

## CREDIT WHEN IT'S DUE: MINING LESSONS LEARNED & SUSTAINABILITY

### Meeting Objectives

- To share effective strategies for successfully implementing, assessing, and sustaining/scaling reverse transfer efforts
- To assess how much progress has occurred in reverse transfer efforts – where it has occurred and why
- To explore the impact of reverse transfer on the broader transfer and completion agendas
- To provide networking opportunities for grantees and funders

### Monday, June 8th

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**11:00 am**                      **Registration Opens**

*The Alexander Hotel, 2<sup>nd</sup> Floor  
333 S Delaware Street*

**11:30 am**                      **Lunch**

**12:00 pm**                      **Welcome Remarks**

*Alexander Ballroom*

**Jamie Merisotis**, *President and CEO*, Lumina Foundation

**12:15 pm**                      **Funders Panel: Interests in Reverse Transfer & Transfer more broadly**

Facilitator: **Dewayne Matthews**, *Vice President of Strategy Development*, Lumina Foundation

**Stacey Clawson**, *Senior Program Officer*, Bill & Melinda Gates Foundation

**Braulio Colon**, *Vice President and Program Director*, Helios Education Foundation

**Bill Moses**, *Managing Director*, Kresge Foundation

**Dominique Raymond**, *Senior Program Director*, USA Funds

**Holly Zanville**, *Strategy Director*, Lumina Foundation

**12:45 pm**                      **State Project Introductions**

Facilitator: **Bill Moses**, *Managing Director*, Kresge Foundation

**1:30 pm**                      **Reverse Transfer Associate Degrees: Lessons Learned from the Field**

Facilitator: **Bill Moses**, *Managing Director*, Kresge Foundation

**Chris Baldwin**, *Executive Director*, Michigan Center for Student Success

**Michelle Blackwell**, *Director of Reverse Transfer*, The University of North Carolina General Administration

**Gloria Gammell**, *Program Manager, Office of the Vice President of Academic Affairs*, University of Tennessee System

**Calista Smith**, *Consultant*, Ohio Board of Regents

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2:30 pm

### Research on Reverse Transfer in CWID States

Facilitator: **Janet Salm**, Program Officer, Measurement Learning and Evaluation, Bill & Melinda Gates Foundation

**Debra D. Bragg**, Gutgsell Endowed Professor, University of Illinois at Urbana-Champaign  
**Jason Taylor**, Assistant Professor, Dept. of Educational Leadership and Policy, University of Utah and Faculty Affiliate to Office of Community College Research and Leadership, University of Illinois at Urbana-Champaign  
**Matt Giani**, Assistant Professor, Office of Community College Research and Leadership, University of Illinois at Urbana-Champaign

3:30 pm

### Break

**Photo Sessions:** Arkansas, Hawaii, Michigan, Florida and Arizona

3:45 pm

### Small Group Discussions: What Does & Doesn't Work

*What are projects doing to maximize reverse transfer in the following areas?*

- Eligibility requirements, accreditation
- Student consent/FERPA
- Transcript exchange
- Conducting degree audits and course equivalencies
- Post-degree audit interventions

*Irish Hill*

### Group 1: Exploring Reverse Transfer

Facilitator: **Sarah Ancel**, Indiana Commission for Higher Education

Alabama, California, Indiana, Louisiana, New Mexico, South Dakota, Vermont and Virginia

*Fountain Square*

### Group 2: Planning Reverse Transfer

Facilitator: **Joe Holliday**, Washington - State Board for Community and Technical Colleges

Idaho, Illinois, North Dakota, Washington and West Virginia

*Fletcher's Place I*

### Group 3: Piloting or Implementing Reverse Transfer

Facilitator: **Christie Fox**, Utah System of Higher Education

Arizona, Iowa, Kansas, Kentucky, Nebraska, New Jersey, Oklahoma, Pennsylvania, Utah and Wyoming

*Fletcher's Place II*

### Group 4: CWID Grantees

Facilitator: **Chris Hockey**, State University of New York System Administration

