determined to be enrolled at the institution where the most semester credit hours were attempted, not including hours earned in the summer. Students who transferred to and graduated from a Texas private college or university in fiscal year 2003 (FY2003) or later are included in the calculation of transfer and graduation rates. Finally, students who left college without earning a degree after the fall of 2000 are in the Not-Found category for fiscal year 2001 (FY2001). For the later two fiscal years shown (i.e., FY2003 and FY2006), students who were not enrolled at any point during the academic year and who left college without earning a degree are included in the Not-Found category.

Two-to-Four-Year Transfers

The flowchart data show that few students who started at a two-year community or technical college (CTC) in Texas transferred to a four-year institution after one year. However, after three years, 24% of the students who began as full-time students at public CTCS had transferred to a public or private Texas university, with 2% (960 students) making two or more cross-level transfers (e.g., from a two-year institution to a four-year institution and back to a two-year institution).

After six years, 40% of the full-time Texas CTC student cohort had transferred at least once across levels (from two-year to four-year) with 8% of students transferring two or more times. Cross-level transfers after six years for the part-time CTC cohort represent 27% of the initial population of students who took fewer than 24 semester credit hours in the first year. Although this is a lower percentage than for the full-time CTC cohort, the actual number of students who transferred across levels was higher for the part-time cohort than for the full-time cohort (i.e., 18,648 part-time cohort students vs. 16,575 full-time cohort students).

In addition to transfer rates, this flowchart has been designed to illustrate two-year certificate and degree completion rates and baccalaureate completion rates. The baccalaureate completion rates for the students who start at two-year colleges can be viewed as an indicator of transfer success. For example, 20% of the students who attempted 24 or more semester credit hours at a two-year institution in FY2001 had earned a bachelor's degree or higher within six years; 12% of the students who attempted less than 24 semester credit hours in the first year had done the same. The Not-Found category in the flowchart is a useful way to track changes in persistence over time. It shows that 41% of the CTC students who attempted fewer than 24 semester credit hours in their first year were not found enrolled during the subsequent spring and summer semesters. By year six, 61% of this cohort was not found, while 20% had earned degrees and certificates and 19% were still enrolled.
Reverse Transfers

The flowchart also provides an excellent window into the phenomenon of reverse transfer (i.e., transfer from four-year to two-year institution before degree completion). The data categories in the chart are determined hierarchically; once a bachelor's degree or higher is attained, inclusion in other categories is precluded. To avoid including undergraduate university enrollees who were taking summer or occasional courses at a community college as a cross-level transfer, the majority of a reverse transfer student's recorded credit hours had to have switched from a four-year institution to a two-year school during a regular semester.

The data in the third row show that for students who attempted a full-time schedule at a Texas public university, 3% (1,553 students) transferred to a two-year institution within one year. Within three years, 12% transferred across levels once, and 6% transferred across levels twice or more. This trend suggests that for students who start at a four-year institution and reverse transfer, a considerable number do transfer back to a university after their enrollment at a two-year institution. By the six-year point, 11% transferred once, and a full 13% transferred two or more times. For those students in the cohort who initially were enrolled full-time at a public university, Table 8.2 shows the graduation rates: 73% who did not transfer graduated with a bachelor's degree or higher in six years or less while only 39% who had two or more cross-level transfers earned a bachelor's degree in that time frame. Of those students with two-or-more cross transfers who did not earn a bachelor's degree, 7% (384 students) did complete a two-year degree or certificate.

Table 8.2 also shows graduation rates for the much smaller number of students who initially enrolled in a Texas public university in fall 2000 with part-time status. Of the 3,281 students who did not transfer, 14% earned a bachelor's degree or higher in six years or less, considerably fewer than the 73% of students who started full time. The baccalaureate attainment rate of 20% for the 806 students with two-or-more cross-level transfers was higher than the rate for students who did not transfer. However, as 61% of the university students who started part time in 2000 were not found by FY2006 (versus 21% of the full-time students), drop-out rates may have contributed to this unexpected outcome.

