Educational Session

2825 - Building TEAMS: Partnering to Impact Transfer Excellence, Achievement, Mindset, and Success
Leadership and Strategic Planning, Partnerships and Collaboration

Using a modified version of Covey's "4DX Model," teams representing 100 professionals from a university and six transfer sending institutions partnered together to address critical transfer barriers impacting transfer success. Through the Transfer Excellence, Achievement, Mindset, and Success (TEAMS) project, each group designed, built, and launched an innovative partner-based solution. This session will examine the research around the barriers impacting transfer success and showcase the creative TEAMS project as a model for replication.

Pam Cavanaugh, *Associate Vice Provost*
Jenny Sumner, *Assistant Vice Provost, Division of Digital Learning*
Kimberly Hardy, *Assistant Vice Provost, UCF Connect*
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Division of Student
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Agenda

1 About UCF

2 Relevant Transfer Topics: What We Know About Transfer Success

3 Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

4 Action for Impact: Designing for Transfer Success at Your Campus

While Florida's statewide 2+2 articulation policies set the foundation for statewide transfer, it is the strong partnerships between specific institutions that ensure its continued success. Over time, many of these partnerships, such as DirectConnect to UCF®...have evolved to provide clear program pathways, campus supports, and other resources that extend beyond the scope of the 2+2 agreements.

THE STATE OF STATE TRANSFER POLICY:
A Typology to Evaluate Transfer and Recognition of Learning Policies, 2022
College Excellence Program, Aspen Institute

About UCF

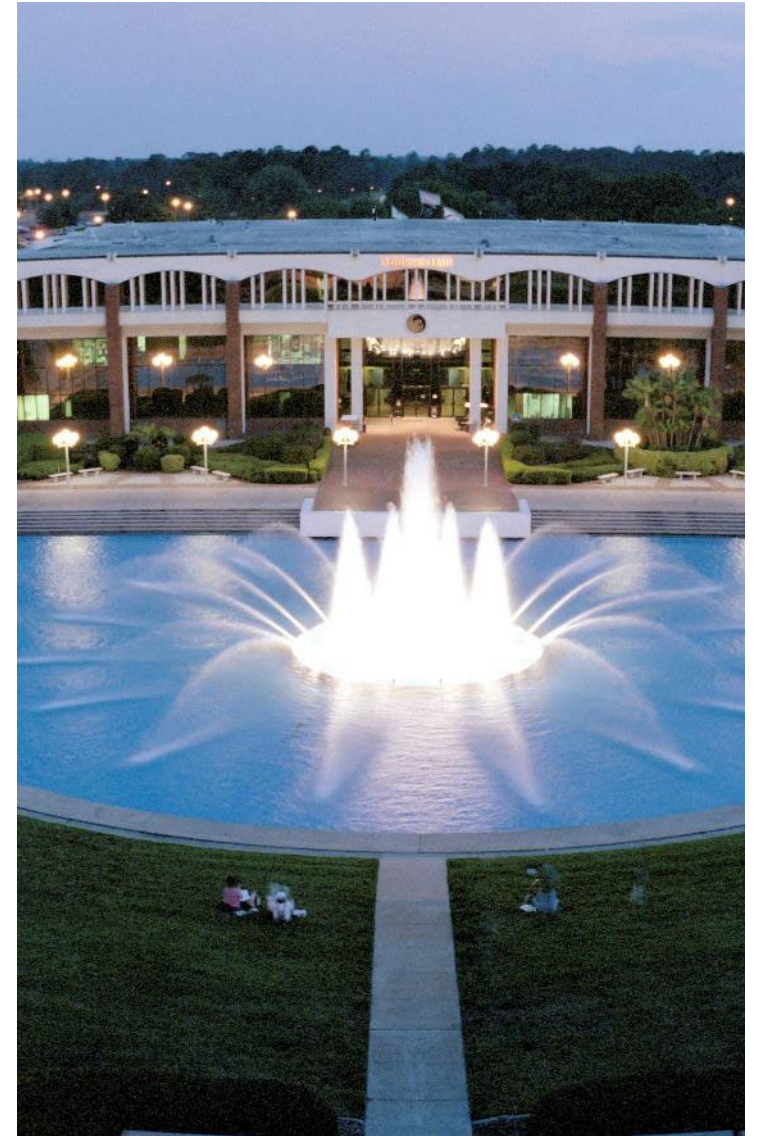## Big

-68,442 enrolled Fall 2022

Transfer Friendly

-48% of Fall '22 admits were transfer students
-A top transfer student serving university in the country

Diverse

-Transfers contribute to UCF's diverse population

Accessible

-100+ fully online programs
-#8 for best online bachelor's programs

Transfer Focused

Culture of Transfer Support

Major Progression
Strategic Plan
Foundations of Excellence
University Innovation Alliance (UIA)
Florida Consortium of Metropolitan Research Universities

