



Credit Mobility Strategies in Action

A Case Study Report on State, System, and
Institutional Efforts to Smooth the Path to a
College Degree for Mobile Students

Kyle Gray
Betsy Mueller
Emily Tichenor
Madeline Trimble

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Introduction

Today's postsecondary students often carry with them a vast array of previous learning experiences. Students may have earned college credit while in high school, attended multiple colleges or universities, taken exams such as AP or IB, obtained trade or industry certifications, or be service members with military transcripts. In fact, 45.6 percent of associate's degree holders and 67 percent of bachelor's degree holders have transcripts from multiple institutions.¹ Multisource opportunities to complete college level learning can be a major accelerator for students, especially adult students, on the path to a credential of value.² Yet all too often, validating these learning experiences and obtaining credit for them from higher education institutions present additional hurdles that students must surmount to maximize their potential as learners. These hurdles are often the result of fractured and complex policies and processes that govern how validated learning from outside sources is evaluated and applied to credentials at colleges and universities. Losing or not receiving credit for validated learning can result in a loss of momentum towards a degree, higher costs, and has been shown to decrease chances of graduation.³

To understand the complex nature of learning recognition and credit transfer in American postsecondary education and examine the systemic barriers to entry many students face as they navigate its institutions, Ithaka S+R conducted a series of qualitative interviews in fall 2024 with state and system-level leaders in Idaho, Illinois, Ohio, and the University of

¹ Doug Shapiro, Afet Dundar, Phoebe Khasaijala Wakhungu, Xin Yuan, Angel Nathan, and Youngsik Hwang, "Time to Degree: A National View of the Time Enrolled and Elapsed for Associate and Bachelor's Degree Earners," *National Student Clearinghouse Research Center*, September 2016, <https://nscresearchcenter.org/wp-content/uploads/SignatureReport11.pdf>.

² Rebecca Klein-Collins, Carianne Bishop, Peace Bransberger, Patrick Lane, and Sarah Leibrandt, "The PLA Boost: Results from a 72-Institution Targeted Study of Prior Learning Assessment and Adult Student Outcomes," *The Western Interstate Commission for Higher Education and the Council for Adult and Experiential Learning*, December 2020, <https://www.cael.org/hubfs/PLA%20Boost%20Paper%20ExecSummary%20-%20Oct%202020.pdf>.

³ David B. Monaghan and Paul Attewell, "The Community College Route to the Bachelor's Degree," *Educational Evaluation and Policy Analysis* 37, no. 1 (2015): 70–91, <https://www.jstor.org/stable/43773487>.

North Carolina System, and representatives from Charter Oak State College and Florida International University. These semi-structured interviews were designed to probe an array of areas related to credit mobility initiatives—chief among them policy, technology, practice, and implementation—and tease out common challenges, themes, and open questions educational leaders continue to grapple with.

These case study reports are timely, as it is more important than ever to find evidence-based solutions to break through systemic and structural barriers to credit mobility. There are 41 million Americans who hold some college credit, but have not earned a college credential.⁴ Engaging this population of students is a key priority as upskilling is critical to growth in many key industries and local economies,⁵ and as demographic shifts are anticipated to drive lower enrollment numbers of the “traditional age” students so many higher education institutions have centered their business models around.⁶ In addition to this significant shift, other forms of validated learning have continued to rise over the past decade including dual enrollment of high school students in college courses, which has seen explosive nationwide growth. During the 2022-2023 academic year, nearly 2.5 million high school students—or 21 percent of all community college enrollment nationally—participated in dual enrollment.⁷ Coupled with these two significant trends are an increase in community college promise scholarship programs that provide access to students to start their higher education journey tuition-free,⁸ an increase in standardized

⁴ “Some College, No Credential Student Outcomes,” *National Student Clearinghouse Research Center*, 6 June 2024, <https://nscresearchcenter.org/some-college-no-credential/>.

⁵ Kristi DePaul, “From Some-College-No-Degree to Success: Postsecondary Pathways for the 40 Million,” *Inside Higher Education*, 26 September 2024, <https://www.insidehighered.com/reports/2024/09/24/some-college-no-degree-success-postsecondary-pathways-40-million>.

⁶ Dan Bauman, “Colleges Were Already Bracing for an ‘Enrollment Cliff.’ Now There Might Be a Second One,” *The Chronicle of Higher Education*, 7 February 2024, <https://www.chronicle.com/article/colleges-were-already-bracing-for-an-enrollment-cliff-now-there-might-be-a-second-one>.

⁷ John Fink, “How Many Students Are Taking Dual Enrollment Courses in High School? New National, State, and College-Level Data,” *Community College Research Center*, 26 August 2024, <https://ccrc.tc.columbia.edu/easyblog/how-many-students-are-taking-dual-enrollment-courses-in-high-school-new-national-state-and-college-level-data.html>.

⁸ Amelia Benavides-Colón, “Free Community College Just Keeps Growing. Will It Pay Off?” *The Chronicle of Higher Education*, 23 August 2024, <https://www.chronicle.com/article/free-community-college-just-keeps-growing-heres-the-latest>.

tests completed for college credit,⁹ and a rise in short-term credential opportunities like boot-camps and certifications.¹⁰ Another area within credit accumulation with the potential to reach large numbers of students are so-called “early postsecondary experiences.” According to Tennessee SCORE,¹¹ an education research and advocacy group, such experiences include “courses or exams that provide students with the chance to earn postsecondary credit while in high school.” Together, all these opportunities can provide significantly increased access to learning, but system and institution leaders must design strategies to ensure this access translates into momentum towards credential completion.

The case studies within this report provide the unique context for each system and institution and a descriptive overview of the policies, practices, and technologies they have employed to improve credit mobility and student outcomes. The case studies also reflect on how efforts underway at these institutions and systems align with the conceptual framework of “holistic credit mobility.”¹² Introduced in 2022, holistic credit mobility is a framework designed to assist postsecondary institutions and systems in developing solutions that support mobile students with multisource validated learning. The case study interviews revealed complex and compelling efforts to improve credit mobility as well as areas where additional solutions are needed to better serve students. Holistic credit mobility is evolving, and learnings from these and future case studies, as well as direct work with institutions and systems implementing credit mobility strategies, will inform and enhance the framework.

⁹ “Student Advanced Placement Participation and Performance Increase over Last Ten Years,” College Board Newsroom, 29 February 2024, <https://newsroom.collegeboard.org/student-advanced-placement-participation-and-performance-increase-over-last-ten-years>.

¹⁰ Sara Weissman, “The Microcredential Generation,” *Inside Higher Ed*, 10 January 2024, <https://www.insidehighered.com/news/tech-innovation/alternative-credentials/2024/10/01/microcredential-generation>.

¹¹ “Building A Vision For Early Postsecondary Opportunities,” Tennessee SCORE, 22 May 2023, <https://tnscore.org/resources/building-a-vision-for-early-postsecondary-opportunities>.

¹² Sarah Pingel, Chau-Fang Lin, and Martin Kurzweil, “Holistic Credit Mobility: Centering Learning in Credential Completion,” *Ithaka S+R*, 16 November 2022, <https://doi.org/10.18665/sr.317882>.

Credit Mobility Terms

This report invokes terms like “mobile student,” “credit mobility,” or “validated learning” to inclusively and accurately describe the vast array of credit and non-credit learning experiences many modern students accumulate over time. These experiences and avenues extend far beyond traditional transfer pathways, and labeling learners with such a narrow term does not account for individual complexity. Credit mobility structures and discussions are holistic only once they accommodate for this variation. Below, we define several key terms as they relate to this case study report.

Credit: Academic credit, or college credit, is the unit of measurement most assigned by postsecondary institutions to recognize a segment of learning completed or a competency demonstrated. Credit is usually earned by completing a college or university course.

Transfer credit: Transfer credit is academic credit from an outside source that a college or university accepts towards a degree program when a student is admitted.

Credit mobility: A broad term for the movement of academic credit and college-level learning by postsecondary students to and between educational institutions in pursuit of a degree or credential.

Dual enrollment: Students currently enrolled in multiple institutions of learning at the same time. This is typically seen in high school dual enrollment students.

Mobile students or mobile learners: These terms refer to the increasing population of postsecondary students who move college level learning and academic credit to and between higher education institutions. These students may move credit laterally, vertically, or in reverse between institutions while completing a degree or credential.

Validated learning: People obtain validated learning when they convert learning into college credit.

Credit for prior learning (CPL): CPL is the process or method through which academic credit is granted for college-level learning that has taken place outside of a college or university. There are many sources of learning that fall under CPL including but not limited to, exams, learning portfolios, noncredit courses or programs, skill certificates, and military service. CPL is sometimes referred to as Prior Learning Assessment (PLA).

