

# Washington Transfer Equity Project

## SUMMARY: THEMES AND PRIORITIES

Facilitated by

The Washington Student Achievement Council

In partnership with

The John N. Gardner Institute for Excellence in Undergraduate Education

The State Higher Education Executive Organizations

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## Executive Summary

Washington state has the goal of increasing postsecondary attainment among working age adults to 70 percent, including among each race and ethnic group and across all regions of the state.<sup>1</sup> Washington will not reach that goal without focused attention on addressing gaps in postsecondary opportunity and attainment for BIPOC and low-income students. In alignment with this goal, in 2022 the Transfer Equity Project (TEP) examined key aspects of Washington’s transfer ecosystem for students, specifically towards achieving equitable student outcomes. The TEP was facilitated by the Washington Student Achievement Council as part of a multi-state initiative from the John N. Gardner Institute for Excellence in Undergraduate Education (Gardner Institute) and the State Higher Education Executive Organizations (SHEEO).

This project was an opportunity to build on over fifty years of work in Washington state to strengthen the transfer ecosystem. This project took the form of a self-study and engaged a task force that included a wide range of participants from various organizations in Washington. See Appendix C for full list.

Through the TEP examination, three key themes were identified:

1. Increasing transparency and effective transfer pathways for students, advisors, faculty, and transfer stakeholders.
2. Developing a more complete picture of the transfer ecosystem and a future research agenda.
3. Defining a statewide shared transfer philosophy and goals.

Together, these themes should serve as a guide for continued conversation among stakeholders in the transfer landscape to move toward action. Given the strong engagement in the task force process, we see an opportunity to continue investing in multi-sector collaboration to modernize transfer in Washington state.

Increasing transparency and effective pathways	<ul style="list-style-type: none"> <li>• Develop student-centric tools such as advising tools, guides, and maps.</li> <li>• Increase personalized, on-going advising and wrap-around supports.</li> <li>• Encouraging sending and receiving institutions to share their track record of success in supporting transfer students; including a demographic breakdown that could empower students to consider if others like them have succeeded in a given pathway.</li> <li>• Reduce barriers to credit transfer.</li> </ul>
Developing a more complete picture of the Washington transfer ecosystem and a future research agenda	<ul style="list-style-type: none"> <li>• Track graduation rates for transfer students at all Washington institutions.</li> <li>• Collect data on transfer student experiences across sectors.</li> <li>• Understand characteristics of the programs students transfer to, and identify program areas where there may be institutional/programmatic barriers.</li> <li>• Examine data for disparities to identify where equity gaps exist and persist.</li> <li>• Develop research questions for longitudinal study.</li> <li>• Collect consistent, qualitative data on transfer experiences.</li> </ul>
Defining a statewide shared philosophy and goals	<ul style="list-style-type: none"> <li>• Develop a cross-organization and cross-sector philosophy, rationale, and goals for equitable transfer outcomes in alignment with statewide equitable attainment goals.</li> <li>• Promote transparency for students regarding the governance structure and regulation of transfer degrees.</li> </ul>

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<sup>1</sup>. Postsecondary credentials include traditional college degrees, certificates, apprenticeship, and other career-based programs.

## Introduction

Transfer commonly refers to the process of students moving earned academic credits between postsecondary institutions, with the goal of students earning their desired credentials despite changes in factors such as location or field of study. More importantly, transfer also calls us to consider the totality of student experiences, understanding students' needs, aspirations, choices, and realities while in pursuit of their desired degree. Nationwide, four out of five students who start at a community college say that they intend to transfer to earn a bachelor's degree or higher. However, [research from the National Student Clearinghouse](#) shows that only one in six actually transfer, and that number has fallen even further since the pandemic. In Washington, students of color and students living on low incomes represent a larger proportion of students who transfer between institutions than those who begin their postsecondary journeys at four-year institutions. However, the experiences and attainment rates of students who transfer, particularly those within these groups, have been poorly understood in our state. Understanding the landscape of transfer, especially for student groups with the lowest rates of transfer success, is the first step to making student-centered improvements to increase student transfer success.

With this background and a focus on our state attainment goal, Washington partners embarked in 2022 on the Transfer Equity Project (TEP), a first self-study of the Washington ecosystem of transfer. The TEP provided the opportunity for stakeholders engaged in the transfer ecosystem - faculty, students, administrators, researchers, and community partners who work with students - to examine what is known about existing policies, practices, and student outcomes at the state and institutional level. Some of the key questions that the task force considered included were:

- How do we ensure that students are centered in Washington's transfer ecosystem?
- How can we equip students to help them make informed choices on efficient transfer pathways?
- What data do we need to understand the most complete picture of transfer student pathways and success?

From this exploration emerged a clearer picture of Washington's strengths and challenges to successful transfer, as well as significant opportunities to improve aspects of the system. The TEP task force identified priorities for action that could reduce barriers to successful transfer and increase our understanding of how to build more equitable and supported pathways.

## Transfer Equity Project Description

The purpose of the TEP was to examine key aspects of Washington's Transfer "ecosystem" for students and identify strengths, gaps, and opportunities to improve the system, with a focus on achieving equitable student outcomes.

WSAC convened the TEP task force in monthly meetings from January through June 2022. Over 25 student leaders, faculty, institutional research professionals, administrators, higher education sector leaders, a community member from an Educational Service District, and a labor union participated as members (Appendix C). A project leadership team worked in collaboration with the Gardner Institute and a SHEEO consultant to pursue a self-study of transfer policies and practices to understand their

relationship to equitable outcomes, particularly for students living on low incomes, in rural communities, or who are people of color. Structurally, the leadership team comprised representatives across multiple sectors, meeting regularly to provide valuable insights on meeting structure, discussion content, and insights on project findings.

Using the Gardner Institute's [Foundational Dimensions for Statewide Excellence in Equitable Transfer framework](#), the task force explored Washington's ecosystem through key performance indicators in the framework dimensions: **Philosophy/Rationale; Transfer Equity; Transfer Receptive Culture; Learning and Curricular Pathways; and Data, Accountability, and Improvement.**<sup>2</sup> In each dimension, the task force discussed transfer from a wide perspective, focusing on student mobility and acknowledging that transfer is the process of students moving earned academic credits between postsecondary institutions with the ultimate goal of earning a credential or degree. The TEP was intentional in this broad approach, including students who transfer between two-year institutions, between four-year institutions, from four-year institutions to two-year institutions, and more.<sup>3</sup>

The task force considered transfer governance and relevant policies in the state, discussed effective practices, examined available student data, and identified gaps or inconsistencies in equitable student outcomes. Across the dimensions, the task force identified priorities for action that could address some of the barriers to equitable transfer success.

