HIGHER EDUCATION COORDINATING COMMISSION

HOUSE BILL 2998 (2017): POST SECONDARY STUDENT TRANSFER

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ACRONYMS 4

EXECUTIVE SUMMARY 5

INTRODUCTION 6

TRANSFER IN OREGON 6

HOUSE BILL 2998 7

WORKGROUP FORMATION 7

WORK PLAN AND CHARTER 8

PROGRESS TO DATE 8

FOUNDATIONAL CURRICULA 8

GENERAL EDUCATION OUTCOMES 8

STATEWIDE DEGREES 9

OREGON TRANSFER MODULE 9

EXAMINATION OF DIFFERENT MODELS OF FOUNDATIONAL CURRICULA 10

DECISION TO REVAMP CURRRENT TRANSFER POLICY INSTRUMENTS 10

THE FOUNDATIONAL CURRICULA AND THEIR ELEMENTS 11

HOW THE FOUNDATIONAL CURRICULA BUILD AND IMPROVE ON EXISTING TRANSFER FRAMEWORKS 13

LATERAL TRANSFERABILITY OF THE FOUNDATIONAL CURRICULA 13

LOST ACADEMIC CREDIT 14

IDEAL DEFINITION 14

BEST MEASURABLE DEFINITION 15

DEFINITION FOR REPORT PURPOSES AND CALCULATION 16

USTA CRITERIA 17

RANKING PROCESS 17

FIRST FOUR MAJOR DISCIPLINES
FOR USTA DEVELOPMENT 23

FUTURE USTA DEVELOPMENT 23

CONCLUSIONS AND RECOMMENDATIONS 24

CONCLUSIONS 24

RECOMMENDATIONS 24

APPENDICES 27

APPENDIX A: TRANSFER WORKGROUP CHARTER 27

APPENDIX B: GENERAL EDUCATION OUTCOMES 33

APPENDIX C: FOUNDATIONAL CURRICULA Q & A 43

APPENDIX D: OREGON TRANSFER MODULE SURVEY RESULTS 48

APPENDIX E: EXCESS CREDIT BY MAJOR COURSE OF STUDY 58

ACRONYMS: ORGANIZATIONS AND STATEWIDE AGREEMENTS

AAOT	**Associate of Arts Oregon Transfer: a 90 credit statewide transfer degree**
ASOT-B	**Associate of Science Oregon Transfer – Business: a 90 credit statewide transfer degree for potential Business majors**
ASOT- CS	**Associate of Science Oregon Transfer – Computer Science: a 90 credit statewide transfer degree for potential Computer Science majors**
CIA	**Council of Instructional Administrators (Community College)**
CSSA	**Council of Student Service Administrators (Community College)**
IFS	**Inter-institutional Faculty Senate: a group of faculty senators from the seven public universities and Oregon Health Sciences University**
JTAC	**Joint Transfer Articulation Committee: a group of administrators, faculty, and advisors that advises HECC on cross-sector transfer and articulation**
OCCA	**Oregon Community Colleges Association: a community colleges advocacy and policy non-profit organization**
OCOP	**Oregon Council of Presidents: a voluntary association of public university presidents**
OEA	**Oregon Education Association: a union representing community college faculty**
OSA	**Oregon Student Association: a student-led advocacy non-profit organization**
OTM	**Oregon Transfer Module: a 45 credit suggested first year curriculum for community college students who plan to transfer to a public university**

EXECUTIVE SUMMARY

House Bill 2998 (2017) directs the Higher Education Coordinating Commission (HECC) and community colleges and universities listed in ORS 352.002 to improve transfer pathways between Oregon's public community colleges and universities. Included in the legislation is a requirement that the HECC submits a report to the Legislative Assembly, no later than February 1, 2018, that:

- In consultation with community colleges and public universities listed in ORS 352.002, defines "lost academic credit" for purposes of the report;
- States the typical number of lost academic credits by current students who transfer from a community college to a public university listed in ORS 352.002;
- Recommends whether more than one foundational curriculum should be established;
- Recommends whether foundational curricula established under the legislation should be transferable for students who transfer from one community college to a different community college or from one public university to a different public university; and
- Lists the initial major disciplines for which unified statewide transfer agreements (USTA) will be established under the legislation.

To meet these reporting requirements, this report determines and recommends the following:

- For this report, "excess credit" is substituted for "lost academic credit". Excess credit is defined as "the difference in the average total number of credits at degree completion between Oregon community college transfer students and first-time freshmen." The HECC and its partners spent significant time discussing what constituted "lost academic credit." A review of the discussion and an operational definition are included in this report.
- The typical number of excess academic credits for students who transfer from a community college to a public university listed in ORS 352.002 is 9.9. However, this number varies widely from major to major, with Civil Engineering as the high, averaging 27.7 excess credits, and Romance Languages, Literatures, and Linguistics as the low averaging -0.4 excess credits (meaning that transfers and direct entry students finish with virtually the same number of credits).
- The HECC, in consultation with community colleges and public universities, recommends establishment of two foundational curricula – one each for prospective STEM and non-STEM majors.
- The HECC, in consultation with community colleges and public universities listed in ORS 352.002, and related stakeholder groups, recommends that community colleges and universities prioritize the transfer of the foundational curricula from community colleges to universities. Once that process is fully operable, community colleges and universities should begin to ensure the foundational curricula are transferable from community college to community college and university to university.
- The initial major courses of study for which USTAs will be established are: biology, business, education, and English.

To provide context for the mandated elements of this report, the HECC has included a summary of the requirements under HB 2998, an overview of the work plan and process for meetings these requirements, a review of the HECC and its partners' progress to date, and an explanation of the established foundational curricula. Finally, it is important to note that, for the purposes of this report, "transfer students" refers to students transferring from an Oregon community college to an Oregon public university.

INTRODUCTION

TRANSFER IN OREGON

Rates of baccalaureate degree completion and time to completion vary between Oregon community college transfer students and students who began post-secondary education at a four-year public university.

In Oregon, of students who transfer with 45-55 credits, 57 percent of those graduate within six years of transfer. Of first-time freshmen who continue to their second year, 76 percent graduate within six years of admission.

The differences remain for students who transfer to university with 90 or more credits. Of those students, 78 percent graduate within six years of transfer. But 85 percent of first-time freshmen who continue to their junior year graduate within six years of admission to the university.[1] In other words, comparable groups of first time freshman and transfer students at Oregon public universities show that transfer students take longer to finish a degree, and accumulate more credits as they do.

Furthermore, we estimate that about three out of five transfer students enter universities with fewer credits accepted than they had earned at community colleges and about one-third lose more than one term of coursework.[2]

Oregon has instituted several transfer degrees and modules during recent decades, including the 90-credit Associate of Arts Oregon Transfer (AAOT), 45-credit Oregon Transfer Module (OTM), and Associate of Science Oregon Transfer (ASOT). In addition, many institutions have developed articulated agreements to facilitate successful credit transfer. The Legislature passed a "Transfer Student Bill of Rights" in 2011, establishing methods to resolve credit transfer issues, which induces the development of uniform, statewide credit transfer pathways. Transfer students often find that while their transfer degrees help them meet the admission standard of the receiving university, their general education and major course of study credits are accepted only on a course-by-course, institution-by-institution basis.

HOUSE BILL 2998

House Bill 2998 (2017) requires that the HECC convenes community colleges and public universities listed in ORS 352.002 to develop one or more foundational curricula of at least 30 college-level academic credits that will count toward degree requirements, with the goal that students will not have to repeat

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[1] SCARF data, Fall 2010 cohort.
[2] Higher Education Coordinating Commission. 2017. *Improving Transfer Pathways in Oregon. Slides 9-11.* Presentation to the Oregon Legislative Assembly. https://olis.leg.state.or.us/liz/2017R1/Downloads/CommitteeMeetingDocument/134361

lower division general education coursework after transfer.

In addition, HB 2998 directs the HECC to convene community colleges and public universities listed in ORS 352.002 to establish unified statewide transfer agreements (USTAs) that will allow students to move more easily from community college to university, in a given major, with no lost credit or unnecessary repeated coursework. The HECC and its community college and university partners are to select the initial major disciplines for USTA establishment and publish the criteria used to make that decision.

The foundational curriculum and USTA framework will create statewide pathways that are negotiated by disciplinary faculty and accepted at all Oregon public universities.

Finally, HB 2998 requires that the HECC submits a report to the Legislative Assembly, no later than February 1, 2018, that:

- In consultation with community colleges and public universities listed in ORS 352.002, defines "lost academic credit" for purposes of the report;
- States the typical number of lost academic credits by current students who transfer from a community college to a public university listed in ORS 352.002;
- Recommends whether more than one foundational curriculum should be established;
- Recommends whether foundational curricula established under the legislation should be transferable for students who transfer from one community college to a different community college or from one public university to a different public university; and
- Lists the initial major disciplines for which unified statewide transfer agreements will be established under the legislation.

WORKGROUP FORMATION

To satisfy HB 2998's mandates, the HECC convened a Transfer Workgroup comprising faculty and staff from Oregon's community colleges, public universities, and related stakeholder groups. Although not specified in the legislation, the HECC consulted broadly with academic leadership in both the community college and public university sectors throughout the state, such as the university Provosts Council, CIA, CSSA, JTAC, OAAA, OCCA, OCOP, OEA and OSA to request nominations for membership on the Workgroup. The final composition of the Transfer Workgroup included representation from each of the seven public universities and seven of the community colleges – some of whom also represented stakeholder groups – the Commission, the Chief Education Office, OCCA, OCOP, and OSA. The Workgroup also included as an observing member a representative from the state's private non-profit colleges.

After its second meeting, the Transfer Workgroup divided into two subgroups to address more fully the tasks identified in the legislation. The Foundational Curricula Subgroup met twice and focused on creating the foundational curricula called for in the legislation. The Policy Subgroup met three times and focused on defining "lost academic credit," developing criteria for selecting the initial majors for USTA development, and recommending whether the foundational curricula should be transferable from community college to community college and university to university.

WORK PLAN AND CHARTER

Upon HB 2998's passage and throughout the summer of 2017, HECC staff worked to create a work plan to fulfill the charge of HB 2998 with the full participation of all affected stakeholders, including faculty, administrators, students, and advocates for post-secondary education. The work plan, once drafted, incorporated extensive feedback from all stakeholder groups and received the support of the Transfer Workgroup, upon its formation.

The group charter was developed and formalized with the consultation and advice of Workgroup members. The charter describes the collective understanding of the legislative and policy tasks before the Workgroup, prescribes a rough method of achieving consensus, and spells out the Workgroup's agreed upon principles and motives for action. The charter is meant to hold all Workgroup members, their organizations, and involved agencies accountable for meeting the goals and deadlines specified by the legislation, and for accurately representing the work to their respective constituencies. The Workgroup charter is included in Appendix A of this report.

PROGRESS TO DATE

We emphasize that this report is an update to the Legislative Assembly on work currently in progress and that there remains much to be done, in the near future and in years to come. The work of HB 2998 will continue as the Commission and its public post-secondary partners build on, maintain, and sustain the work that began in the fall and winter of 2017-18. As of February 1, 2018, the full Transfer Workgroup has met a total of four times, the Foundational Curricula Subgroup twice, and the Policy Subgroups three times, with additional work completed via email.

The full Transfer Workgroup, a diverse assembly of administrators, faculty, and advocates, agreed upon two proposed foundational curricula, developed measurable definitions of "lost academic credit" for the purposes of this report and to inform future research and policy, identified criteria for the selection of the initial major disciplines for USTA development, and identified those initial majors. Those deliverables are outlined further in the remainder of this report.

