Holistic Credit Mobility Institutional Self-Assessment

This self-assessment supports institutions in understanding the current state of their credit mobility initiatives, measuring alignment with the Holistic Credit Mobility Framework and identifying opportunities for improvement. Rather than prescribing a specific course of action, this assessment supports conversations that center students and their learning, identify strengths and areas for improvement, and inform the refinement of goals and action plans. While it is designed for institutions, it may also be used at the state or system level to collect consistent information across member institutions.

The self-assessment tool is organized around the five necessary supports identified in the holistic credit mobility framework (see: https://sr.ithaka.org/publications/holistic-credit-mobility-framework) for advancing a more connected and student-centered approach to credit mobility: effective policy, supportive technology, responsive practice, active collaboration, and data and measurement.

Each section of the assessment consists of 12 items each, resulting in a composite score of 25 total points. The assessment captures the extent to which each item is implemented at scale, enabling comparisons of institutional progress over time and benchmarking relative to peer institutions or across academic sectors.

We encourage institutions to complete this form for themselves, but its uses extend further. State or system offices can share this assessment to their constituent institutions and ask them to share their results, in order to collect information on the scale of holistic credit mobility across their respective jurisdictions. By taking the survey on the website, results will be available in the form of an automatically generated summary report containing charts and analysis.

Support 1: Effective Policy

Part A. Learning Acceptance Modality Coverage

To what extent does your institution have policies in place to accept the following forms of validated learning?

	Unsure	Not used	Planning	Piloting	Largely Implemented	Implemented at Scale
Dual enrollment or dual credit	☐	☐	☐	☐	☐	☐
AP or IB credits	☐	☐	☐	☐	☐	☐
CLEP credits	☐	☐	☐	☐	☐	☐
Military credits	☐	☐	☐	☐	☐	☐
Corporate or industry certifications	☐	☐	☐	☐	☐	☐
International credits	☐	☐	☐	☐	☐	☐
2+2 articulation	☐	☐	☐	☐	☐	☐
Non-Credit	☐	☐	☐	☐	☐	☐
Portfolio assessments	☐	☐	☐	☐	☐	☐
Challenge exams	☐	☐	☐	☐	☐	☐
Credits earned many years ago	☐	☐	☐	☐	☐	☐
CPL transcripted by a prior attended institution	☐	☐	☐	☐	☐	☐

Part B: Credit Mobility Policy & Procedure Availability

Which of the following policies or practices does your institution have in place to protect students' rights and ensure validated learning is evaluated and applied in a timely, equitable, and transparent manner?

This battery distinguishes practice from policy. Practices, even if consistent over time, may not be codified in formal institutional, system, or state policy.

	Unsure	Not currently addressed	Informal or inconsistent practice	Included in procedure or guidance	Policy in development	Codified in formal policy
Credit Acceptance and Portability						
Requirements for accepted credit to apply to degree or program requirements when applicable	☐	☐	☐	☐	☐	☐
Learning outcome-based standards for determining equivalency	☐	☐	☐	☐	☐	☐
Low- or no-cost prior learning assessment	☐	☐	☐	☐	☐	☐
Award elective credit for courses that do not meet direct equivalency requirements but meet college-level standards	☐	☐	☐	☐	☐	☐

	Unsure	Not currently addressed	Informal or inconsistent practice	Included in procedure or guidance	Policy in development	Codified in formal policy
Student Rights and Transparency						
Right to request transfer credit or CPL evaluation	☐	☐	☐	☐	☐	☐
Right to timely (within 30 days) notification of credit decisions	☐	☐	☐	☐	☐	☐
Right to appeal credit decisions	☐	☐	☐	☐	☐	☐
Catalog year protection ensuring students are held to degree requirements in effect at the time of their initial enrollment	☐	☐	☐	☐	☐	☐
Pathways and Program Flexibility						
AAS-to-bachelor's articulation agreements	☐	☐	☐	☐	☐	☐
Transfer articulation agreements for high-volume programs	☐	☐	☐	☐	☐	☐
Meta-major or program-cluster frameworks	☐	☐	☐	☐	☐	☐
Stackable credential pathways in which lower credentials count toward higher credentials	☐	☐	☐	☐	☐	☐

Support 2: Supportive Technology

To what extent does your institution utilize the following technologies:

	Unsure	Not used	Planning	Piloting	Largely implemented	Implemented at scale
Credit Equivalency Transparency						
Technologies that allow **current students** to search credit equivalencies	☐	☐	☐	☐	☐	☐
Technologies that allow **administrators or staff** to search credit equivalencies	☐	☐	☐	☐	☐	☐
Technologies that allow **the public/prospective students** to search credit equivalencies	☐	☐	☐	☐	☐	☐
Credit Applicability Transparency						
Technologies that allow **current students** to understand how transferred credits apply toward program requirements	☐	☐	☐	☐	☐	☐
Technologies that allow **administrators or staff** to understand how transferred credits apply toward program requirements	☐	☐	☐	☐	☐	☐
Technologies that allow **the public/prospective students** to understand how transferred credits apply toward program requirements	☐	☐	☐	☐	☐	☐