Partnership-Driven

Central Florida Higher Education Consortium
DirectConnect to UCF®
Success Coaching
Curriculum Alignment
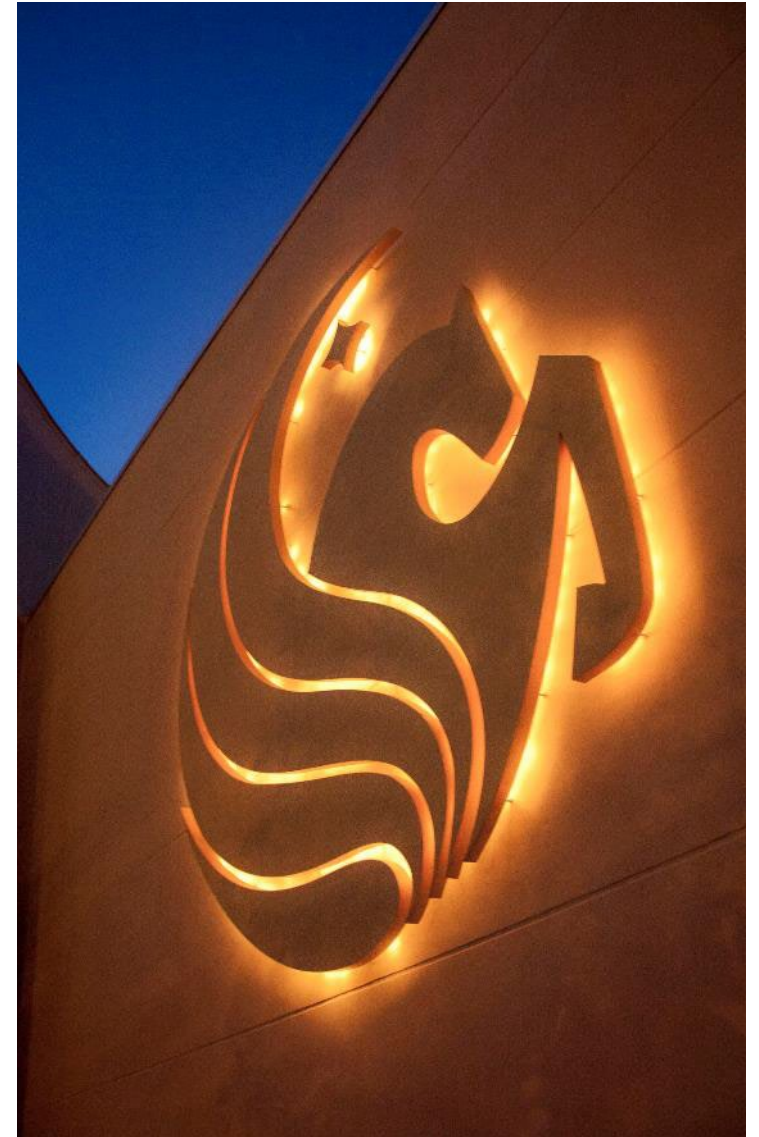*Annual College Access Summit*

Transformative Transfer Work

2019. Design Thinking: How Might We Reimagine DirectConnect to UCF® to Impact Transfer Student Readiness and Success?

2020-2022. Introduced the TEAMS Project: Transfer Excellence, Achievement, Mindset, and Success

2022-2023. Second year of the TEAMS Project

Relevant Transfer Topics

According to

Barbara F. Tobolowsky & Trudy H. Bers, 2022

Navigating the Transfer Maze: A Literature Review of Effective Policies and Practices

National Institute for the Study of Transfer Students

1. Make transfer a priority at both sending and receiving institutions, which means having staff and resources dedicated to transfer student success.

2. Offer timely orientation that helps students understand the receiving campus culture, academic standards and expectations, and any transfer-relevant policies.

3. Develop strong partnerships between institutions to assist students throughout their transfer journeys. These partnerships include cross-institutional advising and participation in orientation.

4. Provide tailored advising for transfer students that includes creating academic plans to completion, course selection, and financial aid options.

5. Develop and administer transfer policies that are clear, well-articulated, and understood by staff, faculty, and students. This includes providing timely, accurate transcript reviews and awarding of credit, with clear communications to students about the applicability of these credits to their programs.

Relevant Transfer Topics

According to

Catherine Hartman, 2022

A Review of Vertical and Horizontal Transfer Student Transitions and Experiences

Transfer Pathway:

1. Transfer Choice and Search Process

2. Demographic Factors Associated with Transfer

3. Structural Forces Impacting Transfer

4. Institutional Barriers to Transfer

Post-Transfer Experiences:

1. Transfer Shock

2. Students' Adjustment, Integration, and Engagement

3. Momentum

4. Sense of Belonging

5. Transfer Student Identity

Relevant Transfer Topics

According to

Nguyen at el, 2020

*Students Speak
Their Truth about Transfer:
What They Need to Get Through
the Gate*

Students' Perspectives:

1. **University Affordability: How Can I Pay for a Bachelor's Degree?**

2. **School-Life Balance: How Do I Practically Transfer Given My Numerous Responsibilities?**

3. **Pathway Navigation: What Steps Do I Take to Transfer?**

4. **Support Network: Who on Campus Cares about My Transfer Success?**

Let's Share!

- What is the one transfer issue that is most top of mind on your campus?

- What is the top challenge associated with your issue?