FOUNDATIONAL CURRICULA

The surrounding context for the newly proposed Foundational Curricula is found in the state's current and active transfer policy agreements and statewide degrees. An understanding of the proposed Foundational Curricula requires a brief discussion of the present transfer pathways available to students, and how new transfer pathways might be better suited to the needs of Oregon's students.

GENERAL EDUCATION OUTCOMES

The General Education Outcomes were created by a workgroup empaneled by the Joint Boards (which formerly comprised members of the State Board of Education and the State Board of Higher Education). That workgroup was known as the Joint Boards' Articulation Committee (JBAC), which is the predecessor of a statewide group today devoted to advising state leadership on transfer and articulation issues, JTAC. The General Education Outcomes reflected a consensus on the purpose of general education, and the subject areas

that ought to be part of a first and second year college curriculum: Arts & Letters, Cultural Literacy, Mathematics, Science or Computer Science, Social Science, and Speech/Oral Communication. Each area has an associated list of "outcomes" and a set of "criteria" that evidences achievement of those outcomes. These Outcomes and Criteria are central to the AAOT and ASOT degrees, and the OTM. The General Education Outcomes are included in Appendix B of this report.

Since the Joint Boards, Provosts, and community colleges approved these Outcomes and Criteria in 2009, Oregon's colleges have been using them as standards for alignment of their Gen Ed classes to ensure transferability. All community colleges must submit general education courses against this set of outcomes, and, in turn, these must be approved by CCWD through its lower division collegiate course approval process authorized by OAR 589-006-0200.[3]

STATEWIDE DEGREES

The AAOT is a 90-credit transferable associate's degree that is intended to cover all lower division general education at a student's intended Oregon public university destination. It was created in the 1980s for that express purpose, to allow for seamless transfer from one public sector to another. The ASOT-Business and ASOT-Computer Science are meant to serve the same purpose for students who intend to major in either of these areas – completion of lower division general education, plus a solid foundation in the intended major degree.

The strength of these degrees – broad transferability and fulfillment of general education at any of the seven state universities – can also prove to be a weakness for many students who attain them. Their construction can lead to students taking too much general education, and missing the appropriate foundational classes for the major due to variability of requirements across majors and between institutions. For example, the AAOT might prepare a student to enter as a junior in some majors, but its lack of specificity in Sciences will not allow a student to transfer into one of the life sciences and graduate within 180 credit hours. Similarly, due to the differing conceptions of the business major at the institutions, the ASOT-Business is a very complex transfer guide that may not allow a student to transfer and graduate efficiently. Many universities and community colleges advise their students away from these statewide transfer instruments for this reason.

OREGON TRANSFER MODULE

The OTM is a subset of the AAOT intended for community college students who plan to transfer to a public university, but are unsure of either destination school or eventual major (it is important to note that until very recently, none of Oregon's community colleges offered specific majors).

The OTM may be of limited benefit as currently implemented and understood. Current awarding patterns suggest that the OTM is not used as an advising tool or organizing principle for lower division transfer. This impression was reinforced by an online survey conducted by HECC staff of over one hundred academic advisors, faculty, and other student services administrators. The results indicated a broad lack of understanding, and a further lack of confidence in the efficacy of OTM to serve as an effective transfer mechanism for the students who need it. Almost sixty percent of respondents indicated that they do not use

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3 Oregon Administrative Rules (2017). https://secure.sos.state.or.us/oard/viewSingleRule.action;JSESSIONID_OARD=rC-jshphNEPxPXjN-UPY7vnwdD2ID5JXa6nLT2vZ-txSzJS6s4QW!79857996?ruleVrsnRsn=153503 . See also CCWD Handbook http://handbook.ccwdwebforms.net/handbook/courses/courses-at-a-glance

the OTM as an advising tool, and many respondents recommended that the OTM be phased out. The full results of the survey may be found in Appendix C of this report. Data on OTM completions that community colleges and universities report to the HECC vary widely by institution, suggesting that there are inconsistencies in how the OTM is recorded and reported in completion data at institutions.

EXAMINATION OF DIFFERENT MODELS OF FOUNDATIONAL CURRICULA

For context, the Transfer Workgroup examined models of constructing foundational, first year, general education requirements used by other states that are designed to facilitate transfer across a system. Broadly speaking, there are three major model frameworks: outcomes based statewide curricula, course based curricula, and a common differentiated "track" system matched to the requirements of broad discipline categories.

Outcomes Based Frameworks Rather than prescribing specific course articulations, some states, such as Indiana, use a competency or "outcomes" based framework specifying which skills or areas a student must demonstrate as part of satisfying state level general education requirements. Oregon uses such a framework in part as its General Education Outcomes for statewide transfer. The advantages of such a framework include institutional autonomy and flexibility. Disadvantages may include the tendency for such agreements to be disregarded or forgotten after a period of years with no clearly defined mechanism for oversight and maintenance.

Course-specific curricula prescribe a set number of courses or credit hours for each area in the framework, and prescribe specific courses that fulfill each area. A statewide foundational curriculum or "general education core" requires a high degree of coordination at the state level, and is often implemented with mandatory common course numbering. Critics of this model also argue that it unnecessarily limits course offerings and academic flexibility.

Concentration-specific frameworks often have two or more options for discipline-tracked foundational curricula. Arizona, in one example, features three tracked foundational pathways: one each for Liberal Arts, Business, or Science/Math. While some areas of study are common to all, each has differentiation points appropriate to a student who wishes to pursue an eventual major in any of these three areas. For example, all students take six credits of first year composition, but Mathematics requirements differ across the three concentrations, with Liberal Arts students able to take any college level math, Business students taking Brief Calculus, and Science students taking Calculus I or higher.

THE DECISION TO REVAMP CURRENT TRANSFER POLICY INSTRUMENTS

Over the course of two meetings, the Foundational Curricula Subgroup further discussed potential models and features of the required foundational curriculum. Over time, some essential principles and features emerged that the subgroup agreed upon. These principles were:

- Transparency: a foundational curriculum must be easy to understand and use for institutions and students. It must be based upon clearly communicated and agreed upon standards for faculty at the institutions.

- Predictability: for students, this means stability in foundational and major pathway requirements. Predictable pathways will lead to greater successful transfer and completion rates over time.

- Rigor: for students and faculty, a rigorous foundational curriculum has high standards fairly and equitably applied in its creation and maintenance in peer review and collaboration processes.

As these principles were examined against the existing OTM and General Education Outcomes framework, Subgroup members felt that these instruments could be modified and re-instated to achieve the goals of the legislation, and to create a better system of statewide general education foundation for students. The Subgroup agreed that Oregon has tried to create workable frameworks in good faith, but that the inconsistent implementation of these frameworks, and the lack of a statewide student transfer "navigation" system for the complex array of bilateral articulation agreements and statewide degrees has led to confusion and frustration for Oregon students who do not have a major or transfer destination when they begin their education.

Despite inconsistent implementation across the system, the OTM remains a workable model and framework that is already adopted by all relevant academic governance bodies across the public institutions. It could, with significant modification, form the basis of foundational curricula that could find support throughout the state's public institutions due to its grounding in long-standing common general education frameworks.

THE FOUNDATIONAL CURRICULA AND THEIR ELEMENTS

The proposed foundational curricula are essentially modifications to improve upon the existing OTM, comprising six of the statewide Gen Ed Outcomes areas: Writing, Cultural Literacy, Arts & Letters, Natural Sciences, and Mathematics. It removes Oral Communication from the core because only five of the seven public universities require it as part of their general education package. It also removes the space for electives as these are not considered part of a foundational curriculum (students who complete either an associate or bachelor's degree based upon this curriculum will still be required to take a certain number of electives).

Additionally, the foundational curricula are differentiated between STEM and Non-STEM (or "BA") pathways. In the STEM foundational curriculum, students are advised to take Mathematics and Natural Sciences credits that are at the appropriate level and in the appropriate disciplines for their eventual USTA path. In the non-STEM foundational curriculum, students are advised to take Social Science credits that at the appropriate level and in the appropriate disciplines for their eventual USTA path. Previously, neither the AAOT nor OTM made allowances for this kind of variation.

Just as significantly, the foundational curricula offer students a guarantee of transferability *and* articulation, something both the AAOT and OTM lack. All courses within the foundational curricula will transfer and articulate into the receiving university's general education core requirements, or the equivalent.[4]

Foundational Curricula

The following foundational curricula is a broad description of course requirements for students at any Oregon community college or public university. Students who have not yet declared a major and plan to transfer can take classes that fit these categories at any Oregon community college and expect all classes to transfer to meet at least 30 credits of general education requirements for a bachelor's degree at any Oregon public university.

Note that specific majors may also have specific requirements for foundational courses that overlap with these categories. Students interested in a certain discipline should follow the Unified Statewide Transfer

[4] Western Oregon University's equivalent is the "Liberal Arts Core" and Oregon State University's equivalent is the "Baccalaureate Core."

Agreement (USTA) guidelines for your intended major when picking the classes that you need. This guide notes several areas where particular consideration is recommended. This will help keep you on track for credits towards your 4 year degree completion.

The Foundational Curriculum is intended as a starting point for students who plan to transfer to a university, but are unsure as to their intended major or transfer destination. Students who are certain of their major, but not their transfer destination, should determine if there is a developed USTA for that major, and follow that as a guide. Students who are certain of both their major and their intended transfer destination should consult an advisor for information on an existing specific articulation agreement, USTA, or degree map that will prescribe their course requirements.

Subject	Foundational Courses for STEM majors	Foundational Courses for non-STEM majors
Writing	2 courses (6-8 credits) WR121, WR122	2 courses (6-8 credits) WR121, WR122
Cultural Literacy	1 course (3-4 credits) See list of AA/OT outcome courses.	1 course (3-4 credits) See list of AA/OT outcome courses.
Arts & Letters	2 courses (6-8 credits) See list of AA/OT outcome courses.	2 courses (6-8 credits) See list of AA/OT outcome courses.
Social Science	2 courses (6-8 credits) See list of AA/OT outcome courses.	2 courses (6-8 credits) See list of AA/OT outcome courses. Many non-STEM majors require specific s sciences courses -- see the USTA for yo intended major.
Natural Sciences	2 courses with labs (8-10 credits) See list of AA/OT outcome courses. Many STEM majors typically require specific majors-level (200+) courses – see the USTA for your intended major.	2 courses with labs (8-10 credits) See list of AA/OT outcome courses. Non-majors level (100) recommended.
Math	1 course (3-5 credits) See list of AA/OT outcome courses. Many STEM majors typically require specific mathematics (200+) courses – see the USTA for your intended major.	1 course (3-5 credits) See list of AA/OT outcome courses MTH 105/111 recommended.
Total	10 courses (32-43 credits)	10 courses (32-43 credits)

There is an accompanying explanatory document, Foundational Curricula Questions and Answers, included as Appendix C of this report. The Foundational Curricula and Questions and Answers are currently in circulation among the state's public post-secondary institutions.

HOW THE FOUNDATIONAL CURRICULA BUILD AND IMPROVE UPON EXISTING TRANSFER FRAMEWORKS

The OTM, like the AAOT, is not a perfect fit for any destination university. It may or may not be implemented so as to be an unbreakable 45 hour credit block. It contains electives which are not necessary to a foundational curriculum. The proposed foundational curricula address those shortcomings and leave ample room for differentiation and modification according to the needs of a student's USTA. They are not overly prescriptive, but allow a student whose needs are not served by any existing articulation agreement or major-specific transfer pathway to complete a subset of general education, approximately 32-43 credits, depending on where the student attends community college, with no unnecessary repetition of completed coursework. Because the foundational curricula contain fewer credits than the OTM, students take only courses guaranteed to transfer as general education at any Oregon public university.