Credit Mobility Landscape

Student transfer and credit for prior learning are far from new areas of interest and concern within higher education. They have been heavily studied for many years and many institutions and state systems have been actively enacting policies, technologies, and processes to improve credit transfer and acceptance. In recent years, institutions have faced increasing pressure,¹³ both locally and nationally,¹⁴ to smooth the path for students with previous learning, as earning credit from multiple sources has become the norm. But despite this intense focus, outcomes for transfer students have remained stagnant and credit for prior learning has remained an underutilized source of college credit for students.¹⁵ Nationally, only 16 percent of community college students successfully transfer institutions and complete a bachelor's degree within six years.¹⁶ A 2024 survey from the American Association of Collegiate Registrars and Admissions Officers (AACRAO) found that 54 percent of institutions currently will not accept credit for prior learning transferred from another school for college credit, even if they offer credit for prior learning at their institution.¹⁷ A 2021 report by the American Council on Education

¹³ Sara Weissman, "California Governor Wants a Guaranteed Transfer Path to UCLA," Inside Higher Ed, 8 March, 2023, <https://www.insidehighered.com/news/2023/03/08/california-governor-wants-guaranteed-transfer-path-ucla>.

¹⁴ "Biden-Harris Administration Convenes Higher Education Leaders to Improve Student Transfer to Increase Completion of College Degrees," US Department of Education, 9 November 2023, <https://www.ed.gov/about/news/press-release/biden-harris-administration-convenes-higher-education-leaders-improve>.

¹⁵ Rebecca Klein-Collins, Carianne Bishop, Peace Bransberger, Patrick Lane, and Sarah Leibrandt, "The PLA Boost: Results from a 72-Institution Targeted Study of Prior Learning Assessment and Adult Student Outcomes," *The Western Interstate Commission for Higher Education and the Council for Adult and Experiential Learning*, December 2020, <https://www.cael.org/hubfs/PLA%20Boost%20Paper%20ExecSummary%20-%20Oct%202020.pdf>.

¹⁶ Tatiana Velasco, John Fink, Mariel Bedoya-Guevara, Davis Jenkins, and Tania LaViolet, "Tracking Transfer: Community College and Four-Year Institutional Effectiveness in Broadening Bachelor's Degree Attainment," Community College Research Center, 21 November 2024, <https://ccrc.tc.columbia.edu/publications/tracking-transfer-community-college-and-four-year-institutional-effectiveness-in-broadening-bachelors-degree-attainment.html>.

¹⁷ Wendy Kilgore, "Enhancing Accessibility and Inclusion: the 2024 Landscape of Credit for Prior Learning in U.S. and Canadian Higher Education," AACRAO, January 2015,

presenting a series of reports commissioned to inform a National Task Force on the Transfer and Award of Credit finds that, “rigid and inflexible transfer of credit policies” erect barriers for modern, mobile students.¹⁸ Such barriers are amplified for low-income learners and students of color. Students report that the process of transferring credits is one of the most challenging parts of moving to a new institution.¹⁹

In order to understand the challenges mobile students face, it is important first to understand who they are and the types of credit they are seeking to move into and between higher education institutions. A mobile student’s journey may look very similar to the examples below.



Ernesto, who has experience in the military, and uses his GI benefits to enroll part-time at his local community college with the goal of transferring to his state’s four-year university



Cecilia, who took six dual enrollment credits while in high school, but decided to take a gap year to work for her family before enrolling in a four-year independent institution later



Sally, a 42-year-old mother with an associate’s degree who is returning to a four-year institution part-time to try to complete her business degree after working in offices in various roles for 20 years while raising her two children

<https://www.aacrao.org/research-publications/aacrao-research/enhancing-accessibility-and-inclusion-the-2024-landscape-of-credit-for-prior-learning-in-us-and-canadian-higher-education>.

¹⁸ “Reimagining Transfer for Students: The National Task Force on the Transfer and Award of Credit,” *American Council on Education*, 2021, <https://www.acenet.edu/Documents/Reimagining-Transfer-for-Student-Success.pdf>.

¹⁹ Alexandra Logue, Yoshiko Oka, David Wutchiett, Kerstin Gentsch, and Stephanie Abbeyquaye, “Possible Causes of Leaks in the Transfer Pipeline: Student Views at the 19 Colleges of The City University of New York,” *Journal of College Student Retention: Research, Theory & Practice* 26, no. 3 (August 2022) <https://journals.sagepub.com/doi/10.1177/15210251221117276>.

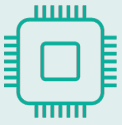
Traditional ways of thinking of transfer as a highly choreographed two year + two year pathway between one community college and one university do not match the reality of student mobility patterns. Instead, students often move laterally, vertically, across state lines,²⁰ and change in and out of programs of study. Institutions also frequently do not inform students before application and matriculation how their previous learning will apply to their new academic program. As the path to earn a college credential becomes increasingly non-linear and multidirectional, it is essential that institutions and systems continue to adapt their processes and policies to serve mobile students and increase student success.

Overview of the Holistic Credit Mobility Framework

Holistic credit mobility is a conceptual framework that encourages higher education systems and institutions to shift their focus from the inputs of the credit transfer process to the output of student learning. Student learning should be the determining factor of progress towards credential completion. This mindset shift requires institutions and policymakers to rethink the traditional gatekeeper role of the past and embrace the multi-source, multi-modal credit accumulation of mobile students to ensure student learning is recognized and applied as frequently as possible to a credential of value.

To achieve holistic credit mobility, institutions should avoid requiring students to repeat learning, provide as much information as possible about how past learning will apply to a credential before a student transfers, and help students chart the shortest path from their past learning to a credential. They should also leverage three essential supports: supportive technology, policy, and responsive practice.

²⁰ “Transfer and Progress,” *National Student Clearinghouse Research Center*, Fall 2023, <https://nscresearchcenter.org/transfer-and-progress>.



Supportive technology involves tools designed and built to facilitate and streamline student transfer. These may include student-facing tools or internal databases of credit equivalencies used to inform administrators and advisors.



Policy-driven pertains to the structural work, at scale or within an institution, that supports students along their increasingly mobile educational journeys. This may center around forging connections between bodies within a state and should keep close at hand the financial incentives and disincentives institutions of higher education encounter when awarding credit for prior learning.



Responsive practice comprises the third and equally essential leg of the holistic credit mobility tripod. Both policy making and technological innovation are stunted if higher education leaders do not strive to develop a deep understanding of student experience and hysteresis in policy implementation. Accordingly, responsive practice focuses on the intricate details of the causal mechanisms which influence varied student outcomes, demanding practitioners, policymakers, and developers actively seek and meaningfully engage with feedback from a wide array of stakeholders.

Working in concert, these three supports can serve as checks and balances to each other and ensure that holistic credit mobility is prioritized in system and institution policy, implemented through responsive student success practices, and visible and accessible through supportive technology utilized actively with students. In our case studies, we illuminate several examples of these three necessary supports in action.

Case Study Overview

Through a series of in-depth interviews, we explored five core areas relevant to holistic credit mobility—policy, technology, responsive practice, implementation, and monitoring and evaluation. We designed these discussions to touch upon a wide range of relevant topics while still permitting participants to guide the conversation and present information about their core areas of focus, concern, and development. We asked about the broad history of credit mobility initiatives in their states, systems, and institutions, their experiences working in this area, and the directions they see their credit mobility efforts going in the future. We sought to understand specific policy contexts and key legislation, as well as the interplay of state boards of education, lawmakers, intermediary organizations, and institutional leadership. We also delved into a wide array of credit types, including credit for prior learning, credits earned in high school (such as dual enrollment, AP, or IB), military credit, credits from multiple prior institutions, corporate training and industry certifications, horizontal or reverse transfer, out of state transfer, and state or system-specific pathways and initiatives. We inquired about responsive practices, such as advising supports and user feedback, and probed technological innovation, challenges and considerations pertaining to implementation, the collection and availability of credit mobility data, and efforts to measure the impact and efficacy of various initiatives.

Technology emerged as a central focus area of all interviews, as both institutions and systems seek to improve business processes and increase information access for students. Similarly, collaboration and coordination to achieve credit mobility goals was a prevalent theme. Other focus areas emerged from our interviews that were crucial to the context of individual systems and institutions, for example economic and workforce alignment and student advising practices. Within this report each case study includes a subsection on technology, the other subsections vary to reflect themes that emerged within each profile.

Participant Selection

We conducted an informal landscape analysis of credit mobility efforts to identify state or system initiatives that are making efforts to put the holistic credit mobility pillars into practice and developed a short list of candidates by relying on publicly available data from the National Center for Education Statistics (NCES) and state sources, research papers, articles, conference presentations, and policy analysis factoring in recent and longstanding initiatives around key areas of credit mobility, such as credit for prior learning.

Interviews were conducted in the fall of 2024 and attended by at least two members of our team, allowing one researcher to lead the interview while another took notes. We conducted a thematic analysis of the conversation transcripts and present these themes below.



Credit Mobility Case Studies

This section presents descriptive overviews and key selections from our interviews with state systems and institutions presented sequentially and alphabetically within each section. The case studies are each further subdivided into themes and areas of focus. An introduction to the varied policy contexts, key statistics, and primary initiatives for each case study subject is also included to provide supportive context.

Idaho

Idaho State Board of Education

Idaho presents the smallest higher educational system yet the largest geographic area of the states profiled here. There are eight public higher educational institutions in Idaho. Due to the state's geography (40 of 44 counties are rural), these institutions are spread hours apart and are often difficult to access for many students, particularly in winter. Transfer rates between institutions are high, and more than half of high school students participate in some form of dual enrollment, which is mostly financed by the state. According to 2022 IPEDS data, the six-year graduation rate for transfer students is 55.2 percent.

