Best Practices in Transfer Evaluation
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Transfer students represent a critical subset of the population needed to meet enrollment goals, and they are savvy in shopping for academic programs that will honor their previous hard work. When changing academic direction, students expect gaps in their education that need to be filled and will work hard to fill them. But they resent barriers to completion in the form of denied credit, needless repetition of content, etc. In a recent survey conducted by the Transfer Friendly Campus Committee, over a quarter of new transfer students cited dissatisfaction with how their prior credits were assessed as the most frustrating aspect of the transfer process. A meaningful, thoughtful, and academically appropriate accommodation of their credits will not only reduce such frustrations, it will enhance their experience as students and ensure that they continue to learn.

Evaluation of transfer credit negotiates a tension between such accommodation and a kind of academic distinction. Universities accommodate the needs of transfer students, whose previous learning demands recognition in the interest of student access and fairness. Simultaneously, institutions distinguish themselves by prioritizing their native curricula and protecting their unique graduation and program requirements. As a result, determining how many credits to transfer and, more importantly, how to apply those credits can challenge even the most well-intentioned staff and faculty, who may find themselves at odds over what will benefit the student best, what constitutes a fair recognition of college-level learning, what coursework duplicates, and what is academically necessary.

The Registrar’s Office operates from the perspective that every effort should be made to maximize transfer credit and avoid duplication of learning. Coursework at UWM should extend what was learned prior to transfer, respecting the fact that previous learning may not align with a student’s present academic goals. To that end, we wish to review some best practices for transfer evaluation in light of both national and UW-System standards.

The following represent best practices in transfer credit practice and are recommended for anyone involved in transfer credit evaluation:

- Consider the “quality,” “comparability,” and “appropriateness” of learning when making transfer decisions. (See discussion of the “Joint Statement on the Transfer and Award of Credit” below.)
- Presume transferability. Rather than burdening the student with defending why we should accept transfer credit, UWM should be prepared to justify why something is not acceptable or cannot apply to a given requirement.
- Avoid preconceptions or prejudices based on the source of the credit. Nor should one presume the rigor or quality of learning based on the institution where the credit was earned. Look beyond external factors, such as accreditation, to a course’s specific content and learning outcomes.
- Don’t expect 100% equivalency. Courses may not align entirely with a particular course at UWM yet provide sufficient coverage of necessary topics to meet a given requirement. What exposure is truly necessary for the student to advance?
• Look beyond specific course equivalencies. A transferring course may not match a specific course at UWM yet still fit within a given discipline or department’s offerings. Also consider that program content may be distributed differently at another institution. Consider bundling courses accepted in transfer, such that a group of courses may be considered comparable to a group of courses at UWM.
• Take the broad view. Consider the course’s content alongside its function and the context within which it was taken. How does the course fit within the other school’s curriculum? How can it fit within UWM’s?
• Focus on application. Default to a consideration of how transfer credit can align with graduation or program requirements whenever possible.
• Privilege course learning outcomes over other measures. Course numbers may not reliably communicate level of instruction. Credit amounts may not reliably indicate how much was learned. Factors other than quantity of content, such as Carnegie hours, may impact the number of credits awarded for a given course. Where outcomes align, credit should be applied.
• Avoid duplication. Coursework at UWM should complete the student’s education, not unduly complicate or repeat it.
• Be open to innovation. ACE-recommended credit, applied to military, government, or corporate-sponsored instruction, may provide evidence of learning equal to or greater than traditional college coursework. Prior learning options may also enter into transfer discussions. Delivery method (online vs face-to-face, for instance) should not factor into transfer decisions.