Members of the Transfer Workgroup are currently discussing the proposed foundational curricula with faculty, administrators, and other stakeholders at their respective institutions. The framework contained within this report may change, depending on the feedback and suggestions offered by the field. However, as it is not a replacement, but rather a modification of existing and currently approved transfer policy instruments, the Workgroup created these foundational curricula so that they can be adopted and implemented with the support of faculty. Institutions retain the authority to decide which of their courses will fulfill each of the foundational curricula core areas. Moreover, nothing in the legislation or in this new framework requires any institution to create new courses to comply with or implement the charge of HB 2998. Instead, each public institution in the state will have access to the full list of courses meant to fulfill the foundational curriculum from each institution. The foundational curricula will be transparent in their construction.

Core areas that are common to all institutions and which have a high degree of similarity across the state, like Math and Writing will likely find broad support. The public universities tend to differ in their conception of other key areas within the foundational curricula, such as Arts & Letters and Cultural Literacy.

The foundational curricula, once implemented, will require ongoing maintenance, oversight, and institutional review processes to make sure they are being properly applied and honored by all of the state's public institutions. Specifically, the proposal offers several ideas to sustain the work going forward, including a faculty-led peer review process meant to mediate differences between sending and receiving institutions in how courses are meant to apply to the curricula. That is, a state-level policy-making body, comprising faculty and administrators, and convened by HECC staff, could review any course where there is controversy over its applicability or transferability for a given foundational curricula core area. The details of such a process are not included in this proposal, but 2998 workgroup members are in agreement that maintenance and oversight with the full participation of faculty are needed to keep this and other emerging transfer frameworks sustainable.

LATERAL TRANSFERABILITY OF THE FOUNDATIONAL CURRICULA

The focus of HB 2998 was to make vertical transfer from community college to university simpler, more efficient, and more transparent for those students who may not have a current articulation framework, and who may not know which major they wish to pursue, or which university they plan to transfer into. National

research and statistics show that students are more mobile than ever and take longer to complete degrees. Forty-five percent of transfer students trans

fer more than once, and students increasingly are transferring back and forth between university and community college due to financial needs, work schedules, and other non-academic factors. A plurality of all transfer students move to a community college from other community colleges and *from* universities.[5] The increased traffic of students from university to community college, between community colleges, and between universities seems to argue for allowing students to use the foundational curricula both within and between post-secondary sectors.

Therefore, pending additional feedback from community college and university stakeholders and a final decision by the Commission, HECC staff recommend that community colleges and universities prioritize the transfer of the foundational curricula from community colleges to universities. Once that process is fully operable, community colleges and universities should begin the process of ensuring the foundational curricula are transferable from community college to community college and university to university.

LOST ACADEMIC CREDIT

HB 2998 directs the HECC, in consultation with Oregon's community colleges and public universities, to define "lost academic credit" for the purposes of this report and calculate the typical number of lost academic credits accumulated by students who transfer form an Oregon community to college to public university listed in ORS 352.002. Thus, recommending a definition of lost academic credit for the purposes of this report was one of the central tasks of the Transfer Workgroup.

From the Workgroup's first meeting, it became clear that many in the Workgroup disliked the term "lost academic credit," believing that it paints an inaccurate picture. Rather, moving forward, the Workgroup would prefer to use a different term, such as "excess credit," or "fluid credit." The Workgroup feels that though a credit may not directly count toward the completion of a degree, it does not necessarily follow that such a credit is valueless as lost academic credit implies. While such a credit may be in excess of the credit needs for a particular degree, it remains a part of the student's educational path. However, acknowledging that this report explicitly mandates the development of a definition of lost academic credit, this report will continue to use this phrase.

IDEAL DEFINITION

The Workgroup also discussed the tension between establishing a definition that truly captures the meaning of lost or excess credit and a definition that is measurable. The Workgroup recognized that there often exist a number of contributing factors to a student's credit accumulation. Credits accumulated due to students' conscious preferences and decisions – for example, credits accumulated by a student who changes majors due to shifting interests – should not count as lost academic credit. Similarly, in some cases, credit accumulation by students who complete a number of courses in a variety of disciplines in order to guide major selection, knowing that they may not all count toward their future major, should not count as lost academic credits. Though, in some cases, clearer pathways and advising may have reduced lost academic credits, credits that an

[5] National Student Clearinghouse. Transfer and Mobility: A National View in Postsecondary Institutions, Fall 2008 Cohort. Signature Report Number 9. July, 2015.

informed student *expects* will transfer to a university, but do not, and those that an informed student *expects* will fulfill specific degree requirements at a university, but do not are lost academic credits.

This definition, however, relies on a clear understanding of student expectations and intent, information that is beyond the scope of what higher education institutions or the HECC can collect. The HECC has no way to discern whether or not a student expected certain credits to transfer to a university and count toward a major.

BEST MEASURABLE DEFINITION

Recognizing that in order to use excess credit as a method for assessing the functionality of a pathway, whether it be the foundational curriculum, a USTA, or an existing articulation agreement, and the impact of policy changes to that functionality, the Workgroup agreed to a measurable definition of lost academic for use in such assessments. That definition follows:

> *A credit that does not fulfill any relevant academic requirements for a given student, including:*
>
> *a) Strict graduation requirements, such as for primary major, bachelor's, and general education;*
>
> *b) Elective credits needed beyond those strict graduation requirements to meet overarching credit requirements (total credits, upper division credits); and*
>
> *c) Requirements for a desired auxiliary academic program, such as an additional major, minor, or pre-professional program, even if this would require credits in excess of overarching credit requirements.*

Though this definition does not fully account for intentional student choice to earn credits that the student knows may not transfer, it does capture the fact that credits counted as elective are not necessarily lost academic credits, and that some students choose to pursue academic programs and interests beyond their primary major.

While Workgroup members and HECC staff agreed that this is the best measurable definition of excess credit, for the purposes of this report, this definition is not operational. Readily available at the HECC are data that show the number of credits students have at graduation that are in excess of the requirement for a bachelor's degree, which is 180 credits. This information is available for both first-time freshmen and community college transfer students. However, defining lost credit with reference to the requirements for specific majors requires additional information and expertise. The HECC has student course information for courses taken at the community colleges and public universities, including the course title and number, the number of credits earned, and the grade received. Thus, the HECC can only tally the courses taken that *appear* to be in a student's major department at both the community colleges and public universities. In order to conduct a thorough and more accurate analysis, however, the HECC would need to compare these student records to universities' lists of courses accepted for general education requirements and courses required for majors. To do so, the HECC would either need to rely on universities to conduct an analysis, or to ask them to provide:

a) Specific courses required for majors and pre-professional programs at the universities;

b) Specific courses at the community colleges that the universities accept as fulfilling these requirements and which requirements they fulfill;

c) Any changes to (a) and (b) that occurred over approximately the past ten years; and

d) Transcripts for students in these majors to answer unclear course information in the quantitative student records and to confirm conclusions.

Further, there is currently no completely reliable way to connect the data for community college students with the data for university students. Therefore, any approach that uses community college and university data will lose a small number of transfer students because their identifying information (e.g., name, birthdate) does not match. With this caveat, the legislative requirement for "the typical number of lost academic credits" could be met using the agreed upon definition from above, though even the approach above, whether undertaken by the universities and Workgroup or by HECC staff, will require significant time and effort for a small number of majors.

As a result, the HECC and the Workgroup developed a second, more basic measurable definition for the purposes of the assessment of the typical number of lost academic credits by current students who transfer from a community college to a public university required by HB 2998.

DEFINITION FOR REPORT PURPOSES AND CALCULATION

HECC's data systems are able to show the number of credits students have accumulated upon graduation for both transfer students and first-time freshmen. Thus, for the purposes of this report, lost academic credit is defined as excess credit, or:

> *"The difference in the average total number of credits at degree completion between transfer students and first-time freshmen."*

Using this definition and data submitted to the HECC by universities through the Student Centralized Administrative Reporting File (SCARF) for the 2010 fall fourth week student cohort, the HECC found that Oregon community college transfer students who completed a bachelor's degree accumulated an average of 9.9 excess credits, compared to first-time freshmen who completed a bachelor's degree. Though making a precise estimate is difficult, this credit differential represents millions of dollars of student tuition, financial aid, and state FTE appropriations spent unnecessarily.

It is important to note that lost academic credit varies widely from major course of study to major course of study (defined in this report as classification of instructional programs at the 4-digit level). For example, among major disciplines with at least 30 first-time freshmen graduates and at least 30 Oregon community college transfer graduates, Civil Engineering had the highest average number of excess credits at 27.7 (see Table 1, below). In contrast, the average excess credits for the major course of study with the lowest average – Romance Languages, Literatures, and Linguistics was -.4, meaning that transfer students in this major course of study typically complete degrees with slightly fewer credits than first-time freshmen in the same major course of study.

Table 1: Excess Credit –Average, High, and Low

Major Course of Study at Completion	Average Credits at Completion (First-Time Freshmen)	Average Credits at Completion (OR Community College Transfer Students)	Average Excess Credits
All Major Disciplines	201.9	211.8	9.9

1408-Civil Engineering	212.7	240.4	27.7
1609-Romance Languages, Literatures, and Linguistics	211.4	211.0	-0.4

A complete table of excess by major course of study for those major disciplines with at least 30 first-time freshmen graduates and at least 30 Oregon community college transfer graduates is included in Appendix E.

USTA CRITERIA

HB 2998 also mandates that the HECC convenes and consults with Oregon's community colleges and public universities listed in ORS 352.002 to determine the initial major courses of study for which unified statewide transfer agreements (USTAs) will be established, and to identify the criteria used to make that determination. Further, the legislation specifies that the criteria must include, but are not limited to:

- The major disciplines with the most frequent workforce demand; and
- The majors with the highest enrollment among students who transfer from a community college to a public university.

The Transfer Workgroup agreed that a number of additional criteria should be considered when deciding the USTA establishment order, including:

- Excess credit upon completion for transfer students compared to first-time freshmen;
- The feasibility of establishing a USTA (based on factors such as known curricular challenges, the existence of a group or groups already conducting similar work, etc.);
- The educational equity of the major course of study (based on factors such as enrollment at the point of transfer and at completion of underserved students, and the disparity between those numbers; and
- Disciplinary variety to ensure a balance of STEM, social science, humanities, etc. major courses of study among the USTAs to be established.

RANKING PROCESS

Recognizing that some criteria are easily quantifiable and measurable, while others are not, the Workgroup divided the USTA ranking process into two steps. Furthermore, they agreed that certain criteria should carry more weight than others.

Step 1 – Quantitative Calculations

a) Create ranked lists of the top 20 4-Digit CIP[6] codes for the following measurable criteria:

- New entering transfer student enrollment (combined 2010-2017 fall 4th week student cohorts)
- Excess credit (2010 fall 4th week student cohorts, source)
- Workforce demand (projected jobs in 2024, cross-walked to student majors, source: Oregon Employment Department.

b) On each list, assign points to each 4-Digit CIP based on rank (rank 1 = 20 points, rank 20 = 1 point)

c) Multiply the points for each 4-Digit CIP on each list by the weight assigned to each criterion:

- Enrollment = 4
- Excess credit = 4
- Workforce demand = 1

Table 2: Excess Credit -Top 20 Major Disciplines[7]

Major Course of Study at Completion	Average Excess Credits	Rank (20 = Highest)	Score (Rank X 4)
1408-Civil Engineering	27.7	20	80
5109-Allied Health Diagnostics, Intervention, and Treatment	25.6	19	76
1101-Computer & Info Sciences, Gen	24.4	18	72
0301-Natural Resources Conservation & Research	20.3	17	68
1419-Mechanical Engineering	19.7	16	64
3099-Multi/Interdisciplinary Studies, Other	18.2	15	60

[6] CIP = Classification of Instructional Programs, a standardized taxonomy of academic disciplines and majors used by US institutions. Note that programs at different institutions with the same CIP may have very different requirements.