In addition to task force discussions, WSAC gathered perspectives on the Washington transfer ecosystem from additional stakeholders, including students, academic advisors, union leaders, and institutional leaders in research and in diversity, equity, and inclusion. These were gathered through interviews, follow-up meetings, and monthly calls with the student task force leaders.

## What do we know about students who transfer in Washington?

Transfer is the process of students moving earned academic credits between postsecondary institutions in order to complete a credential. While transfer can broadly include students moving earned credits between community and technical colleges (CTCs) or between universities, Washington state data and subsequent research has primarily focused on student attending two-year institutions and moving earned credits or associate-level degrees to four-year institutions for the purpose of bachelor's degree attainment. For example, Washington publishes biennial legislative reports on transfer that examine CTC students who intend to transfer to public four-year institutions.

Generally, Washington state provides students with a range of opportunities including different types of transfer-specific degrees designed intentionally to amplify student success. Washington has robust statewide transfer degrees and articulation agreements in addition to institution-to-institution articulation agreements, all of which increase students' chance of seamless transfer. Students who plan their transfer process with one of these [academic transfer degrees](#) are less likely to run into barriers than students who transfer without.

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<sup>2</sup> The Gardner Institute's framework and Key Performance Indicators used in the TEP is summarized here: [https://docs.google.com/document/d/1NaIXxwgtU-8ntcEKgeLoMM0HeWQf3aVqgmzc\\_f7\\_U5A/view](https://docs.google.com/document/d/1NaIXxwgtU-8ntcEKgeLoMM0HeWQf3aVqgmzc_f7_U5A/view)

<sup>3</sup> The TEP did not include Dual Credit, including Running Start, as part of the self-study.

Notably, among students attempting to transfer from CTC to four-year institutions, some have completed a degree designed for transfer, some have completed a degree not primarily intended for transfer (such as a professional technical degree), and some transfer having completed only some credits but no degree.

<b>Who is a transfer student?</b>
<b>CTC students who:</b> <ul style="list-style-type: none"><li>- Complete an academic transfer degree;<sup>4</sup> or</li><li>- Complete another associate degree; or</li><li>- Complete some associate-level credits and apply their credits to another university.</li></ul>
<b>Additional transfer pathways:</b> <ul style="list-style-type: none"><li>- CTC to CTC</li><li>- University to CTC</li><li>- University to university</li></ul>

Washington has robust data on the overall success of CTC students who intend to transfer to in-state, public four-year institutions. However, relatively little is known about success rates for other transfer pathways. Additionally, there is no clear understanding of how extensive or effective transfer is between individual institutions. A [2022 report published by Washington’s Education Research & Data Center](#) (ERDC) found that during the 2016-17 academic year, approximately 45 percent of students who expressed intent to transfer<sup>5</sup> and completed a transfer degree from a CTC did enroll at a public four-year college or university in the state within two years.<sup>6</sup> In this analysis, the majority of students (numbering 16,318 at 55 percent) took other pathways, which could include transferring to a private college or university in the state, transferring to out-of-state institutions, or not continuing their studies any further.

WSAC’s [2020 Equity Landscape Report](#) found that among students who expressed intent to transfer from CTCs and completed an academic transfer degree, enrollment transfer rates at four-year institutions vary by race/ethnicity and income.<sup>7</sup> American Indian/Alaska Native, Black/African American, and Hispanic/Latino students have the lowest transfer rates of any racial or ethnic group. While Asian-identifying students had the highest transfer rate, that rate was still only a quarter of Asian students who expressed intent to transfer.

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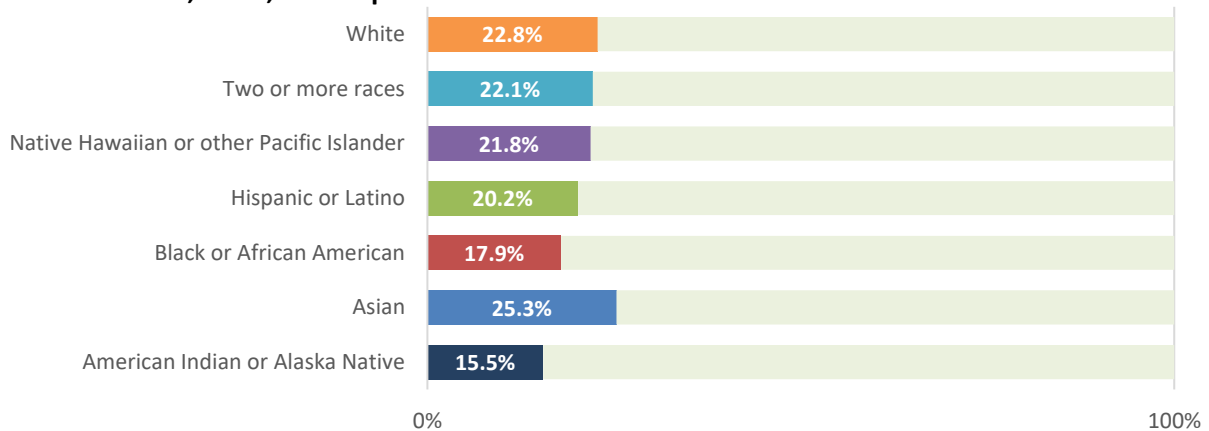
<sup>4</sup> This does not include running start students who earn a degree or transfer dual credits.

<sup>5</sup> “Intent to transfer” refers to students identified and were coded as “academic transfer students.” These students declared the intent to earn an academic transfer degree and completed that degree.

<sup>6</sup> This data set is limited to a comparison of students who completed a transfer degree from one of the 34 Community and Technical Colleges and enrolled in courses at a Washington four-year public institution compared to those who completed their transfer degree and did not enroll in a Washington four-year public institution within two years.

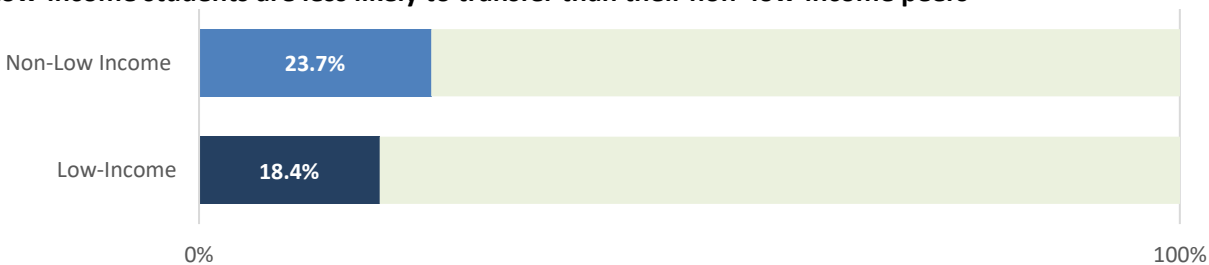
<sup>7</sup> Data used to evaluate transfer in this report is limited to a calculation of Washington public two-year academic transfer student headcount in academic year 2016-17 and Washington public four-year institution transfer student enrollment in academic year 2018-19.

