

Participant Handout

Introduction

Welcome to the eleventh Transfer Intensive session! This participant handout will allow you to capture your thoughts, conversations, and reflections throughout the session, particularly during your partnership team breakout group time. Please reference the session agenda on page 3 for an overview of the day's activities. Notecatchers begin on page 4.

Session Objectives

By the conclusion of the STEP Launch, participants will:

- Agree on the action items and timeline to sustain and implement the STEP following the conclusion of the Transfer Intensive
- Understand their critical individual roles in being an advocate for transfer beyond the STEP Launch
- Identify additional stakeholders/personnel on both campuses who need to be engaged in the next phase of the transfer reform work

Participating Teams

1. Queens College, CUNY – LaGuardia Community College – Queensborough Community College
2. California State University- Fullerton – Fullerton College
3. University of Hawaii-West Oahu – Honolulu Community College – Kaua'i Community College
4. University of Houston-Downtown – College of the Mainland
5. University of North Carolina-Charlotte – Central Piedmont Community College
6. Idaho State University – College of Southern Idaho
7. Portland State University – Portland Community College
8. University of Southern Maine – Southern Maine Community College
9. Metropolitan State University of Denver – Community College of Denver
10. Slippery Rock University – Butler County Community College – Community College of Beaver County

Zoom Logistics

To help us better facilitate the breakout conversations and sustain an engaging virtual environment, please consider the following:

- Make sure Zoom is downloaded on your device in advance of the meeting time.
- You are encouraged to use your video camera for the duration of the session, taking breaks as needed.
- **Please update your Zoom display name according to the naming conventions presented below. This will allow us to sort you into breakout rooms more quickly.** You can rename yourself by clicking the three dots next to your name in the Participant Window and selecting the option to “rename.”
 - Team number (available on page 1) - Name
 - Example: 11-Kate Hamilton
- In the top-right corner of the Zoom window, you will see an option for “Gallery View” or “Speaker View.” It is recommended that you have the “Speaker View” selected.
- To communicate with the moderators or presenters or to ask a question, please use the chat feature found in the settings bar at the bottom of your screen.
- Please visit the Zoom support web page to learn about the computer requirements to join a Zoom meeting. For the videoconference, we recommend using a well-lit room with minimal background noise.
- If you encounter technical difficulties or disconnect unexpectedly during the video conference, please text (951) 536-5339 for assistance.

Session Agenda

2:00 – 2:10 PM ET	Welcome & Announcements Kate Hamilton
2:10 - 2:50 PM ET	Presidential Reflection and STEP Keynote Presentations Team 6: Idaho State University and College of Southern Idaho Team 7: Portland State University and Portland Community College
2:50 - 2:55 PM ET	Breakout Room Instructions Kate Hamilton
2:55 - 3:05 PM ET	Partnership Team Breakout: Presentation Reflection Discussion led by PMs
3:05 - 4:10 PM ET	Full Partnership Team Breakout: STEP Sustainability Discussion led by Team Facilitators
4:10 - 4:30 PM ET	Conclusion and Evaluation Kate Hamilton

Keynote Speakers and Q&A

Presentation led by:

Team 6 | 20 mins

- President Robert Wagner, Idaho State University
- President L. Dean Fisher, College of Southern Idaho

Team 7 | 20 mins

- President Ann Cudd, Portland State University
- President Adrien Bennings, Portland Community College

NOTES:

- **Team 6**

- Transfer vision statement shared
- Keeping their own identity and mission and still focusing on transfer and education
- Programs: Health sciences, education, engineering, computer science
- Land to Idaho state- to build a building
- Co-admission.
 - Apply once to both
 - 4 year experience
 - Intentional relationship building
 - Summits
 - Teams work together and communicate well

Semester College Visits: Staff from both institutions participate in regular visits each semester. These visits allow advisors to connect directly with students and provide guidance on transfer opportunities and degree planning.

Reverse-Engineered Advising Pathways: Advising pathways are designed backwards from the bachelor's degree requirements at ISU, ensuring that students taking courses at CSI are completing coursework that aligns seamlessly with their intended ISU programs.

Proactive Advisor Connections: We intentionally avoid asking students directly if they are planning to transfer. This approach allows advisors to connect students with ISU advisors **earlier in their academic journey**, building awareness of transfer options and establishing relationships long before a formal transfer decision is made.