[7] Calculated using data reported to the HECC through the Student Centralized Administrative Reporting File (SCARF) on the 2010 fall 4th week student cohort. Only major courses of study with at least 30 first-time freshmen graduates and at least 30 Oregon community college transfer graduates were included.

1312-Teacher Education/Professional Development, Levels & Method	17.8	14	56
3105-Health & Physical Education/Fitness	16.8	13	52
5214-Marketing	13.3	12	48
4506-Economics	12.8	11	44
2301-English Language & Literature, General	12.3	10	40
5122-Public Health	11.3	9	36
4301-Criminal Justice & Corrections	10.8	8	32
5007-Fine and Studio Arts	10.7	7	28
4501-Social Sciences, General	10.1	6	24
1107-Computer Science	9.8	5	20
1907-Human Development/Family Studies/Related Services	9.7	4	16
2401-Liberal Arts & Science, General Studies/Humanities	9.6	3	12
2601-Biology, General	9.5	2	8
5203-Accounting & Related Services	9.5	1	4

Table 3: New Entering Transfer Student Enrollment, 2010-2017 Fall 4th Week Cohorts -Top 20 Major Disciplines[8]

Major Course of Study at Completion	New Entering Transfer Student Enrollment (sum of 8 cohorts)	Rank (20 = Highest)	Score (Rank X 4)
4201-Psychology, General	2729	20	80

[8] Calculated using data reported to the HECC through the Student Centralized Administrative Reporting File (SCARF) for the 2010-2017 fall 4th week student cohorts.

5202-Business Administration, Management, & Operations	2728	19	76
2601-Biology, General	1660	18	72
2401-Liberal Arts & Sciences, General Studies/Humanities	1598	17	68
5201-Business/Commerce, General	1066	16	64
4301-Criminal Justice & Corrections	1033	15	60
1907-Human Development/Family Studies/Related Services	855	14	56
5122-Public Health	843	13	52
1107-Computer Science	834	12	48
1419-Mechanical Engineering	833	11	44
2301-English Language & Literature, General	824	10	40
5203-Accounting & Related Services	816	9	36
1312-Teacher Education/Professional Development, Levels & Method	705	8	32
5109-Allied Health Diagnostics, Intervention, and Treatment	675	7	28
1101-Computer & Information Sciences, General	640	6	24
3105-Health & Physical Education/Fitness	632	5	20
4511-Sociology	605	4	16
0301-Natural Resources Conservation & Research	573	3	12
5007-Fine and Studio Arts	566	2	8
5401-History	561	1	4

Table 4: Workforce Demand by Major Course of Study[9]

Major Course of Study at Completion	Transfer Student Enrollment	Rank (20 = Highest)	Score (Rank X 1)
5202-Business Administration, Management, & Operations	32,983	20	20
5201-Business/Commerce, General	27,317	19	19
4301-Criminal Justice & Corrections	17,524	18	18
5203-Accounting & Related Services	14,794	17	17
1101-Computer & Information Sciences, General	12,499	16	16
1107-Computer Science	11,723	15	15
1312-Teacher Education/Professional Development, Levels & Methods	11,639	14	14
1907-Human Development/Family Studies/Related Services	9,692	13	13
5401-History	6,584	12	12
5214 - Marketing	6,209	11	11
4506 - Economics	6,069	10	10
5109-Allied Health Diagnostics, Intervention, and Treatment	5,224	9	11
4201-Psychology, General	4,857	8	10
1408-Civil Engineering	4,847	7	9

[9] Calculated for the major courses of study with the 20 highest combined scores for excess credit and enrollment. Calculated by matching the 4-digit CIP code with the associated standard occupational classification (SOC) codes using the National Center for Education Statistics' CIP to SOC Crosswalk found here: https://nces.ed.gov/ipeds/cipcode/resources.aspx?y=55, and then summing the number of job openings for those SOC codes projected in the Oregon Employment Department's Occupational Employment Projections 2014-2024, found here: https://www.qualityinfo.org/documents/10182/92203/Oregon+Occupational+Employment+Projections+2014-2024?version=1.7

1419-Mechanical Engineering	4,784	6	8
5007-Fine and Studio Arts	4,415	5	7
4510-Political Science & Government	4,033	4	6
4502-Anthropology	3,963	3	5
5122-Public Health	3,935	2	4
4511-Sociology	3,903	1	3

d) Add together the weighted point totals from each list for each 4-Digit CIP and re-rank the list based on total points.

Table 5: Top 20 Majors by Combined Score

Major Course of Study	Enrollment Score	Excess Credit Score	Workforce Demand Score	Total Score	Overall Rank (1 = highest)
5202-Business Administration, Management, & Operations	76	24	20	120	1
1419-Mechanical Engineering	44	68	6	118	2
1101-Computer & Information Sciences, General	24	72	16	112	3
4301-Criminal Justice & Corrections	60	32	18	110	4
5109-Allied Health Diagnostics, Intervention, and Treatment	28	72	9	109	5
1312-Teacher Education/Professional Development, Levels & Method	32	56	14	102	6
5122-Public Health	52	36	2	90	7
4201-Psychology, General	80	0	8	88	8
1408-Civil Engineering	0	80	7	87	9

1907-Human Development/Family Studies/Related Services	56	16	13	85	10
5201-Business/Commerce, General	64	0	19	83	11
1107-Computer Science	48	20	15	83	11
2601-Biology, General	72	8	0	80	13
0301-Natural Resources Conservation & Research	12	68	0	80	13
2301-English Language & Literature, General	40	40	0	80	13
2401-Liberal Arts & Sciences, General Studies/Humanities	68	12	0	80	13
3105-Health & Physical Education/Fitness	20	52	0	72	17
5214-Marketing	0	48	12	60	18
5203-Accounting & Related Services	36	4	17	57	19
4506-Economics	0	44	11	55	20

Step 2 – Additional Considerations

A group of subject matter experts will assess the final ranked list generated in Step 1d and select three majors that collectively strike a balance in the following criteria:

- Feasibility
- Equity
- Disciplinary variety

FIRST FOUR MAJOR DISCIPLINES FOR USTA DEVELOPMENT

In the interest of meeting legislative deadlines and recognizing the importance of this work, the Transfer Workgroup recommended that work begin on four USTAs as soon as possible. Based on the two-step process

described above, the Workgroup – acting as the group of subject-matter experts cited in Step 2 – determined that the first major disciplines for which USTAs should be established are:

- Business
- Teacher education and professional development
- Biology
- English Language & Literature

FUTURE USTA DEVELOPMENT

The Transfer Workgroup agreed that there is value in continued monitoring of the USTA selection and development process by a group of experts – whether that group has the composition (if not identical membership) as the Transfer Workgroup, or it should be the Joint Transfer and Articulation Committee (JTAC) with additional faculty representation. The Transfer Workgroup will solidify the details of this recommendation at its final meeting and we will clarify the group's composition. This group will determine the future order of USTA development and ensure that the major-specific USTA workgroups are making progress toward the establishment of USTAs.

CONCLUSIONS AND RECOMMENDATIONS

CONCLUSIONS

The HECC reiterates that the work of House Bill 2998 has just begun. Since the legislation's passage, the HECC and the Transfer Workgroup completed the following:

- The creation of two proposed foundational curricula;
- The transferability of those curricula from community college to community college and university to university;
- Definitions of "lost academic credit" for the purposes of this report and for future use;
- Criteria for deciding the order by which USTAs will be established; and
- The first four major disciplines for which USTAs will be established.

Yet, much work remains to ensure the success of these transfer initiatives. The HECC and the Transfer Workgroup identified a number of recommendations.

RECOMMENDATIONS

1. <u>Establishment and Funding of a Foundational Curricula Oversight Body</u>

The HECC and the Transfer Workgroup recommend the establishment or designation of a group of community college and university representatives with subject matter and transfer expertise charged with

ongoing oversight of the foundational curricula. This body will ensure that the foundational curricula are functioning, recommend policy decisions, such as how the foundational curricula will be noted in transcripts, make any necessary changes to the foundational curricula, and assist in the resolution of disputes between sending and receiving institutions related to the foundational curricula.

To ensure its sustainability and proper functioning, we recommend that the Legislative Assembly appropriate funds for faculty release time for service on this group.

2. Establishment and Funding of a USTA Oversight Body

Like with the foundational curricula, the HECC and the Transfer Workgroup believe that the establishment or designation of a group of community college and university representatives with subject matter and transfer expertise will be vital to the success of the USTA development work. This body, which may be the same group as the Foundational Curricula Oversight Body, will ensure that the major-specific USTA workgroups – tasked with developing USTAs for specific majors – are making progress and are slated to meet the deadlines set out in HB 2998. Furthermore, this body will determine the future order of USTA development.

Again, to ensure its sustainability and proper functioning, we recommend that the Legislative Assembly appropriate funds for faculty release time for service on this group.

3. Funding for HECC Staff Work

If permanent funding is provided for this work, HECC can continue in its role as a convener and coordinator for the future of this transfer work. To that end, the HECC plans to continue providing staff support for the major-specific USTA workgroups and the oversight bodies described above.

In addition, the HECC plans to host a kick-off meeting for the USTA development work, where we will invite representatives from states who have successfully conducted similar efforts, such as Connecticut, Washington, and Minnesota, to offer guidance and best practices.

Finally, the HECC will continue to meet its reporting requirements under HB 2998, namely, the directive that, "[t]o the extent relevant data is available, the commission shall report annually to the Legislative Assembly on whether existing unified statewide transfer agreements are meeting the goals set forth in section 3 (2) of this 2017 Act."[10]

However, for the HECC to complete this work, it requires additional funding. HB 2998 provides limited duration funding for a total of one HECC staff position for the 2017-19 biennium. For the HECC to continue its role as a convener and coordinator for this transfer work, we recommend that this funding be enhanced and made a continuing part of HECC's operational budget.

4. Creation of a student-facing online transfer portal

A consistent theme throughout the workgroup process concerns the need for a statewide transfer navigation system for students and advisors. Currently, thirty-nine states have such an online database for students to find their way from one institution to another in a given transfer pathway. HECC has advocated for such a statewide system since its report on House Bill 2525 (2015).

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[10] House Bill 2998 (2017).
https://olis.leg.state.or.us/liz/2017R1/Downloads/MeasureDocument/HB2998/Enrolled

The creation and maintenance of such a system raises numerous technical and policy questions that must be addressed before HECC or any institution can create and implement it. Not all institutions use the same registration systems. It would require a nearly unprecedented level of coordination among Oregon's institutions in addition to sufficient funding to build and maintain. But it can be done and has been done in other states. Further, such coordination would have benefits for transfer students beyond maintaining the data system.

HECC recommends the creation of a technical workgroup made up of registrars, advisors, and IT professionals to evaluate the functional needs and technical requirements for a student facing transfer portal, and to receive proposals for its creation and implementation. HECC would likely seek funding for such a system in the 2019-2021 biennium.

HB 2998 TRANSFER WORKGROUP

GROUP CHARTER

A Purpose of the Workgroup

Legislative Charge

House Bill 2998 (2017) requires that the Higher Education Coordinating Commission (HECC) convene faculty from Oregon's public colleges and universities to create one or more "foundational curricula" of at least thirty credits. These foundational curricula must be fully transferable and applicable to degree requirements at any Oregon public university. Additionally, this legislation requires that the group assembled produce criteria and recommendations for the establishment of unified statewide transfer agreements.