**American Indian, Black, and Hispanic Students have the lowest transfer rates.**



Source: WSAC [Equity Landscape Report](#), pg. 30. Calculation of public 2-year academic transfer student headcount in academic year 2016-17 and Washington public 4-year institution transfer student enrollment in academic year 2018-19, by race

**Low-income students are less likely to transfer than their non-low-income peers**



Source: WSAC [Equity Landscape Report](#), pg. 31. Calculation of Washington public 2-year academic transfer student headcount in academic year 2016-17 and Washington public 4-year institution transfer student enrollment in academic year 2018-19, by need-based aid status

The Equity Landscape Report further notes that “it is possible that students who initially express interest in transferring to a 4-year institution later change their minds, but the disparity in successful transfer. It is possible that students who initially express interest in transferring to a 4-year institution later change their minds, but the disparity in successful transfer rates for low-income students suggests that there are still equity gaps in transfer outcomes. Some low-income students see transfer as an affordable pathway to acquiring a bachelor’s degree, so making transfer more efficient and effective can help these students succeed.”

What we know about transfer students in Washington relies heavily on data from Washington's public two- and four-year institutions and analysis primarily involving transfer students who express intent to transfer specifically from the CTCs to public four-year institutions. This is a narrow view of transfer and does not allow for a data-driven, comprehensive statewide transfer perspective. Washington needs additional data to inform a broader picture of students’ transfer pathways. These data needs, along with priorities for a future research agenda, were discussed by the TEP, and will be discussed in a dedicated section later in this report.

A list of reports pertaining to transfer in Washington can be found in Appendix E.

## What do we know about the transfer ecosystem for students?

Washington has a system of transfer that is grounded in collaborative, multi-sector partnerships. Transfer is supported through institutional partnerships, joint commissions, and councils, representing a decentralized system. Washington's transfer efforts largely rely upon these intentional partnerships and other shared efforts involving institutions, sectors, administrators, faculty, and staff.

The task force considered philosophy and rationales from two state-level coordination entities focused on transfer:

- **The Intercollege Relations Commission (ICRC)**, the state coordination body for transfer, facilitates transfer between institutions for all students pursuing bachelor's degrees in Washington. ICRC does include some elements of a philosophy in their handbook, such as written values, but no central philosophy/rationale is provided.
- **The Joint Transfer Council (JTC)** is a multi-sector working collaborative of institutional representatives that works in partnership with ICRC. JTC facilitates new transfer degree creation and revisions to existing transfer degree programs. Recommendations from JTC are vetted through systems and institutions, and final policy decisions (such as the adoption of new degrees) are made at the institution level. JTC and ICRC focus on improving in-state transfer agreements, including the development of advising guides. At the time of this report, JTC was developing a statement of purpose that is likely to include a distinct focus on improving equitable transfer outcomes for students.

The systems that govern transfer degrees and processes are not clear to students or other stakeholders who may be helping students navigate the process. As such, there is great potential across Washington's transfer entities to develop a shared, united philosophy and rationale for equitable transfer outcomes statewide.

### How do we ensure students are centered in Washington's transfer ecosystem?

- **Priority:** Develop a cross-organization and cross-sector philosophy and rationale that centers students and includes common goals for equitable transfer outcomes. This can help lead the effort to increase student mobility and achieve the state credential attainment goal.
- **Considerations:** Efforts to articulate a united statewide philosophy and common goals need to be funded and developed in a way that helps students and advocates understand the system and its goals. A unified philosophy could support many of the TEP's themes and priorities by creating opportunities for alignment that could impact future research questions or support the development of centralized transfer tools for students.

## Transfer degrees ease the complex transfer process

One strength of the Washington transfer ecosystem is the set of [associate degrees and agreements specifically designed for transfer](#). Public CTCs offer transfer associate degrees that make it easier for students to transfer to bachelor's degree programs and include the following types: Direct Transfer Agreement Associates Degree (DTA), Associate of Science - Transfer Degree (AS-T), and Major Related Programs. These degrees allow students to meet all or most lower division general education



requirements before they transfer. Depending on the degree, they may also meet some lower division requirements for their major. Once admitted to a bachelor's degree program, students who complete transfer degrees can generally expect 90 transferable quarter credits and a junior class standing.

Students may transfer with other types of degrees, including professional technical or applied science degrees: Associate of Applied Science (AAS) or Associate of Applied Science - Transfer Degree (AAS-T). Depending on the bachelor's degree they seek, students can transfer some or all of their associate degree credits. These additional degree types are prime candidates for further study in similar ways to how the DTA has been studied: to better understand whether students with these degrees successfully transfer, complete degrees, and do so with a minimal excess credit.

Students may also transfer without a degree, in which case receiving institutions often evaluate completed credits for transfer on a course-by-course basis. Washington has some policies to assist students transferring without a transfer degree. While these policies exist, additional study could help to understand their impact or efficacy:

- **Washington 45** ([RCW 28B.10.696](#)) is a list of general education courses taught at public CTCs which most four-year public institutions accept as meeting a year's worth of general education requirements.
- **Reverse Transfer** allows students who transferred to a four-year institution without completing an associate degree to transfer their credits back to their CTC to complete an associate degree.
- **The transfer ecosystem recognizes that some learning occurs outside of higher education institutions, and Washington policy addresses both dual credit and academic credit for prior learning.**<sup>8</sup> [RCW 28B.10.054](#) ensures that institutions of higher education have policies that facilitate the articulation of Advanced Placement, International Baccalaureate and Cambridge International exams. Similarly, state policy requires that each institution must have a transparent policy on academic credit for prior learning ([RCW 28B.77.230](#)) and a policy on credit for military training that is shared with military-connected students, ([RCW 28B.10.057](#))

***Spotlight:** Three Washington Institutions—Eastern Washington University, Western Washington University, and Skagit Valley College— are currently participating in the [Gardner Institute's Curricular Analytics Community \(CAC\)](#). The CAC uses curricular analytics tools to visualize the ways in which institutional degree plans and courses interact to impact student success. The process involves faculty and staff in a process that leverages improvement science and curricular analytics tools to identify opportunities for equitable curriculum redesign at their institutions to increase equitable persistence and graduation rates.*

## What do we know about support for students who transfer?

Sending and receiving institutions share responsibility for building transfer-receptive cultures. This includes a student-centered process of transferring credits and applying credits to degrees, building institutional cultures that recognizes and support transfer students, and implementing relevant and accessible academic and student supports.

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<sup>8</sup> While dual credit is a component of credit transfer, it was not a focus of the TEP.