	Unsure	Not used	Planning	Piloting	Largely implemented	Implemented at scale
Internal Credit Equivalency Databases						
Internal databases of credit equivalencies for in-state or within-system institutions	☐	☐	☐	☐	☐	☐
Internal databases of credit equivalencies that includes out-of-state institutions	☐	☐	☐	☐	☐	☐
Internal databases of credit equivalencies for credit by exam, such as AP, IB, and CLEP	☐	☐	☐	☐	☐	☐
Internal databases of credit equivalencies for other non-course sources of validated learning, such as military learning or industry credentials	☐	☐	☐	☐	☐	☐
Automation and Workflow Support						
Technologies that automate or support credit equivalency recommendation, review, or determination	☐	☐	☐	☐	☐	☐
Technologies that support transcript, credential, or learning record intake and routing	☐	☐	☐	☐	☐	☐

Support 3: Responsive Practices

To what extent does your institution engage in the following practices:

	Unsure	Not used	Planning	Piloting	Largely implemented	Implemented at scale
Proactive Intake and Advising						
Pre-enrollment advising on credit transfer options and academic pathways	☐	☐	☐	☐	☐	☐
Proactive screening for potentially-validatable prior learning before course registration	☐	☐	☐	☐	☐	☐
Specialized advising for transfer, returning adult, military, working adult, or other mobile learner populations	☐	☐	☐	☐	☐	☐
Students receive credit evaluation results in time to inform course-taking decisions	☐	☐	☐	☐	☐	☐
Ongoing advising to help students maximize their accepted credits and understand how credits are applied as their academic plans evolve	☐	☐	☐	☐	☐	☐
Advisor training on different transfer pathways and CPL policies and practices to support accurate advising to students	☐	☐	☐	☐	☐	☐
Student-Friendly Practices						
Provide options for students to complete only the learning outcomes they have not yet demonstrated, without retaking a full course	☐	☐	☐	☐	☐	☐
Screening stopped-out students for credential eligibility or near-eligibility through the use of degree audits, substitutions and exceptions, or catalog-year reviews	☐	☐	☐	☐	☐	☐

	Unsure	Not used	Planning	Piloting	Largely implemented	Implemented at scale
Feedback and Coordination						
Feedback is gathered from students to understand their experience with applying for transfer and receiving credits for courses taken through institutions, CPL, and other validated learning sources	☐	☐	☐	☐	☐	☐
Active and engaged collaboration between administrators, staff, and faculty to ensure equivalency alignment for institutional course transfers and CPL credits	☐	☐	☐	☐	☐	☐
Clear communication channels and active engagement with partner institutions regarding credit transfer assessment and equivalencies	☐	☐	☐	☐	☐	☐
Use of dashboards or reports to improve advising, evaluation, and support for students bringing validated learning	☐	☐	☐	☐	☐	☐

Support 4: Active Collaboration

To what extent does your institution collaborate with the following stakeholders around credit mobility:

	Unsure	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
State/Regional Employers and Workforce Agencies						
Leaders from our respective sectors regularly meet and communicate in service of our collaborative partnership.	☐	☐	☐	☐	☐	☐
We have achieved alignment and clarity of purpose between our sectors.	☐	☐	☐	☐	☐	☐
We have developed a seamless pathway experience for mobile students following the most common and well-traveled pathways between our sectors to accelerate their path to a credential.	☐	☐	☐	☐	☐	☐
K-12 Sending Institutions						
Leaders from our respective sectors regularly meet and communicate in service of our collaborative partnership.	☐	☐	☐	☐	☐	☐
We have achieved alignment and clarity of purpose between our sectors.	☐	☐	☐	☐	☐	☐
We have developed a seamless pathway experience for mobile students following the most common and well-traveled pathways between our sectors to accelerate their path to a credential.	☐	☐	☐	☐	☐	☐

	Unsure	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Most Common Postsecondary Sending Systems/Institutions						
Leaders from our respective sectors regularly meet and communicate in service of our collaborative partnership.	☐	☐	☐	☐	☐	☐
We have achieved alignment and clarity of purpose between our sectors.	☐	☐	☐	☐	☐	☐
We have developed a seamless pathway experience for mobile students following the most common and well-traveled pathways between our sectors to accelerate their path to a credential.	☐	☐	☐	☐	☐	☐
Most Common Postsecondary Receiving Systems/Institutions						
Leaders from our respective sectors regularly meet and communicate in service of our collaborative partnership.	☐	☐	☐	☐	☐	☐
We have achieved alignment and clarity of purpose between our sectors.	☐	☐	☐	☐	☐	☐
We have developed a seamless pathway experience for mobile students following the most common and well-traveled pathways between our sectors to accelerate their path to a credential.	☐	☐	☐	☐	☐	☐

Support 5: Data & Measurement

Part A. Metrics and data sources

To what extent does your institution collect, track, and monitor the following key performance indicators or other sources of information about the effectiveness of credit mobility policy and practice?

