# Chapter Two: Socially Just Design in the Transfer System

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| 1:00–1:15pm  | Welcome: Sara Stein Koch, Institute Fellow and Senior Associate for Institutional Support, Gardner Institute  
Chapter Introduction: Andrew K. Koch, President and Chief Operations & Innovation Officer, Gardner Institute |
| 1:15–2:15    | The Transfer Moment: Advancing Equity and Challenging the Status Quo - John N. Gardner, Chair and CEO, Gardner Institute; Janet Marling, Executive Director, NISTS |
| 2:15–2:20    | Break                                                                |
| 2:20–2:50    | Case Studies - Choose one of the following:                          |
|              | • Meeting the Highest Transfer Potential of Community College Students: Building a transfer admissions pipeline that targets institutional retention and promotes choice, access, equity, and success upon transfer. - Nancy Lee Sánchez, Executive Director of the Kaplan Educational Foundation  
While following the academic trajectory of a community college student, this session seeks to engage attendees in identifying policy and practice opportunities to fully support a transfer pipeline (from community college to four-year) that addresses retention pitfalls and barriers to degree completion. The goal is to identify the timeline and needed resources to engage students from recruitment through transfer, and ensuring that community college students have choice and the opportunity to meet their highest transfer potential. Attendees will receive an electronic copy of *Your Guide to College Transfer*. |
|              | • Coffee & Community for First-Generation Transfer Students: Culturally Responsive Space of Belonging - Micaela Bermudez, Undergraduate Programs Assistant; Angelica Caudillo, Educational Opportunity Program Counselor and Transfer Services Coordinator; Malaphone Phommasa, Director of Academic Success Initiatives; University of California, Santa Barbara  
Our weekly Coffee & Community program serves as an affirming, supportive environment for first-generation transfer students at the University of California, Santa Barbara. It began as a collaboration with the Educational Opportunity Program when the Transfer Student Center opened in 2016 and remains a beloved core program. This case study will highlight students’ experiences in Coffee & Community and present strategies for supporting first-generation transfers students’ sense of belonging while affirming their intersectional identities. |
|              | • Momentum Stoppers and Equity Blockers: The Implications of the Design of Gateway Courses and Curriculum for Students at Their Transfer-Receiving Institutions - Brent Drake, Fellow for Research and Innovation; Andrew K. Koch, President and Chief Operating & Innovation Officer, Gardner Institute  
Drawing on their chapter from the recently released book, *The Transfer Experience: A Handbook for Creating a More Equitable and Successful Postsecondary System*, Drs. Koch and Drake will examine the implications of gateway courses taken by transfer students at the institutions to which they transferred. The session will delve into outcomes for transfer students compared to non-transfer students as well as transfer students disaggregated by race/ethnicity, income, and first-generation status. The case study will call into questions assumptions about transfer students and the courses they take, as well as highlight opportunities for action for more just and equitable design in gateway courses and curricula. |
| 2:50–2:55    | Break                                                                |
Case Studies - Choose one of the following:

- **DirectConnect to UCF: A Consortium Framework for Impact** – Pam Cavanaugh, Associate Vice Provost, University of Central Florida

  As one of the largest transfer institutions in the nation, the University of Central Florida leverages a consortium framework, the Central Florida Higher Education Consortium, branded DirectConnect to UCF®, as an intentionally designed, partnership-driven, college access program. Built on the principles of access, choice, transition, flexibility, academic support and guaranteed pathways for progression and completion, DirectConnect to UCF® increases access to high-quality bachelor’s degrees to students who might not otherwise attend a four-year university. Since 2006, UCF has awarded more than 56,900 bachelor’s degrees to students through this program, improving the social mobility and critical workforce needs of the region.

- **Social Justice in Designing and Implementing a Transfer & Returning Student Resource Center** – Randi Harris, Director, Transfer & Returning Student Resource Center; Shayna Snyder, Transfer and Returning Student Advisor; Portland State University

  This session presents a case study of the design and implementation of Transfer and Returning Student Resource Center at Portland State University, with Equity and inclusion as core values. The TRSRC committed to ongoing work towards racial justice and being anti-racist, recognizing the ways in which white supremacy shapes campus cultures. We will talk about the ways in which we are actively taking steps to dismantle and re-envision how PSU and the Transfer and Returning Student Resource Center can be for all students, faculty, and staff.