Institutions in Washington have taken a variety of approaches to build transfer-receptive cultures. Examples discussed in the task force included the following:

- Shared staffing models for advisors and admissions staff between sending and receiving institutions.
- Providing orientation and navigational support specific to transfer students.
- Increasing awareness of transfer students' presence within institutions such as institutions providing up-to-date data on transfer students including student demographics and best practices at department or institutional levels.

### **Spotlight: Central Washington University's Transfer Center**

*The Transfer Center at CWU is a dedicated Center focused on helping transfer students make a seamless transition from their previous institution(s) to CWU. The Center serves prospective students, newly admitted students and current students through pre-admission, transition support, and assistance establishing connections to the campus community. Dedicated staff, including peer to peer student ambassadors, provide information and campus referrals, visit community colleges across the state, and facilitate community building among transfer students at CWU.*

## Wrap-around supports for transfer students' non-academic needs

In addition to the known disparities regarding race/ethnicity and income discussed in the Equity Landscape report, the task force also noted a lack of investment in wrap-around services more broadly needed to support all students in Washington and expressed curiosity to learn more about the implications for transfer students specifically. Examples of wrap-around services could include resources or referrals related to transportation, food and housing, and other basic needs. Task force members shared particular concerns about childcare access for parenting students who transfer, as well as support for place-bound and online students who may not be receiving the same access to basic needs support as students who are on campus.

At the state level, there are multiple initiatives and programs available to institutions from state agencies that assist and support all students, inclusive of transfer students, such as emergency assistance grants, supported access to food benefits and pantries, and childcare subsidies and services. However, to better understand any gaps in transfer student support, comprehensive assessment of students' unmet basic needs should identify transfer students as a discrete student population.

At the institution level, colleges represented in the task force described their own ways of evaluating and monitoring the needs of transfer students, with intentional approaches in providing relevant support to diverse transfer students. Promising practice exchanges among institutions could help identify and expand effective strategies across institutions.

*"As with life, direction changes and though education is a priority, it's often a juggling act to remain successful. So long as a student wants to continue pursuing their education, the schools and governing bodies should provide the flexibility to inform the student of the options they have to continue."*

*- Task force member*

## What are the challenges to transfer student success?

Despite these institutional and cross-institutional highlights overall, the task force identified barriers in the transfer system that make existing processes opaque to students and to those who help them navigate transfer. A summary of student perspectives on transfer experiences can be found in Appendix A.

*"Transferring has been tough for me as I had a hard time navigating through the system alone. I was not given many resources to understand the concept of transfer and what would make my transfer easiest for me. Had I had prior knowledge, I would not have only saved almost \$20,000 this year, but I would have not battled with wondering if I could keep up in my schooling and if I was heading down the right path for me."*

- Transfer student

### Information available to students

Student task force members shared individual stories about challenges to accessing information in the transfer process. Some emphasized that even with exceptional advisors and mentors – faculty and staff alike – the act of transferring between institutions was frustrating, complex, and at times felt impossible to navigate. Even advisors commented on the level of expertise needed to assist students effectively. For example, one advisor's process included information-gathering from CTC and university program web pages, utilizing academic catalogs, collecting and updating information on program requirements and policies to distribute to their advisees, organizing information into spreadsheets, and building spreadsheets with multiple tabs to compare degrees, concentration availability, requirements such as practicum, and other aspects such as modality or factors that would help students make decisions. This did not include helping students identify admissions timelines, application requirements, or pre/co-requisite information.

*"Washington needs a system with academic maps and matching courses like an academic GPS that is accessible to students, faculty and staff."*

- Task force member

In general, barriers include:

- Lack of easily accessible, public, regularly updated information about transfer equivalencies, policies, and practices was frequently identified by task force members as a barrier to students, advisors, and others, even with transfer-specific degrees. Students shared that the information available depends upon the institution or if the student themselves have knowledge of entities like JTC or WSAC. In general, students noted that the information is not easy to understand, and often uses academic language that is unfamiliar, contributing to additional confusion and frustrations.
- Lack of support for navigating transfer processes was highlighted by task force members frequently, and it was noted that students' success may depend on their access to and quality of advising at both sending and receiving institutions. While advising models at institutions range from professional advisors to tenure-track faculty, both face challenges regarding training, professional development, and turnover, ultimately impacting students' ability to understand and successfully transfer.

*“It’s hard to know where to begin or what any of it means. It’s hard to know what questions to ask, and it’s easy to get lost in the information.”*

*- Transfer student*

Whether or not a student pursues a transfer degree, additional opportunities exist to create greater transparency for students. Students on the task force shared they did not understand or consider how different institution-specific requirements would impact them, even with a transfer degree. While Washington publishes transfer agreements between institutions, students and their support systems do not necessarily know what these mean or how to interpret them.

### How can we equip students to help them make informed choices?

Exploring this question, the task force identified the following priorities and considerations to increase transparency:

- **Developing student-centric advising tools, guides, and maps:** Many two- and four-year institutions utilize program maps to help students understand major requirements. Coordinating these types of maps across institutions could better help students understand their paths between institutions.
  - **Example:** The City University of New York (CUNY) created the [“Transfer Explorer \(T-Rex\)”](#) tool. Course equivalencies are available for all CUNY schools in a publicly searchable, easy to use database that is updated in real-time.
- **Increasing personalized, on-going advising:** Advising is especially important early as students develop their intent to transfer, through their time of application and acceptance in the four-year institution, and through arrival and adjustment.
  - **Example:** Pierce College (PC) and the University of Washington-Tacoma (UW Tacoma) have utilized MOUs to establish a shared staff role between both institutions, essentially creating a dedicated “Pierce College to University of Washington Tacoma Transfer Academic Advisor” who advises, recruits, and supports students interested in transferring to UW Tacoma. This position reports to both admissions at UW Tacoma and advising at PC, increasing effective transfer, and helping students navigate a seamless partnership between the two institutions.
- **Investing in academic and student support:** This includes increased advisor capacity, peer-to-peer transfer student support, as well as support for basic needs such as housing and childcare.
  - **Example:** Central Washington University’s Transfer Center employs “Transfer Peer Ambassadors” who meet with current or prospective transfer students to engage in peer-to-peer support and connection to resources.
- **Success outcomes transparency:** Encouraging sending and receiving institutions to share their track record of success in supporting transfer students and including a demographic breakdown that could empower students to consider if others like them have succeeded in a given pathway.

- While no explicitly student-facing examples were found, an example is provided that represents the spirit of increasing transparency: The University of Washington's [STEM Transfer Partnerships initiative](#) focuses on STEM students successfully transferring from two-year to four-year institutions by bringing together pairs of two- and four-year institutions together to target structural inequities and collaborating to solve them.

