



Holistic Credit Mobility – Project Overview and Request for Proposal

Deadline: October 4, 2024

Timeline: November 2024 through January 2026

Today's postsecondary students accumulate college credit and other validated learning experiences from more sources and in more forms than ever before. Adult learners may complete military or corporate training, obtain credit for prior learning through a competency-based examination, or accumulate credits at multiple institutions along their educational journey. Additionally, high school students routinely earn college credit through dual enrollment programs or exam scores on AP or IB exams. Despite this increase in mobility and access, many students continue to face significant and systemic challenges when they attempt to not only earn credits but to move those credits between postsecondary institutions. These systemic challenges disproportionately impact students from lower socioeconomic backgrounds and contribute to lower levels of credential completion.

In November 2022, [Ithaka S+R](#) introduced [Holistic Credit Mobility \(HCM\)](#) as a framework for understanding and addressing the complexities of student mobility. HCM prioritizes the success of students who earn credits through multiple forms and sources of validated learning by focusing on three key areas that institutions and systems should adopt: supportive technology, policy, and responsive practice. This approach accommodates credit accumulation from diverse institutions and learning experiences. HCM shifts the focus from traditional input-based credit systems to an output-based model centering student learning as the primary determinant of academic progress. The framework empowers students to chart a path that counts all their learning toward a credential, access transparent and clear information regarding how their credits will transfer, and make informed decisions that can decrease their time to degree completion. By embracing HCM, institutions can create policies, practices, and technologies that clearly and cogently reinforce these goals and seamlessly support student success in a mobile learning environment.

HCM Cohort Project: The next phase of the HCM project, a collaboration with [Complete College America](#) (CCA), will include supporting the early-stage work of a cohort of systems or institutional consortia seeking to improve credit mobility through one or more of the three pillars of HCM: policy, practice, and technology. To achieve this, Ithaka S+R and CCA will select 10-12 system and/or institutional consortia to form a cohort dedicated to advancing holistic credit mobility in concrete and impactful ways, empowering champions at participating institutions, and building capacity for advocacy and action around credit mobility policies and processes. Over 12 months beginning in early 2025, cohort members will develop an action plan to improve upon and sustain their efforts in advancing holistic credit mobility within their context. To support these efforts, cohort members will engage and learn from existing research, HCM case studies, field experts, and peer cohort members by participating in in-person and virtual sessions. Learnings from the cohort will be documented to generate an

actionable HCM playbook comprised of research and strategies that can help institutions overcome the challenges associated with credit mobility.

Project Funding and Collaboration: This project is being coordinated collaboratively by Ithaca S+R and Complete College America (CCA) with generous support from [Ascendium Education Group](#).

Subgrant Funding: Each system or consortium will receive an up to **\$40,000 subgrant** from Ithaca S+R to support personnel participation and project related expenses. Ithaca S+R and CCA will provide a template to use in developing subgrant budgets which may include personnel and other costs associated with fulfilling the responsibilities in the project scope. Additional details for establishing a budget will be provided once cohort members are selected.

Application Process: Please submit written responses to the questions in the attached [Addendum](#) describing how this project aligns with your organization's current and future initiatives, your system or institutions' capacity to participate in the listed activities, and your system or institutions' practices around holistic credit mobility. Your answers will help guide the development of cohort activities and your participation in each session. Please submit your written responses to Kyle Gray (kyle.gray@ithaka.org) by **October 4, 2024**; a selection decision will be made by October 28, 2024 following project team review.

An **RFP Information Session** will be held on Monday, September 16 at 12 pm ET to provide an overview of the HCM project, cohort activities, and application process. We will also answer any questions you may have before submitting your application. Please [register here](#) to attend.

Benefits of Participation:

1. Learn from and connect with national leading experts in credit mobility and access to shared resources, best practices, and expert guidance.
2. Engagement with Ithaca S+R and CCA staff throughout the project including 1:1 technical assistance in between learning sessions to support plan development and execution of strategies for student mobility and transfer.
3. Collaborate and engage with institutional or system leaders actively working to improve credit mobility, leading to new possibilities for joint initiatives.
4. Develop plans to improve credit transferability for current and prospective students that can ultimately lead to higher student retention, graduation rates, and shorter time-to-degree.
5. Opportunity to heighten reputation for improving credit mobility, serving as a leading example regionally and nationally, and attracting a larger, more diverse student population.
6. Align with local, regional, and state initiatives aimed at improving student outcomes and transfer related goals.
7. Possible opportunities to present at national conferences and/or contribute to publications in collaboration with Ithaca S+R and CCA to showcase practices and policies implemented as part of this project.