Dual credit is a significant building block of Idaho's credit mobility efforts, and they "use dual credit to mean simultaneously earning both high school and college credit at the same time and ... multiple modalities." Many of these dual credit courses are offered remotely, which helps make them available to the state's largely rural student population. In recent years, institutions in Idaho have worked closely with military students and families and expanded their transfer infrastructure to include things like credit for prior learning, CLEP, and out-of-state transfer. Institutions also committed to using the ACE Military Guide when assisting students affiliated with the military.

Systemwide, 37,868 students enrolled in dual credit courses in fiscal year 2022. From FY16 to FY22, the total number of students who took at least

one dual credit class increased 114.3 percent while total dual credit hours in the state increased 130.8 percent.²¹ These efforts are advanced by a common course numbering system for general education courses, further tying the institutions together. Where course numbering does not align, articulation agreements centered on majors take up the slack.

We interviewed two representatives, both at the State Board of Education, which, for academic and transfer purposes, is the governing body for all educational institutions in the state from “K to PhD.” Both staff members work closely with one another on issues pertaining to credit mobility, particularly dual credit, and collectively bring roughly 30 years’ worth of experience in Idaho higher education. Their roles regularly bring them into close proximity with institutional leaders and provosts, and “while we’re a large state, we’re small enough ... that being able to build and maintain relationships with key players both at the leadership levels and also at the implementation levels is really important.” These “relatively flat and really pretty close working relationships” enable the various leaders in the state to stay “on the same page as much as [they] can be.”

Technology

Idaho centralizes course equivalency information in their Course Transfer website.²² The tool allows users to search source equivalencies, breaks down the statewide General Education Matriculation (GEM) core curriculum,²³ and presents information on how credit is awarded for common dual credit courses and exams, such as AP, IB, and CLEP. The primary CourseTransfer audiences are students and high school guidance counselors “that are helping to advise students” and “probably use [CourseTransfer] more than anyone.” Given the frequency of dual credit enrollment in the state, the site is particularly geared towards students applying those credits towards their first postsecondary experience. Idaho’s postsecondary institutions also offer CollegeSource’s Transfer Equivalency System, a national database of course equivalencies that help students with previous exposure to higher education, especially those from out of state, better understand how their credits may transfer.

²¹ “Postsecondary Data Dashboard,” Idaho State Board of Education, 2025, <https://dashboard.boardofed.idaho.gov/PostsecondaryDashboard.html#MainTitle>.

²² “CourseTransfer,” Idaho.gov, 2025, <https://coursetransfer.idaho.gov/>.

²³ Policy III.N of the Idaho State Board of Higher Education Policies. “III.N. – Statewide General Education,” Idaho.gov, 2025, [III.N. - Statewide General Education | Idaho State Board of Education](#).

In Idaho, these technological services play a key role in informing stakeholders across the state. The state board is focused on increasing knowledge and awareness, and leadership “recognize that a whole lot of people don't understand the transfer process.” Yet students are not the only group with incomplete knowledge of the myriad forms of transfer available: legislators and practitioners are also aided and informed by these tools. Interestingly, Idaho interviewees noted that, “Course Transfer was developed many years ago and it has served several purposes, but the primary one was in response to legislative questions about transferability.” By standardizing information and clearly laying out for students where their credits can transfer, what was formerly perceived as a black box by key stakeholders in the state is now much more widely understood.

While knowledge gaps may be addressed through these tools, the Idaho interviewees noted that lack of awareness about what the tools offer is also an issue: “[Course Transfer] is not used as much as we want, in many cases because a lot of people don't know about its existence.” While access to these tools may be low, more traditional advising supports may still be making a difference and supporting increasingly mobile students. Knowledge sharing in general is a core challenge for these Idaho leaders, and they expressed strong interest in:

A third-party solution ... that will help students have a clearinghouse for, [or] a place to go to even understand what institutions they have credit from and then be able to share that credit with our institutions in a more efficient manner. That has been a challenge for all transfer students, but I think it's become more of a challenge as dual credit has become increasingly utilized.

Transcript issues frequently come into play for students with dual credit courses at multiple institutions. Our conversation revealed that, “because of how geographically distributed [Idaho is], [students] might take classes from one to four to all eight institutions.” This presents a technical hurdle for students who need to obtain transcripts from multiple institutions. Helping students understand what learning they have already accomplished presents a challenge in the state, but our Idaho contacts are optimistic about technologies that can address these challenges head on.

Coordination and Collaboration

Closeness despite geography guides Idaho's postsecondary outreach and engagement philosophy. The higher education board drives regular contact between the institutions:

In addition to official meetings which we do have on a regular basis, we work very hard to maintain professional relationships with the implementers on our campuses. So, registrars, admissions, the door credit coordinators, our student affairs, professionals, and our chief academic officer maintain those same types of relationships. To the provosts both through the meetings [by picking] up a phone and call and the presidents. So, I think Idaho is unique in that we have that single governance structure and we're rural enough to know each other. We get to know each other pretty well as we celebrate [successes] and face challenges.

While "a high percentage of the work [Idaho performs] is policy implementation," an interviewee noted that their approach "Only works because of these relationships [my colleague] is talking about, and I would say because of the increasing or the continued and increasing sense of trust and paired mission." The conversation also revealed how their efforts to increase dual credit enrollment served as a primary policy initiative that helped cement these ties.

Idaho's higher education leaders are able to build and maintain trusting relationships due in part to their small size, and they prioritize inclusivity and work to bring as many players to the policy table as possible, recognizing that, foremost, policy making is a "collaborative process" that entails bringing together all segments of postsecondary education to refine policy and educate both those affected and those not impacted by a given initiative. Our interviewees enunciated that leaders in the state are cognizant of the importance of bottom-up processes:

[Whenever] we've had to do more of a top-down policy implementation, you can pretty much guess that that does not go over well, and it wouldn't in most places. Because we don't know all the things that the campus staff are facing, and we miss it if we don't engage with them for effective policy making. And so, we don't do it that way. It's an inclusive process, even when something is necessary, and necessarily quick, we still reach out to include all the relevant parties.

Deep awareness of policy implementation challenges drives a strong desire to craft inclusive practices. Our conversation revealed that, when it comes to credit mobility, faculty are, more often than not, the key stakeholder necessary for leaders to engage. Identifying and tapping individuals most motivated to assist specific efforts meaningfully moves the needle on gaining buy-in. These are all relationships the state board manages, to the success of holistic credit mobility initiatives and learners alike.

This underlines the complex nature of improving credit mobility: institutions and practitioners need to both recognize the situation of the groups and endeavor to support even the most complex student journeys. Further, they need to be made aware that they are not fighting these battles alone by actively seeking feedback and input. Trust remains paramount, fostering respect and garnering goodwill throughout the state and allowing leaders to more accurately and acutely ascertain needs, challenges, and desires. The power of convening, when used in this way, promotes holistic credit mobility and improves the policy-making process in the states and systems profiled herein.

Student Advising

Idaho relies heavily on high school advisors to guide its large dual enrollment population. In fact, “there is a statutory requirement that [dual enrolled students] receive advising by the time they get to 15 credits.” However, this support is imperfect, as the statute is vague about exactly who should provide that guidance. Both interviewees also noted that they work closely with dual credit staff to bolster advising efforts and spread awareness of common issues. There is interest in standardizing these advising practices to more clearly direct students to support, but for now most institutions have dedicated dual credit advising personnel.

Education and Outreach

Education and training do not apply only to practitioners. A considerable number of students in Idaho lack requisite information about the intricacies of transferring the dual credit they have more than likely earned in high school. Because dual credit courses are more affordable than their on-campus equivalents—high school students pay just \$75 per credit hour—it’s important for students to transfer these. As our conversation revealed:

We have a few issues, and some of these will go to the general population as well, but a lot of times high school students who are earning credit are very familiar with their high school transcript. But [they] still don't recognize the need to have those dual credits reflected on a college transfer transcript in order to transfer. So, it's a process of educating.

This educational gap is not limited to dual credits: it also extends to AP credit transfer. Too many high school students take AP exams yet are unaware they need to report these scores to institutions. The state board recognizes this knowledge gap and is “Ramping up [their] advising for that subset of our population.” By creating a more informed student body, Idaho is ensuring that the policy changes to increase attainment are not only implemented but harnessed by mobile students.

Cross-Institutional Alignment

Our Idaho conversation also engaged with the intricacies of alignment. Though dual enrollment is a cornerstone of their credit mobility offerings, some of their early work in the space:

[Revealed] some inconsistencies that our post-secondary admissions officers were seeing in Idaho high school graduates, [where] the requirements for graduation were not aligned with the college entrance requirements, and they felt horrible that students were thinking they were college ready because they had graduated and they would have to opt in to the college going.

Identifying this mismatch drove them to forge connections between sectors and reduce such barriers to entry. Importantly, this change “came from folks who care enough about students to worry about what they were left with.” This example, one of many, they informed us, also captures the importance of regular engagement with all aspects of the educational pipeline.

Illinois

Illinois Community College Board

Illinois has a long history of credit transfer legislation and practice and is one of the nation's leaders in terms of transfer outcomes: 64.1 percent of transfer students graduated within six years in 2022, according to IPEDS. A keystone of the Illinois transfer infrastructure came in 1993, when “the universities and community colleges, board of higher education, the community college board all came together, and transfer coordinators created the Illinois Articulation Initiative.”