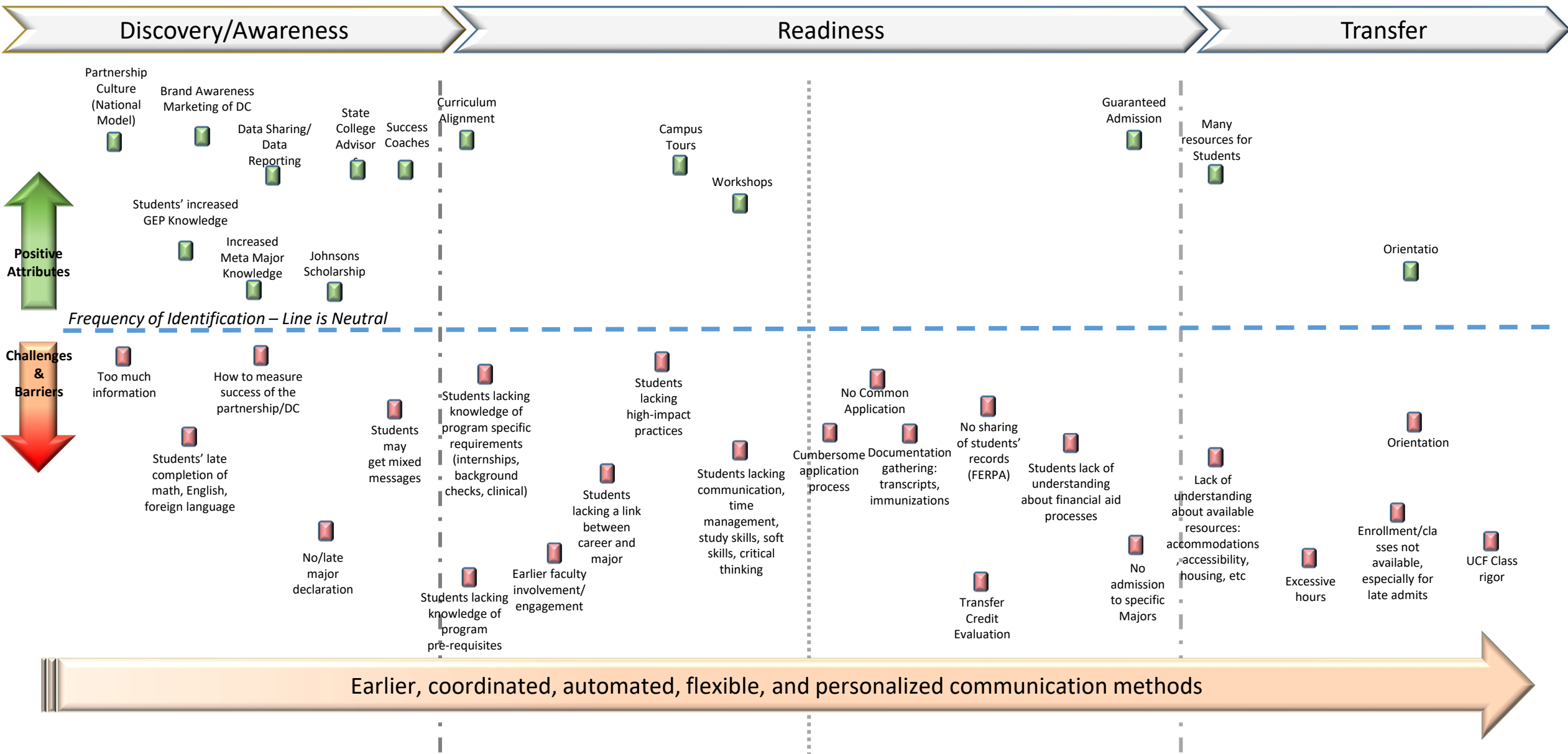

Go to **www.menti.com** and use the code **6491 7027**

Strong institutional partnerships are critical to the transfer process for students because they can help ease navigation from one college to the next.
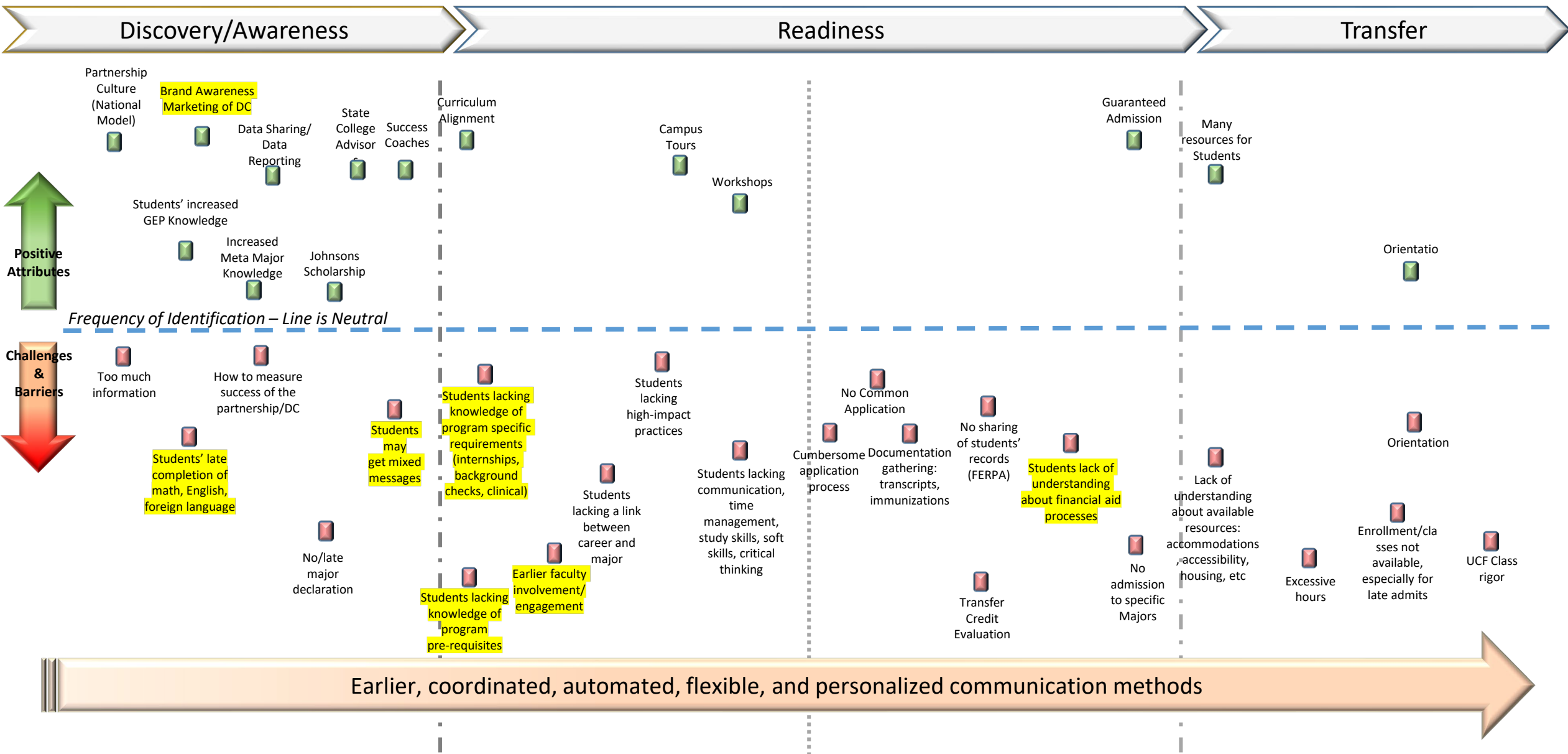
Theresa Ling Yeh and Lia Wetzstein, 2022
Institutional Partnerships for Transfer Student Success: An Examination of Catalysts and Barriers to Collaboration
Community College Review