## Barriers in credit transfer

In addition to navigation, the TEP emphasized the overarching need to continue investigating ways to reduce barriers for transfer of credits as a critical element for student success in degree completion. Continuing to identify opportunities to simplify transfer degrees and align learning and curricular pathways is crucial to the overall success and sustainability of the transfer ecosystem. This includes:

- Ensuring applicability of credit to degree programs and minimal loss of credit.
- Addressing transfer of credits not just for general education, but expansion to meet requirements for specific programs of study.
- Engaging faculty through discipline and major specific communities of practice. Task force members noted that these have helped to promote trust related to course content and have created a structure for increased faculty engagement.
- Examining areas where students encounter unintentional delays in time-to-degree such as course sequencing or accessing and receiving support to succeed in critical gateway courses.
- Identifying and examining bottlenecks where students might face unintentional delays in time to degree such as course progression specific to gateway courses, schedule forecasting, and/or course sequencing.

*“Course equivalencies don’t make sense [to me]. I’ve had to retake calculus at all three of my institutions [despite passing all courses].”*

*- Transfer student*

### How can we transform the system to create more efficient transfer pathways?

Exploring this question, the task force identified the following priorities and considerations to increase efficiency:

- **Faculty engagement:** Continuing to create opportunities for faculty engagement across institutions through discipline and major-specific lenses. This could be an ongoing opportunity to investigate how to reduce barriers for transfer of credits.
  - **Example:** The Washington Council for Engineering & Related Technical Education (WCERTE) has supported the development of discipline-driven faculty groups who are creating cross-sector communities of learning. These groups have aided building faculty knowledge of each other’s courses, increasing trust and collaboration.
- **Encouraging assessment within and across institutions:** Regular review of policies and practices to ensure transfer pathways exist and barriers are mitigated.

- **Examples:** Gardner’s Curricular Analytics Community (CAC) leverages improvement science and curricular analytics tools to identify opportunities for curriculum redesign. Engaging in the CAC with both a sending and receiving institution could amplify the opportunity for improvement.

## How can data and assessment inform transfer ecosystem improvements?

Discussions of data and its role in informing policy and practice underscored almost all task force conversations. Overall, task force members desired more information and research than what is publicly available to better understand the effectiveness of Washington’s transfer systems and student success.

## What data on students who transfer in Washington is currently available, and how is it tracked?

Using SBCTC and ERDC data sources, Washington partners can evaluate the following data for public institutions in the state:

- The number of academic transfer students who completed a transfer degree from Washington’s CTCs and enrolled at a Washington public four-year institution.
- The number of academic transfer students who completed their transfer degree at Washington CTCs but did not enroll at a Washington public four-year institution.
- By student cohorts:
  - The number and percent enrolled in academic transfer programs at CTCs, by degree type.
  - The number and percent who completed a transfer degree and/ or Washington 45.
  - The number and percent who enrolled at Washington public four-year institutions.
- The type of degree, such as Direct Transfer Agreement.

This data can be disaggregated by race and ethnicity, income, and gender. Depending on the source, data can also be disaggregated by additional demographic information such as first-generation status, and if the student received accommodations for a disability.

Washington does not regularly track disaggregated data on students with bachelor’s degree intent and does not currently include those who do not transfer or those who do not complete a bachelor’s degree. Washington also does not track students who transfer to private four-year institutions within the state or those who transfer out of state.

The task force explored what questions might help the state better understand the experiences and dynamics of the transfer ecosystem (Appendix B) along with preliminary opportunities for future exploration depending upon statewide and institutional-level data. In the future, the ability to disaggregate data and explore how these factors impact student success is a particular area of interest to identify and respond to equity gaps.

**Spotlight:** As a result of the conversations during the TEP, ERDC has recently completed a report on public institution students in Washington with intent to transfer who did not transfer. The report disaggregated data by race, income, and gender. This is the “flipside” of the data set used in the 2021 state transfer report to the legislature that focused on students who expressed intent to transfer and did so.

**What data do we need to understand the “most complete” picture of transfer students?**

Exploring this question, the task force identified these priorities to better understand the full picture of students who transfer in Washington:

- Entities who play a role in state transfer should collaborate and continue to build pathways forward to regularly assess transfer patterns, transfer student outcomes, and transfer culture. As a state, Washington should:
  - Track graduation rates for transfer students at private four-year institutions.
  - Collect data on transfer student experiences across sectors. Without standard questions and performance metrics, Washington has relied on anecdotal information.
  - Understand characteristics of the programs that students transfer to and identify program areas where there may be institutional or programmatic barriers.
  - Transfer students should be included as a population-level group whenever possible, just as other factors such as race, ethnicity, or first-generation status are disaggregated.
- Identify if there are existing qualitative and quantitative data sets or if additional data collection is necessary.
- Collect and examine data disparities to identify where equity gaps exist and persist. This could help evaluate both academic and non-academic student needs and assist in identifying barriers to student success.
- Develop research questions for longitudinal study.
- Collect formal, qualitative data on transfer experiences.
- Ensure transfer students can be identified within data sets and can be further disaggregated by demographic and population-level equity factors such as race, gender, income, age, and the intersection of multiple factors.

Options for a future research agenda could include, but are not limited to:

- Identifying the barriers for students who successfully transfer between institutions but do not complete a bachelor’s degree.
- Understanding the success of students who have *not* indicated intent to transfer but transfer to a four-year institution.
- Examining how geographic location and proximity to two- and four-year institutions impact transfer students.
- Gathering qualitative data on student experiences.
- Evaluating student course taking in key fields that must be completed in specific sequences to better understand how schedule forecasting and course sequencing impacts students’ time to degree.
- Evaluating the impact of transfer regarding career earnings and economic mobility.



- Statewide disaggregation of demographic numbers and percentage rates for students who complete associate degrees and continue on to bachelors of applied science (B.A.S.) degrees at CTCs, as well as other four-year institutions offering B.A.S. degrees.

## Advancing Washington’s Transfer Ecosystem

The task force has identified key themes that would advance equitable outcomes in Washington’s transfer ecosystem:

1. Working to **increase transparency for students, advisors, faculty, and all transfer stakeholders** by prioritizing students and their needs. Ideas include creating centralized student-facing tools and resources to help students make informed decisions and better navigate the transfer process. This could include, but is not limited to, enhancing transfer-inclusive culture at receiving institutions through orientation and advising, and increasing quality and consistency of advising.
2. **Developing a future research agenda** to better understand equity and attainment gaps in transfer. This requires additional evaluation of longitudinal data. In addition, qualitative data focusing on the experience of transfer students could also help shed light on disparities and areas for improvement throughout the ecosystem.
3. **Defining a statewide shared philosophy** across state-level entities to guide the long-term strategy and vision for the future of transfer in Washington. Developing a statewide philosophy and rationale could foster alignment among the various players in our broad transfer ecosystem.