- **How Prior Learning Assessment Contributes to a Socially Just Transfer System** – Rose Rojas, Interim Director, Workforce Strategies; Kathy Silberman, Senior Transfer Coordinator; Maricopa Community College

  Students often enter our institutions with prior college-level learning, not only from a traditional in-person or online classroom, but also achieved through work, military experiences, high school standardized exams, or other non-traditional forms of prior learning. This learning can often translate to college credit, but restrictive and outdated Prior Learning Assessment policies and practices can prevent successful implementation. As our institution is making significant strides utilizing PLA to improve access and degree completion for all students, we will share our accomplishments, challenges, and where we are headed as we continue to integrate PLA into our curriculum, student services and workforce initiatives.

3:15 - 3:20 Break

3:20 – 4:30 **Shaping the Movement: Discussion on a Socially Just Design in the Transfer System** – Katie Locke, Director of Marketing and Communications and Ed Willis, Resident Fellow, Gardner Institute

**Key Note Presenters**

**John N Gardner**

John Gardner is a non-profit organization co-founder and CEO, professor, and higher education change agent whose principal interests have been in improving student success in critical undergraduate transitions: first year, sophomore, transfer, and senior, especially for all those who are less privileged than he was as a child. John is the founder of two national entities: 1) The National Resource Center for the First-Year Experience and Students in Transition at the University of South Carolina; and 2) with his wife, Betsy O. Barefoot, the John N. Gardner Institute for Excellence in Undergraduate Education (based in Brevard, North Carolina).

**Janet Marling**

Janet L. Marling, Ph.D. has been affiliated with NISTS since its establishment in 2002 and was named executive director in 2011. In this role and through her extensive speaking, training, and consulting activities, Dr. Marling works with individuals, higher education institutions and associations, state agencies, foundations, and legislative bodies to improve transfer policy, practice, and research. She edited the New Directions for Higher Education volume titled, Collegiate Transfer: Navigating the New Normal, published by Jossey-Bass, and has been involved as a project director and/or co-principal investigator for multiple research grants focusing on transfer student success.
Facilitators

Katie Locke
Katie is an experienced marketer, communicator, and equity advocate. Driven by social justice and equity, she takes pride in working towards achieving the institute's social justice mission. As the Director of Marketing and Communication, Katie leads the communications and marketing efforts for the Gardner Institute, serves on the Excellence in Academic Advising Core team, and co-leads the Socially Just Design Project team for the Gardner Institute. She lives in Asheville, NC with her daughter Annabell.

Sara Stein Koch
Sara is an Institute Fellow and Senior Associate for Institutional Support with the Gardner Institute. She has spent the past three decades in administration, training, coaching, facilitation, and teaching in higher education.

Her current work with the Institute involves the development of Excellence in Academic Advising. She also advises institutions in Excellence in Academic Advising, Foundations of Excellence First-Year and Transfer, Gateways to Completion, and Retention Performance Management processes. She also coordinates the curriculum for the Annual Gateway Course Experience Conference. Sara was involved in the development of the Gateways to Completion process, development and administration of the two year National Survey on Student Success practices, and strategic planning for the Institute.

Ed Willis
Ed Willis is a seasoned university administrator providing vision and leadership for diverse student-body environments, while managing key internal and external stakeholder relationships involving student affairs. He possesses a deep understanding of the academic process and its relationship to student issues, as well as the ability to identify and implement initiatives that promote student-centered communities, improve the quality of the student experience, and bolster university relations. As a leading expert on student-centered learning environments, Ed has held significant roles at major research universities, historically black colleges and universities, and large commuting/community colleges with student populations from 7K to 40K.

Case Studies Presenters

Michaela Bermudez
Micaela (Mica) is a first-generation, transfer, and a non-traditional college graduate from the University of California, Santa Barbara (UCSB). In 2019, she received her B.A. in Psychology with a minor in Applied Psychology and completed her undergraduate research examining self-efficacy beliefs and belonging among first-generation college students. She’s the Programs Assistant for the ONDAS Student Center and Transfer Student Center at UCSB. Mica assists in the planning, coordination, and evaluation of all Center workshops and programs that are designed for transfer students and first-generation college students. She is dedicated to supporting, mentoring, and motivating traditionally underserved and minoritized students.