Reimagining Transfer Success:
Longitudinal Example of Partnership Efforts

| Discovery/Awareness | Readiness | Transfer |

Positive Attributes ↑

- Partnership Culture (National Model)
- Brand Awareness Marketing of DC
- Data Sharing/ Data Reporting
- State College Advisor
- Success Coaches
- Curriculum Alignment
- Campus Tours
- Workshops
- Guaranteed Admission
- Many resources for Students
- Students' increased GEP Knowledge
- Increased Meta Major Knowledge
- Johnsons Scholarship
- Orientatio

Frequency of Identification – Line is Neutral

Challenges & Barriers ↓

- Too much information
- How to measure success of the partnership/DC
- Students may get mixed messages
- Students lacking knowledge of program specific requirements (internships, background checks, clinical)
- Students lacking high-impact practices
- No Common Application
- No sharing of students' records (FERPA)
- Orientation
- Students' late completion of math, English, foreign language
- Cumbersome application process
- Documentation gathering: transcripts, immunizations
- Students lack of understanding about financial aid processes
- Lack of understanding about available resources: accommodations, accessibility, housing, etc
- Enrollment/classes not available, especially for late admits
- Students lacking a link between career and major
- Students lacking communication, time management, study skills, soft skills, critical thinking
- No/late major declaration
- Students lacking knowledge of program pre-requisites
- Earlier faculty involvement/ engagement
- Transfer Credit Evaluation
- No admission to specific Majors
- Excessive hours
- UCF Class rigor

Earlier, coordinated, automated, flexible, and personalized communication methods →

Reimagining Transfer Success:
Longitudinal Example of Partnership Efforts

Discovery/Awareness → **Readiness** → **Transfer**

Positive Attributes (↑ green arrow)

- Partnership Culture (National Model)
- Brand Awareness Marketing of DC
- Data Sharing/ Data Reporting
- State College Advisors
- Success Coaches
- Curriculum Alignment
- Students' increased GEP Knowledge
- Increased Meta Major Knowledge
- Johnsons Scholarship
- Campus Tours
- Workshops
- Guaranteed Admission
- Many resources for Students
- Orientation

Frequency of Identification – Line is Neutral

Challenges & Barriers (↓ red arrow)

- Too much information
- How to measure success of the partnership/DC
- Students' late completion of math, English, foreign language
- No/late major declaration
- Students may get mixed messages
- Students lacking knowledge of program specific requirements (internships, background checks, clinical)
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Earlier, coordinated, automated, flexible, and personalized communication methods

Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

2019. Design Thinking: How Might We Reimagine DirectConnect to UCF® to Impact Transfer Student Readiness and Success?

- Used design thinking to discover "what is," "what if," "what wows," and "what now?"

- 74 individual worksheets

- Advanced knowledge to build practical solutions to transfer student challenges.
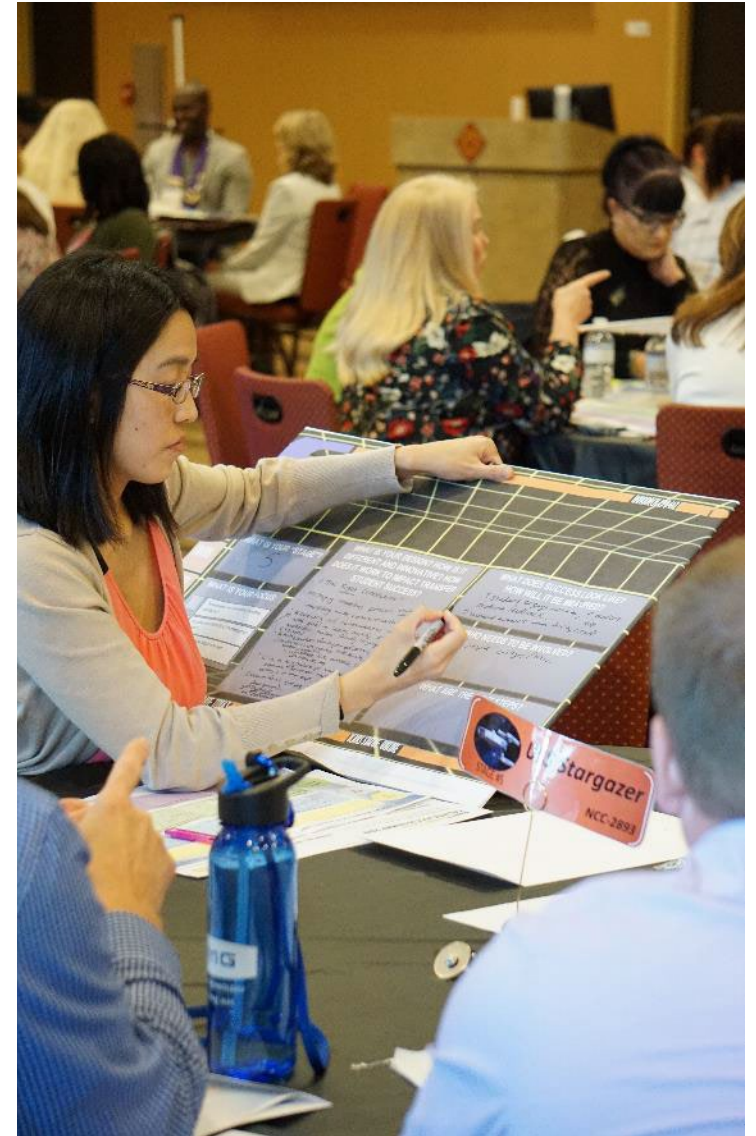
Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