<table>
<thead>
<tr>
<th>Number of transfers across levels</th>
<th>Total enrolled</th>
<th>Baccalaureate or higher degree</th>
<th>Two-year degree</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Number</td>
<td>Six-year graduation rate</td>
</tr>
<tr>
<td><strong>Full time in first academic year</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>35,052</td>
<td>25,608</td>
<td>73%</td>
</tr>
<tr>
<td>2 or more</td>
<td>5,775</td>
<td>2,281</td>
<td>39%</td>
</tr>
<tr>
<td><strong>Part time in first academic year</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0</td>
<td>3,281</td>
<td>460</td>
<td>14%</td>
</tr>
<tr>
<td>2 or more</td>
<td>806</td>
<td>161</td>
<td>20%</td>
</tr>
</tbody>
</table>
Other Applications for Transfer Flow Chart Models

Flowcharts of this type can also be used to observe year-to-year changes in enrollment and persistence. While not shown in this text due to space limitations, this flowchart was originally produced to show all six years of annual data. The results revealed that, generally, transfer rates increased little after year three, while the largest increases in baccalaureate rates were seen between years four and six.

In addition to providing trend data, flowcharts such as this one can be used to compare transfer rates for a variety of populations. For example, data on this flowchart were disaggregated by ethnicity and gender to provide institutional personnel and policy makers additional insight into the cross-level transfer phenomenon.

Cross-State Work Group Data on Transfer

National two-year institution initiatives like Achieving the Dream consider transfer a positive outcome for community college students. The Achieving the Dream Cross-State Data Group (i.e., a team of professionals from Connecticut, Florida, North Carolina, Ohio, Texas, and Virginia who analyzed data and designed community college success measures) found between-state differences in transfer patterns can be explained partly by differing state policies (Jobs for the Future, 2008). The Cross-State study looked at six-year outcomes of a fall 1999 community college cohort of first-time-in-college students, including those who transferred without earning an award; those who earned an award (i.e., associate degree or less) with or without transfer; and those who were still enrolled in the sixth year with at least 30 semester credit hours earned. Texas had the highest percentage (25%) of students transferring without an award, while Florida had a high percentage of associate degree earners enrolling in universities (22%). Florida has a policy that provides for automatic admission of students who earn an associate degree. Texas, on the other hand, has no incentives for students to stay and earn a two-year degree if they intend to transfer, except for completing the core curriculum, which can be transferred en bloc. Half of the Texas students in this cohort who earned an associate degree later transferred to a university, compared with 69% in Florida.

The variation in other states’ transfer rates may also be related to differences in their transfer policies. Ohio had the lowest transfer rate (22%) of students who earned an associate degree in the Cross-State study, but it had the highest rate of students earning an associate degree (23%). Due to the characteristics of the Ohio public university system, community colleges encourage students to look at their degrees as terminal degrees rather than as transfer degrees. In North Carolina, new policies were implemented in the late 1990s, including the adoption of a statewide articulation agreement. These new policies encouraged a balanced approach to transfer, with or without earning a degree at a community college prior to transfer. In North Carolina, there seems to be an even distribution between students who transfer with an associate degree (14%) and those who transfer without a degree (16%). Eventually, 34% of the associate degree earners transfer to universities.

Other work done by the Data Work Group looked at transfer patterns of students in developmental education compared with college-prepared students. For the fall 2002 cohort in Texas, 49% of college-ready students transferred in six years, with or without an award from a community college, compared with 22% of students who needed developmental education. Of those who needed developmental English only, 35% transferred versus 23% of those who started in upper-level developmental math and 14% of the students who started in lower-level developmental math. In general, younger students (i.e., under 22 years of age) were twice as likely to transfer as older students, with the initial level of preparedness appearing to have little bearing on the decision. Also, younger students were more likely to transfer without earning an award (23%) than older students (6%).
Swirling

While sometimes perceived as the exception to the rule, data suggest that the nonlinear enrollment patterns typically characterized as swirling are very common. McCormick (2003) showed that swirlers who transfer are less likely to graduate, but he also pointed to a "need for a more sophisticated accounting of attendance patterns" (p. 21) and suggested that swirling without transferring, growth in distance and online education programs, and the emergence of convenience providers (Zemsky & Shaman, 1997) are all factors that should be considered when studying swirling and related student outcomes. Kuh commented "the more swirling, the less the public really knows about the quality of the educational experience" (Marklein, 2005, D6). Clearly, a case can be made for including swirling patterns when designing models for analyzing transfer data.