Background
The recommendations above are informed by the “Joint Statement on the Transfer and Award of Credit” (2017), which provides guidance to colleges and universities concerning transfer and is endorsed by the American Association of Collegiate Registrars and Admissions Officers (AACRAO), the American Council on Education (ACE), & the Council for Higher Education Accreditation (CHEA). The “Joint Statement,” in turn, proceeds from stated assumptions that recognize institutional autonomy; promote “social equity;” recognize the complex reality of when, how, and where students acquire credit; and encourage an expansive view of what can be considered “validated learning” (p. 1). To this end, both sending and receiving institutions work in tandem to, in the first case, make information about coursework available for review via transcripts, course catalogs, syllabi, etc. and in the second case, articulate and publish clear policies regarding transfer. Institutions are encouraged to “provide maximum consideration for the individual student who has changed institutions or objectives” (p. 2).

Three considerations are specifically outlined in the “Joint Statement”—the quality, comparability, and appropriateness of the learning being evaluated. Accreditation offers one measure of quality but is by no means the only one. While UWM accepts credit from any institution regionally or nationally accredited by a CHEA-recognized accrediting body, other determinations may be considered, such as review of course outcomes and the sending institution’s mission. For example, a business school that lacks the appropriate accreditation may nonetheless provide instruction that aligns with the approach of our business faculty, which could positively impact how we view the transcribed credit. In determining quality, evaluators should be wary of preconceptions or prejudices, focusing on course content over other considerations. For example, course numbers, a common indicator of level of instruction, should be referenced with caution. Many schools in the WI technical college system are only allowed to number associate-degree courses at the 100-level, which may not convey the true nature of the course content or rigor. Additionally, the “Joint Statement” encourages openness to innovation in education (p. 4). As schools continue to wrestle with alternative means of assessing and awarding credit, relying
on a single, traditional model may fail to recognize genuine learning. In addition to internal assessment options for these learners, a willingness to embrace such innovations when used by other institutions or when validated by other agencies (such as ACE-recommended credit for military and corporate-sponsored learning or competency-based education) may broaden the path to degree completion.

In addition to the broader standards recommended in the “Joint Statement,” UW-System guidelines provide parameters for transfer credit evaluation (Board of Regents, 2015). The System’s approach echoes the “Joint Statement,” which it explicitly endorses, in its dual focus on “a student-centered transfer process” and respect for “institutional autonomy and program integrity.” Toward that end, the policy provides direction regarding the three principles of quality, comparability, and applicability derived from ACE’s document. Further direction is provided courtesy of 14 “Principles of Accommodation.” Highlights of these principles include recommendations not to adhere only to specific course equivalencies. Institutions should prioritize application of credit to degree requirements whenever possible, regardless of whether a precise course equivalency exists. GER requirements should be viewed in terms of “broad academic areas” and, when possible, recognized in the same way as at the sending institution. Departmental credit should be awarded for coursework within a discipline for which UWM may lack a comparable course. Greater accommodations are specified for students transferring within the UW-System, such as recognizing courses as meeting the same requirements as at the original institution and transferring credit earned through prior learning assessment (PLA). Exceptions granted through articulation agreements are also expressly allowed in a section devoted to Wisconsin Technical College System transfer.

