



Transfer Credit: Best Practices for Small Colleges

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Gathering evidence to solve the mystery of ...The Successful Evaluation

- » **Know the rules**
- » **Prepare for the Evaluation**
- » **Start the Evaluation**
- » **Know when to bring in the Specialists**
- » **Case Solved – Completing the Evaluation**





Know the rules- "It's the law ma'am!"





Know the rules cont...

- » **Be well versed on your school's transfer credit rules as published in the course catalog.**
- » **What is the definition of an official transcript?**
 - Issued to student
 - Faxed
 - Hand delivered in a sealed envelope
 - School to school by mail
 - Electronic transcripts (security code)
 - National Student Clearinghouse



Know the rules cont...

» **Time limit on credits**

- Major / core level courses
- Mathematics
- IT / Computer Courses
- Law courses
- Any time limit on credits should be published in course catalog



Know the rules cont...

- » **Accreditation**
 - National vs. Regional Accreditation
- » **Mode of Delivery**
 - Online vs. Brick and Mortar
- » **Required Grades**
 - “C”, “C-”, “D”
- » **Required Credits**



Know the rules cont...

» **Standardized Tests**

- CLEP
- DANTES
- International Baccalaureate
- Advanced Placement

» **Articulation Agreements**



Preparing for the Evaluation

Your School Name Here
Your School Address _____

Name: Your Name _____

ID# : Your Student ID _____
DOB: Your Date of Birth _____

Dept.	Course No.	Title	Units Attempted	Units Earned	GRADE	GRADE POINTS
*** ACADEMIC TRANSCRIPT ***						
FALL	1968					
COM	101	Introduction to Speech Communication	3.0	3.0	A-	12.0
CIS	101	Introduction to Business Computers	3.0	3.0	B	9.0
ENG	121	English Composition	3.0	3.0	A	12.0
FRN	101	Beginning French I	3.0	3.0	B	9.0
MTH	111	Analytical Geometry & Calculus I	3.0	3.0	B-	9.0
PHY	113	Classical Physics	3.0	3.0	A	12.0
SEMESTER TOTALS			18.0	18.0	3.50	63.0
SPRING	1969					
ENG	122	Critical Writing and Reading	3.0	3.0	A	12.0
FRN	102	Beginning French II	3.0	3.0	B	9.0
MTH	112	Analytical Geometry & Calculus II	3.0	3.0	A	12.0
PHY	114	Classical Physics II	3.0	3.0	B	9.0
PSY	101	Introduction to Psychology	3.0	3.0	A-	12.0
SEMESTER TOTALS			15.0	15.0	3.60	54.0
CUMULATIVE TOTALS			33.0	33.0	3.55	117.0
FALL	1969					
ART	123	Art Appreciation	3.0	3.0	B-	9.0
BIO	121	General Biology I	3.0	3.0	B	9.0
ECO	201	Intro to Microeconomics	3.0	3.0	A-	12.0
FIN	101	Personal Finance Decision	3.0	3.0	A	12.0
HIS	122	World History 1877 to Present	3.0	3.0	A	12.0
SEMESTER TOTALS			15.0	15.0	3.60	54.0
SPRING	1970					
ACC	201	Moniers Accounting	3.0	3.0	A	12.0
ART	131	Intro to Music Appreciation	3.0	3.0	B	9.0
BIO	127	General Biology II	3.0	3.0	A	12.0
ECO	202	Intro to Macroeconomics	3.0	3.0	A-	12.0
FIN	266	Principles of Finance	3.0	3.0	A	12.0
ENG	206	Written Business Communications	3.0	3.0	A-	12.0
SEMESTER TOTALS			18.0	18.0	3.83	69.0
CUMULATIVE TOTALS			66.0	66.0	3.64	240.0

Memoranda & Footnotes:
CG Change of grade
IR Incomplete removed
IC Incomplete charged
RC Repeated class
S Substitution
BP By petition
TC Transfer credit
AO Audit only, no credit received
Student is in good standing unless otherwise indicated.

Transcripts Issued
06/09/1991

Degree or Credential Certification
BBA 06/09/1991

TRANSCRIPT IS ONLY VALID WITH THIS SIGNATURE

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Preparing for the Evaluation

Gathering Evidence

Is this an official transcript? Consider the following:

- Issued to student stamp?
- Check postmark on the envelope (same as the school)
- Date the transcript was printed? Over 2 weeks old?
- Placed in another envelope?
- Faxed from a reliable source?
- Tape on envelope – DON'T JUDGE



Preparing for the Evaluation

Verifying Accreditation

- Legend on back of transcript – NOT FULLPROOF
- Ope.ed.gov\accreditation
- Chea.org
- Accreditation agency website



Preparing for the Evaluation

Verify unit of credit

- Semester
- Quarter
- Transcript legend
- IPEDS
- School Website
- Converting Semester to Quarter / Quarter to Semester
- Remember 1.5 formula



Start the Evaluation – On the Case (Analyzing the Evidence)



POLICE LINE DO NOT CROSS

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Start the Evaluation – On the Case (analyzing the evidence)

- » **Eliminate obviously unusable courses**
 - Low Grades
 - Old courses
 - Insufficient Credits



Analyzing the Evidence cont...

Have you evaluated this school before? A transfer credit database...

