



Revised CAS Standards for TRANSFER STUDENT PROGRAMS & SERVICES

National Transfer Student Week
October 22, 2025 | 11am ET



National

Transfer

Student

Week

TODAY'S PRESENTERS



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Daniel Wright

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Christopher Robinson

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Cedric Howard

Seattle Colleges District

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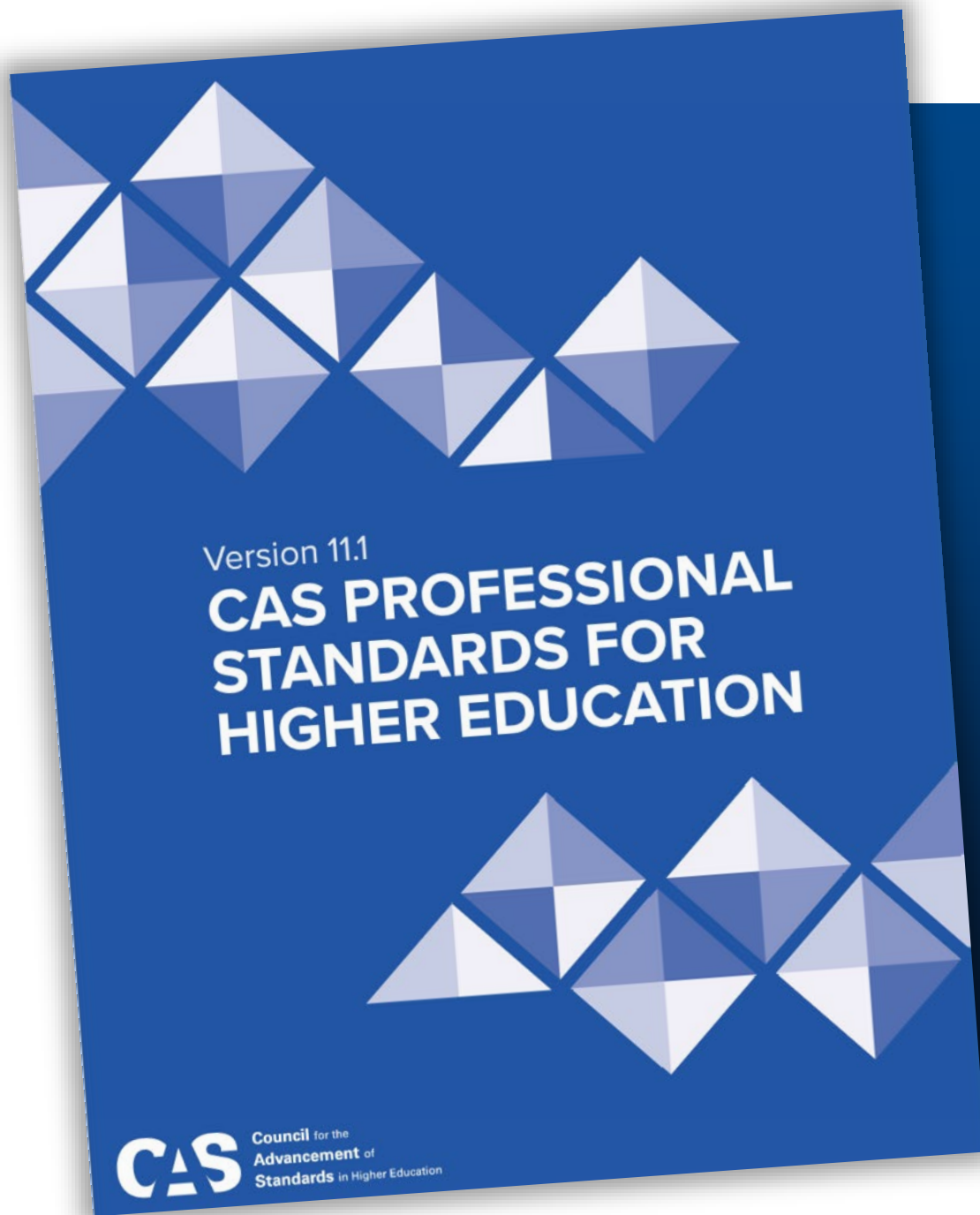
Rita Snyder Furr