Deliverables

The Workgroup is collectively responsible for:

- Recommending the establishment of one or more foundational curricula based upon the requirements of the legislation;
- Recommending the first three major courses of study for which unified statewide transfer agreements will be established, and the criteria on which that and future determinations are based;
- Providing counsel to the HECC on the creation of a definition of "lost academic credit" for the HECC's report to be submitted to the Legislative Assembly by February 1, 2018;
- Providing counsel to the HECC on whether the recommended foundational curricula established should be transferable for students who transfer from one community college to a different community college or from one public university to a different public university;
- Using the best available data and information for all decisions and work products.

B Workgroup Roles and Requirements

Roles and Responsibilities of Members

The work required by HB 2998 can only be successful if all workgroup members (faculty, administrators, and agency staff) agree upon our respective and shared responsibilities. As a group we agree to:

- Pursue a shared understanding of the current state of transfer policy and practice;
- Pursue solutions based upon that shared understanding within the framework and authorities of the legislation;
- Accurately communicate progress made and obstacles faced to our constituent groups;
- Solicit reactions and feedback from constituent groups, and synthesize and communicate accurately those reactions back to the workgroup;
- Assist with implementation of policy and agreements once these goals are achieved by the group.

Values and Principles

The work of this legislation is underwritten by these and other values and principles we hold in common as institutions and the state's post-secondary coordinating agency:

- Student Success: we acknowledge that this legislation is driven by our collective responsibility to help students become successful through transparent and understandable transfer policy and practice. Prioritizing the needs and challenges faced by transfer students consistent with our mission of equity-conscious policy-making.
- Transparency: all members of the workgroup are open about their views and the needs and goals of their constituency within the context of the current legislation; that all members are communicating with their constituent groups in a regular and substantive way; that all decisions reached by the group, and its process in reaching them, are matters of public record.
- Inclusion: all constituencies and groups affected by workgroup decisions are represented; that everyone brings their respective expertise and experience to the discussion
- Equity: we recognize that as transfer students are more likely first generation, underrepresented, rural, and lower income, a seamless system of transfer is congruent with the goal of greater access and affordability for students who have been underserved in the past.
- Collaboration: this legislation demands collaborative effort among institutions, HECC staff, and all those represented by the members of the workgroup. Creating a better framework for vertical transfer for students across the state cannot be accomplished by any one institution or by any agency. Every phase must be undertaken in close partnership by all involved and affected.

C Workgroup Meetings

Meeting Schedule and Process

Meeting agendas will be created at least five working days prior to their scheduled time to allow workgroup members to review any necessary background information, research, or to prepare brief meeting presentations. HECC staff will prepare all materials necessary.

Meeting facilitators will exercise their discretion to move the conversation or agenda forward once key issues have been fully discussed.

HECC staff will release meeting summaries following every meeting for workgroup inspection, edits, and corrections prior to releasing the summaries to the public. Although meetings are not required to meet the requirements of public meeting law, their process, discussions, and projects will be matters of public record and conversation.

Meetings are scheduled to accommodate the greatest number of group members possible. Although workgroup members are expected to attend all meeting in-person, if a member is unable to do so due to unavoidable circumstances, then alternative accommodations, including tele/video conferencing, may be made.

Meetings will follow the stated agenda. However, if necessary, facilitators may allow for deviation from the published agenda to allow for extended discussion or the processing of new information.

Decision Making

Decisions will be made via consensus after all viewpoints have been heard. Consensus in this context means that although differing viewpoints may exist, all agree that all viewpoints have been heard and that the process may move forward.

Meeting facilitators or any group member may call for a vote on individual issues as necessary. In the event of a deadlock on any issue, the group may revisit the decisions or assumptions leading up to the impasse to find alternative means of resolving the issue.

Once a decision is reached, all group members must be willing to move forward and actively support its implementation or adoption.

D Workgroup Members and Composition

Full Workgroup

Name	Role	Institution
Seth Anthony	Faculty	OIT
Cindy Baccar	Registrar	PSU
Elizabeth Cox Brand	Executive Director (OSSC)	OCCA
Ann Cary	Faculty	PCC
John Copp	Faculty	CGCC
Amy Cox	Staff	HECC
Patrick Crane	Facilitator	HECC
Cheryl Davies	Faculty	SOCC
Veronica Dujon	Facilitator	HECC
John Edwards	Faculty	OSU
Anne Haberkern	Administrator	PCC
John Hamblin	Administrator	MHCC
Maurice Hamington	Administrator	PSU
Robert Kyr	Faculty	IFS/UO
Carol Long	Administrator	Willamette U.
Tina Martinez	Faculty	BMCC
Anthony Medina	Staff	HECC
Erin Mulvey	Advisor	OSU
David Plotkin	Administrator	CCC
Sean Pollack	Staff	HECC
Carrie Randall	Advisor	LBCC
Dana Richardson	Director	OCOP
David Rives	Commissioner	HECC
Hilda Rosselli	Administrator	Chief Ed Office
Jim Salt	Faculty/OEA Chair	OEA/LCC
Tad Shannon	Faculty	WOU
Chris Stanek	Institutional Research	SOU

Julia Steinberger	Staff	HECC
Kyle Thomas	Staff	HECC
Ricardo Lujan-Valerio	Legislative Director	OSA
David Vande Pol	Administrator	WOU
Frances White	Faculty	UO

[The full Transfer Workgroup will at times be divided into two subgroups: Foundational Curricula Subgroup, and Policy Subgroup]

Foundational Curricula Subgroup Membership

The members of this subgroup are responsible for creating one or more foundational curricula

Name	Role	Institution
Seth Anthony	Faculty (Chemistry)	OIT
Cindy Baccar	Registrar	PSU
Ann Cary	Faculty (Math)	PCC
Cheryl Davies	Faculty (Psychology)	SOCC
John Edwards	Faculty (Psychology)	OSU
Maurice Hamington	Faculty (UNST and Philosophy)	PSU
Tina Martinez	Faculty (Sociology)	BMCC
David Plotkin	VP Instruction & Student Services	CCC
Carrie Randall	Advisor	LBCC
Veronica Dujon	Facilitator	HECC
Sean Pollack	Staff	HECC

Policy Subgroup Membership

The members of this subgroup are responsible for recommending the first three major courses of study for which unified statewide transfer agreements will be established, and the criteria on which that and future determinations are based, and providing council to the HECC on a definition of "lost academic credit."

Name	Role	Institution
Elizabeth Cox Brand	OCCA/OSSC	OCCA
Anne Haberkern	Curriculum Director	PCC
John Hamblin	Executive Dean	MHCC
Robert Kyr	Faculty (Music)	IFS
Erin Mulvey	Advisor	OSU
Dana Richardson	OCOP	OCOP
Hilda Rosselli	Chief Education Office	Chief Education Office
Jim Salt	Faculty (Social Science)	LBCC, OEA
Ricardo Lujan-Valerio	Legislative Director	OSA
David Vande Pol	Exec. Dir. Regional Outreach and Innovation	EOU
Patrick Crane	Facilitator	HECC
Julia Steinberger	Staff	HECC
Kyle Thomas	Staff	HECC

APPENDIX B: GENERAL EDUCATION OUTCOMES

Approved by the Joint Boards' Articulation Committee On November 9, 2009; approved by the Councils of Chief Academic Officers and Provosts on November 13, 2009; approved by Unified Educational Enterprise on November 23, 2009; approved by the Joint Boards of Education on January 7, 2010.

Background

This work was inspired by the need to identify the fundamental principles that shape General Education in colleges and universities throughout Oregon. The intent was to use the principles in two ways: (1) to create a rational basis for determining the equivalency of courses intended to transfer; and (2) to enhance General Education throughout Oregon by encouraging direct dialog among faculty in each of the disciplines within this rich curriculum. We recognized that these goals were ambitious, but we were optimistic because of the collegial attention that had already been given to General Education in Oregon. Creation of the Associate of Arts Oregon Transfer (AAOT) degree in the late 1980s was possible because of our shared vision of the key disciplinary elements of General Education and, in 2005, the same spirit generated the Oregon Transfer Module (OTM). Our common understanding of the importance and overall purpose of General Education was articulated by the OUS Provosts' Council and endorsed by the Community Colleges' Council of Instructional Administrators in Fall 2004.

The Purpose of General Education

The education of undergraduate students is an essential activity of all Oregon colleges and universities. While undergraduate education needs to provide discipline-specific knowledge and skills through concentrated work in an academic major, it must also help students develop the habits of mind that lead to thoughtful and productive global citizenship. All parts of a well-designed education encourage these habits, but an effective General Education curriculum has this as its explicit goal. To this end, it seeks to promote:

- *The capacity for analytical thinking and problem solving;*
- *The ability to communicate effectively, including listening, observing, speaking, and writing;*
- *An understanding of the natural world and the role of humans in it;*
- *An appreciation of the arts and humanities and the richness of human experience and expression;*
- *An awareness of multiple perspectives and the importance of diversity;*
- *A sense of societal responsibility, community service, and global citizenship; and*
- *The ability to develop a sense of direction, with the self-discipline needed for the ethical pursuit of a purposeful life.*

What was the problem?

Although colleges and universities in Oregon embrace the value of General Education, most have developed their own unique philosophies and curricula that support these ideals. These varied curricula are a valuable resource for Oregon students, but the underlying mechanics are complicated sets of course and credit specifications. Emphasis on these details can reduce this coursework to a mere check-list of requirements and fail to communicate the opportunities for delight and discovery it offers. Moreover, when students transfer, General Education credits may be "lost" because of

incompatibilities among variant curricula – leading to understandable frustration in the face of seemingly arbitrary decisions.

What did we do about it?

As educators, we knew we had the responsibility for improving matters. While General Education curricula depend on course and credit requirements to shape the intellectual experiences we desire for students, we know that a variety of structures can promote the qualities we're after. Thinking through the genetic underpinnings of cancer promotes analytical thinking, but so does dissecting the religious and cultural influences in 7th century Spain.

The Joint Boards Articulation Commission (JBAC) believed that what was needed was a collaboratively-developed framework within which to consider specific General Education courses. The framework would consist of two elements: (1) the broad outcomes we desire for students who take these courses and (2) the criteria for courses likely to achieve those outcomes. In addition to smoothing transfer, such a model had the potential to strengthen General Education in fundamental ways. By adhering to general principles rather than a rigid template, faculty would have the freedom to design General Education courses that exploit individual expertise and new insights. Students would benefit from faculty innovation in the classroom, while retaining assurance of the transferability of their coursework. Beginning in February 2006, JBAC led the effort to create this framework through the steps outlined below.

What results do we anticipate?

Short-term: A clear statement of the intended learning outcomes of a General Education curriculum, regardless of its particular design, will help all of us communicate the key role of General Education – to students, parents, and Oregon citizens. The definition of criteria for effective General Education courses will be immediately helpful to faculty as they improve existing General Education courses and design new ones.

Long-term: We hope that the criteria for effective General Education courses will form the basis of a new, faculty-led procedure for making thoughtful decisions about General Education coursework. At present, equivalency decisions can appear arbitrary because they are made according to local campus guidelines that are not widely known. In the new system, transferability will not depend on identity of course numbering or content, but on more general characteristics that can be shared by courses on diverse topics. Perhaps most important, we hope that the new system will foster a culture of substantive curricular discussions among faculty from diverse institutions. The collegiality of such groups was demonstrated during the creation of these Outcomes and Criteria statements and we think their combination of disciplinary expertise and direct classroom experience is powerful. They are in the best position to communicate the nature of college-level work in their areas and to stimulate interest in high quality General Education for students throughout Oregon.

Arts & Letters

Outcomes

As a result of taking General Education Arts & Letters* courses, a student should be able to:

- Interpret and engage in the Arts & Letters, making use of the creative process to enrich the quality of life; and
- Critically analyze values and ethics within a range of human experience and expression to engage more fully in local and global issues.