The Illinois Articulation Initiative (IAI) established a general education core comprising a set curriculum and credit hours that, if completed, transfers as a package and a given student is no longer required to take lower-level courses.²⁴ The IAI is so firmly cemented as the primary mode of transfer in the state that even a sizable portion of private colleges in the state accept these credits, though they are not legislatively mandated to do so. The IAI is regularly updated based on panels of faculty experts reviewing syllabi and establishing updated equivalencies; in the past decade, Illinois passed a law requiring this previously voluntary core curriculum at all public institutions. In 2023 legislation, lower division courses associated with specific majors must now be accepted as in-major by upper division institutions, provided the IAI major codes align. Other recent efforts introduced credit for prior learning and reverse transfer, but the IAI remains the prime mover of transfer students within the state.

We interviewed a leader at the Illinois Community College Board (ICCB), who brings 20 years' experience in the state across adult education, workforce development, and career technical education. Formed in 1965, the Community College Board is a 12-member board, mostly appointed by the governor, that serves as the coordinating agency for the 39 community college districts in the state, currently comprising 45 institutions including the city colleges of Chicago. The Community College Board works closely with the Board of Higher Education, which oversees four-year institutions, the governor's office, and college presidents, trustees, and other leadership.

Within the higher education governance structure in Illinois, the Community College Board is classified as a state agency, as are each of

²⁴ “What is IAI? | iTransfer,” Itransfer.org, 2025, <https://ittransfer.org/aboutiai/>.

the public four-year universities. Student financial aid is under the purview of the Illinois Student Assistance Commission, another agency. The higher education board also engages with the K-12 agencies, particularly on dual enrollment. All agencies work directly with the general assembly, and there is no hierarchy in those relationships.

Technology

Illinois created iTransfer, its primary technological tool supporting credit mobility, to increase the transparency of the Illinois Articulation Agreement.²⁵ This web platform was developed in-house and is currently co-managed by the Illinois Community College Board, the Illinois Board of Higher Education (IBHE), and Illinois State University. The platform lays out the various articulation mechanisms, namely block transfer and major agreements, essentially acting as a comprehensive guide for students and practitioners navigating the IAI.

Illinois also offers MyCreditsTransfer,²⁶ which taps into Transferology's national equivalency database to support transfer within and into the state. A large number of private and public institutions in the state participate,²⁷ and the resource is particularly useful for determining how credits will be received. Illinois employs the tool to supplement, but not supplant, their existing technology supports. Transferology can be useful because, "not every course [is contained in the IAI]." We learned in our conversation that Transferology provides Illinois "a great system for students who know they want to transfer, but don't know where they want to go."

Coordination and Collaboration

In Illinois, longstanding policy initiatives cannot occur without robust institutional buy-in. The way to achieve this is through collaboration and coordination. As our interlocutor noted, "Sometimes they're institutionally initiated, sometimes the boards will do it." Effective policy changes "do not happen overnight. It's a lot to ask of people. I don't think it's enough to pass laws and say, you must do x, y, and z or else. I think you've got to do the bottom up and the top down, together." This extends even to the core

²⁵ "What is IAI? | iTransfer," Illinois Transfer Portal, 2025, <https://itransfer.org/aboutiai/>

²⁶ "MyCreditsTransfer," itransfer.org, 2025, [MyCreditsTransfer | iTransfer](https://itransfer.org/mycreditstransfer/).

²⁷ "Participating Institutions," MyCreditTransfer, 2025, <https://mycredittransfer.org/participants.asp>.

of the state's articulation structure, the IAI, which is:

A faculty driven process established the gen ed core, which is 37 to 41 credit hours, [and maintains] that if a student takes all of those courses, then they transfer as a package and they are no longer required to take additional lower division gen ed. [This] goes back to the early nineties and was a voluntary agreement that had about a hundred institutions, give or take (including most privates in the system in Illinois, though certainly not everyone) ... [that] had been in place since the nineties and was voluntary up until ... five to eight years ago when there was an actual law passed that codified the requirement that the public institution participate in the Illinois articulation initiative.

This policy framework compellingly captures the progress institutions, guided by faculty and coordinated through an agency, can make towards improving holistic credit mobility. That the policy was only recently codified into law also reveals that legislation need not be, by any means, the prime mover in this area. These robust public-private partnerships in Illinois also rely heavily on faculty input:

The structure of the transfer piece, and I think what makes it so powerful, is that there are about 27 panels of faculty that are made up of two year and four year private, and public faculty in specific disciplines ... faculty have to submit their syllabi to this and they get reviewed and basically they all have to have very similar outcomes and there's requirements and those kind of things.

The picture is clear: faculty input and involvement are key to unlocking increased credit mobility for students.

Student Advising

In Illinois, our interlocutor firmly believed that they offer, “pretty robust, pretty good advising structures across our systems.” Yet there is considerable variation in the size of institutions in the system, and thus variation in the advising manpower available to students. They noted:

You've got a vast[ly] ... significant disparity in size and resources in Illinois. Some of these bigger institutions have established counseling structures. And then some of the smaller ones are just going to have smaller offices; they're just going to have people that are responsible for multiple things; people that are engaged with students. But, I think,

even in that context, colleges do everything they can to be available: to be good stewards with their students.

While such variation in support was a common theme in our conversations, we also unearthed practices that offer great promise in the holistic credit mobility context. Our conversation also revealed:

Interesting shifts that I think colleges are in different places on. I hate this term, but I'll use it because it's something I think of: *intrusive advising* [emphasis added]—the sort of proactive outreach to students. I think some colleges are better at that than others. You do still have colleges across the state and the country that [say], 'here's the counseling office: all you have to do is walk in, come in, and talk to us; get an appointment and we'll sit with you.' And then you've got others that are proactively doing outreach and have navigators or mentors ... that are proactively engaged.

Illinois is focused on funding proactive advising initiatives, and this framework of “intrusive advising” effortlessly captures the sort of proactive engagement that institutions need to offer students so they may overcome barriers to access and entry, especially for mobile students from underserved backgrounds.

Another issue surrounding student advising, “self-advising,” requires careful consideration. In an era where states, systems, and institutions are developing sophisticated technological supports that enable students to directly access robust information to inform their educational journeys, some states suggested that students may be prone to “go it alone.” This is an issue our Illinois interviewee faces in their engagement with students, noting:

So many students also self-advise. How do you reach those students and get those students to do more than just the minimum of check in with their counselor and make sure they're taking advantage of that service? And I think there's no lack of services, no lack of opportunity. I think some of it is about strategically how do we engage students?

Education and Outreach

Illinois law requires every public institution to keep a general education core with common numbering. As we learned from our interview, a number of private institutions have also signed on to this as well, though their commitment is voluntary. While clearly a net positive and a boon for

mobile students, at the “enrollment management/registrar level,” knowledge about the “whole big system” in the state may not be as widespread as it is at public institutions. This presents “an education [problem], and a perennial [one], particularly as more and more folks retire and turnover [increases].” However, by extending education and outreach efforts to these private institutions, the board is demonstrating the commitment necessary to remove barriers to access.

Cross-Institutional Alignment

Our Illinois contact presented thoughtful insight on how the state’s interconnectedness guards against policy refraction and hysteresis and serves to consolidate practices:

[Implementation] is part education, part over communication, part accountability, part political will. Sometimes it's sorting out what's the real problem, what's a perceived problem, and [building] community. I will say there are times when we run across things and I looked at a college and [say], ‘Why are you requiring this course? What is that doing?’

Student success courses can be one such extra requirement for students that add little learning value in Illinois higher education. Here our interlocutor laid bare an essential responsive duty of higher education leaders: harness their position to identify and understand barriers mobile students face and act to address them.

Economic and Workforce Alignment

In addition to the IAI and in response to a shortage of early childhood educators, Illinois developed the Early Childhood Access Consortium for Equity.²⁸ Harnessing federal funding, they were able to create a scholarship fund to provide total cost of attendance scholarships. They also developed a new transfer pathway structured around the Early Childhood CDA,²⁹ instituting “a uniform credit system [where] every institution [would] give some college credit” for prior learning in early childhood and established the Associate Applied Science and Early Childhood degree. This associate’s degree was then “required to be articulated into a four-year degree.” This helped the state respond to the

²⁸ ECACE Illinois, <https://www.ecace.org/>.

²⁹ Council for Professional Recognition, <https://www.cdacouncil.org/en/>.

needs of students and the state’s economy simultaneously.

Illinois’s alignment work extends beyond the consortium. Another major challenge involves shifting perceptions of career and technical education and aligning such programs with more traditional bachelor’s degree programs. Part of this needs to involve developing “applied bachelor-type” pathways, which may bridge the gap between career and technical education and traditional four-year college tracks, bringing students with formerly terminal applied degrees into the fold to meet evolving workforce needs. This presents an additional area where alignment work is ongoing.

Ohio

Ohio Department of Higher Education

Like its neighbor, Ohio has one of the longest-standing legislative histories supporting transfer, dating back to 1990. The array of transfer pathways in Ohio is vast. Built upon a common general education curriculum, known as Transfer 36.³⁰ Ohio strives to incorporate as many types of credit as they can across a wide range of initiatives, and Transfer36 has been enhanced in recent years to include a diversity of learning experiences from career-technical credit to military experience and industry recognized credentials to apprenticeships. According to 2022 IPEDS data, the six-year graduation rate for transfer students is 37.7 percent.