George Mason University

QUICK POLL

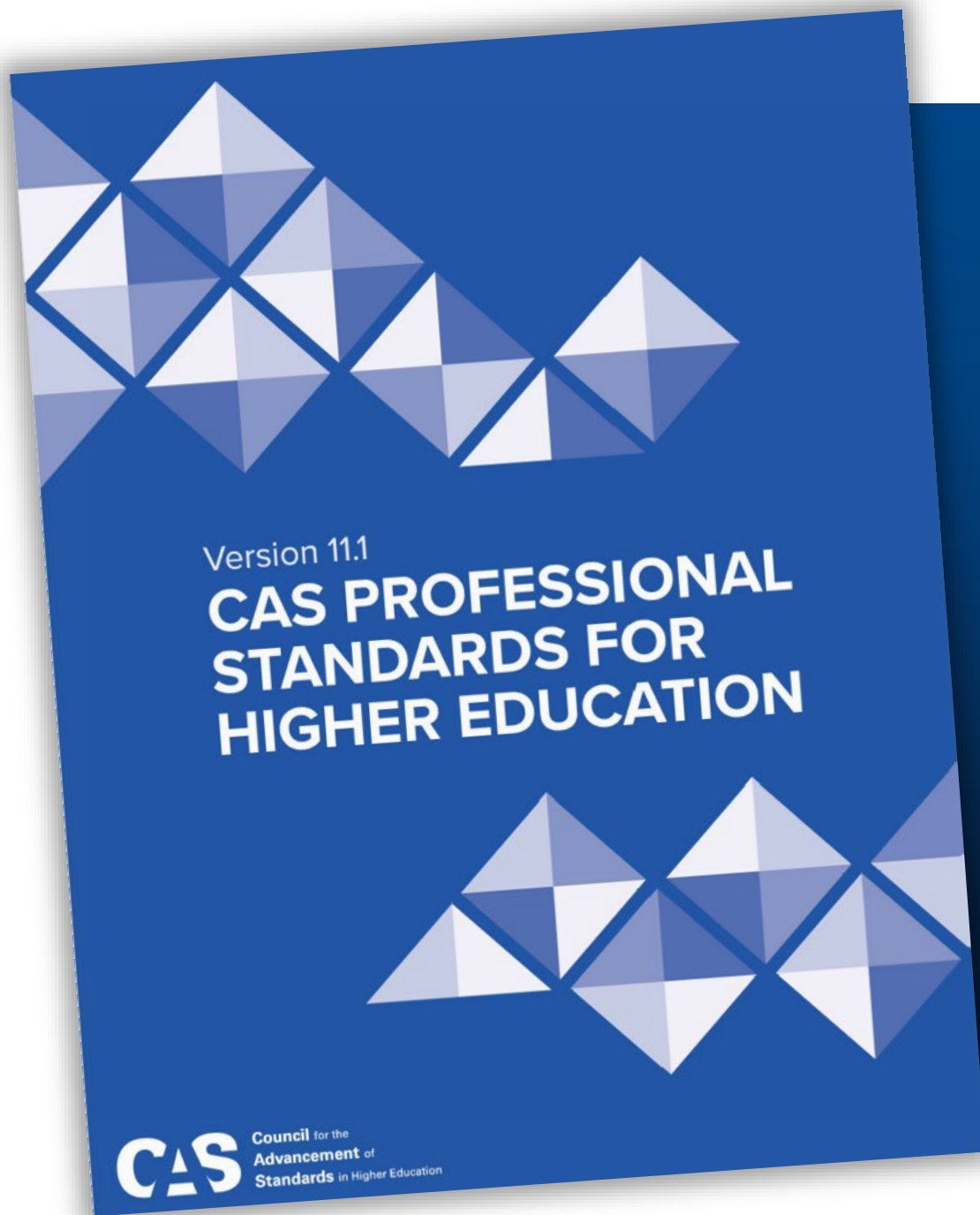
What is your level of experience with CAS?