Just as swirling can be defined in many ways, there are numerous methods to track swirling patterns using state-wide enrollment data. In order to gain a general sense of the extent to which students attend several institutions in the course of earning a bachelor's degree, a simple analysis of 10 years of enrollment data for fiscal year 2008 (FY2008) baccalaureate graduates from Texas public postsecondary institutions was conducted by the authors. Of the 94,428 students who earned a degree in FY2008 and attended a Texas public higher education institution anytime between 1999 and 2008, 28% were enrolled at only one public institution. Students who were reported as enrolled by two institutions comprised 40% of the cohort, those who attended three institutions represented an additional 20% of the graduates, and students who attended between 4 and 11 institutions made up the remaining 12% of the population. The data include students who swirl without transferring but exclude dual-credit students and students with invalid identifiers.

These data, which show that almost a third of the 2008 baccalaureate graduates in Texas attended three or more institutions, highlight the importance of understanding multiple enrollment patterns at the statewide level. How to attribute degrees earned should be part of any discussion of accountability systems in states with high levels of student movement across institutions.

Data Alignment Across Sectors

The many examples of transfer data reports discussed in the previous section emphasize the value of having a comprehensive state data system in which students can be tracked across educational levels and sectors. In addition to having extensive state-level data systems that allow for data sharing across the secondary and postsecondary sectors, Texas has a higher education data system that facilitates the smooth alignment of two-year and four-year college data. As a result, transfer students can be followed in a variety of ways, allowing for a range of transfer outcomes to be considered. As the state moves toward the collection of student course-level data, even more opportunities for researching transfer movement and performance will emerge.

Statewide Transfer Policies and Local Transfer Agreements

The advantages of taking a statewide approach to transfer policy include the ability to affect large numbers of students, uniformity (e.g., the transfer guarantee is good at any affected institution and for any qualifying student who follows the guidelines), and enforceability (e.g., the laws of the state, or the regulatory powers invested by law in the agency, can be used to ensure the guarantee of transfer). For example, Texas instituted its current core curriculum transfer policy in 1999, which guarantees that each public institution will accept all core curriculum credits (i.e., with a grade of C or better) from every other Texas public institution. Data from subsequent...
years show that many students have taken advantage of this policy and the transfer guarantees that it affords. However, there are also disadvantages to this kind of centralized approach. The state has few mechanisms to inform students of these transfer guarantees directly; therefore, it must often rely upon the institutions to disseminate information. Because the state agency is removed from the students and the institutions, it can be difficult to determine how often its transfer policies are used and how effective they are in promoting smooth and efficient transfer for students. Again, the state must rely upon the institutions to provide assistance in the form of data reports. If all institutions involved in statewide articulation agreements are required to collect and submit student and course-level data, such as individual student identifiers, courses attempted, and grade points earned, the efficacy of those statewide articulations can be analyzed.

Finally, statewide policies must, by necessity, be relatively simple and use a one-size-fits-all approach. Because they are universal in nature, statewide policies cannot be tailored to fit local needs. In addition, policies that are formulated to fit every contingency should be avoided, as such well-intentioned policies are often far too complicated for students and advisors to understand. An example is the Texas Field of Study Curriculum for Engineering, which was developed to facilitate the transfer of credits for students in all of the engineering disciplines. This curriculum was developed and promulgated by the state, but relatively few students have taken advantage of it due to its complexity. Because data showed that the curriculum was not often used, state administrators decided to develop a simpler, more focused transfer curriculum. This led to the creation of the Mechanical Engineering Transfer Compact, which is intended only for students in mechanical engineering. In the coming years, state administrators will examine transfer data and compare the effects of the Compact with the older Field of Study Curriculum to determine which is more effective in ensuring student transfer.