- A common student ID **61**

- Multiplatform mobile app **45**

- Mobile app with include chat bot and other technologies **41**

- **39** A common application process

- RAISE: Reward & Incentivize Student Engagement **37**

- **30** More focused and personalized communication

- DC2UCF mobile app **30**

- DC Virtual Community (webcourse) for connections **28**

- DC Virtual Community (webcourse) for connections **28**

- Concurrent Transfer Experience to help establish student **25** connections

- 3-series webcourse for students to complete at the state college prior to transfer **22**

- Inter-Institutional Partner Learning Community for success coaches, advisor, and other stakeholders **17**

Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

Using a poster-boarding and crowd-sourcing activity, 4 key concept areas emerged:

- Learning Communities, Communication, Information Sharing

- A mobile app designed for student readiness, engagement, and success

- Common Application and Data Sharing

- Course(s)/events for student readiness and success

Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

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2020-2022. Introduced the TEAMS Project: Transfer Excellence, Achievement, Mindset, and Success

- 130+ participants from seven institutions participated in the Zoom event (due to COVID-19)

- Used the "4DX Model"

- Six teams focused on a goal of their own design:
  - Team 1: Admissions, Financial Aid, Enrollment Process
  - Team 2: Coaching, Advising, and Major Ready
  - Team 3: Communication: DirectConnect Branding, Marketing, and Overall Messaging
  - Team 4: Communication: Student information, Communication, and Mode of Delivery
  - Team 5: Transfer Process and Preparation: Discovery & Awareness
  - Team 6: Transfer Process and Preparation: Readiness
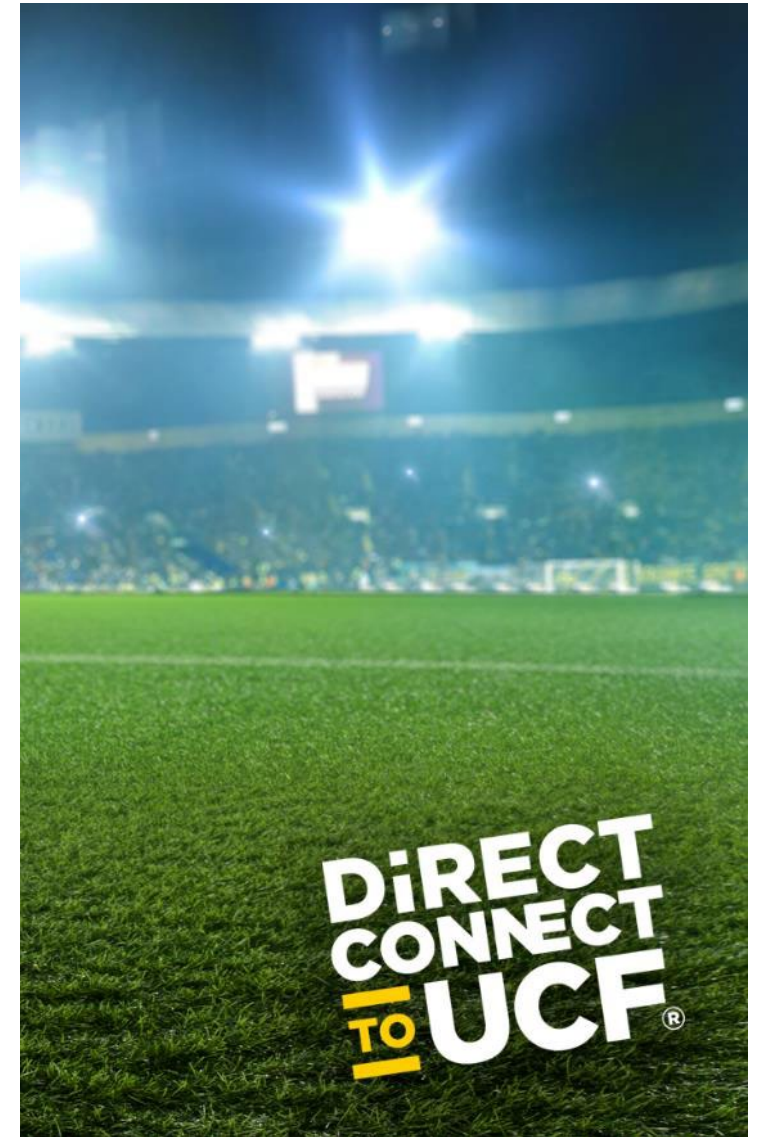
Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