We spoke to three leaders working directly with transfer who have nearly 40 years’ experience in the state between them. These leaders repeatedly espoused a guiding principle—“learning mobility”—which informs their overall approach to credit mobility and dovetails neatly with the holistic credit mobility framework: “the word ‘transfer’ doesn’t even do justice anymore with what we’re doing. It’s really learning mobility—it’s really facilitating the movement of learning throughout the system to help students.”

The Ohio Department of Higher Education is a coordinating, not a governing, body. Its chancellor serves in the governor’s cabinet, and there are 13 universities and 22 community colleges under their purview. As a

³⁰ “Ohio Transfer 36,” Transfer Credit Ohio, 2021, <https://transfercredit.ohio.gov/educational-partners/educational-partner-initiatives/ohio-transfer-36>.

state agency, “Under the governor, our role is to implement articulation and transfer policy, but the agency deals with an array of other responsibilities from funding to legal matters, to program approval, to workforce, development etc.” In terms of policy setting, our interlocutors made clear that not all policy is driven top-down by the general assembly. Instead, they harness their role as a coordinating body to enact change “through everyone working together, to reach a goal or implement a law.” Rather, when laws are passed down, they “work together on how we’re going to implement that directive...we all work together to reach a common goal.”

Technology

Ohio has a robust history of technological innovation supporting student mobility. They currently operate a few platforms—the Ohio Course Equivalency Management System (CEMS), the Credit Transfer Tool, and the Ohio Guaranteed Pathways Tool—and offer CollegeSource’s Transferology³¹ CEMS allows faculty to submit their course information for faculty panel review to establish equivalency to agreed upon learning outcomes. This allows the state to maintain a database of all statewide equivalencies. The Credit Transfer Tool, in turn, provides a listing of all approved equivalencies from the various initiatives including AP, military, CLEP as well as traditional college coursework. This includes AP, military, CLEP, and other common forms of transfer: students enter the learning they have achieved and see how it matches up with courses in the system.

Ohio also developed a tool to support its Guaranteed Pathways block transfer program. This tool “shows the agreed upon pathways for the associate degree and then also for the remaining coursework for the bachelor’s degree,” permitting students to gauge their options. Like Idaho and Illinois, Ohio also offers Transferology, which “allows students to enter their prior college courses and learning experiences to find out in advance

³¹ “Course Equivalency Management System,” Transfer Credit Ohio, 18 December 2024, <https://transfercredit.ohio.gov/initiatives-upd/cems>.

“Credit Transfer Tool,” Transfer Credit Ohio, 18 December 2024, <https://transfercredit.ohio.gov/students/student-programs/credit-transfer-tool/tool/credit-transfer-tool>.

“Ohio Guaranteed Transfer Pathways Tool,” Transfer Credit Ohio, 18 December 2024, <https://transfercredit.ohio.gov/students/student-programs/ogtp/pathways-search-tool>.

“Transferology,” Transfer Credit Ohio, 2025, <https://transfercredit.ohio.gov/students/students-page-components/degree-planning-tools/degree-planning-3-transferology>.

how these experiences would transfer and apply toward a degree program at various colleges and universities.” This tool is available to all institutions in the state, public and private.

Our conversation revealed clear alignment over the need to present publicly, clearly, and efficiently the options available to students. As our interviewees noted: “the whole goal of this is full transparency about what [students] need to do in the first 60 credit hours and in the second 60 credit hours.” The discussion also revealed longstanding sticking points that may be remedied through additional technological innovation. Ohio previously developed and operated “a system called the Articulation and Transfer Clearinghouse (ATC), where we had transcripts that were distributed among our two- and four-year institutions electronically.” The system ultimately became outdated, and third parties have since taken over this service, but it remains a key area of interest within the state. Such technological development may also nest within existing partnerships, at least in Ohio. For example, the Ohio College Comeback Compact,³² a voluntary association of institutions in the state, supported in part by Ithaka S+R,³³ is working to increase access to stranded credits and withheld transcripts, common barriers to reenrollment.

Coordination and Collaboration

The Ohio Department of Higher Education lives up to its role as a coordinating body, regularly engaging varied stakeholders from all levels of education within the state and forging and maintaining connections that directly impact policy and practice. Our participants revealed that:

It really is three groups of people coming together to really help students. It's the general assembly, it's our agency, and it's the institutions. And we really all need to work together in what's best for students. Sometimes there is legislation that's passed, but many times those ideas came from, came from the institutions.

Knowledge of the key players is crucial when considering the mechanisms by which policy is accomplished. Maintaining close relationships is crucial when numerous policies originate from initiatives within the institutions or

³² Ohio College Comeback Compact, <https://ohiocollegecomeback.org/>.

³³ Martin Kurzweil, Elizabeth Looker, and Brittany Pearce, “After Successful Pilot, the Ohio College Comeback Compact Moves to Full Implementation,” *Ithaka S+R*, 27 September 2023, <https://sr.ithaka.org/blog/after-successful-pilot-the-ohio-college-comeback-compact-moves-to-full-implementation/>.

collaborative working groups. While legislative mandate is common in Ohio higher education, it more often serves as a baseline guiding the actual work of constructing change: a starting-off point for the real work of negotiating details and building a working holistic credit mobility system. These initiatives still impact credit mobility and shape state policy, even without legislative involvement or strong-arming. Yet, without the coordinating role of the state higher education agency, such initiatives may not come to fruition at all. When it comes to holistic credit mobility at scale, these coordinating bodies are putting students first and balancing a wide array of interests and agendas in the process.

Our conversation also painted a complex picture of how agenda setting and policy-making impacts practice in Ohio. The state higher education agency maintains multi-directional and multi-faceted working relationships and nuanced understanding of whom to engage with and when. This iterative policy-making process entails fielding input from multiple directions at the same time, building out various aspects of any given policy from all directions simultaneously. It also requires a keen awareness of the various parties working in all areas of credit mobility. Thus, holistic credit mobility policy initiatives were accomplished not only through collaboration and exchange, but through a deep understanding of who best should lead each charge:

Let's take the AP policy in Ohio; it said you will need to develop an AP policy. So, we developed by working with the institutions, the AP policy. 'Create a course equivalency system:' we created that with the faculty and the institutions. 'Work with military:' we led the charge with that and how we were going to do that. The [Ohio Guaranteed] Pathways: [we] led the charge to do that.

They further added that,

"A lot of ideas don't necessarily have to go through the general assembly ... So, we don't have to make it a law if the institutions are following it ... because it's not just law, it's really policy."

These Ohio leaders view faculty as the core component of their transfer system and emphasized the importance of faculty involvement to facilitate collaboration between community colleges, universities, and ODHE and generally spark buy-in across the state. Our interlocutors went even further to underscore the centrality of this flexible leadership mentality:

Underlying [our] vision is the focus on everything—all our efforts—are faculty driven, student focused. That is the kind of tagline for all of the transfer work that's been done in Ohio. That's what it boils down to. So, we're doing all this work, but that's where it comes from: the faculty.

Ohio provides compelling evidence that, when properly tapped, the deep well of faculty support can make or break credit mobility in a state.

Economic and Workforce Alignment

Our Ohio interviewees were adamant that a central part of credit mobility involves meeting the needs of the state. They extolled that, “More recently, which is very exciting, ... we're dealing with emerging technologies. We are using many of the same procedures that we have in place, but in a more rapid way and involving [working] hand in hand with industry representation at the table.” Ohio higher education leadership is “working directly with ... our Ohio Manufacturing Association (OMA) and trying to figure out how to get our ... engineering technology-type programs better in alignment with the OMA work that the industry wants to see.” In fact, Ohio has forged industry partnerships with instrumental employers, in order to direct learners into crucial sectors of the economy. When seeking guidance on forging this path, they also tapped into out-of-state resources:

[We've] been working with [other states] on [navigating industry partnerships] too. We've been having conversations with the people in [a similar industrial state] about how we can work together to get things done faster and more effectively and efficiently. And that's wonderful; that's so exciting.

This outreach and alignment directly fuel efforts to meet students where they are at and provides additional pathways for credit mobility, and student enthusiasm for these new approaches is clear.

North Carolina

University of North Carolina System

The University of North Carolina System encompasses 17 institutions across the state and enrolled nearly 248,000 students in Fall 2024.³⁴ The UNC System is governed by a board of governors which has responsibility for the planning, development, and overall governance of the UNC System along with developing policies to guide its 17 institutions. Each institution also has a chancellor who is “charged with the day-to-day operations of their individual campuses.” All public four-year colleges in the state are part of the UNC System, and so system leadership plays an analogous role to the boards of higher education or like agencies in the other profiled states. According to 2022 IPEDS data, the six-year graduation rate for transfer students is 64 percent.

In 2014, “Senate Bill 761 required the UNC system to develop a uniform apparatus for granting course credits based on military training or experience.” Years of convening faculty panels to evaluate military training courses and job experiences and software development ultimately became the Military Equivalency System (MES).³⁵ A 2022 system Strategic Plan established clear goals for serving military affiliated students, galvanizing work on the MES.³⁶ Under the leadership of President Peter Hans and the System's strategic focus on recruiting and serving military students, the UNC System has continued to increase staff capacity and information technology needs for MES.