- Strive to be consistent
- Don't reinvent the wheel with each evaluation
- We will delve deeper into this issue later



Determine Equivalency – The puzzle pieces fit





Determine Equivalency – The puzzle pieces fit

- 1. Course descriptions**
- 2. College Source/TES**
- 3. Online Catalogs**
- 4. Petition for Course descriptions/ syllabi**
- 5. When to get student involved**
- 6. 80/20 guideline**
- 7. When in doubt...send to academics. (More on this later)**
- 8. Posting credits**
- 9. Required signatures?**
 - Registrar
 - Program Chair
 - Academic Deans
 - Student
- 10. Mode & format to inform key stakeholders of evaluation results?**
 - Email/ letter/ online degree plan
 - Meeting with student



Determine Equivalency - Send for the Specialists (working with Academics)

1. When to send course descriptions to Academics

- When in doubt – DON'T GUESS!!!
- Large amount of credit- get a second opinion
- No credit – get a second opinion

2. Best place to use a given course

- General Education
- Open Elective

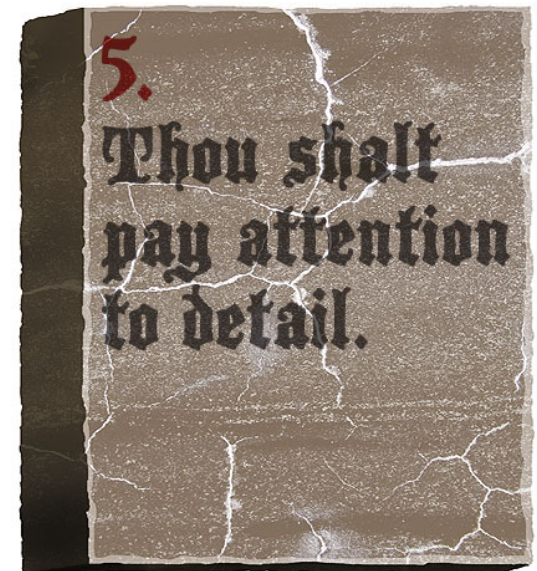
3. Is it best to grant credit? Are we setting a student up for failure of next course in sequence?



Send for the Specialists (working with Academics)

- **Set up regular meetings with Academic Departments**

- Establish evaluation expectations
- What to look for when evaluating a course
- Most important elements of the course
 - Key Concepts
 - Commonly used Jargon (get definitions)
- Review the following with Academics
 - Review your school's transfer credit rules
 - Percentage limit/residency requirements
 - Age limit of credits
 - How to quickly locate a course description



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Marking a Transcript

1st Semester
Your School Name Here
Your School Address _____

Name: Your Name _____

ID# 114110 _____
DOB: Your Date of Birth _____

Dept.	Course No.	Title	Units Attempted	Units Earned	GRADE	GRADE POINTS
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Thomas Alan Carother

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THE GREAT SEAL OF THE STATE OF CALIFORNIA



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Marking a Transcript

- **Make copies?**
- **Imaged transcript with overwrite ability**
- **Write directly on transcript**
 - Establish guidelines
 - Consistent
 - Include legend (if codes are used)



Example of a Transcript Coding system

1. **TR – Approved transfer**
2. **LG – Low grade (denied transfer)**
3. **IC – Insufficient credit (denied transfer)**
4. **RP – Repeated course / taken at your school (denied transfer)**
5. **DV – Developmental / not used to fill Grad requirements (denied transfer)**
6. **WD – Withdrawal (denied transfer)**
7. **TO – Too old to transfer (denied transfer)**
8. **TS – Transferred from another school / original transcript required (denied transfer)**
9. **EX – Extra/ no room to use valid course (denied transfer)**



Developing an approved Transfer Credit Database

- **TES / Course description database**
- **Campus management system**
- **Excel if no other option**





What info should go into the transfer database?

- 1. IPEDS identifier and/or school name**
- 2. Catalog year**
- 3. Course number**
- 4. Course name**
- 5. Lowest required grade**
- 6. Your school's equivalent course**



Training Your Staff

1. Start simply

- Enter completed evaluations
- Update transfer credit database

2. Compare key words in course descriptions

3. Start with General Education courses

4. Move on to program specific evaluations



Further Training

- 1. Review their evaluations BEFORE it is entered into the system**
- 2. Establish a minimum correct percentage**
 - 90% for 2 consecutive weeks
 - Don't forget to count unused courses as much as incorrectly used courses



Unofficial Evaluations

- **Unofficial transcripts**
- **Make no promises to students... just an idea**
- **Student still must submit official transcript in a timely manner**
- **This practice greatly assists admissions**



Trends in Transfer Credit

- » **Academic institutions have been tasked to become more transfer friendly**
- » **Each year thousands of students transfer from one institution to another**
 - Approx. 1/3 of college seniors have transferred at some time in their career
- » **Non-transferred credits equal**
 - Longer enrollment
 - More tuition payments
 - Additional federal funding
 - Repeated coursework



Trends in Transfer Credit cont...

- » **In 2005, the U.S. Government Accountability Office, suggested to Congress that Title IV eligible schools not deny the transfer of credit on the sole basis of a sending institutions type of accreditation**



Trends in Transfer Credit cont...

- » **Statewide required course code systems/articulation agreements**
- » **Private/For Profit institutions tend to be more transfer friendly**
- » **Students are shopping transfer credit**
- » **Transfer credit is becoming a enrollment and retention tool**

What is the potential relationship between increased PELL eligibility and transfer credit?



Work Cited

Office, U. S. (2005). *Transfer Students Post Secondary Institutions Could Promote More Consistent Consideration of Coursework by not Basing Determinations on Accreditation.* Washington D.C.: GAO.

Sullivan, J. H. (2005). *Hearing on "College Credit Mobility: Can Transfer of Credit Policies Be Improved".* Washington D.C.: AACRAO.



The End...

CASE SOLVED



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