- **Team 7**

- MOU signed by Presidents
- Student Empowerment= focus
- Goal is to graduate them in no more than 200 credits
- Locate Univ on CC campus
- Co map top 10 majors
- Shared governance and working groups
- Co-marketing approach
- Awareness of on-campus activities
- Communication plan
- Embedded staff

Presentation Reflection

Activity led by PMs

GUIDING QUESTIONS:

- What initial reflections do you have from the STEP presentations?
- What specific questions or actions will you need to discuss with your presidents to ensure sustainable implementation of the STEP?

NOTES:

End this discussion at 1:05

- Questions not answered directly- great intentions - and what about the details of the practices
- Much of what they named we have done
- Measurable goals (Idaho) - interesting
- The way forward...
 - Human hours and hard work
 - SIS - how to work together? MSU Denver is changing theirs (live Jan 2027)
- Tag line - like One Good Decision
- Team 9- We have- presidential alignment, MOUs, Articulation agreements
- Team 9- Middlewear vendors? Past conversation, SIS challenges. MSU Denver needs to get those (SIS changes) resolved to support such exploration
- Team 9- How to market and include CU Denver
- Team 9- How might we engage in joint recruiting from high school forward
- Team 9- Advising- advisor to advisor vs advisor to transfer rep would be better
- Team 9- Transfer team at MSU Denver. Maybe move up time re: exposure and hand off
- Team 9- We have the means to sustain this effort and have a transfer summit coming up later in February.
- Team 9- We have the opportunity to explore combined advising spaces on the Auraria Campus.
- Team 9-Marketing- testing communications- working on industrial design right now. Key messages needed and how will we measure effectiveness. Campaign needed- how to share costs for that?
- Team 9-Degree attainment - shared program maps - would like to see that there
 - Summit will speak to this and support goal setting to fill in the STEP

STEP Sustainability

Activity led by Facilitators

Part 1: STEP Executive Summary

Instructions: PMs will spend 5-10 minutes presenting an overview of the finished STEP. Cabinet Leads should take notes while PMs are presenting.

NOTES:

Part 2: Implementing the STEP

Instructions: Facilitators will lead teams in a discussion of the following questions. Team members and presidents should provide comments and reflections. PMs should take notes on the topics discussed and the next steps essential for implementation.

Strengthening Communications		
<i>STEP sections to reference: Reform Strategies, Implementation Timeline, Our Team</i>		
Discussion Question	Notes	Next Steps
<u>Audience:</u> Which 2–3 stakeholder groups (potential students, faculty, community members, employers, parents, etc.) most need to understand your reform strategies and near-term timeline?		
<u>Intent:</u> Why are these stakeholder groups the most important for STEP implementation, and what support do you need from them in return?		
<u>Message/Messenger:</u> Who should deliver the message, and what key points do these audiences need to hear to support understanding, buy-in, or resource needs? How can you most effectively build a case for buy-in from these stakeholder groups? What support can your presidents provide to maximize casemaking effectiveness?		

Addressing Challenges

STEP sections to reference: Reform Strategies, Implementation Timeline

Discussion Question	Notes	Next Steps
Considering your reform strategies and your implementation timeline, what are the 1–2 biggest barriers that could keep your STEP from moving forward as planned in the next year?		
For each barrier, what is one proactive, concrete action the team (and the presidents) can take now to reduce or prevent it?		

Ensuring Sustainability

STEP sections to reference: Reform Strategies, Our Team

Discussion Question	Notes	Next Steps
What funding sources are available to support start-up costs? What funding sources are available to support recurring costs and the long-term sustainability of the STEP? Where might each institution look in its budget for reallocating funding?		
Who is responsible for each reform strategy or other component of STEP implementation, and how will these responsibilities be reinforced by the structures and roles described in your “Our Team” section?		

Concrete Next Steps

STEP sections to reference: Our Team, Implementation Timeline

Discussion Question	Notes	Next Steps
Based on your STEP, what recurring meeting cadence (frequency, format, and core participants) will best support implementation in the first 6 months?		
Who will lead the first meeting, and what decisions or tasks need to be completed at that meeting to launch implementation successfully?		
Before leaving today, what are your immediate next steps for the next 30 days, and who is responsible for each?		