The 4DX Model

1. Focus on the WIG (Widely Important Goal)

2. Act On Real Time (Lead) Data

3. Keep Score

4. Demand Accountability
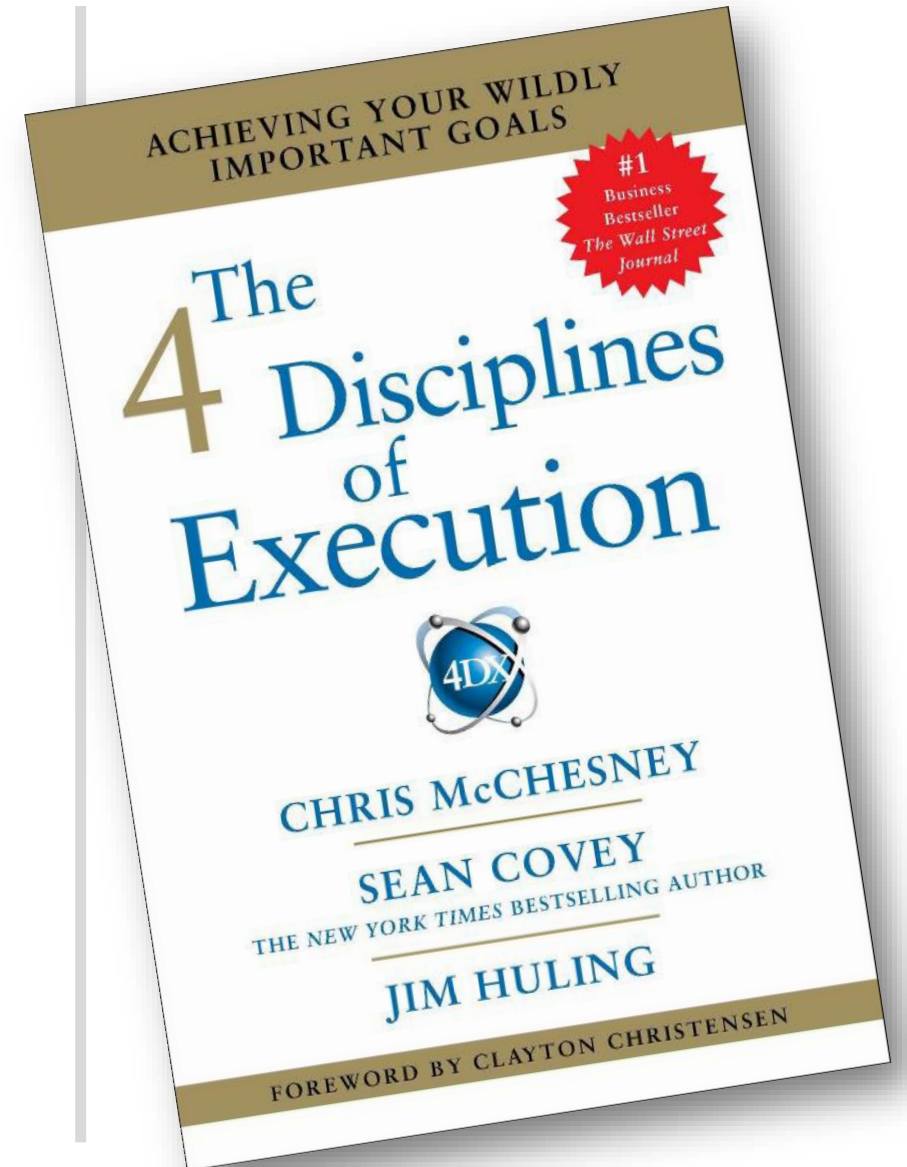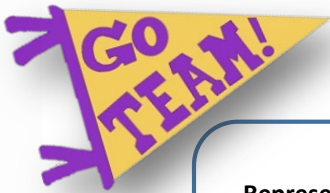
DirectConnect to UCF® TEAMS Project
(Transfer Excellence, Achievement, Mindset, and Success)

DirectConnect to UCF® Steering Committee

Champions Committee

Representatives from the DirectConnect Steering Committee: Erik D'Aquino (DSC); Jan Lloyd-Lesley (SSC); Edna Jones Miller (VC); Saul Reyes (CF); Randy Fletcher (EFSC)
Co-Captains from each of the six teams: Deborah Bradford, Raphel Robinson, Angie Smith, Joshua Poniatowski, Bethany Parmer, Martin Malpica, Carolyn Scott, Lauren Miller, Justin Greathouse, Tanya Armstrong, Melissa Rosa-Alvarez, Kim Hardy, Karen Hogans
Project Leads: Pam Cavanaugh, Jenny Sumner

Team 1: Admissions, Financial Aid, Enrollment Process
UCF Captain: Deborah Bradford
Partner Captain: Raphel Robinson (CF)

Team's Proposed Deliverable: By fall 2021 have face-to-face and virtual pre-enrollment sessions for admitted students and deferred for degree students coming from our partner institutions.

Team 2: Coaching, Advising, and Major Ready
UCF Captain: Angie Smith
Partner Captain: Joshua Poniatowski (DSC)
Partner Captain: Bethany Parmer (LSSC)

Team's Proposed Deliverable: Initially the team stated they would like to create a Microsoft Teams site for Advisors, Coaches and faculty to share information and use discussion boards to share information.

Team 3: Communication: DirectConnect Branding, Marketing, and Overall Messaging
UCF Captain: Martin Malpica
Partner Captain: Carolyn A. Scott (LSSC)

Team's Proposed Deliverable: The team will co-create a Brand Book Guideline for DirectConnect to UCF. The guideline will create streamlined universal use of core messaging, social media posts, email messaging, branding, and signup actions to be used by all (for all levels - marketers, advisors/coaches, administrators).

Team 4: Communication: Student information, Communication, and Mode of Delivery
UCF Captain: Lauren Miller
Partner Captain: Justin Greathouse (LSSC)

Team's Proposed Deliverable: Team's Proposed Deliverable: The team will develop a Communication Plan that will include targeted student messaging on a schedule developed using data associated with the calendar (and associated actions), student behavior, and transfer student information/activities.

Team 5: Transfer Process & Preparation: Discovery & Awareness
UCF Captain: Tanya Armstrong
Partner Captain: Melissa Rosa-Alvarez (SSC)

Team's Proposed Deliverable: A 'Discover & Awareness' weeklong program to include Kahoot games, Virtual Scavenger hunts, Student and Faculty Panels and other fun activities. The objective is to introduce middle and HS students to successful resources for college and career readiness. Target Audience Avid/Trio populations in the service area of our State College Partners

Team 6: Transfer Process & Preparation: Readiness
UCF Captain: Kim Hardy
*Partner Captain: Karen Hogans (LSSC)*