Cohort Selection Criteria:

1. System or consortium of institutions, in which a backbone entity is coordinating member institutions in jointly working towards enacting or improving credit mobility processes in the areas of policy, practice, or technology in alignment with Ithaca S+R's HCM framework.

2. Strong focus on equity and serving students who are first-generation to college, low income, or historically underrepresented in higher education.
3. Demonstrated executive leadership at the system and institutional levels to support a devised action plan and necessary investments for improving credit mobility, including student transfer, across multiple institutions.
4. Ability to collect and provide data on current credit transfer practices or experience with transferring a variety of credit types (AP, dual enrollment, military, certificates, etc.).

Cohort Roles and Expectations:

1. Serve as a thought partner and active participant in each learning session and the final convening designed to assist members identify policies, practices, and processes that align with the three pillars of holistic credit mobility.
2. Participate in learning activities to identify areas of targeted technical support for holistic credit mobility activities.
3. Collect and report common metrics of student credit mobility outcomes to better track institutional progress over time.
4. Willingness to dedicate staff time across departments to participate in the learning sessions over a 12 month timeframe.

Key Activities:

1. Identify strategic priorities and develop an implementation plan to address existing gaps and improve processes, institutional policies, and technological infrastructure around holistic credit mobility beyond the initial cohort period, with a focus on sustaining efforts into future years.
2. Participate in 5 virtual sessions (minimum of 90 minutes each) over 12 months to dig in deep on current practices, policies, and technologies, and drive improvements, plus attend a final in-person meeting with all cohort members early 2026.
3. Complete pre- and post- meeting assignments to advance project work and attend 1:1 virtual meetings (approximately one hour) with Ithaca S+R coaches in the months between learning sessions to check-in on progress.
4. Provide feedback and input to Ithaca S+R and CCA regarding process and learnings that will be used as part of the evaluation of this project provided to the funder.

Important Dates:

- **September 16, 2024**
 - Virtual information session
- **October 4, 2024:**
 - Request for Proposal deadline
- **October 2024:**
 - Proposal review process and final selection of cohort members
- **November 2024:**
 - Initial conversations with cohort to assess priorities
- **January 2025-January 2026:**
 - Cohort sessions

Ithaka S+R

Ithaka S+R is a nonprofit research and strategic advising service dedicated to broadening access to quality postsecondary education, improving student outcomes, and advancing research and knowledge. Ithaka S+R is a part of ITHAKA, a nonprofit organization with a mission to improve access to knowledge and education for people around the world.

Complete College America

Complete College America (CCA) is a non-profit organization dedicated to transforming higher education into an engine of equity and opportunity. CCA believes that current higher education systems perpetuate societal inequalities and aims to change this by increasing college completion rates for all students, regardless of their background. To achieve this, CCA works with states, institutions, and partners to implement effective strategies and policies that support student success.

Addendum: Holistic Credit Mobility – Request for Proposal Questions

1. How does participation in this project support your system or institutional goals around equity, student success, and access and outcomes for specific student groups (e.g. adult learners, first generation, military, historically underrepresented communities, etc.) and what, if any, problems do you hope to solve?
2. Using the scale below, how would you currently assess your system's or institutions' policies, responsive practices, and technologies used to facilitate the award of credit to students gained from outside your institutions or system? Please provide an example supporting your selection. Note that you will not be disqualified for providing examples that are "emerging." We are seeking to understand the stage of various initiatives and are hoping to create a diverse set of committed systems/institutions in the cohort.
 - **Emerging:** we are beginning to assess and understand how we can provide more holistic credit mobility at our institution/system
 - **Advancing:** we are actively engaged in understanding and improving credit mobility
 - **Fully scaled:** we consider credits moving into our systems/institution holistically through clear policies, responsive and proactive processes, and using technology
3. Please indicate any current or planned system-wide or college-specific initiatives (within or across a system or group of institutions) that facilitate credit mobility for non-traditional students, detailing technologies used (e.g., SIS's, transcribing or learning management systems, or other credit transfer platforms).
 - a. Does your system or consortium track data on credit transfer and mobility activities and outcomes and have you identified any goals or KPIs to help students recognize credits for learning outside a single institution or facilitate transfer? If so, what are they?
 - b. If not, what are your goals for creating processes and practices to track such data to help you understand student mobility and credit transfer within or across your system or group of institutions?
4. What challenges and obstacles do you anticipate your system or consortium may encounter in participating in this project?
5. We are constructing a learning agenda for the cohort. What would be most helpful and useful to you and your institution or system to learn and connect with others over the next 12 months?
6. Please list any areas of this project you need further information on from Ithaka S+R and CCA to feel confident in proceeding.