Colorado, Florida, Maryland, Michigan, Oregon, Texas and New York

*Pogue's Run*

### Group 5: CWID Grantees

Facilitator: **Rose Rojas**, Maricopa County Community College District

Arkansas, Georgia, Hawaii, Minnesota, Missouri, North Carolina, Ohio and Tennessee

4:45 pm

### Small Group Report Out: What Does & Doesn't Work

Facilitator: **Braulio Colon**, Vice President and Program Director, Helios Education Foundation

5:15 pm

### Break

**Photo Sessions:** Guest States, Maryland, North Carolina, Colorado, Georgia, Minnesota, Missouri, New York, Ohio, Oregon, Tennessee, Texas and OCCRL.

6:15 pm

### Group Dinner

*Alexander Ballroom*

## CREDIT WHEN IT'S DUE: MINING LESSONS LEARNED & SUSTAINABILITY

- 7:00 pm**      **The Impact of Reverse Transfer on the Broader Transfer and Completion Agendas**  
**Dewayne Matthews**, *Vice President of Strategy Development*, Lumina Foundation  
Facilitator: **Paul Fain**, *News Editor*, Inside Higher Education
- George Pernsteiner**, *President*, State Higher Education Executive Officers Association  
**Mike Reilly**, *Executive Director*, American Association of Collegiate Registrars and Admissions Officers  
**Bruce Vandal**, *Vice President*, Complete College America

**8:00 pm**      **Adjourn**

**Tuesday, June 9th**

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**8:15 am**      **Breakfast**

- 8:45 am**      **National Student Clearinghouse: New Developments in Technology for Interstate Data Capability**  
**Courtney Brown**, *Director of Organizational Performance and Evaluation*, Lumina Foundation  
Facilitator: **David Pelham**, *Vice President of Higher Education Development and Client Relations*, National Student Clearinghouse
- Vanessa Brown**, *Project Manager*, National Student Clearinghouse  
**Brenda Selman**, *Registrar*, University of Missouri - Columbia  
**Shelby Stanfield**, *Registrar*, University of Texas at Austin

- 9:45 am**      **Small Group Discussions: What's Missing & What's Possible**  
*What are projects doing to maximize reverse transfer in the following areas?*
- *Vendor software platforms*
  - *State policy*
  - *Relationship to other transfer efforts*
  - *Other*

*Fletcher's Place*      **Group 1: Technology**  
Facilitators: **Gary Rodwell**, University of Hawaii at Manoa  
**Jason Taylor**, Office of Community College Research and Leadership

*Alexander Ballroom*      **Group 2: State/System Policy**  
Facilitators: **Elizabeth Cox Brand**, Oregon Community College Association  
**Heather McCambly**, Office of Community College Research and Leadership

*Irish Hill*      **Group 3: Relationship to Transfer & Completion**  
Facilitators: **Matt Giani**, Office of Community College Research and Leadership  
**Lynette O'Keefe**, Lone Star College System

*Alexander Ballroom*      **Group 4: Sustainability**  
Facilitators: **Debra Bragg**, Office of Community College Research and Leadership  
**Amy Werner**, Missouri Department of Higher Education

*Pogue's Run*      **Group 5: Getting Started with Reverse Transfer**  
Facilitators: **Gloria Gammel**, University of Tennessee System  
**Sara Garcia**, Office of Community College Research and Leadership

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**10:45 am**            **Break**

**11:00 am**            **Small Group Report Out: What's Missing & What's Possible**  
Facilitator: **Nicole McDonald**, *Strategy Officer*, Lumina Foundation

**11:30 am**            **Lunch**

**12:00 pm**            **Town Hall Discussion: What have we heard? What comes next?**  
**Holly Zanville**, *Strategy Director*, Lumina Foundation  
Facilitator: **Kirk Carapezza**, *Managing Editor & Reporter*, WGBH-Boston

**1:00 pm**            **Adjourn**  
*Transportation to the Indianapolis International Airport will be provided with shuttles departing at 1:15 pm and 1:45 pm.*