Team's Proposed Deliverable: A "transfer series" of virtual events, recorded and housed in one location for students (such as DirectConnect® website). Events to include a variety of topics related to transfer readiness: preparing for the academic experience, providing faculty engagement opportunities, and introducing students to success resources, including involvement and peer coaching.
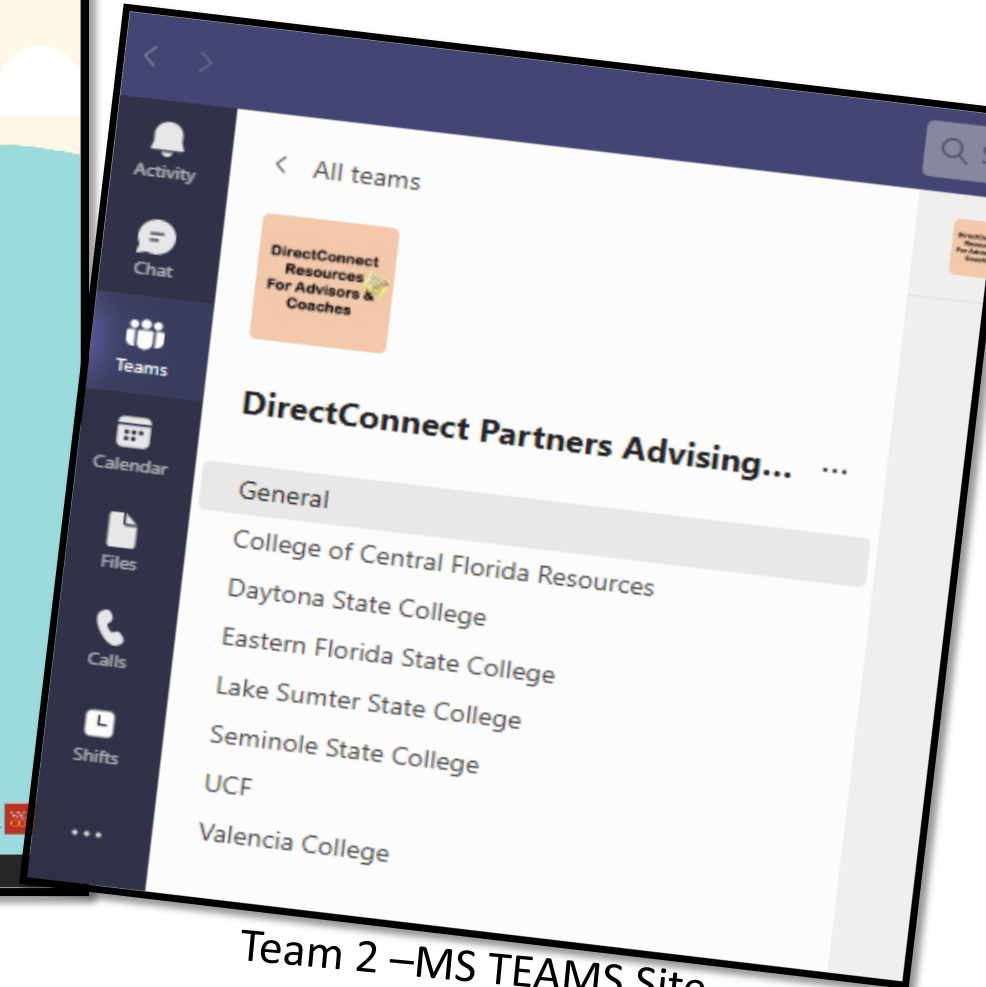
Deliverables

Team 3 – A Partnership Created, Joint Style Guide with Website
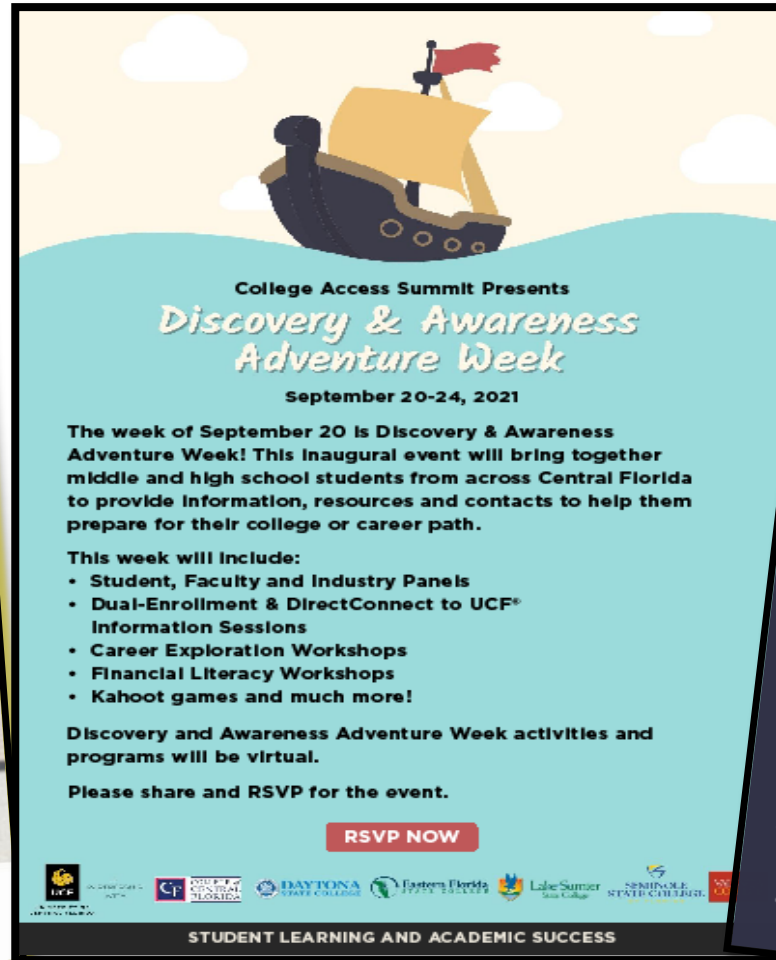
Team 5 – Discovery Week for Avid/Trio

Team 2 – MS TEAMS Site to share information

Deliverables

Connect from the couch!