The University of North Carolina System presents a slightly different model for enacting change at scale. Their military recruitment initiative, and the policy supports that came out of it, took shape in a 2022 system strategy wherein two out of twelve system goals pertain to recruiting and serving military students and to serving the broader military community in the

³⁴ The University of North Carolina System, “Enrollment increases across the UNC system,” 12 September 2024, <https://www.northcarolina.edu/news/enrollment-increases-across-the-unc-system/>.

³⁵ “Transfer Student Resources, UNC System | Military Equivalency System,” The UNC System, 2024, <https://coursetransfer.northcarolina.edu/military?h=1>.

³⁶ “Higher Expectations Strategic Plan 2022-2027,” The University of North Carolina System, 2022. <https://www.northcarolina.edu/impact/strategic-plan/>; Transfer Student Resources, UNC System | Military Equivalency System | Search Equivalencies,” The UNC System, 2024, <https://coursetransfer.northcarolina.edu/military?h=1>.

state. While this initiative was sparked by 2014 legislation pushing for increased retention of the state’s large military population, the system worked internally to set strategy and policies to meet these goals. That said, the system is large, and the central office played a similar role in tapping faculty support, convening stakeholders, and working to enact change.

We spoke with two leaders working directly with military students and the MES at the system level. Working at the intersection of “workforce development, economic development, and military affairs,” they bring 15 years’ experience in the UNC system. Both have exposure to implementation as well as strategy development.

Technology

The UNC System Military Equivalency System (MES) provides a unique and innovative solution targeted specifically at boosting military enrollment in the state. This interactive database captures military training course and occupation codes (for both short term training courses and occupational-experiences cultivated on the job), relying on ACE credit recommendations to determine course content and level, and then ties this prior learning to courses offered across the entire UNC system. Service members enter ACE identification codes from their Joint Services Transcript (JST) which are then linked to course offerings across the system.³⁷ The MES launched in early 2024 and contains over 16,000 equivalencies. A key innovation offered by the MES is the ability to capture skill level for occupations and version number for training courses, which change over time. Each armed forces occupation contains multiple skill levels, and the MES accounts for advanced skill levels to match what may appear to be the same information to a broader range of courses if a prospective student has achieved a higher level of learning through experience.

While this technological tool provides insight into complex underlying credit equivalencies, it also reveals institutional variation within a system that complicates user experiences. In the UNC system, course equivalencies for military students have not yet been uniformly established. The system returns results for each specific institution, and some are further along in the process of accepting such credits than others. In practice, users may find that some schools are willing to grant far more credit than others, even if their course

³⁷ “The Ace Military Guide,” American Council on Education, <https://www.acenet.edu/Programs-Services/Pages/Credit-Transcripts/Military-Guide-Online.aspx>.

components are similar. Our UNC interviewees "see this as a feature that enables the institutions to see how other universities are granting credit and identify opportunities to offer more credit to military students. This also empowers military students to know up front, before they apply for admission, where they can maximize credit transfer."

Under this view, friendly competition can powerfully increase not just overall transfer rates but incentivize institutions across the system to work to improve their credit equivalency options and generally become more friendly to service members, driving the system as a whole to meet their stated goals. In fact, MES leadership have already seen this in action, where institutions, once made aware of what sister schools were offering, reevaluated and increased their own equivalencies. This also highlights the importance of direct student contact with the schools they wish to transfer to; those personnel may act as a bottleneck, or they may respond to the needs of students and restructure to accommodate and advance credit mobility.

Economic and Workforce Alignment

North Carolina contains the nation's largest military base and a large share of service members, many of whom previously turned to out-of-state options to continue their educational journeys. The UNC system developed the MES in response to this trend and out of a desire to tap into this broad labor force to fill strategic needs in the second largest sector of their economy. At the core of the program lies "a recognition that we want to continue to support the thriving of our economy and also retain these folks in state." After rolling out the online tool, they have started working alongside staff at various schools on its usage starting with nursing faculty, where there is the highest workforce need in the state.

Charter Oak State College (New Britain, CT)

Charter Oak State College

Non-traditional learning experiences are built into the foundations of Charter Oak State College in New Britain, Connecticut. The average Charter Oak student comes in with 60-70 transfer credits, and about 30 percent of matriculated students have some type of credit for prior learning (CPL) on their record. Exams such as CLEP or AP and military credits based on ACE equivalencies are documented internally and integrated into the catalog. Advisors also help students maximize potential credit from work experience or earned credentials in industries such as nursing, firefighting, and policing that the college may already have evaluated. These students may be established in their careers and are not necessarily looking for a career change but do want additional education to progress in their career or secure promotions.

The school was established by the Connecticut legislature in 1973 as a path to a degree for students with “a large number of credits earned toward a degree, but no degree” and was officially designated a college in 1980. This allowed Charter Oak to serve students who “would not be able to reenter into the [academic] program they had originally been in” due to changing major requirements. In order to accomplish this, Charter Oak was designed to document students’ prior learning and connect those experiences to degree requirements in order to award degrees. This overarching sense that “a different approach was needed in order for students to complete degrees...has followed the mission of the college as it evolved over the years,” and, in the mid-2000s, Charter Oak continued to expand their nontraditional approach by offering online courses. These courses replaced their previous video-based correspondence courses and gave Charter Oak an early start down a path that many institutions would not explore until over a decade later. Charter Oak maintains a focus on distance learning and offers online bachelor’s, master’s, associate, and certificate programs. According to 2022 IPEDS data, the six-year graduation rate for transfer students is 54 percent.

As part of our research, we had the opportunity to speak with a long-time employee at Charter Oak with nearly two decades’ experience working in several transfer-related roles at the school, spanning academic advising, transfer evaluation, and the registrar, interacting with both students and faculty.

Technology

Charter Oak currently maintains a database that contains articulation agreements with schools in other states, common equivalencies, and exams such as CLEP. This database helps to ensure consistency and equity in evaluating incoming transfer credits, but they are seeking out additional technology to improve the process by making it more efficient and transparent. One way they hope to do this is by using AI scanning tools to load information into the system more quickly, potentially using a data automation system. Charter Oak is also currently working with Ithaka S+R as a pilot member of Transfer Explorer, a tool they hope will increase transparency and allow students to clearly view and understand how their credits will transfer.³⁸

For out of state transfer students, advisors consult CollegeSource's Transfer Equivalency System (TES), which allows them to review catalogs of faraway institutions and evaluate them accordingly. If necessary, advisors will contact the registrar's office and are often able to dig up additional course information needed to clarify equivalencies. Their policy is to accept courses if the outcomes are similar enough, even if the course is not offered at Charter Oak. The process for international transfer is more bespoke and often requires students to provide information about their programs since online documentation is not as robust.

As transfer technologies continue to gain traction, Charter Oak is increasingly open to new technological tools to integrate "transfer credit into our system faster" and reduce "manual data entry." These platforms offer promise for determining credit equivalencies more efficiently and thus providing students additional time to make informed decisions about their learning.

Student Advising

Charter Oak's engagement with students begins during the admissions process, where they collect all documents relating to previous learning. "Once at the point of acceptance," Charter Oak evaluates these learning experiences, providing each student with a "comprehensive transfer credit

³⁸ Betsy Mueller, Emily Tichenor, Martin Kurzweil, and Alexandra W. Logue, "Providing Credit Transfer Visibility to Improve Credit Mobility: Ithaka S+R's 'Universal Credit Transfer Explorer' Launching in Three States in 2024," *Ithaka S+R*, 22 February 2024, <https://sr.ithaka.org/blog/providing-credit-transfer-visibility-to-improve-credit-mobility/>.

evaluation.” Transfer evaluators handle these approvals through an internal process that is streamlined to ensure credit is applied equitably and consistently across cases. When students transfer into Charter Oak, their main contact point is the admissions counselor, who shares the transfer credit evaluation and provides support and clarification. Students “work with admissions until the point where they [pay their tuition] deposit and register for their first course and then they move over to career academic advisors who work with them until graduation.”

This proactive student advising is not the only form of support offered. After course credits are approved, students work with career academic advisors well-versed in various types of non-traditional credits. Advisors make course suggestions, ensuring prerequisites are taken, and often proactively inform students of alternative credit options, such as CLEP exams, that can help satisfy needed requirements. These student advisors live and breathe Charter Oak’s mission:

Our Admissions Counselors and Academic Advisors are well versed in the types of non-traditional or non-collegiate training that the college accepts. They’ll often recommend those to students to accelerate degree completion or offer lower cost options to complete certain requirements. “Transfer Evaluators” also serve as an additional knowledge-sharing role internally, helping Charter Oak to “make prudent decisions” and ensure that staff have “reached out to the right faculty to make sure that students are getting full credit for the work they’ve done previously.”

Throughout the process, Charter Oak advisors are looking for ways for students to be awarded credit where possible, noting that “If you have a way of documenting [the experience], there’s a way to give them real credit.” There are a wide variety of ways students acquire learning and demonstrate that learning. By looking at their full experience, advisors are able to determine what students already know, and what they still need to learn.