Each of the three themes share a common denominator: a call for all entities involved in Washington’s transfer ecosystem to continue to examine and commit resources to reducing barriers for transfer students. Across all themes, this could include but is not limited to continuing to identify equity gaps, the transfer of credits, or navigating the transfer process. Ultimately, the goal is to create a smoother, less complex pathway for students as efficiently as possible, with minimal excess credits and other delays in their educational journey.

Together, these themes should serve as a guide for continued conversation toward action, specific to each stakeholder within the transfer landscape. Given the strong engagement in the task force process, we see an opportunity to continue investing in multi-sector collaboration to address the priorities identified in this project.

A summary of themes and subsequent priorities is provided below:



Theme	Priorities
<p>Increase transparency and effective pathways</p>	<p><i>How can we equip students to help them make informed choices?</i></p> <ul style="list-style-type: none"> <li>● Developing student-centric advising tools, guides, and maps.</li> <li>● Increasing personalized, on-going advising.</li> <li>● Investing in academic and student supports.</li> <li>● Reduce barriers to credit transferability.</li> <li>● Increasing faculty engagement across institutions, through discipline and major-specific channels.</li> <li>● Encouraging institutional transparency to share their track record of success transfer students to students such as a demographic breakdown that could empower students to consider if others like them have succeeded in a given pathway.</li> </ul>
<p>Develop a future research agenda</p>	<p><i>What do we need to understand the “most complete” picture of transfer students?</i></p> <ul style="list-style-type: none"> <li>● Track graduation rates for transfer students at private four-year institutions.</li> <li>● Collect data on transfer student experiences across sectors. Without standard questions and performance metrics, we are working on an anecdotal level.</li> <li>● Understand characteristics of the programs that students transfer to and identify program areas where there may be institutional/programmatic barriers. Transfer students should be included as a population-level group whenever possible, just as other factors such as race, ethnicity, or first-generation status are disaggregated.</li> <li>● Collect and examine data disparities to identify where equity gaps exist and persist. This could help evaluate both academic and non-academic student needs and assist in identifying barriers to student success. This must include the disaggregation of data by demographic and population-level equity factors.</li> <li>● Developing researching questions for longitudinal study.</li> <li>● Collecting formal, qualitative data on transfer experiences.</li> </ul>
<p>Define a statewide shared philosophy</p>	<p><i>How do we ensure students are centered in our work?</i></p> <ul style="list-style-type: none"> <li>● Develop a cross-organization and cross-sector philosophy and rationale, including common goals for equitable transfer outcomes.</li> <li>● Focus on the full picture of student mobility and achievement of the state credential attainment goal.</li> </ul>

## Acknowledgements

Overall, the TEP's deeply student-centered approach created an environment that allowed for true exploration and discussion. This task force process helped illuminate a multi-dimensional landscape of the transfer ecosystem, allowing stakeholders to see beyond their normal scope of interest in transfer.

We extend deep gratitude to all who participated and contributed to the Transfer Equity Project:

- Students who willingly shared their experiences which helped to illuminate the realities of the transfer ecosystem in Washington.
- Consultants Bruce Vandal and Betsy Griffin.
- The Project Leadership Team and the task force members.
- Additional stakeholders who shared their perspectives, including transfer advisors, and other student affairs professionals.

## Appendices List

- Appendix A: Student Perspectives on Transfer
- Appendix B: Future research agenda
- Appendix C: Equity Project Participants
- Appendix D: Washington transfer entities and governance structure
- Appendix E: Existing Washington-specific transfer reports

## Appendix A: Student Perspectives on Transfer

Six students with experience transferring in Washington provided perspectives and offered insights to illuminate their transfer experiences throughout the TEP, with three students participating in monthly meetings, and smaller groups engaged in conversation and activities with WSAC staff.

In a focus group environment, we asked students to tell us their transfer stories through a map-making activity. Students were instructed to identify the key decision points they made in their journey, the information sources and people that helped them make their decision, and the barriers that they encountered.

Through their stories, we learned that the majority of participating students lived on low incomes; identified as students of color, immigrants, or the children of immigrants; and/or are non-native English speakers. Additionally, these students made the journeys across the following institutions:

- A student who transferred from two-year CTCs to four-year regional public institution
- Two students who transferred from two-year CTCs to four-year research institutions
- Two students who transferred from two-year CTCs to four-year private, not-for-profit institutions
- A student who transferred from four-year regional institution to CTCs to public four-year institution

Themes that emerged from the student stories

**Frustration and Stress:** Students expressed a high degree of frustration and stress related to the transfer process. Each student provided an example of a time when the process was so frustrating that they doubted their self-worth, experienced imposter syndrome, questioned whether transferring was “worth it” and subsequently considered other non-higher education paths. These feelings were influenced by a variety of factors in their transfer path, including incorrect transfer information and advice, misleading messaging about time to degree, and (for some) a lack of navigational support. Once students completed the transfer to a four-year institution, they expressed relief. One student described this as “finally being able to focus on learning. Attending college with the sole purpose of transferring to another college is exhausting and time consuming.”

**Excess Credits:** Students took courses that did not transfer to their new institutions, and commonly students shared that they had to retake courses. In one instance, a STEM-major student shared with frustration that they had to take calculus at three separate institutions—while they had passed each course, the calculus curricula had not aligned. We asked *when* students began to compare course equivalencies, and most students shared they did not fully grasp the importance until they had *completed* transferring and were registering for classes at their new institution. As well, students described frustration with courses that weren’t transferable, but which they were advised to take to complete their associate degree.

**Affordability:** Finances were the most common factor in deciding to attend a two-year institution when deciding between a two-year or a two-year institution. Students shared stories of not understanding the cost of attendance—including how many terms of school they needed to finance—until after starting at

their new institution. Many believed it would only take two years once they transferred to a four-year institution, but for all students in the focus group, none will complete in the two-year time frame, which added unanticipated costs. Additionally, students noted the cost it takes to apply to transfer to a new institution, highlighting application fees to the new institution, and paying for transcripts to be sent from multiple sources including their current postsecondary institution, high school transcripts, and dual credit opportunities such as CTE and AP scores. One student described a process of sending transcripts from five separate sources to complete a single application for transfer.

**Students learn about transferring at different times and the messaging varies:** In general, students did not learn about transfer from high school messaging—messaging focused on a four-year degree. One student shared that they learned about two-year colleges only when, after application and acceptance to a four-year university, they could not afford the cost. Another student learned about transferring when they were dissatisfied with their current institution. A third student learned that transferring was an option during their first term at a CTC where it was emphasized that students should complete their associate degree and make plans to transfer within two years as an expectation for all new students.