1. I am learning about CAS for the first time.
2. I have read or attended a presentation about CAS.
3. I have used the CAS Standards and Guidelines in my work.
4. I am a CAS expert and have reviewed CAS materials extensively.



TODAY'S CONVERSATION

- NOT a deep dive
- ✓ Quick introduction



TODAY'S CONVERSATION

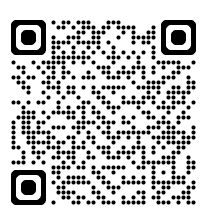
- CAS Overview
- TSPS Revision Focus
- Self-Study Process



ENTITY



DOCUMENT/
PROCESS



CAS Contextual Statement

TRANSFER STUDENT PROGRAMS AND SERVICES

This document and the provide a historical gro framework for Transfer (TSPS) that both transfe institutions can adapt b resources, and student prescriptive, these rec of services needed to goals, from degree co

Institutions have varyi students. This docume those who, after high s (1) enrolled in multiple (2) enrolled in one po in the process of enr regardless of whether Although transfer occ focuses on undergrad United States, where transfer each year (Ka

Because each institu is no universal appro or positioning TSPS v organizational structi dedicated transfer o while others distribu existing department orientation, registr

Regardless of struct ensuring that transfe credit equivalencie students receive ac throughout their tra holistic delivery of c are encouraged to related functional a New Student Orie Undergraduate Ad

Transfer Origins a

The transfer pathw

Transfer Student

CAS Standards and Guidelines

TRANSFER STUDENT PROGRAMS AND SERVICES



INTRODUCTION AND INSTRUCTIONS CAS Self-Assessment Guide

The *Self-Assessment Guides* (SAG) translate functional area CAS standards and guidelines into tools for conducting self-study. Educators can use this SAG to gain informed perspectives on the strengths and deficiencies of their programs and services as well as to plan for improvements. Grounded in the reflective, self-regulation approach to quality assurance in higher education endorsed by CAS, this SAG provides institutional, divisional, departmental, and unit leaders with a tool to assess programs and services using currently accepted standards of practice.

The *Introduction* outlines the self-assessment process, describes how to complete a programmatic self-study, and is organized into three sections:

- I. Self-Assessment Guide Organization and Process
- II. Rating Examples
- III. Formulating an Action Plan, Preparing a Report, and Closing the Loop

The introduction is followed by the *Self-Assessment Worksheet*, which presents the CAS standards for the functional area and incorporates a series of criterion measures for rating purposes.

I. Self-Assessment Guide and Process

CAS developed and has incorporated a number of common criteria that have relevance for each and every functional area, no matter what its primary focus. These common criteria are referred to as "General Standards," which form the core of all functional area standards. CAS standards and guidelines are organized into 12 parts, and the SAG workbook corresponds with the same sections:

- | | |
|--|---|
| Part 1. Mission | Part 7. Human Resources |
| Part 2. Program and Services | Part 8. Collaboration and Communication |
| Part 3. Student Learning, Development, and Success | Part 9. Ethics, Law, and Policy |
| Part 4. Assessment | Part 10. Financial Resources |
| Part 5. Access, Equity, Diversity, and Inclusion | Part 11. Technology |
| Part 6. Leadership, Management, and Supervision | Part 12. Facilities and Infrastructure |

For each set of standards and guidelines, CAS provides a Self-Assessment Guide (SAG) that includes a recommended comprehensive self-study process for program evaluation. Seven basic steps to using a SAG are suggested for implementing a functional area self-study. The following self-study process is recommended.



CAS OVERVIEW

What is CAS?

- HE Consortium
 - 45 + years
 - 40+ organizations
 - 50+ standards & self-assessment guides

Why Standards?