Flexibility

Flexibility lies at the core of Charter Oak’s holistic approach to credit mobility. For students whose academic journeys may extend beyond Charter Oak, the school offers a “credit registry” or “credit banking transcript” that students can provide to another school or employer. These offerings help students to “document that they have college-level learning

in workforce related areas for credentials that may be helpful for them professionally.” These same “credentials or credit recommendations” can be used in workforce applications, to document workforce-related college education, or can even be used toward a degree at Charter Oak later on.

Collaboration and Coordination

Charter Oak is involved with a number of policy initiatives and collaborative ventures that help center students. Their participation in the Connecticut Board of Regents (established in 2011) allows for easier cooperation and coordination of transfer student success among the CSCU institutions. This speaks to a broader “movement towards making transfer easier within [the] system,” and a working group of key personnel meet monthly to address “common barriers to transfer for students within our system.” These developments, combined with a desire to “preserve students within the system by fostering transfer,” resulted in the development of a “general education transfer alignment policy.” Now, Charter Oak, Connecticut State Community College, and the four Connecticut state universities have an agreement for general education category alignment in order to try and alleviate transfer issues at the state level. They have also established articulation agreements across the state. These institutions are also leveraging this collaboration to more readily identify and serve community college students who indicate interest in transfer by putting them in contact with four-year advising staff during as early as their first semester.

Charter Oak’s credit mobility leadership extends beyond their increased presence in the state. Charter Oak is a member of the Consortium for the Assessment of College Equivalence (CACE),³⁹ a network of four other credit mobility-focused postsecondary institutions. This consortium shares course reviews and credit-related information in order to advance “student progress toward graduation and to further the mission of credit for prior learning.” Personnel at these other institutions have become key resources for staff members at Charter Oak, and their continued engagement has resulted in shared basic standards for assessing CPL. In a similar vein, Charter Oak is also part of a regional collection of

³⁹“Consortium for the Assessment of College Equivalence,” <https://cacereviews.org/>.

postsecondary institutions and practitioners, the New England Transfer Association.⁴⁰

These collaborative ventures and closer working relationships within the state of Connecticut speak to the importance of policy alignment to support credit mobility. Our conversation highlighted the belief that, “in order for each prior learning program to be robust and successful, it was kind of important to make sure we were all doing it the same way or in a way that we could agree that each other's standards were of a certain quality that we could recognize like-minded programs.” This positioning not only helps cement Charter Oak’s innovation and leadership in the space; it also centers student needs in conversations beyond their campus.

Competition

Charter Oak endeavors to provide transparent information about credit acceptance online. They previously published the vast majority of their credit for prior learning equivalencies online, which involved listing “how many credits might be available for a given certification.” However, Charter Oak discovered that these credit recommendations were often adopted by other institutions who did not provide information to Charter Oak in turn. Now, Charter Oak primarily shares these recommendations with close collaborators and members of the CACE consortium instead of the public at large. This speaks to the financial and competitive challenges facing postsecondary institutions serving mobile learners and the power of collaboration in alleviating some of these pain points.

⁴⁰“About Us,” New England Transfer Association, <https://www.newenglandtransfer.org/about-us>.

Florida International University (Miami, FL)

Florida International University

When it opened in 1972, Florida International University (FIU) only accepted transfer students. To this day, transfer “remains in the DNA of the institution,” supporting one of the largest transfer enrollments in the nation. We spoke with two individuals at FIU: one with over 20 years of experience leading transfer initiatives and the other responsible for spearheading and executing their process for automating data infrastructure in their decade of service. Both have seen the scope of transfer-related work at FIU and nationally, evolve over that time.

FIU’s transfer “philosophy” is simple: “each student represents a unique transition experience and a progression.” Their goal—to be the best transfer institution in the country—stems from this belief and is fueled by passion and teamwork. The 2022 IPEDS data speak to this, and the six-year graduation rate for transfer students is 69.4 percent. To accomplish this, they have sought out and maintained a variety of working relationships, both formal and informal, to learn and share best practices. These include membership in statewide consortia and placing a high priority on conference and convening attendance for staff. Additionally, FIU has sought out relationships with education partners such as International Baccalaureate (IB) and Cambridge International Education (CIE) to improve data integration to accelerate the posting of accelerated credits. FIU sees these relationships as necessary and mutually beneficial for the institution and organizations, but more importantly, for students.

Technology

The FIU transfer team benefits from a substantial amount of institutional buy-in for technology and innovation, as well as in support from the central development team. FIU has been using Peoplesoft since 2003 and consider themselves leaders on the capacity of such systems to support transfer needs. They maintain two key public-facing examples of transfer-related supportive technology. The first, Transfer Guides,⁴¹ are available for every major offered at FIU. These one-page guides aim to prepare students for transfer by showing admission requirements and the list of prerequisites for each major. They were developed using Florida’s

⁴¹ “Transfer Guides,” Transfer & Transition Services, 2025, <https://transfer.fiu.edu/transfer-101/guides-resources/transfer-guides/>.

common course numbering system as well as articulated equivalencies for other courses, including combinations. For this reason, the guides are most useful to local or regional transfer students, but the website includes suggestions for how non-local students can utilize the guides as well.

Before the introduction of Transfer Guides, students had to rely on searching institutional catalogs, websites that often lacked up-to-date information, and peers for guidance. Additionally, some course equivalencies were only known at the departmental level due to separate agreements, meaning this information was not always communicated to new faculty or advisors. Now, the information is more transparent, centralized, and can easily produce PDFs or generate ADA compliant web versions, making them more accessible.

FIU's primary supportive technology for course equivalencies is the Transfer Equivalency Database (TED).⁴² The TED features a searchable collection of all course equivalencies or "transfer rules" that FIU has approved from institutions in the US, Puerto Rico, and Guam. Currently, TED contains about 90,000 rules, and it is updated on a daily basis as new equivalencies are approved and legacy rules are updated. The database also ties in with FIU catalog descriptions, making even more information available to students. FIU's overarching goal with TED "is to have every single state and institution covered so students know how their courses are going to transfer over."

Due to the large volume of transfer at FIU, the Transfer and Transition Services (TTS) team developed a triage equivalency review process for matriculating students that begins with staff separating Florida students from out of state and international students. With the help of articulation agreements and Florida's common course numbering system, in-state student cases are often simpler, and equivalencies can largely be automated. Before this tool and process were developed, the team relied on paper forms and tracking progress in Excel. Now, the process automatically clears these simpler cases from the queue multiple times per day with no staff intervention required. For domestic courses, this typically means they "can resolve or approve the equivalency within 24 to 72 hours."

⁴² "Transfer Equivalency Database," Transfer & Transition Services, 2025, <https://transfer.fiu.edu/transfer-101/transfer-equivalency/transfer-equivalency-database/index.html>.

FIU is also continually exploring new technologies and innovations to enhance transfer credit processing, including a recent implementation of an optical character recognition solution that has significantly sped up the process of posting credits to a student's record after the initial transcript receipt. These changes have allowed staff, who previously focused on manual credit posting, to shift their efforts toward handling more complex cases.

Complicated or edge cases often involve securing and reviewing syllabi and consulting with faculty and other team members. Every new course that is evaluated is added to TED, which creates a more seamless path for the next student. The TTS team may also review institutional catalogs and reach out to faculty or staff from sending institutions to better understand curricular requirements or learning outcome to determine the correct course equivalency. Their comprehensive process could also include taking the student's intended major into account or otherwise being flexible by considering learning outcomes at the student level.

Transparency

Another focal point of FIU's approach to transfer is transparency. FIU endeavors to make information on credit equivalencies available to students not only prior to matriculation, but in many cases, at admission. They provide a personalized "transfer credit report" to admitted students in a student-facing dashboard showing their currently established equivalencies. FIU notes that, "our automation has allowed this work to be done proactively," so that once a student is admitted they can receive their transfer report (along with information about how to read it and next steps if they need more courses reviewed). The goal is to provide students "full transparency about how their courses transfer as soon as humanly possible, which results in better conversations between students and their advisors and appropriate course enrollments." FIU also maintains a separate internal database for international transfer equivalencies but has not made it public because there is variation in details such as course prefixes, numbers, and course combinations that may be confusing or misleading to students or other users without additional, personalized context provided by staff.

Coordination and Collaboration: Faculty Direction and Trust

Faculty play a foundational role in establishing course equivalencies at FIU, and the TTS team relies “heavily on their expertise and timely approvals.” One of the things that makes equivalency work unique and efficient at FIU is that the equivalency team has “co-ownership with faculty” of the course equivalency process. Prior to the establishment of TTS and development of TED, faculty played a central role in the course equivalency process, one that did not lead to the establishment of articulated transfer rules, and therefore efficiencies in timely decision making. Through two decades of working closely with faculty and building mutual trust, FIU’s transfer team have been able to evaluate routine equivalencies, such as for general education courses and other lower-division courses. The team also maximizes transfer credit through the use of “pseudo courses that can satisfy a requirement category when a direct equivalent cannot be made.” While the strong faculty partnership allows the FIU transfer team to handle the lion’s share of equivalencies, faculty are consulted frequently as a quality assurance check, and faculty remain the sole approvers of upper-level discipline course equivalency decisions. This model not only relieves faculty capacity to focus on research and teaching but gives them the time they need to review and advise on more complicated course equivalencies, particularly those from international institutions. The ongoing collaboration and relationship-building with new faculty has resulted in most course equivalency decisions being made within 72 hours.