Local articulation agreements are those that are developed by the institutions themselves and are reached through direct negotiation between two or more institutions. Local in this usage means that the institutions are filling the needs of their own students and does not necessarily suggest that the schools are actually in close physical proximity. These arrangements may have a time limit or may be good until rescinded by mutual agreement. One advantage of local articulation agreements is the ability to fine-tune student transfer. For example, two institutions may use local agreements to specify lower-division transfer guarantees for several degree programs that are unique to one of the institutions. Another advantage is the opportunity for further adjustment to the local agreement. Since only a few institutions are involved, it is relatively easy for them to modify their work, in contrast to state-level policies where many stakeholders are involved, some of which may be resistant to change. Although a central state authority may decide to review data regarding the efficacy of local articulation agreements, in most cases it is up to the administrators at each local institution to ensure the collection and analysis of such data.

Some of the data collection and analysis approaches used at the statewide level, including those described in this chapter, may be useful in tracking the effectiveness of local transfer agreements and activities. One practical application of the data is the assessment of an institution's student transfer patterns to determine whether existing articulation agreements could be enhanced or new agreements developed to recruit more transfer students. In revising or developing articulation agreements, institutions may wish to include a provision whereby the receiving institution shares data about student performance with the sending institution. Additionally, an institution might review its transfer student performance data to determine whether additional resources may be needed to enhance academic and nonacademic support services targeted to transfer students. Furthermore, institutions can use such data to determine whether transfer student support services should be focused on the first year after transfer or the second year, depending on the results of a persistence data analysis. Four-year institutions can also use the data to determine which two-year
slanding institutions provide an adequate academic foundation for student success, as reflected in student GPA posttransfer, and which do not.

Conclusion

This chapter focused on using statewide data to identify and evaluate student transfer patterns, linking them with student performance measures when available. Because of the robust data collected by the Coordinating Board, the agency is able to look at transfer versus native student test scores, developmental education needs, and grade point average as measures of performance related to transfer. The analysis of the statewide data shows the frequency of student transfer both within and across levels and highlights the importance of including student movement when developing accountability systems, data analysis approaches, and higher education policies. Finally, institutions may wish to compare their transfer student performance data with like institutions, such as Texas does with the peer groups identified in the Texas Accountability System. Peer group institutions may benefit from meeting regularly to compare data and share information about successful and effective transfer initiatives carried out on their campuses.

The issues presented here are by no means comprehensive. As states continue to expand their data collection efforts and as transfer becomes increasingly important in achieving the country’s higher education goals, other ways of identifying transfer patterns will emerge and more sophisticated systems will need to be developed to correlate transfer phenomena with student performance. While other states may not have the resources to perform comparable analyses of transfer student activities, many should soon be able to do so. The Statewide Longitudinal Data Systems Grant Program, which was authorized by the Educational Technical Assistance Act of 2002, was designed to assist state education agencies in developing and implementing longitudinal data systems. These systems are meant to enhance the ability of states to manage and analyze educational data, from K-12 into higher education, including the collection of individual student course-level records. The data systems are intended to help policy makers make data-driven decisions to improve student learning and facilitate research on educational issues. Institutions of higher education and state higher education boards are encouraged to carefully consider these systems in the development and refinement of policies designed to facilitate transfer and ensure optimum efficiency of state resources.

It is within this context the following questions are offered with the hope of guiding future discussion, research, and policy development:

◦ How should statewide goals for student success be reflected in transfer policies?
◦ In what ways can a state accountability system elevate the importance of transfer?
◦ How can transfer measures in accountability systems be used as incentives for improvement?
◦ Should a state set targets for the number (or percentage) of students who transfer from a two-year institution to a four-year institution? Or should the targets be set at the institutional level?
◦ How can institutional and state administrators best coordinate the collection of data to facilitate good planning at both the local and state levels?