- Comprehensive framework to create, evaluate, & improve
- Grounded in research, equity, and student success

MANY USES OF CAS

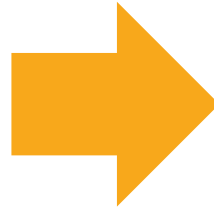
Not prescriptive, but adaptable to institutional context.

- Design new or reimagine programs and services
- Develop learning and development outcomes
- Focus time, energy, and resources
- Enact continuous improvement → *strategic & operational planning, program assessment*

TSPS REVISION CHALLENGE

THEN (2011)

- Creating from scratch
- Functional area-focused
- Right for the moment, but...



NOW (2023)

- Research floodgates!
- Broad scope:
 - Multi-Units
 - Sending + Receiving
- Holistic support and “success”

Contextual Statement

CAS Contextual Statement

TRANSFER STUDENT PROGRAMS AND SERVICES

This document and the accompanying standards provide a historical grounding and modern-day framework for Transfer Student Programs and Services (TSPS) that both transfer-sending and -receiving institutions can adapt based on their missions, resources, and student demographics. While not prescriptive, these recommendations outline the scope of services needed to support transfer students' varied goals, from degree completion to career advancement.

Institutions have varying criteria for categorizing transfer students. This document defines transfer students as those who, after high school graduation, have either: (1) enrolled in multiple postsecondary institutions, or (2) enrolled in one postsecondary institution and are in the process of enrolling in an additional institution, regardless of whether transfer credits are conferred. Although transfer occurs globally, this framework focuses on undergraduate students transfer in the United States, where well over one million students transfer each year (Karamarkovich et al., 2025).

Because each institutional context is unique, there is no universal approach to serving transfer students or positioning TSPS within an institution's broader organizational structure. Some institutions create dedicated transfer centers that consolidate services, while others distribute transfer responsibilities across existing departments (e.g., admissions, advising, orientation, registrar) with designated personnel.

Regardless of structure, TSPS plays a vital role in ensuring that transfer pathways are clearly documented, credit equivalencies are fair and transparent, and students receive accurate, consistent guidance throughout their transfer journeys. To confirm the holistic delivery of essential transfer supports, readers are encouraged to review the CAS standards of related functional areas, such as Academic Advising, New Student Orientation, Registrar Services, and Undergraduate Admissions.

Transfer Origins and Evolution

The transfer pathway emerged in the early 1900s when

the University of Chicago and Joliet College formally separated the delivery of lower-division coursework from specialized upper-division study (Handel, 2013). This 'junior college' model spread quickly across the country, with transfer as the primary purpose until economic and labor pressures of the 1930s-40s prompted a significant shift toward terminal vocational degrees and job training. Federal policy initiatives in the 1960s further cemented local workforce development as a central mission, leading to the significant expansion of the comprehensive 'community college' system, inclusive of entire academic and occupational programs rather than lower-division courses. Transfer remained a dominant function of junior and community colleges until the 1970s, when enrollment in occupational programs increased dramatically from one third to over 50 percent of full-time students (Handel, 2013).

The utilization of community colleges as venues both to acquire lower-division course credits and to enroll in degree-granting programs created a complex relationship between community colleges and universities that persists today (Handel, 2021). Early university leaders who supported the transfer model were motivated by competing institutional priorities: expanding college access for growing numbers of high school graduates while preserving their ability to selectively admit students. This tension has shaped transfer policies for over a century and sparked ongoing debates about institutional responsibilities and student success. As Handel (2021) observed, community colleges have traditionally shouldered most of the responsibility for transfer outcomes, whereas universities' equally significant role has received far less scrutiny. In recent years, however, more universities have begun acknowledging their responsibility in the transfer process, recognizing community college transfers as an enrollment source and developing more intentional supports to facilitate their success.