References

Transfer Student Recruitment Opportunities

Improve Available Information

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| **Update transfer guides.** Transfer guides detail course-by-course equivalencies so that students can see how their courses might transfer to UWM. These guides are created and updated by advising units; we need your help in updating them annually and completely.  
https://uwm.edu/onestop/your-student-record/transfer-credits/transferring-course-credits/ | Head of advising in your school/college.  
In Letters and Science, contact Deanna Alba, dsalba@uwm.edu |
| There are two systems that can provide you with your transfer information:  
**Via Transferology**  
1. Visit https://transferologylab.com If this is your first time to the site, you will need to create an account.  
2. Using the “Advising & Recruiting” drop down menu, choose “transfer equivalencies.”  
3. Enter any part of the name of the institution the credits are coming in from the “transferring from” box.  
4. Click on the green view button when you see the name of the school.  
5. Use the drop-down menu to choose the department name or number to view the equivalencies from that department.  
**Via TED**  
1. Visit https://web.uwm.edu/registrar/tools/ted  
2. Enter the institution the credits are coming from. Wait for it to load.  
3. Enter the subject area name or number. Wait for it to load. Hit submit.  
4. Note the color coding: Pink = equivalencies that have expired and are only valid if the student took the class during the valid time period. Blue = courses that have two equivalencies, one if the student is transferring into CGS at Waukesha or Washington Co, and a different equivalency if the student is transferring to main campus. | |
| **Update existing articulation agreements.** Articulation agreements are package arrangements between two institutions; for example, “students who complete an Associate’s in X must only complete Y courses in order to finish their degree at UWM.” Program level outcomes should be privileged over narrower, course-to-course equivalencies.  
You can view existing articulation agreements here; please ensure that the details of any agreements you have are up to date.  
https://uwm.edu/registrar/students/articulation-agreements/ | Chris Head, Assistant Director of Transfer Services, head@uwm.edu |
Create transfer student web pages. Our data suggests that students are more likely to visit department pages than school/college or administrative pages. We should, therefore, make transfer information prominent on each department page. Ideally, this would be a page for each department; barring that, it might be a link to a school/college page from each department page.

Business and Social Work are good examples of this second method, although a top-level menu would be even better:

- [https://uwm.edu/business/](https://uwm.edu/business/) (see Academics→Transfer Students)
- [https://uwm.edu/socialwelfare/](https://uwm.edu/socialwelfare/) (see Academics→Transfer Students)

The page should include the following (even if duplicated elsewhere on your site):

- Highlights of your school/college prospective students will find interesting. What makes your program(s) uniquely attractive to students?
- Application information
  - Link to OUA Transfer Admissions page: [https://uwm.edu/undergrad-admission/student-type/transfer/](https://uwm.edu/undergrad-admission/student-type/transfer/)
  - Any details regarding selective admission to school/college (if applicable)
  - Any additional steps required for admission to major (include when a student would do this)
- Links to any transfer guides and articulation agreements
- Contact information for relevant advisor/faculty member(s)
- Instructions on scheduling a meeting with a faculty member, academic advisor, or recruiter. Typically, students not yet enrolled would meet with a recruiter.
- Instructions on receiving unofficial credit review before application; include the option to upload unofficial transcript for credit review. Examples:
  - [https://uwm.edu/business/academics/undergrad/transfer-students/](https://uwm.edu/business/academics/undergrad/transfer-students/)
  - [https://uwm.edu/socialwelfare/transfer/](https://uwm.edu/socialwelfare/transfer/)
- Contact information for admitted students (if different).
- Links to financial aid Information:
  - Scholarship Information: [https://uwm.edu/onestop/finances/types-of-financial-aid/scholarships/](https://uwm.edu/onestop/finances/types-of-financial-aid/scholarships/)
  - Financial Aid Information: [https://uwm.edu/onestop/finances/receiving-financial-aid/tips-for-transfer-students/](https://uwm.edu/onestop/finances/receiving-financial-aid/tips-for-transfer-students/)
- Outline of degree program(s)
  - If school/college offers few degrees, include general education requirements, schools/college requirements, major requirements,
and any other required professional experiences. Example: https://uwm.edu/informationstudies/academics/undergraduate/ist/

- If school/college offers too many degrees to outline all requirements, include an outline of what commonalities exist with an explanation of how the major courses or other requirements would fit. Include further information on how students access the more detailed degree outline.