The FIU and Miami Dade College Partnership

Recent research has highlighted the potential for transfer partnership dyads to contribute to transfer student success.⁴³ We were particularly interested in FIU’s partnership with Miami Dade College (MDC). Although

⁴³ Nathan Sutherland, Kevin Stange, and Jordan Matsudaira, “New Measures of Postsecondary Education Transfer Performance: Transfer-out rates for community colleges, transfer student graduation rates at four-year colleges, and the institutional dyads contributing to student success,” *Homeroom, the Official Blog of the US Department of Education*, 9 November 2023, <https://web.archive.org/web/20250115224355/https://blog.ed.gov/2023/11/new-measures-of-postsecondary-education-transfer-performance-transfer-out-rates-for-community-colleges-transfer-student-graduation-rates-at-four-year-colleges-and-the-institutional-dyads-contributi>.

FIU maintains long-standing partnerships with many Florida colleges, MDC remains the largest source of incoming transfer students by volume at FIU. Transfer partnerships—typically bridging a two-year community college and four-year university in the same region or metro area—can present a successful model capable of handling large volumes of mobile students. A 2017 qualitative study by Fink & Jenkins based on 350 interviews at six transfer dyads found that, “highly effective institutional partnerships” employ three broad strategies: (a) make transfer a priority, (b) create clear programmatic pathways with aligned high-quality instruction, and (c) provide tailored transfer advising.”⁴⁴ This report complements this body of research by finding similar approaches well underway at FIU and MDC.

Students at Miami Dade College, Broward College, and Palm Beach State College are eligible to participate in FIU Connect4Success, an admissions transfer pathway that affirms students’ transfer goals and guides them to become “transfer ready.”⁴⁵ Among other benefits like guaranteed admission and access to FIU facilities, students in the program receive access to FIU Bridge Advisors and transition workshops so they are ready to enroll in upper-division courses when they transfer to FIU. The Bridge Advisors are housed at MDC, and other colleges, “working in tandem with college advisors and students.” Bridge advisors also connect students to FIU events before students transfer serving to “develop and maintain their 4-year identity.” By providing opportunities to engage with campus staff early, the program also hopes to lower or remove any transfer fears and barriers to credit mobility even before students have identified the pathways available to them. In the future, FIU hopes to add more discipline-specific Bridge Advisors in key programs to further support students pursuing STEM and other more complex pathways. FIU Bridge Advisors are also available to meet with any prospective student; “our pre-transition support and guidance is happily offered to any student interested in transferring to FIU.”

For 27 years and counting, "FIU-MDC Day" has brought together faculty, staff, and senior administrators—including the presidents—to reflect on their work and reaffirm their commitment to improving transfer student

⁴⁴ John Fink and Davis Jenkins, “Takes Two to Tango: Essential Practices of Highly Effective Transfer Partnerships,” *Community College Review* 45, no. 4 (2017): 294-310, https://www.myfuturenc.org/wp-content/uploads/2018/05/Fink_Jenkins_Transfer-Partnerships_08.17.pdf.

⁴⁵ “Connect4Success,” Transfer & Transition Services, 2025, <https://transfer.fiu.edu/connect4success/>.

outcomes. Hosted alternately by each institution, this annual event provides a dedicated space to address concerns, identify barriers, and explore opportunities for new collaborations, such as expanding articulation agreements to include associate degrees in science and developing pathways to FIU graduate degrees for MDC bachelor graduates. The gathering also highlights student success stories, further showcasing the positive impact of the partnership.

Looking Towards a Holistic Credit Mobility Future

This report captures a moment in credit mobility innovation; the structures under construction serve the students of tomorrow. Some of our interviews included discussion about the future of credit mobility broadly, and within the interviewees institutions and systems. Responses suggest a great deal of work to be done yet offer hope for a fuller adoption of holistic credit mobility principles as a guiding framework in the higher education transfer space.

In Illinois, three primary areas emerged: a) “how applied degrees fit into the equation”; b) implementation; and c) “work to be done in the sort of fringe transfer areas.” The first item entails approaching the problem from an “employment perspective.” They noted Illinois’s declining high school population, indicating that making higher education more “attractive to adults” would be one powerful and increasingly necessary mechanism to keep enrollment strong while also addressing economic needs. The second item centers on the implementation of technological solutions to improve processes and reduce the work required to process more routine forms of transfer, freeing up labor to address more complex student needs or develop new capacities. The final item involves those elements of holistic credit mobility that are not widely used or built out, such as prior learning assessment, reverse transfer, and working through challenges related to fine tuning course equivalencies.

The Ohio team noted outright that “transfer is changing” and urged us to keep in mind that the equation is not simply, “how credit is moving from one institution to another,” but how people are moving from one institution to another. Ohio, too, desires more robust recognition of credit for prior learning, industry credentials, and other forms of validated learning. Their end goal is that “every student reaches their highest level of academic attainment,” which stipulates that “everything be connected” along that journey. They:

Want to recognize students wherever they come from, recognize any prior learning that they've had in terms of college level, and try to make sure that they get the appropriate college credit, and then make

sure that they know how to reach their highest level of academic attainment through pathways.

This envisions an increasingly holistic future for credit mobility in the state. UNC's goals for the Military Equivalency System include increasing the number of course equivalencies in the database and better understanding "the evolution of warfare" and corresponding military service needs which will yield potential students bringing "new and unique" experiences that have not yet been identified or translated into course equivalencies. At the same time, they see this development as an opportunity for UNC to expand its course offerings and keep pace with an evolving labor market, better serving and tapping into their state's workforce and economy.

Key Takeaways

These examples highlight the variety of ways systems and institutions are working to improve student outcomes by fostering institutional collaboration, improving access to data and transfer planning technology tools, implementing policies, and improving advising practices. The case studies also highlight the complexity and deep interdependencies of credit mobility efforts within systems of higher education. Implementing, scaling, and sustaining credit mobility strategies is work that is labor intensive and requires continuous maintenance. Key takeaways from this initial series of credit mobility case studies include:

Transfer-Tech Optimism

States and systems use a wide array of tools and programs to support students, faculty, and administrators developed both in-house and provided by educational technology firms or non-profit service providers. Software tools address credit mobility knowledge gaps at scale, informing students, practitioners, and policymakers simultaneously. Credit mobility technologies offer promise for reaching underserved student populations, especially those with military service. Software tools increase transparency and access, but do not operate as standalone solutions and are intended to be used in conjunction with other student supports.

Overwhelmingly, our interlocutors expressed firm faith in the promise of technological supports. Automating routine tasks, increasing the accessibility of information, and providing students a fuller accounting of

their potential journeys free up the necessary space for practitioners to focus on unique student needs.

Fostering Institutional and Faculty Trust

Trust remains paramount, fostering respect and garnering goodwill throughout these states, allowing leaders to more accurately and acutely ascertain needs, challenges, and desires. The power of convening, when used in this way, promotes holistic credit mobility and improves the policy-making process in the states and systems profiled herein.

When it comes to credit mobility, faculty are more often than not the key stakeholder necessary for leaders to engage. Identifying and tapping individuals most motivated to assist specific efforts meaningfully moves the needle on gaining buy-in. These are all relationships state coordinating and governing boards manage, to the success of holistic credit mobility initiatives.

Coordination and Collaboration

Successful credit mobility initiatives, be they internal to an institution or applied at the state level, demand continued collaboration between key stakeholders in order to successfully understand and address the barriers learners face. State boards and coordinating bodies play a key role in convening key stakeholders, forging connections across institutions, and supporting policy development and implementation that lifts all boats. Credit mobility cannot be addressed in a vacuum.

Economic and Workforce Alignment

Successful credit mobility strategies often account for shifting state and local economic needs. Holistic credit mobility within states and systems is driven in part by cross-institutional and economic and workforce alignment, bringing together individual and state needs to drive attainment and economic growth. Identifying and tapping demand for particular programs, certifications, or labor can garner buy-in from key stakeholders, recruit in-demand populations of learners, and yield beneficial outcomes that reverberate through a region or sector. Targeted programs also serve as proof of concepts that can be expanded upon or adapted to different program areas or credentials.

The Evolving Credit Mobility Landscape

Changes in system and state approaches to credit mobility do not occur in a vacuum. Rather, the efforts we uncovered in this report involve responsive and iterative approaches to improving student outcomes over time. As credit mobility options proliferate, so too does the work necessary to meet shifting conceptions of who constitutes a learner and in what capacity, forging new modalities of verified learning and assimilating them into existing structures. The leaders we spoke with appear poised and committed to this task.

Conclusion

These case studies will form the backbone of a growing body of work at Ithaka S+R that aims to examine the wide array of policy structures, technological tools, and responsive student supports that states, systems, and institutions employ to ease student transitions and award credit where credit is due. Armed with this practical knowledge, Ithaka S+R is launching a year-long community of practice that will bring together state, system, and institutional leaders from across the nation to understand credit mobility more broadly, work to identify solutions to existing barriers, and continue to refine the holistic credit mobility framework. Over the duration of the project, we aim to help participants set goals and strategies that will support continued change. This engagement arc will culminate in a playbook intended to set forth best practices and further encourage the development and adoption of holistic credit mobility initiatives.

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