Angelica Caudillo
Angelica Caudillo, M.S., is a College Student Personnel, Educational Opportunity Program (EOP) Counselor and Transfer Services Coordinator at University of California, Santa Barbara for over 5 years. Angelica's background includes orientation services, career advising, and veteran's liaison and coordinator. She grew up in Ventura County and completed her bachelor's at UCSC and master's in Counseling and Guidance at California Lutheran University. Angelica has focused her efforts on first-generation college students for over ten years at different institutions, and the transfer student population has been her core serviced population for the past seven years.
Randi Harris is the Director of the Transfer & Returning Student Resource Center at Portland State University. She leads and collaborates on innovative projects and initiatives to enhance student learning, experience, and success.

Andrew K Koch

Dr. Koch is a child of immigrants who came to the United States in pursuit of a better life. His first language was not English, and his family viewed postsecondary education as the best means for realizing the American Dream. He is a staunch advocate for and leader of efforts that eliminate people's educational and life successes being bound by the color of their skin and/or their family circumstances. He has worked in and with higher education institutions for nearly thirty years – the last eleven with the Gardner Institute where he is the President and Chief Operating & Innovation Officer.

Dr. Malaphone Phommasa (she/her) is a proud daughter of Lao refugees and first-generation college graduate. She serves as the Director of Academic Success Initiatives in the Office of Undergraduate Education at the University of California, Santa Barbara, focusing her efforts on supporting the success of first-generation college students and transfer students. Prior to her current role, Malaphone was the founding Director of the UCSB Transfer Student Center and served as an Assistant Professor, Minority Faculty Fellow at Marshall University. She is a scholar-practitioner who is passionate about advancing equity, access, and opportunity for minoritized and underserved students in higher education.

Rose Rojas, Interim Director of Workforce Strategies at the Maricopa Community Colleges (Arizona), develops innovative pathways to increase student access to college and success in the workforce. In her prior role as Director of the Center for Curriculum and Transfer Articulation, she established Maricopa as a leader in student transfer by creating a university partnership model adapted by community colleges across the country. She serves on several higher education advisory boards and co-authored a chapter on PLA for the recently published book, The Transfer Experience: A Handbook for Creating a More Equitable and Successful Postsecondary System (Gardner, Rosenberg and Koch).
Nancy Lee Sánchez is the Executive Director of the Kaplan Educational Foundation. Author of “Your Guide to College Transfer” and an education contributor to Forbes, Sánchez is responsible for the design and implementation of the Kaplan Leadership Program community college to four-year advisement model, which prepares low-income, under-represented and nontraditional students to transfer to top institutions and become leaders in their communities and profession. Sánchez has over 25 years of expertise providing greater access to higher education, improving the college experience, and supporting leadership among low-income, under-represented and nontraditional students through collaborative partnerships that target degree-attainment gaps. She is a 2021 Doctoral candidate in Educational Innovation and Leadership at NYU.

Kathy Silberman has worked in higher education for 19 years in academic advisement, recruitment, disability services, and currently, as a Senior Transfer Coordinator in the Center for Curriculum and Transfer Articulation at the Maricopa Community Colleges in Arizona. She enjoys collaborating with advisors and the district’s four-year institution partners to support student transfer and degree completion. She and Rose Rojas co-authored a chapter on Prior Learning Assessment in the newly published book, The Transfer Experience: A Handbook for Creating a More Equitable and Successful Postsecondary System (Gardner, Rosenberg, and Koch).

Shayna Snyder is a Transfer and Returning Student Advisor in the Portland State University Transfer Center. Through teaching, advising, and creating and facilitating workshops, their focus is on creating educational spaces that foster a sense of belonging and promote self-advocacy for all students.

Thank You to NISTS -This Chapter’s Co-Authors
The National Institute for the Study of Transfer Students (NISTS) exists to improve the lives of transfer students. Through research, education, and advocacy, we support professionals who directly serve transfer students, as well as those who create transfer policy and conduct transfer-related research.