- Relevant academic policies for transfer students. Examples:
  - Course Repeat Policies
  - Residence Credit Policies
  - Transfer GPA policies, if relevant.
  - Other academic policies specific to the school/college
Develop and Improve Pathways; Streamline Curriculum
Examine and streamline pathways with two-year institutions with top partners (MATC, Madison College, WCTC, Gateway, College of General Studies, UW Branch Campuses)

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<td><strong>Examine curriculum for transfer friendliness.</strong> Some common items can make a curriculum less transfer friendly; for example,</td>
<td>Dave Clark, <a href="mailto:dclark@uwm.edu">dclark@uwm.edu</a></td>
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<td>• <strong>Double dips.</strong> For example, the International requirement in L&amp;S is typically fulfilled through carefully advising students to take gen ed courses that fulfill two requirements. For transfer students who have not received this advising, this requirement, as implemented, amounts to additional credits to degree.</td>
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<td>• <strong>Inflexible requirements.</strong> Where possible within the intended learning outcomes of your program, consider fewer individual course requirements, in favor of freer substitutions.</td>
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<td>• <strong>Incompatibility with partner institutions.</strong> Where do most of your transfers come from? How might small changes better benefit those students? What likely partners are sending you very few students? Might the curriculum be part of the reason?</td>
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<td><strong>Examine additional course-by-course equivalencies.</strong> These determine how students who do not earn an Associate’s Degree will transfer. General education courses from other schools are important to consider. We are obliged to honor general education courses from UW schools, but do not always honor gen ed courses from non-UW schools.</td>
<td>Chris Head, Assistant Director of Transfer Services, <a href="mailto:head@uwm.edu">head@uwm.edu</a></td>
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<td><strong>Develop articulation agreements.</strong> These provide the structure for students who complete an Associate’s Degree.</td>
<td>Chris Head, Assistant Director of Transfer Services, <a href="mailto:head@uwm.edu">head@uwm.edu</a></td>
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<td><strong>Create innovative new possibilities.</strong> We can create unique program-to-program links in a variety of ways, and we have a number of tools available to us, including reverse transfer, MOUs, and dual admission. Please reach out to Chris Head to discuss.</td>
<td>Chris Head, Assistant Director of Transfer Services, <a href="mailto:head@uwm.edu">head@uwm.edu</a></td>
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<td><strong>Create clear transfer pathways.</strong> Pathways could include articulation agreements, MOUs, or a structure like that in SOIS that allows for more flexibility in applying transfer credits to degree.</td>
<td>Chris Head, Assistant Director of Transfer Services, <a href="mailto:head@uwm.edu">head@uwm.edu</a></td>
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<td><strong>Consider scholarships for transfer students.</strong> Clearly state in Panther Scholarship Portal and in transfer online/print materials if transfer</td>
<td>Chris Head, Assistant Director of Transfer Services, <a href="mailto:head@uwm.edu">head@uwm.edu</a></td>
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students are considered for current student scholarship opportunities.

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<th>Create pathways for CGS students. We have unique opportunities with CGS. Nursing has started offering more pre-nursing coursework at the Waukesha Campus.</th>
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<td>• Work to align curriculum to create seamless transfer from associate to bachelor</td>
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<td>• Educate CGS advisors on Milwaukee campus programs to improve advising for students changing careers.</td>
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<td>• Develop relationships with CGS faculty (similar to other feeders)</td>
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<td>• Participate in major exploration events</td>
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<th>Create new transfer guides for top IL Community Colleges</th>
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| Chris Head, Assistant Director of Transfer Services, head@uwm.edu |

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### Engage with Students and Partners

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<td><strong>Participate in Office of Undergraduate Admissions (OUA) Welcome Programs.</strong> Advising units get this information and coordinate who from the school/college is attending. If faculty are interested in getting more involved, they should speak with the advising offices to find out where there is need within their school/college.</td>
<td>Head of advising in your school/college</td>
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| Guest lecture. Lecture at two-year campuses & host colleagues on campus. | Your disciplinary colleagues on other campuses. |

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<th>Remind potential transfer students to ask the right questions.</th>
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<tr>
<td>• Number of credits to degree completion</td>
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<td>• Financial aid</td>
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| If you talk to a lot of potential transfer students, ask a transfer advisor or recruiter for tips. |