* "Arts & Letters" refers to works of art, whether written, crafted, designed, or performed and documents of historical or cultural significance.

Criteria

A course in Arts & Letters should:

1. Introduce the fundamental ideas and practices of the discipline and allow students to apply them.
2. Elicit analytical and critical responses to historical and/or cultural works, such as literature, music, language, philosophy, religion, and the visual and performing arts.
3. Explore the conventions and techniques of significant forms of human expression.
4. Place the discipline in a historical and cultural context and demonstrate its relationship with other discipline.
5. Each course should also do at least one of the following:
    - Foster creative individual expression *via* analysis, synthesis, and critical evaluation;
    - Compare/contrast attitudes and values of specific historical periods or world cultures; and
    - Examine the origins and influences of ethical or aesthetic traditions.

Cultural Literacy

Cultural Literacy outcomes will be included in courses that meet the outcomes and criteria of a Discipline Studies requirement.

Outcomes

As a result of taking a designated Cultural Literacy course, learners would be able to:

- Identify and analyze complex practices, values, and beliefs and the culturally and historically defined meanings of difference.

Criteria

A course with the Cultural Literacy designation will:

1. Explore how culturally-based assumptions influence perceptions, behaviors, and policies.
2. Examine the historical bases and evolution of diverse cultural ideas, behaviors, and issues.

Each course *may* also do one or more of the following:

- Critically examine the impact of cultural filters on social interaction so as to encourage sensitivity and empathy toward people with different values or beliefs.
- Investigate how discrimination arises from culturally defined meanings attributed to difference.
- Analyze how social institutions perpetuate systems of privilege and discrimination.

- Explore social constructs in terms of power relationships.

Mathematics

Outcomes

As a result of taking General Education Mathematics courses, a student should be able to:

- Use appropriate mathematics to solve problems; and
- Recognize which mathematical concepts are applicable to a scenario, apply appropriate mathematics and technology in its analysis, and then accurately interpret, validate, and communicate the results.

Criteria

A collegiate level Mathematics course should require students to:

1. Use the tools of arithmetic and algebra to work with more complex mathematical concepts.
2. Design and follow a multi-step mathematical process through to a logical conclusion and judge the reasonableness of the results.
3. Create mathematical models, analyze these models, and, when appropriate, find and interpret solutions.
4. Compare a variety of mathematical tools, including technology, to determine an effective method of analysis.
5. Analyze and communicate both problems and solutions in ways that are useful to themselves and to others.
6. Use mathematical terminology, notation and symbolic processes appropriately and correctly.
7. Make mathematical connections to, and solve problems from, other disciplines.

Science or Computer Science*

Outcomes

As a result of taking General Education Science or Computer Science* courses, a student should be able to:

- Gather, comprehend, and communicate scientific and technical information in order to explore ideas, models, and solutions and generate further questions;
- Apply scientific and technical modes of inquiry, individually, and collaboratively, to critically evaluate existing or alternative explanations, solve problems, and make evidence-based decisions in an ethical manner; and
- Assess the strengths and weaknesses of scientific studies and critically examine the influence of scientific and technical knowledge on human society and the environment.

* Computer Science not included as a core area for the proposed Foundational Curricula (2018). Remains as part of the AAOT General Education package.

Criteria

A General Education course in either Science or Computer Science* should:

1. Analyze the development, scope, and limitations of fundamental scientific concepts, models, theories, and methods.
2. Engage students in problem-solving and investigation, through the application of scientific and mathematical methods and concepts, and by using evidence to create and test models and draw conclusions. The goal should be to develop analytical thinking that includes evaluation, synthesis, and creative insight.
3. Examine relationships with other subject areas, including the ethical application of science in human society and the relevance of science to everyday life.

In addition,

A General Education course in Science should:

- Engage students in collaborative, hands-on and/or real-life activities that develop scientific reasoning and the capacity to apply mathematics and that allow students to experience the exhilaration of discovery; and

A General Education course in Computer Science* should:

- Engage students in the design of algorithms and computer programs that solve problems.

Social Science

Outcomes

As a result of taking General Education Social Science courses, a student should be able to:

- Apply analytical skills to social phenomena in order to understand human behavior; and
- Apply knowledge and experience to foster personal growth and better appreciate the diverse social world in which we live.

Criteria

An introductory course in the Social Sciences should be broad in scope. Courses may focus on specialized or interdisciplinary subjects, but there must be substantial course content locating the subject in the broader context of the discipline(s). Approved courses will help students to:

1. Understand the role of individuals and institutions within the context of society.
2. Assess different theories and concepts and understand the distinctions between empirical and other methods of inquiry.
3. Utilize appropriate information literacy skills in written and oral communication.
4. Understand the diversity of human experience and thought, individually and collectively.
5. Apply knowledge and skills to contemporary problems and issues.

Speech/Oral Communication*

*Speech/Oral Communication not included as a core area for the Proprosed Foundational Curricula (2018). It remains as part of the AAOT General Education package.

Outcomes

As a result of taking General Education Speech/Oral Communication courses, a student should be able to:

- Engage in ethical communication processes that accomplish goals;
- Respond to the needs of diverse audiences and contexts; and
- Build and manage relationships.

Criteria

A course in Speech/Oral Communication should provide:

1. Instruction in fundamental communication theories.
2. Instruction and practice of appropriate oral communication techniques.
3. Instruction and practice in the listening process.
4. Instruction and practice in comprehension, interpretation, and critical evaluation of communication.
5. Instruction and practice in adapting verbal and non-verbal messages for the listener and communication contexts.
6. Instruction in the responsibilities of ethical communicators.
7. Instruction in the value and consequences of effective communication.

Writing

Outcomes

As a result of completing the General Education Writing sequence, a student should be able to:

- Read actively, think critically, and write purposefully and capably for academic and, in some cases, professional audiences;
- Locate, evaluate, and ethically utilize information to communicate effectively; and
- Demonstrate appropriate reasoning in response to complex issues.

Criteria

A course in Writing should:

1. Create a learning environment that fosters respectful and free exchange of ideas.
2. Include college-level readings that challenge students and require the analysis of complex ideas.
3. Provide guided discussion and model practices that help students listen to, reflect upon, and respond to others' ideas.
4. Foster students' ability to summarize and respond in writing to ideas generated by reading and discussion.
5. Require a substantial amount of formal and informal writing.
6. Emphasize writing as a recursive process of productive revision that results in complete, polished texts appropriate to audience needs and rhetorical situations.
7. Foreground the importance of focus, organization, and logical development of written work.

8. Guide students to reflect on their own writing, to provide feedback on peers' drafts, and to respond to peer and instructor comments.
9. Direct students to craft clear sentences and to recognize and apply the conventions of Edited Standard Written English.
10. Provide students with practice summarizing, paraphrasing, analyzing, synthesizing, and citing sources using a conventional documentation system.
11. Require appropriate technologies in the service of writing and learning.

Information Literacy

Information Literacy outcomes and criteria will be embedded in the Writing Foundational Requirements courses.

Outcomes

As a result of taking General Education Writing courses infused with Information Literacy, a student who successfully completes should be able to:

- Formulate a problem statement;
- Determine the nature and extent of the information needed to address the problem;
- Access relevant information effectively and efficiently;
- Evaluate information and its source critically; and
- Understand many of the economic, legal, and social issues surrounding the use of information.

Criteria

A Writing course infused with Information Literacy should include:

1. Instruction and practice in identifying gaps in knowledge and recognizing when information is needed.
2. Instruction and practice in finding information efficiently and effectively, using appropriate research tools and search strategies.
3. Instruction and practice in evaluating and selecting information using appropriate criteria.
4. Instruction and practice in research strategies that are recursive and involve multiple stages such as modification of the original strategy and revision of the topic.
5. Instruction and practice in the ethical and legal use of information and information technologies.
6. Instruction and practice in creating, producing, and communicating understanding of a subject through synthesis of relevant information.

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APPENDIX C: FOUNDATIONAL CURRICULA QUESTIONS AND ANSWERS

Foundational Curriculum (FC)
Questions and Answers

What is the purpose of the Foundational Curriculum (FC)? What does it guarantee for the student?

> The FC is intended to guide students who are not yet certain about the major and school to which they will transfer. If the FC is completed, the set of courses are guaranteed to be accepted by any Oregon public university and applied to general education requirements for the bachelor's degree. Each university has identified at least 30 credits of general education requirements that are satisfied by the completion of the FC.
>
> At only 30 credits, the FC is NOT a complete first year curriculum. Advising will be necessary to guide the student in completing a full-time first year at a community college and make the optimal choices to making progress towards a specific major at a specific school.

Who should use the Foundational Curriculum?

> The Foundational Curriculum will assist students who are beginning a course of general studies at an Oregon community college with the intention to transfer to an Oregon public university, and who are unsure of their eventual major, and/or unsure of their eventual transfer institution. Students who are certain of both of these should consult an existing transfer guide for their intended transfer institution and major.
>
> Students who are certain of a major, but not a school, should consult the USTA for that major, if it exists, for guidance beyond the foundational curriculum (It should be noted that completion of the FC or USTA does not guarantee admittance to any university). Students who are certain of a school, but not a major, should consult a transfer advisor at their destination university.

Will the Foundational Curriculum replace the Oregon Transfer Module (OTM) or the Associate of Arts Oregon Transfer (AAOT)?

> No. While the design of FC attempts to address some of the weaknesses of the OTM, the OTM and AAOT continue to be available for students to follow and earn. The FC becomes another option for students who may not want to complete the full 45 credit OTM or the 90 credit AAOT. We believe, however, that the FC will be a more useful and focused transfer instrument for students who are still exploring potential majors, and who are unsure of their eventual transfer institution.

Additionally, the topical areas within the FC can (in alignment with university transfer policy and procedures) provide additional information which universities may choose to use to support transfer of individual courses outside the FC, OTM, or AAOT.

Will the FC be misleading, in that many majors require very specific general education/pre-requisites that are not specified within the FC? For instance, to ensure maximum transfer and junior status in the major for a student intending to transfer in Business, wouldn't it be better if there were specific courses in general education identified such as economics for the social sciences block?

The FC is intended to identify the most broadly applicable set of course choices for the broadest number of students. The FC is not intended to serve the same purpose as, nor supplant, major specific transfer guides. The FC also serves as a building block in the development of the emerging major-specific Unified Statewide Transfer Agreements (USTA), which will provide specific tracks for students at community colleges based on general education AND major requirements. In those USTAs, specific courses and/or elective options will be identified.

The FC identifies areas where consultation of a USTA is most likely to be useful, both for STEM and non-STEM majors, but, because of the large number of degree programs statewide and their complexities, it can not be expected to identify every area where consultation of degree-specific information may be beneficial to a student. (For instance, in order to meet ABET accreditation requirements, some engineering programs specify particular social science courses.) As soon as a student gains clarity about their intended major or target university, they are encouraged to begin referring to the USTA or institution-specific transfer information.

How will the universities treat the FC when they currently do not uniformly honor the OTM or the AAOT degree?

Under the mandate of HB2998, which requires a foundational curriculum be adopted by all Oregon public colleges and universities, all universities will be expected to accept and apply all courses from a completed FC to meet general education or equivalent requirements. (No such legislative mandate existed for the OTM.) The precise general education or equivalent requirements which are deemed to be fulfilled by the FC are at the discretion of each university, so long as the 30 credit threshold is met for the entire FC and courses are not treated as "free elective" credit.

It does not guarantee that all of the Universities general education requirements will have been fulfilled – many universities have additional or upper-division general education requirements beyond the lower-division general education requirements which the FC will fulfill.