Although limited transfer research evolved alongside community colleges' expansion, transfer-specific theoretical frameworks didn't appear until the 2010s (see Brinkley-Etzkorn & Cherry, 2022). Extensive literature reviews, such as the

CAS

Contextual Statement

1. Introduction
2. History
3. Key Tenets
 - Transfer Pathways
 - Transfer Barriers
4. Current Trends
 - Reframing the Transfer Student Experience
 - Partnerships and Collaboration
5. Persistent Challenges
 - Limited Access to Data
 - Power Imbalances
 - Belonging & Engagement
6. Looking Ahead

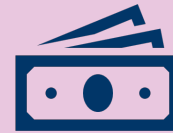
BARRIERS TO TRANSFER SUCCESS



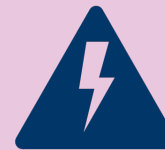
1. Diffuse or Inaccurate Information



2. Course and Credit Issues



3. Financial Challenges



4. Campus Environments



BARRIER #1

Diffuse or Inaccurate Information

- Outdated websites and inconsistent messaging
- Understaffed offices, possibly lacking transfer expertise
- Impact on student decision-making

BARRIER #2

Course Transferability & Credit Articulation Issues

- Credit loss and overaccumulation
- Misaligned requirements and varied numbering systems
- Limited course availability during transfer registration



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FINANCIAL AID



BARRIER #3

Financial Challenges

- Hidden costs beyond tuition
- Financial aid gaps and misaligned deadlines
- Balancing work, family, and education expenses

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BARRIER #4

Ambivalent Campus Environments

- Assumptions about transfer student abilities and preparedness
- Stigma and self-doubt among transfer students
- "Rationalized neglect" in institutional structures