**Information about transfer is hard to understand:** Students felt like their advisors were out of touch with their individual circumstances or even academic interests. Students felt pressured to fit a “norm” of completing in two years and some cited this as the reason they took courses that were unnecessary. Students expressed wanting a single, reliable information source. Even students who benefited from helpful advisors cited the need to do additional research to understand what they needed to do, such as procedural timelines on when to send transcripts. They found it hard to know what to ask or anticipate when navigating through a foreign and complex process for the first time. Students primarily relied on information from websites, advisors, faculty, and peers. The level of accuracy, ability to interpret and understand the information, and the timeliness of identifying information are all factors that impacted students’ transfer experiences.

**Students suggested the following ideas to improve transfer experiences:**

- Socializing knowledge about transfer earlier, with a recommendation to start as early as high school.
- A single, reliable information source about transfer that not only provides information and explains information such as course equivalencies, but also provides detailed information on timelines, decisions, costs, and processes. Students suggested comprehensive FAQs that illuminate the questions they *should be considering* but did not know to ask.
- User-friendly websites for students. This could include clearly identifying a *person* the student could contact directly to ask questions specific to their major or pathway, or student-friendly language.
- Plain, student-friendly language, or explaining transfer vernacular. For instance, while students located information on websites, they often did not understand the terms they encountered. One student shared that they found information on “upper and lower division” transfer credits for their major but had no idea what it meant. When the student googled the term, it was unclear how these different divisions affect them.
- Opportunities to have peer-to-peer support from students who have been through the transfer process. Students want to see more information shared with them about the reality and expectations or the transfer process, and the decisions they will need to consider. One student described relying on Reddit threads to read narratives and build their own step-by-step process from a student who had transferred to the institution desired.

## Appendix B: Questions for Future Research

The TEP generated robust questions for future inquiry. Considering both available data and a commitment to improving policy and practices, the following roadmap has been suggested:

### ***Short term objectives***

Disaggregated demographic overall numbers and percentage rates on:

1. Students who complete associate degrees and continue to bachelor's degree programs at the Community and Technical Colleges. They are currently not included in the transfer data rates.
2. Students who have not indicated an intent to transfer but who complete a regular associate degree or DTA transfer degree and enroll at a four-year institution.

### ***Longer term objectives***

1. Collect and examine transfer data from independent, not-for-profit four-year institutions.
2. Collect and examine data on student course taking in key fields that must be completed in specific sequences to qualify for a smooth transfer without a need for remediation. This may include an analysis of post-transfer credits and time-to-degree completion.
3. Qualitative data on student experiences, to illuminate:
  - a. Barriers to students completing a transfer.
  - b. Supports that may have assisted them in completing a transfer.
4. Using the chart below, for each topical area, determine if there is existing data that can be used to answer the questions; if no data exists, determine the feasibility of data collection.

**Chart: topics and data-related questions identified by the TEP**

<p><b>Topics identified by the TEP</b></p>	<p><b>What do we need to understand more in order to build a system/more effectively serve students?</b></p>
<p>Create greater transparency and effectively communicate with students about their transfer options</p>	<p>What are student perceptions and experiences of transfer pathways?</p> <p>What data do students currently have access to that could inform their transfer paths?</p> <p>Is student-facing data currently disaggregated in a way that students can identify with subgroups, experiences, etc. and see themselves?</p>
<p>Ensure students have adequate support, including immediate needs and long-term complexities</p>	<p>How soon (quarter/semesters) are students in contact with the transfer-intending institution?</p> <p>Does pre-transfer advisement from target institutions affect overall time to degree?</p> <p>What are current models of advisement and support?</p> <p>What are student experiences of advisement, orientation, support? What do they perceive as most critical? (e.g. advising, financial aid, career services, community)</p>
<p>Understand and support transfer decision-making</p>	<p>What information do students need to make informed decisions about <i>where</i> and <i>when</i> they transfer?</p> <p>What are the top decision-making criteria that transfer students use to choose a four-year institution? (e.g., major, cost, location, personal connection, faculty advice etc.)</p> <p>What interventions and strategies effectively address challenges of “student Swirl”?</p> <p>How does geographic location and proximity to two- and four-year institutions impact transfer students’ decisions?</p>

<p>Monitor unique education outcomes of transfer students with a focus on equity gaps</p>	<p>What are the characteristics related to outcomes of students who intend to transfer?</p> <p>What is transfer students' course success in university (GPA?) disaggregated by demographics?</p> <p>Are there education outcome differences between direct entry students (students who do not transfer) and transfer students? How many quarters/semesters are students taking to complete degrees after transfer?</p> <p>For those not completing degrees post-transfer, what are the factors causing them to stop out? In stated reasons for stopping out, are there differences in demographic groups?</p> <p>How many students have DTA vs. non-DTA? What is the difference in persistence, retention, and completion once a student transfers to complete a bachelor's degree?</p>
<p>Differentiate and meet the needs of different populations of transfer students to eliminate equity gaps</p>	<p>For place-bound students, what modality and residency status would meet both high quality and accessibility needs?</p> <p>How well are supports (such as academic, financial aid, coaching) meeting the needs of transfer students?</p>
<p>Ensure transfer student affordability</p>	<p>How many transfer students are using financial aid?</p> <p>How common are transfer student focused scholarships?</p> <p>How much are transfer students working? How does that impact retention at both 2-year and 4-year?</p> <p>How many transfer students are experiencing basic needs insecurity? How many are accessing public benefits or institutional resources?</p>

<p>Facilitate smooth curricular pathways</p>	<p>What are the blocks to curricular pathways across institutions?</p> <p>Are there specific major preparedness courses that are indicators of successful major transfer?</p> <p>What is the average number of credits that transfer students have that don't "count" toward anything?</p> <p>Is there an impact on credits-to-completion if a student transfers from a quarter system to a semester system?</p>
<p>Ensure students are informed and supported in Academic Credit for Prior Learning (ACPL) options toward completion</p>	<p>How does having access to credit for prior learning impact student outcomes? (Disaggregated by demographics)</p> <p>How many students have earned credits through prior learning?</p> <p>What type of credit? What major/career pathways?</p> <p>What institutions are offering credit for prior learning? What type of credit is being offered? Toward what degrees?</p> <p>What barriers or challenges do institutions have in offering credit for prior learning? How are institutions determining whether to offer credit for prior learning?</p>
<p>Additional areas of interest</p>	<p>Does reverse transfer help with degree completion? How many students currently complete degrees through reverse transfer?</p> <p>How can we help WA transfer students understand the value of completing a degree through reverse transfer?</p> <p>Does the state have a list of industry employers that support (time and/or money) employees to go back and finish their degree?</p>