The FC also does not negate degree-specific requirements that intersect with lower-division general education requirements. For example: if a student completes BIO211 and 212 to satisfy the Natural Sciences requirement in the FC, but their engineering major requires PHY221 and 222 as foundational requirements, the physics requirement would not be waived.

Will universities be required to change general education requirements or curriculum maps?

No. The foundational curriculum is designed to have rough alignment with the commonalities of general education requirements at all 7 public universities. Each university will decide which specific general education requirements are met by the FC categories.

Applying the FC to general education requirements may require a small amount of flexibility from universities, as they cannot "unpack" a completed FC to accept only some parts of it and not others. For example, a university may elect to "apply" the FC to their general education requirement of 6 credits of social science courses from two different disciplines. However, if a student completes the FC by taking two social sciences classes from the same discipline, the university must still deem that requirement as met.

How will this work, when some of the courses defined as meeting general education requirements at CCs do not align uniformly as general education courses at all of the universities. How will this issue be resolved?

The universities will commit to honoring courses identified by community colleges as meeting statewide AAOT general education outcomes [link to this here], and applying them to their general education requirements.

Community colleges will commit to a common and consistent standard of rigor in applying the outcomes and outcome descriptions to courses that faculty nominate as meeting general education outcomes.

We further recommend that the state put in place a mechanism to:

(1) track and centrally list courses identified by community colleges as meeting each of the FC subject categories, so that this doesn't have to be communicated piecemeal from school-to-school, but is available as a common statewide reference.

(2) put into place a peer-review process to examine a course identified by a community college to meet a general education outcome that a) does not appear to meet general education outcomes or b) is not accepted at a transfer institution to meet general education outcomes.

For instance, a community college or university could request a review of a course listed as meeting an AAOT general education outcome that does not

appear to fit the criteria; or, a community college or university could request a review if a course that is listed as meeting an AAOT general education requirement, but is not be accepted at one or more institutions as meeting FC areas. This peer-review process should involve both university and community college faculty.

.

Will the new FC provide new ways for students to transfer out of community colleges sooner rather than after their AAOT is complete?

No. The Foundational Curriculum does not define an optimal point of transfer, but provides a common framework for USTAs to be built upon. The optimal point of transfer will be identified in USTAs or based on the individual student's circumstances. These circumstances include not only their progress in a discipline but also other factors such as their financial, social and academic circumstances.

Is the state defining for community colleges their "meta-major" areas for transfer programs?

That is not the intent of the tracks in Foundational Curriculum. By identifying only two broad tracks, the Foundational Curriculum provides initial guidance for undecided students that will aid them in maximizing the use of their credits as early in their post-secondary academic career as possible.

How will this new curriculum be identified on transcripts?

Like the OTM, it probably will have a unique award statement, such as FC - Foundational Curriculum or FC-STEM. It will not replace the OTM designation, it will just be an additional option. This is a technical consideration for the state's registrars and admissions officials.

Why are Communication outcomes not included in FC? Aren't these skills ones that employers are clamoring for?

There is variability in the way these outcomes (Oral Communication in particular) are defined or met at individual universities that makes straightforward agreement on means of meeting these outcomes challenging. We recommend further work in this area to move towards inclusion of these outcomes in future revisions to the FC.

How will the Foundational Curriculum and USTAs be communicated? How will CCs and universities stay abreast of changes?

The Higher Education Coordinating Commission will maintain a publicly accessible clearinghouse of

- the Foundational Curriculum requirements,
- courses that meet the AAAOT outcome requirements,
- USTAs and their detailed course requirements.

While the USTA process has yet to be fully defined, we anticipate that universities will agree that they will continue to accept a USTA even if changes are made to the specific major; and that no changes to USTA course requirements will be made without approval from a process coordinated by the HECC and involving university and community college faculty.

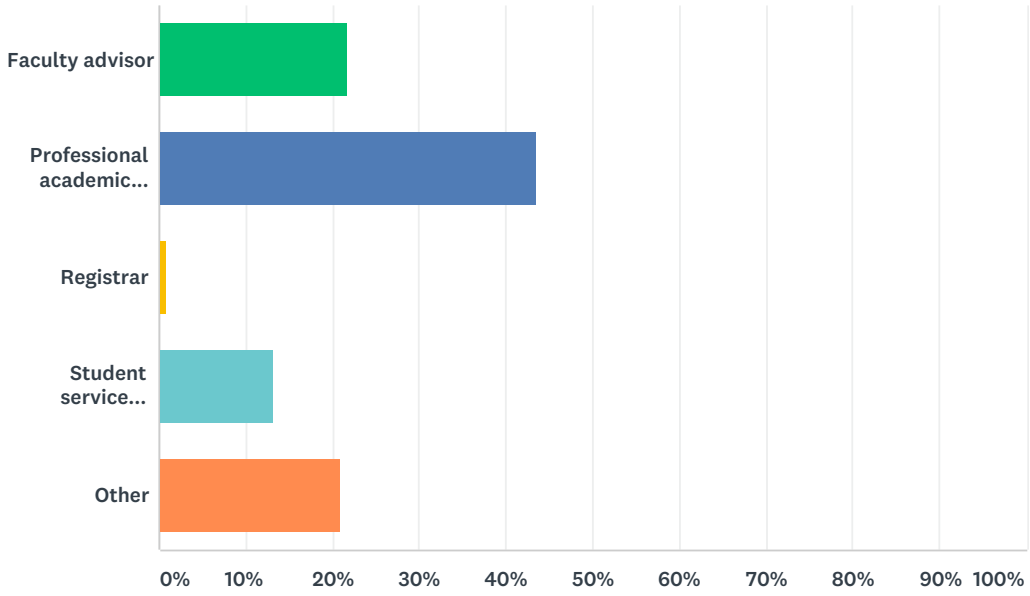
APPENDIX D: OREGON TRANSFER MODULE SURVEY RESULTS

Copy of OTM Survey for HB 2998 Workgroup

Q9 Are you

SurveyMonkey

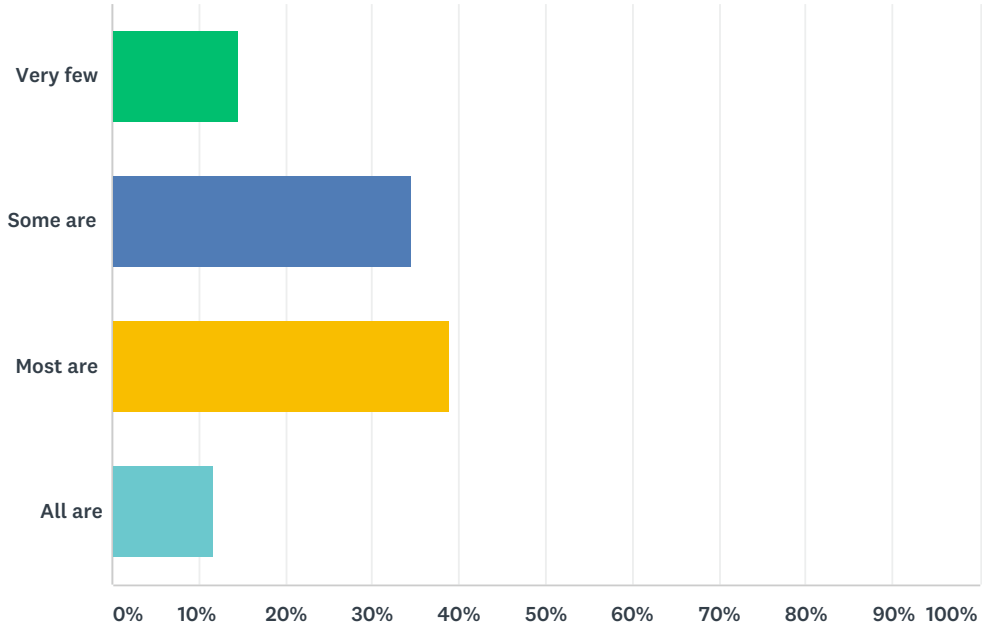
Answered: 129 Skipped: 7



ANSWER CHOICES	RESPONSES	
Faculty advisor	21.71%	28
Professional academic advisor	43.41%	56
Registrar	0.78%	1
Student service administrator	13.18%	17
Other	20.93%	27
TOTAL		129

Q1 Are your institution's advisors aware of the Oregon Transfer Module (OTM)?

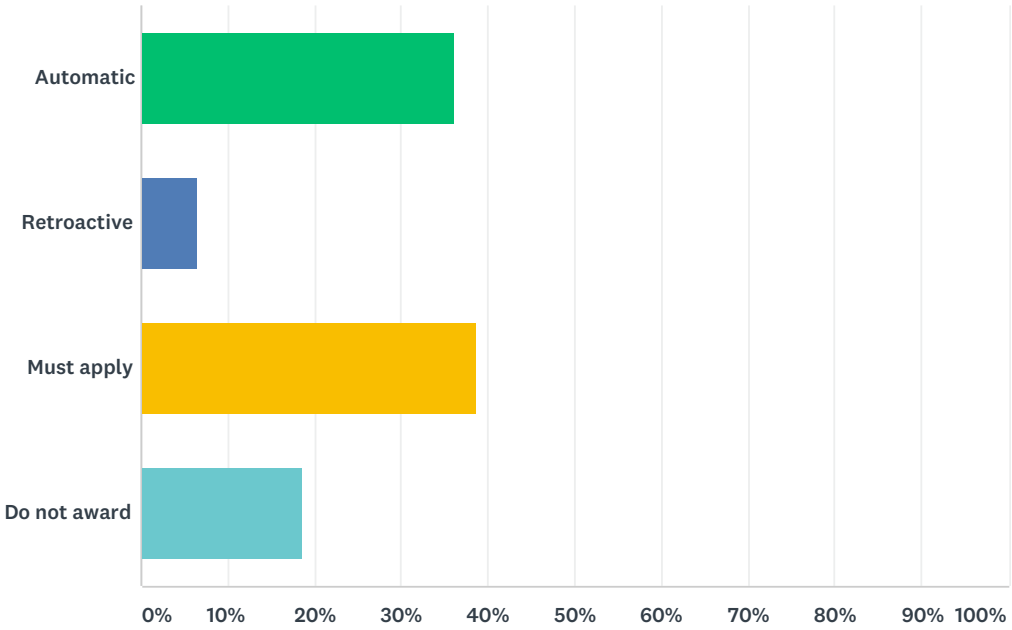
Answered: 136 Skipped: 0



ANSWER CHOICES	RESPONSES	
Very few	14.71%	20
Some are	34.56%	47
Most are	38.97%	53
All are	11.76%	16
TOTAL		136

Q2 Does your institution award the OTM, and if so how?

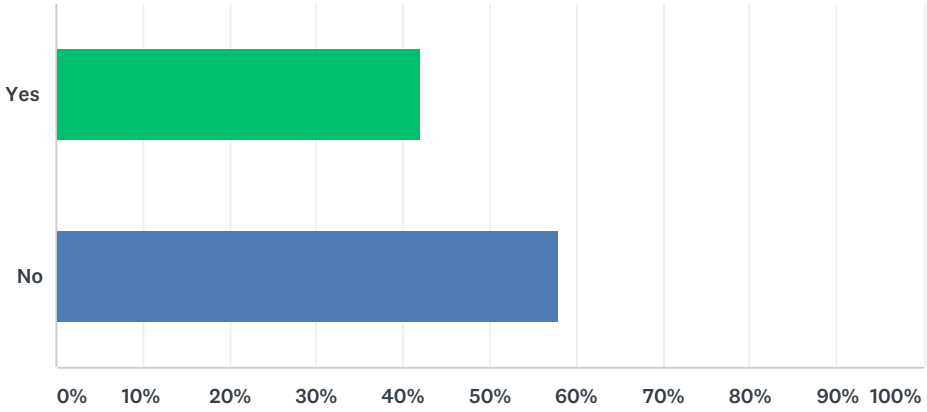
Answered: 124 Skipped: 12



ANSWER CHOICES	RESPONSES	
Automatic	36.29%	45
Retroactive	6.45%	8
Must apply	38.71%	48
Do not award	18.55%	23
TOTAL		124

Q3 For Community Colleges: Do community college advisors advise students to plan coursework around the OTM?