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TRANSFER STUDENT EXPERIENCE

Brief Transition v. Complex Journey



TRANSFER STUDENT EXPERIENCE

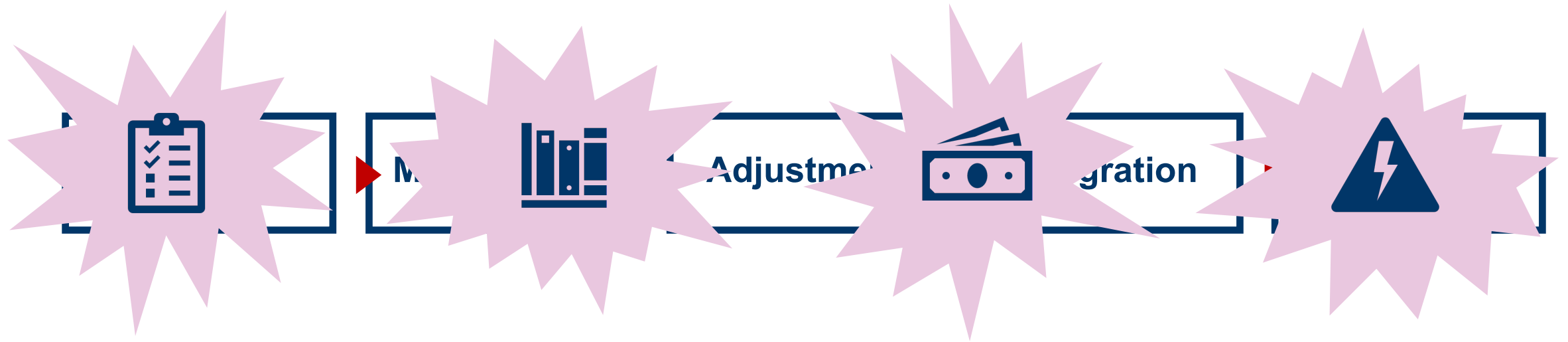
Brief Transition v. Complex Journey



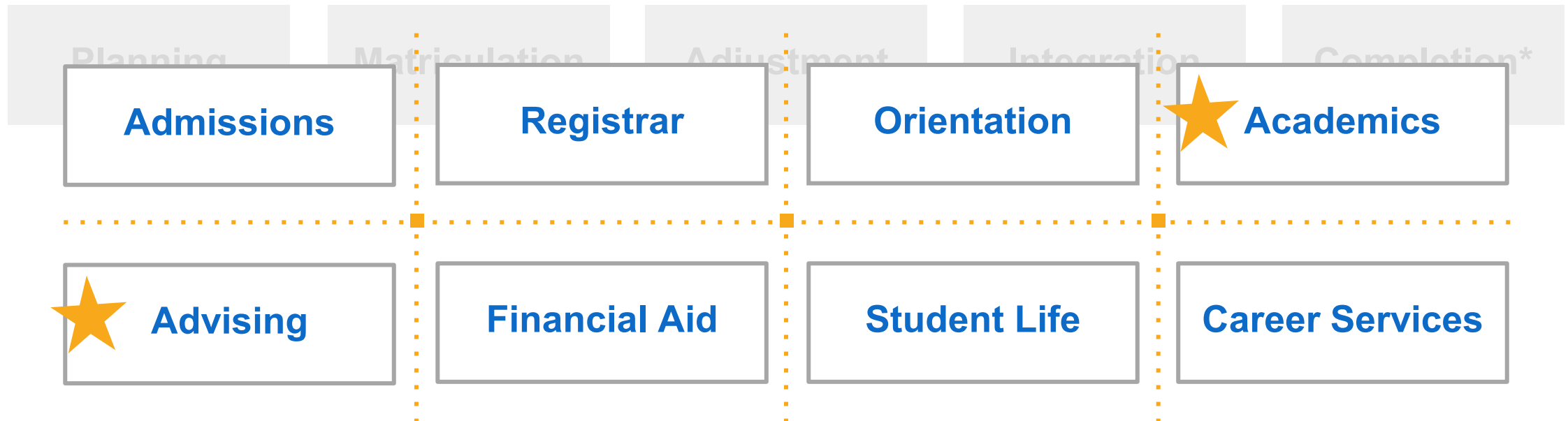
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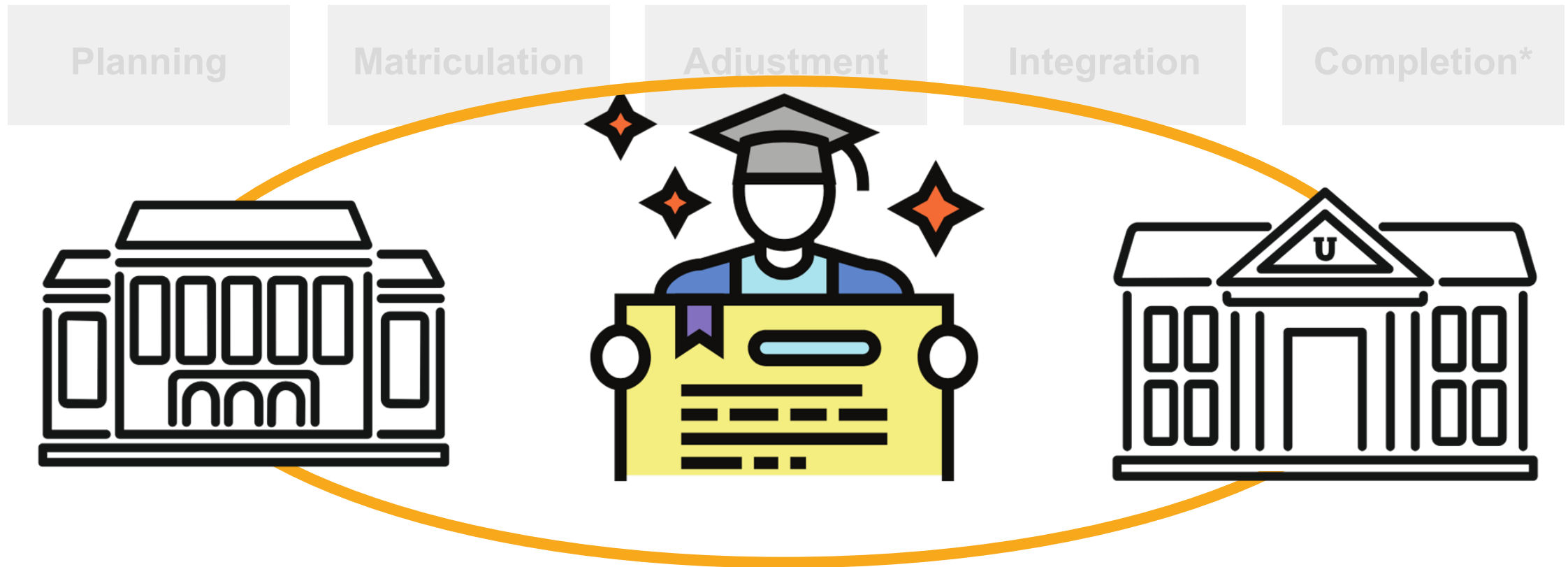
TRANSFER STUDENT EXPERIENCE



