**EQUITY TRANSFER INITIATIVE**

**Background Information Template**

**LEAD INSTITUTION**

|  |  |
| --- | --- |
| Institution Name |  |
| Institution Street Address |  |
| City, State ZIP |  |
| Lead Institution’s Primary Contact Name (First and Last) |  |
| Lead Contact’s Phone  | ( )  |
| Lead Contact’s Email Address |  |

**PARTNER INSTITUTION(S)**

|  |  |
| --- | --- |
| Institution Name |  |
| Institution Street Address |  |
| City, State ZIP |  |

|  |  |
| --- | --- |
| Institution Name |  |
| Institution Street Address |  |
| City, State ZIP |  |

|  |  |
| --- | --- |
| Institution Name |  |
| Institution Street Address |  |
| City, State ZIP |  |

**TRANSFER PATHWAYS**

Please list the official names of the programs that the lead institution will align with the partner institution(s)

|  |  |  |  |
| --- | --- | --- | --- |
|  | Lead Institution’s Program Title | ADD Participant Institution’s Name  | ADD Participant Institution’s Name  |
| Pathway 1 | Name of Program | Name of Program | Name of Program |
| # of credit hours |  |  |  |
| Pathway 2 |  |  |  |
| # of credit hours |  |  |  |
| Pathway 3 |  |  |  |
| # of credit hours |  |  |  |
| Pathway 4 |  |  |  |
| # of credit hours |  |  |  |
| Pathway 5 |  |  |  |
| # of credit hours |  |  |  |

**STUDENT DEMOGRAPHICS**

Which student demographic(s) will you focus on increasing as a part of your ETI work?

|  |  |
| --- | --- |
| Student Demographic | Place an X next to each that you will focus on within your ETI work |
| African American |  |
| Hispanic |  |
| Adult learners |  |
| First-generation |  |

**EQUITY STRATEGIES**

In order to ensure that the student demographic(s) that your ETI project will focus on can persist and complete, it is important to focus on eliminating barriers and to view components of transfer through an equity lens. Please provide your thoughts around new equity and/or evidenced-based equity strategies that the partnership(s) will consider implementing as a part of its work.

|  |  |
| --- | --- |
| Focal Area | New Equity and/or Evidence-based Equity Strategy(ies) |
| Student onboarding |  |
| Academic advising at two-year institution |  |
| Career counseling (can be addressed within student onboarding or separately) |  |
| Course instruction at two-year institution(s) |  |
| Staffing support for target students at two-year institution |  |
| Hand-off of students between two-year and four-year institution |  |
| Policy review (i.e., application fees at receiving institution, credit for prior learning) |  |
| Academic advising at four-year institution |  |
| Course instruction at four-year institution(s) |  |
| Staffing support for target students at four-year institution |  |
| Reverse transfer in the event that students do not complete bachelor’s degree |  |

**CURRENT STATE OF TRANSFER**

Please describe the current relationship between the lead and participating institution(s) regarding transfer, and what obstacles will need to be addressed in establishing a stronger transfer pathway for students, and in particular to serve the targeted demographic(s) listed previously.

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| --- |
|  |

**LEAD AND PARTICIPATING INSTITUTION(S) ADVANCE PLANNING**

In the space provided below, please address how the lead and participant institution(s) plan to address the topics listed under each broad category. Related to financial implications, please also consider how your institutions plan to address the financial aspects of decisions that you make collectively (i.e., whether each institution will share financial responsibility, or whether the financial responsibility will fall with the lead or participating institution.

|  |
| --- |
| Financial Implications |
| Alignment of dual enrollment to transfer pathways (if applicable) |  |
| Faculty meetings to align curriculum, courses, and programs |  |
| Student success coaches (if needed) |  |
| Financial projections for impact of considerations for implementing 120 credit promise, reduced course choice, guaranteed transfer |  |
| Marketing and advertising |  |
| Programmer to integrate technology if institutions are on different platforms |  |
| Student Services |
| Student services (i.e., application policies) |  |
| Advising to the major |  |
| Technology |
| Exchange of data when the institutions are on different student management systems |  |
| Scalability |
| Ensuring that the defined model is scalable to other programs and other institutions |  |