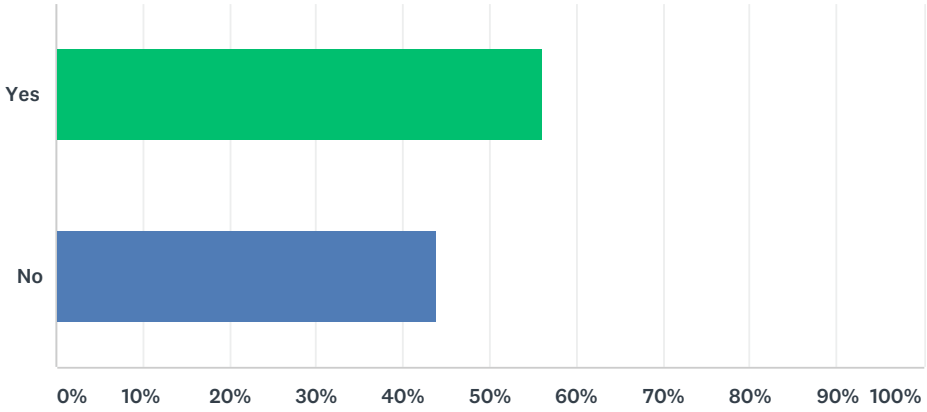
Answered: 112 Skipped: 24



ANSWER CHOICES	RESPONSES	
Yes	41.96%	47
No	58.04%	65
TOTAL		112

Q4 Do community colleges (sending) or universities (receiving) treat OTM as a first year transfer curriculum?

Answered: 125 Skipped: 11



ANSWER CHOICES	RESPONSES	
Yes	56.00%	70
No	44.00%	55
TOTAL		125

Q5 If you answered NO to question 4, why not?
Representative responses
Answered: 66

Our institution is much more focused on the AAOT and ASOT-B for transfer students

We don't have a standardized first year curriculum, students get to choose between BA/BS requirements. Students with OTM can transfer in with Sophomore standing purely from having enough credits to be a Sophomore. And certainly OTM has no bearing on whether a student is on track with their major.

For many years at this institution, the OTM was seen as a waster of time. A credential that took you no where.

The OTM is really a suggestion about courses students should take to advance towards completion of a four year degree. I would not call it a "curriculum"; there is nothing particularly cohesive or complete about it.

Universities don't see its value

There is no discussion around the OTM, most know that it exists, but there are no transfer guides that we use with students.

If "treat OTM as a first year transfer curriculum" means "advise students that it will fulfill first year requirements at a 4 year institution", we (CC) do not advise students that this is the case because it is not. At least 4 of the former OUS schools (as confirmed by their Registrars, most recently in June 2017) do not provide any specific benefit to students with an OTM; it is simply treated the same way as any other 45 transferrable credits, the individual courses are articulated or not based on the content, and fulfill individual gen ed requirements (or don't) based on those individual course-by-course articulations. Similarly for incoming students, we (CC) do not grant any specific benefit to students holding an OTM from another institution.

We (community colleges) do but only if it fits the student transfer goals.

Q6 If you could redesign or reform the OTM, how would you do it?

Answered: 62

Representative Responses

I would make it a block transfer for first year work and offer sophomore standing at the transfer institution with successful completion. I would also want to integrate a guided pathway model, so that the 45 credits was encompassing the needed prerequisite for specific majors

It may be easier to award in our system if it were a Certificate program. I would also provide more information about each of the OR public universities' core curriculums (link to each site?) so students know they need to be careful in their choosing depending on their transfer school.

Make it have a point that students can understand. Make it the core of the eventual redesign of AAOT that all universities will accept.

I would get rid of it. It is overall meaningless. When I worked at a community college most were not interested in it.

Honestly, any degree/certificate/module that markets itself as allowing students to transfer cleanly to EVERY school for EVERY major is deeply dangerous. Students MUST communicate early with their transfer institution about their graduation requirements and their major's requirements. Students who transfer in here with an OTM or AAOT routinely come in needing more credits than they expected because they though the OTM or AAOT alone would allow them complete their chosen degree in 2-3 years. I've seen enough student issues at transfer that I almost feel like the promotion of OTM and AAOT border on the unethical. That said, having worked at both college's and a university, I see OTM's as mostly irrelevent. I have never had a student ask about in 8 years of advising. Also, the OTM forces students to take health and communication courses that aren't needed at our institution. Students can also graduate here without taking math if they 2 years of a second language, and the OTM forces students to take math but not language. Some majors require a language, best done starting in their first year. Requiring math over language is not in the best interest of all students.

I don't know that it is the OTM that needs redesign or reform. I think the whole state system of transferability between colleges and universities should be looked at. Possibly looking into common course numbering and making it more transparent at the University level what courses from the Community Colleges will work toward not just General Education, but majors as well. Taking that information and creating common transfer degrees that the universities will acknowledge as meeting their ldc general education and major requirements so that students truly have two years (90 cr approx) to finish their Bachelor degree. If we had common transfer degrees, this would allow students to move or "swirl" between community colleges as well, without losing credits and/or having to take additional credits.

Q6 If you could redesign or reform the OTM, how would you do it?

Answered: 62

Representative Responses

I wouldn't. I would let it die its natural death. I think the OTM was an attempt to solve a perceived problem, but it was not fully supported by advisors, and therefore, rarely embraced. I think to reform it, we would need to determine the actual problem it is trying to solve and work on that. There is not a common curriculum across the state, and that presents challenges to having a single plan that works for everyone.

I was at a meeting where I heard a story about where the OTM came from: that Inter-Institutional Faculty Senate had developed the OTM because they had heard that if they didn't the state was going to step in. So they created the minimal product (the OTM) that could get the state off their backs about transfer. I don't know if that story is true. But if I could redesign the OTM, I would do it with the primary goal of serving STUDENTS, not the primary goal of serving faculty and institutional autonomy from oversight.

Q7 What do you think works best about the OTM?

Answered: 91

Representative Responses

I don't use the OTM
Nothing. It can do more harm than good.
The transferability of the OTM to the various community colleges and universities in Oregon.
It gives students a clear idea of when they can transfer and be considered a "transfer student," and what the base requirements are for admittance.
It is a good option for quicker transfer to a 4 year college and it is clear and simple (but perhaps falsely so)
streamlines education and reduces time and cost to student
Guarantees a minimum of math and writing.
Early progress incentive is a motivator for low-attention span students
The OTM provides some framework for students to choose courses who are on a short-time frame, but it is only useful if used with an academic advisor, most likely. How is a student supposed to know that it should be paired with the Direct Transfer requirements for a 4-year. I've worked at two different community colleges in the last six years, and I've met with approximately 3000-5000 students per year, and I've never used the OTM beyond being trained on how to use it.
Allowing students in their first year to explore their interests is important, so some flexibility is key. All students should take at least one writing class in their first term.
It is the bullseye in the dart board of education. Students can start in the center, regardless of degree path and work outwards towards major requirments. Most universities accept OTM courses as part of a Baccalaureate Core- so accepting courses "unwrapped"
If it is accepted at the four year institutions, it provides students an opportunity to get a full year under their belt and recognize that they are college material prior to transferring to larger institutions.
The uniformity, but Universities are working to undermine the usefulness of the degrees and transfers by adding so many classes that can only be taken at the university level the degree cannot be completed in two years after transferring. Also, universities are breaking their own rules and pushing junior level courses into sophomore year. Please read the League of Women Voters review of higher education in Oregon published this last year.

Q8 What would you like us to know about the OTM, the first year of college, and transfer students?

Answered: 93

Representative Responses

If the Universities are not going to be flexible with transfer coursework, doing something on the OTM level is a waste of time.

Students are really excited to get something tangible, so awarding a one year OTM certificate may be a way to create milestones for the student. While the OTM is flexible, it may encourage the student to take classes before a clear transfer goal is made contributing to excessive credit accumulation. Both of these things need to be taken into account.

At the community college level, it would be great to have a way to mark our transfer students as "complete" even if they don't get an Associate's degree. This may have been the point of the OTM, but I don't think it has quite worked at our institution.

That they need to have more guidance to show them options but keep them on track so that they do not take unnecessary classes or miss required classes. In the end, we want them to complete their education in a timely manner and reach their career goal.

Faculty are very particular about what will and won't be accepted for requirements. Statewide common agreement would need to be mandated in order to work. And if you can, move us to semesters. :)

Students are not taking the correct level or sequence of science courses for STEM majors.

How does it benefit the student to receive the OTM?

Many transfer students are undecided- even if they choose a major. For example "Business" and "Computer Science" are huge categories with specific majors inside them. Business is really "Marketing, accounting, etc" and computer science is really "programming, help desk, graphics" . The OTM makes it possible for students with these "big majors" to make progress towards a degree while still exploring major requirements.

This is very important - very much in sync with Guided Pathways work, and will help students save time and money in the long term.

APPENDIX E: EXCESS CREDIT BY MAJOR COURSE OF STUDY

Major Course of Study at Completion	Average Credits at Completion (First-Time Freshmen)	Average Credits at Completion (OR Community College Transfer Students)	Average Excess Credits
1408-Civil Engineering	212.7	240.4	27.7
5109-Allied Health Diagnostics, Intervention, and Treatment	222.9	248.5	25.6
1101-Computer & Information Sciences, General	202.6	226.9	24.4
0301-Natural Resources Conservation & Research	200.7	221.0	20.3
1419-Mechanical Engineering	214.3	233.9	19.7
3099-Multi/Interdisciplinary Studies, Other	190.8	209.0	18.2
1312-Teacher Education/Professional Development, Levels & Method	207.2	225.0	17.8
3105-Health & Physical Education/Fitness	203.1	219.9	16.8
5214-Marketing	197.4	210.7	13.3
4506-Economics	191.0	203.8	12.8
2301-English Language & Literature, General	197.7	210.0	12.3
5122-Public Health	196.2	207.5	11.3
4301-Criminal Justice & Corrections	190.3	201.1	10.8
5007-Fine and Studio Arts	206.5	217.2	10.7
4501-Social Sciences, General	187.5	197.6	10.1
1107-Computer Science	212.4	222.1	9.8
1907-Human Development/Family Studies/Related Services	194.3	204.0	9.7

2401-Liberal Arts & Sciences, General Studies/Humanities	192.3	202.0	9.6
2601-Biology, General	207.4	217.0	9.5
5203-Accounting & Related Services	210.1	219.7	9.5
5201-Business/Commerce, General	197.9	206.7	8.9
4502-Anthropology	192.0	200.9	8.9
4201-Psychology, General	190.6	199.2	8.6
3001-Biological & Physical Sciences	204.3	212.1	7.9
5401-History	197.9	205.1	7.3
5202-Business Administration, Management, & Operations	200.2	207.2	7.0
5208-Finance & Financial Management Services	202.9	209.8	6.8
0901-Communication & Media Studies	192.3	197.1	4.8
4510-Political Science & Government	194.5	199.1	4.5
4511-Sociology	190.1	194.2	4.1
2701-Mathematics	210.9	213.7	2.8
1609-Romance Languages, Literatures, and Linguistics	211.4	211.0	-0.4

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