TRANSFER STUDENT EXPERIENCE



TRANSFER STUDENT EXPERIENCE



Standards & Guidelines

CAS Standards and Guidelines

TRANSFER STUDENT PROGRAMS AND SERVICES

► GUIDING PRINCIPLE: STUDENTS AND THEIR ENVIRONMENTS

PART 1. MISSION

1.1 Functional Area Mission

The mission of Transfer Student Programs and Services (TSPS) is to ensure successful transitions for all transfer students and remove barriers to their success.

To achieve this mission, TSPS must:

- provide students guidance and access to the resources necessary to navigate the transfer transition, develop meaningful connections, and facilitate decision-making to achieve their educational and career goals
- collaborate with other departments within the institution whose programs and services are essential to transfer student success
- establish partnerships with primary or key transfer-sending or -receiving institutions and other relevant community partners
- advocate for resources, policies, and practices in support of transfer students

The TSPS mission must be created with attention to the diverse pathways students take toward earning credentials.

The TSPS mission should be inclusive, acknowledging the variety and intersecting identities within the transfer student community, and catering to any student looking to transfer credits in or out of the institution.

The TSPS mission must align with the mission and core values of the department, college, division, institution, and applicable professional standards.

The TSPS mission should:

Regardless of its organizational structure, TSPS must collaborate and consult with its constituents to advance its mission.

1.2 Mission Statements

TSPS must develop, implement, disseminate, regularly review, and update its mission statement.

TSPS mission statements must reference student learning, development, and success.

PART 2. PROGRAMS AND SERVICES

2.1 Functional Area Goals

Transfer Student Programs and Services (TSPS) must be guided by a set of written goals directly related to its stated mission, priorities, institutional core values, and expectations.

TSPS must establish goals that focus on providing comprehensive, equitable support for transfer students throughout their educational journeys.

TSPS goals should aim to:

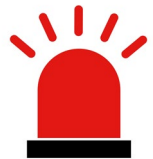
- Identify and address issues that hinder transfer student success
- increase students' transfer capital and efficacy in navigating institutional processes
- cultivate sustainable intra- and inter-institutional partnerships to facilitate seamless transitions
- develop resources and programming tailored to the needs of varied transfer student populations
- enhance transfer students' access to resources, support services, and learning opportunities

CAS

Standards & Guidelines

“Must” v.
“Should”

1. Mission
2. Programs and Services
3. Student Learning, Development, and Success
4. Assessment
5. Access, Diversity, Equity, Inclusion, and Justice
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TSPS GUIDING “WHY”



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CAS

Practical Starting Points

1. Mission
2. Programs and Services
3. Student Learning, Development, and Success
4. Assessment
5. Access, Diversity, Equity, Inclusion, and Justice
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Self- Assessment Guide

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WHY

- Internally driven
- Contextually relevant and helpful
- Charts quality program development using widely agreed-upon quality indicators across standards and departments
- Systematic and regular reflection of progress and planning

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HOW

- Effective in terms of time, cost, etc.
- Intentional with objectives and outcomes
- Evidence and reflection drives determination and alignment
- Collaborative, focused, shared purpose and goals



Photo by Allison Shelley/Complete College Photo Library

CAS

Self- Assessment Guide (SAG)