## Appendix C: Transfer Equity Project Participants

### Project Leadership Team

- **Ami Magisos**, Associate Director, Policy and Planning, Washington Student Achievement Council
- **Abby Chien**, Assistant Director, Policy and Planning, Washington Student Achievement Council
- **Heather Hudson**, Director, Policy and Planning, Washington Student Achievement Council
- **Daryl Monear**, Associate Director of Research, Washington Student Achievement Council
- **Julie Garver**, Senior Director of Policy and Academic Affairs, Council of Presidents
- **Shea Hamilton**, formerly Director of Policy and Public Affairs, Independent Colleges of Washington
- **Summer Kenesson**, Director, Policy Research, State Board for Community and Technical Colleges
- **Bill Lyne**, President of United Faculty of Washington State, and WWU Faculty
- **Bonnie Nelson**, Education Research and Data Center
- **Carli Schiffner**, Deputy Executive Director, State Board for Community and Technical Colleges
- **Valerie Sundby**, Director of Transfer Education, State Board for Community and Technical Colleges

### TEP Consultants

- **Bruce Vandal**, Consultant, State Higher Education Executives Office Organization
- **Betsy Griffin**, Vice President and Resident Scholar, John N. Gardner Institute for Excellence in Undergraduate Education

### Project Task Force Participants, by Institution

Institution	Name	Title
Central Washington University	Keith Lewis	Faculty
Central Washington University	Megan McConnell	Interim Associate Dean & Transfer Center Director
Central Washington University	Gail Mackin	Associate Vice Provost for Undergraduate and Faculty Affairs
Eastern Washington University	Jens Larson	Associate Vice President for Enrollment Management
Eastern Washington University	Shari Clarke	Vice President for Diversity & Senior Diversity Officer
Independent Colleges of Washington	Terri Standish-Kuon	President and CEO
Lake Washington Institute of Technology	Robert Britten	Executive Director

<b>Institution</b>	<b>Name</b>	<b>Title</b>
North Central Educational Service District	Sue Kane	Director of STEM Initiatives and Strategic Partnerships
North Seattle College	D'Andre Fisher	Associate Vice President Equity, Diversity and Inclusion
Pacific Lutheran University	Ann Auman	Dean of Natural Sciences
Pierce College	Matt Campbell	Interim President
Pierce College Puyallup	Christine McMullin	Director of Advising and Entry Services
Saint Martin's University	Nadaa Elbarbary	Student
Service Employees International Union	Katie McCarthy	Senior Research Program Manager for our Research Insights and Innovation team
Shoreline Community College/ Seattle University	Mashaal Shameem	Student
Spokane Community College	Bill Rambo	Faculty
Spokane Falls Community College	Sally Jackson	Director of Planning, Institutional Effectiveness, & Research
University of Washington	David Sundine	Associate Director
Walla Walla University	Emily Tillotson	Professor and DEI Specialist
Washington State University - Vancouver	Amber Rysavy	Student (Graduated)
Washington State University	Fran Hermanson	Executive Director of Institutional Research

## Appendix D: Washington State Transfer Entities

**Education Research & Data Center (ERDC)** - Compiles data about students as they move through school to the workforce.

- **Membership:** State agency
- **State statute:** During the 2007 session, the Washington Legislature passed a bill that created the Education Research & Data Center (ERDC) in the Office of Financial Management. [RCW 43.41.400](#)

**Intercollege Relations Commission (ICRC)** - Facilitates transfer between institutions for all students pursuing baccalaureate degrees in Washington State.

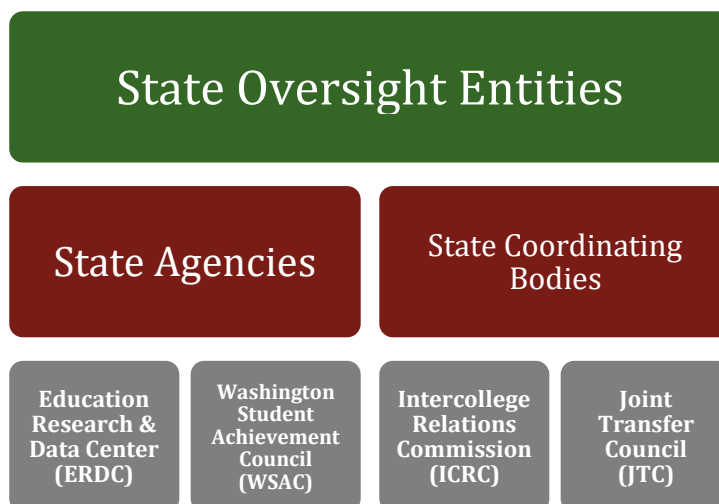
- **Membership:** Composed of representatives appointed by the presidents of all public baccalaureate universities and community and technical colleges, as well as many independent colleges and universities in Washington State.
- **State statute:** N/A

**Joint Transfer Council (JTC)** - A multi-sector standing committee that works to improve and advance student transfer in Washington. JTC works on behalf of the institutions represented and in collaboration with the Intercollege Relations Commission (ICRC) and the Washington Student Achievement Council (WSAC).

- **Membership:** Representatives from the six public four-year colleges and universities, four-year private, nonprofit institutions, vice presidents of instruction or student services from eight community and technical colleges, and representatives from the Council of Presidents (COP), Independent Colleges of Washington (ICW), and State Board for Community and Technical Colleges (SBCTC).
- **State statute:** N/A

**Washington Student Achievement Council (WSAC)** - State's transfer liaison. The agency is a single statewide point of contact for transfer issues. WSAC also stores and maintains transfer agreements.

- **Membership:** State agency
- **State statute:** WSAC is a cabinet-level state agency that works to raise educational attainment through strategic engagement, program management, and partnerships. [28B.77 RCW](#)



## Appendix E: Existing Washington-Specific Transfer Reports

To the extent to which transfer has been studied in Washington state, this appendix includes direct links to additional Washington-specific resources listed in chronological order:

Reports and resources:

- [Education Research & Data Center 2022 Report on Demographics and Postsecondary Enrollment for Students with Academic Transfer Degrees](#)
- [Washington Student Achievement Council 2021 Legislative Report: Washington Transfer Associate Degree Effectiveness Update](#)
- [Council of Presidents 2021 Reverse Transfer Summary](#)
- [Independent Colleges of Washington 2021 Strengthening Transfer Pathways to the Liberal Arts](#)
- [Washington Student Achievement Council 2020 Equity Landscape Report: Exploring Equity Gaps in Washington Postsecondary Education](#)

## About the Washington Student Achievement Council

The Washington Student Achievement Council is committed to increasing educational opportunities and attainment in Washington. The Council has three main functions:

- Lead statewide strategic planning to increase educational attainment.
- Administer programs that help people access and pay for college.
- Advocate for the economic, social, and civic benefits of higher education.

The Council has ten members. Four members represent each of Washington's major education sectors: four-year public baccalaureates, four-year private colleges, public community and technical colleges, and K-12 public schools. Six are citizen members, including two current students (one graduate student and one undergraduate student).

If you would like copies of this document in an alternative format, please contact the Washington Student Achievement Council at:

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