What: DirectConnect to UCF Information Session
When: Wednesday, March 23, 2022, Noon – 1 pm
Where: *Virtually* anywhere!
How: Register online

View our full event calend

Transferring is a big move. **But it doesn't have to be a big deal.**

Check in with your personal **Success Coach**
Check out your **Transfer To-Do List**

Let us en-*Knight*-en you!
Get it done before

JULY 1

Take the first steps:
☑ **Sign Up** in a minute for inside info
☑ **Chat** with your Success Coach
☑ **Explore** UCF majors & careers

Connect. Transfer. Graduate.
Look at you, already crossing off the to-do list 😊

Team 4 – Partnership Developed Messaging to Encourage Earlier DirectConnect Sign-up

Christopher Leo
Associate Instructor, Integrated Business

Jaylen Brown
Senior, Finance and Marketing
Chair, College of Business Student Ambassador Program

Widaad Zaman, Ph.D.
Associate Lecturer
Psychology

Team 6 –
A Video Series of Faculty and Peers Detailing Successful Transfer Tips

Reimagining Transfer Success: Longitudinal Example of Partnership Efforts

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2022-2023. Second year of the TEAMS Project

- 4 teams focused on a goal of their own design:
    - Team 1: Financial Literacy, Planning, and Micro Grants
    - Team 2: Data and Metrics to Inform Transfer Success Strategies
    - Team 3: Major Readiness At or Before 30-Credit Hours
    - Team 4: Pre-requisite Completion for Successful Transition

- Deliverables are expected in March 2023 at the convening of the annual College Access Summit.

2022-2023 DirectConnect to UCF® TEAMS Project

(Transfer Excellence, Achievement, Mindset, and Success)

Leading Innovations for Student Success

DirectConnect to UCF® Steering Committee

Champions Committee

Representatives from the DirectConnect Steering Committee: Erik D'Aquino (DSC), Edna Jones Miller (VC), Karen Hogans (LSSC), Jan Lloyd (SSC), Michelle Loufek (EFSC), Saul Reyes (CF)

Co-Captains from each of the four teams: Karemah Manselle (UCF); Cynthia Dixon (Daytona State); Captain: Deborah Bradford (UCF); Thomas Hoke (Seminole State); Diana Pienaar (Valencia); Bernard Huggins (UCF); Renee Roth (Eastern Florida); Angie Smith (UCF); Debbie Lynch (Seminole State)

Project Leads: Kim Hardy, Jenny Sumner

Project Sponsor: Pam Cavanaugh

Team 1: Financial Literacy, Planning, and Micro Grants
Captain: Karemah Manselle (UCF)
Captain: Cynthia Dixon (Daytona State)

Team's Proposed Deliverable:
Create, design, and deliver a week-long financial literacy event, packaged as a virtual bootcamp, with various topics delivered to students. Topics will include: money management, smart borrowing and budgeting, financial aid, maximizing scholarships, transfer student money matters. The event will also include a student panel to talk about their financial experiences. The **"Centsible" Knights Academy, a Bootcamp to Financial Wellness.**

Team 2: Data and Metrics to Inform Transfer Success Strategies
Captain: Deborah Bradford (UCF)
Captain: Thomas Hoke (Seminole State)
Captain: Diana Pienaar (Valencia)

Team's Proposed Deliverable:
Create and launch a single site where all public-facing transfer data can be inventoried and easily/directly accessed by state college and UCF representatives. The site will also include contact information of data experts from each partner institution.

Team 3: Major Readiness at or Before 30-Credit Hours
Captain: Bernard Huggins (UCF)
Captain: Renee Roth (Eastern Florida)

Team's Proposed Deliverable:
Create, design, and deliver a major readiness awareness campaign that will include: (1) a major readiness awareness week, and a (2) major readiness tool kit that will be a repository of resources for students, faculty, and staff. The awareness week will include a marketing campaign, and the tool kit will include various collateral for promoting students' major readiness at or before 30-credit hours.

Team 4: Pre-requisite Completion for Successful Transition
Captain: Angie Smith (UCF)
Captain: Debbie Lynch (Seminole State)

Team's Proposed Deliverable:
Create, design, and deliver a "Meet your Major" event where undecided students can meet with representatives from their state college(s) and UCF to discuss pre-requisite, major requirements, and selection of a UCF major. Develop a plan for tracking students who attend the event, and their related success outcomes. Develop a guidebook for how to host a "Meet your Major" event on state college partner campuses.

The composition and sheer number of transfer students creates urgency for institutions to advance innovative solutions to meet these students' needs.

M. Peter McPherson, President Emeritus of APLU
Forbes, April 15, 2021

What is? → WHAT IS WORKING REALLY WELL ON YOUR CAMPUS? | WHAT JUST NEEDS TO BE TWEAKED? | WHAT IS NOT WORKING AT ALL?

What if? → WHAT ARE THE OPPORTUNITES THAT EXIST? (LIMITLESS POSSIBILITY THINKING!) | PRIORITIZE YOUR OPPORTUNITIES!

What wows? → SELECT <u>ONE</u> OPPORTUNITY THAT YOU WANT TO FURTHER DEVELOP.

☐ To enhance an identified positive attribute?
☐ To solve an identified challenge/barrier?
☐ To create a new idea not yet explored!?

IDEATE & INNOVATE!! (THINK IN TERMS OF "WHAT COULD BE"?)
HOW IS THIS DIFFERENT AND INNOVATIVE? HOW DOES IT WORK TO IMPACT TRANSFER STUDENT SUCCESS?

THIS IS NOT JUST ABOUT THE LOOK AND FEEL OF THE IDEA,
BUT RATHER HOW IT <u>WORKS</u> TO SOLVE, ENHANCE, OR BRING ABOUT SOMETHING NEW FOR STUDENT SUCCESS!

What now? → WHO NEEDS TO BE INVOLVED TO MAKE IT HAPPEN? | WHAT DOES SUCCESS LOOK LIKE? HOW WILL IT BE MEAURED? | WHAT ARE THE NEXT THREE IMMEDIATE STEPS?

1.

2.

3.

Contact Information

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