PART 1. MISSION

Suggested Evidence and Documentation for Part 1:

- ☐ Current mission statement, brief description of how it was developed, and date of last review
- ☐ Additional goals, values, and statements of purpose
- ☐ Description and copies (if applicable) of where mission statement is disseminated (e.g., included in operating and personnel policies, procedures and/or handbook, hanging in office common space, on website, in strategic plan, and other promotional materials)
- ☐ Institutional/divisional mission statements (e.g., map program mission to broader mission statements)
- ☐ Any additional professional standards aligned with program/service (e.g., standards promoted by functional area organizations)
- ☐ Institutional demographics, description of student population served, and information about community setting

1.1 Functional Area Mission

- ▶ The functional area mission is aligned with the mission and core values of the department, college, division, institution, and applicable professional standards.
- ▶ The functional area mission is appropriate for the institution's constituents.
- ▶ The functional area collaborates and consults with its constituents to advance its mission.

Compliant

Not-Compliant

Insufficient Evidence

Not-Applicable

Justification of Finding for 1.1:

SELF-STUDY & PROGRAM REVIEW



RESULTS

- Supports staff development
- Assembles results into an action plan for improvement
 - Institutional, divisional, and functional area effectiveness and align with accreditation
- Provides recognition and rewards at a local level
- Develops a shared vision among constituents



GOALS FOR YOUR CAMPUS

- Intentional application
- Meaningful reflection and usage
- Culture building
- Proactively applied and responsive to findings
- Elevating objectives and outcomes

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TRANSFER STUDENT PROGRAMS AND SERVICES

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PART 2. PROGRAMS AND SERVICES

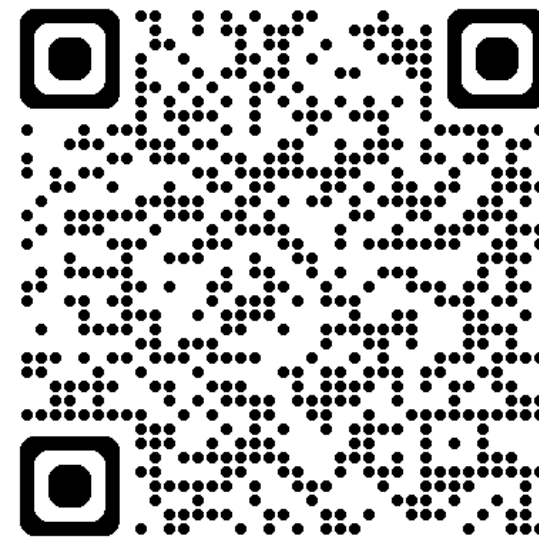
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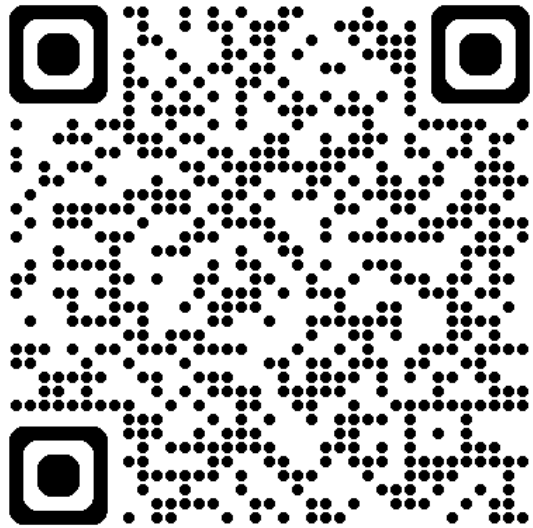
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- Increase students' transfer capital and efficacy in navigating institutional processes
- cultivate sustainable intra- and inter-institutional partnerships to facilitate seamless transitions
- develop resources and programming tailored to the needs of varied transfer student populations
- enhance transfer students' access to resources, support services, and learning opportunities
- foster belonging and kinship among transfer students integrating into the broader institutional



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Thanks for joining us!
QUESTIONS?



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