> *"**Collected**" refers to whether the data exists in your systems' information systems;*
> *"**Monitored**" refers to whether the metrics are tracked and centrally organized into a report, table, or dashboard; and,*
> *"**Used to Inform Decisions**" refers to whether the metric's levels and trends are actively referenced to inform strategic decision-making and drive continuous improvement processes.*

	Unsure	Not Collected	Planning to Collect	Collected but not Monitored	Collected and Monitored	Collected, Monitored, & Used to Inform Decisions
The share of students bringing accepted validated learning	☐	☐	☐	☐	☐	☐
The number of validated-learning credits accepted	☐	☐	☐	☐	☐	☐
Credit acceptance rate	☐	☐	☐	☐	☐	☐
Incoming transfer credit applicability to degree or program requirements	☐	☐	☐	☐	☐	☐
Reasons presented learning is not accepted or not applied (e.g., no equivalent course, course outside degree requirements, minimum grade requirement, etc.)	☐	☐	☐	☐	☐	☐
Retention rates for students bringing validated learning	☐	☐	☐	☐	☐	☐

	Unsure	Not Collected	Planning to Collect	Collected but not Monitored	Collected and Monitored	Collected, Monitored, & Used to Inform Decisions
Graduation rates for students bringing validated learning	☐	☐	☐	☐	☐	☐
Average time-to-credential for completers bringing validated learning	☐	☐	☐	☐	☐	☐
Top sending and receiving institutions for students who transfer into or out of the institution	☐	☐	☐	☐	☐	☐
Downstream outcomes after transfer-out, such as graduation, time-to-degree, or credit applicability	☐	☐	☐	☐	☐	☐
Timing of credit evaluation, including whether completed before enrollment or course registration	☐	☐	☐	☐	☐	☐
Student feedback through surveys, interviews, or focus groups from students bringing validated learning	☐	☐	☐	☐	☐	☐

Part B. Disaggregation by source of learning

To what extent does your institution collect, track, and monitor credit mobility data for subgroups of students bringing in each of the following subgroups of validated learning?

	Unsure or Not Applicable	Not Collected	Planning to Collect	Collected but not Monitored	Collected and Monitored	Collected, Monitored, & Used to Inform Decisions
Vertical transfer (2-year to 4-year)	☐	☐	☐	☐	☐	☐
Horizontal transfer (either 4-year to 4-year or 2-year to 2-year)	☐	☐	☐	☐	☐	☐
Reverse transfer (4-year to 2-year)	☐	☐	☐	☐	☐	☐
Dual enrollment or early college credit	☐	☐	☐	☐	☐	☐
Credit by exam for high school exams (e.g., AP, IB)	☐	☐	☐	☐	☐	☐
Credit by exam for other exams (e.g., CLEP)	☐	☐	☐	☐	☐	☐
Military learning	☐	☐	☐	☐	☐	☐
Industry-recognized credentials	☐	☐	☐	☐	☐	☐

Self-Assessment Scoring Sheet

Support 1: Effective Policy

Part A. Learning Acceptance Modality Coverage

		Number selected	Multiply by:	To get:
	Unsure or Not Used	_____	1	_____
	Planning	_____	2	_____
	Piloted	_____	3	_____
	Largely Implemented	_____	4	_____
	Implemented at Scale	_____	5	_____
Total			*Sum up the final column:*	_____
Effective Policy, Part A subscore			*Divide by 24:*	_____

Part B. Credit Mobility Policy & Procedure Availability

		Number selected	Multiply by:	To get:
	Unsure or Not currently addressed	_____	1	_____
	Informal or inconsistent practice	_____	2	_____
	Included in procedure or guidance	_____	3	_____
	Policy in development	_____	4	_____
	Codified in formal policy	_____	5	_____
Total			*Sum up the final column:*	_____
Effective Policy, Part B subscore			*Divide by 24:*	_____

Total Effective Policy score

Part A subscore + Part B subscore = _____

(Maximum Effective Policy score = 5)

Support 2: Supportive Technology

		Number selected	Multiply by:	To get:
	Unsure or Not used	_____	1	_____
	Planning	_____	2	_____
	Piloting	_____	3	_____
	Largely implemented	_____	4	_____
	Implemented at scale	_____	5	_____
Total			*Sum up the final column:*	_____
Supportive Technology score			*Divide by 12:*	_____

Total Supportive Technology score_____

(Maximum Supportive Technology score = 5)

Support 3: Responsive Practice

		Number selected	Multiply by:	To get:
	Unsure or Not used	_____	1	_____
	Planning	_____	2	_____
	Piloting	_____	3	_____
	Largely implemented	_____	4	_____
	Implemented at scale	_____	5	_____
Total			*Sum up the final column:*	_____
Supportive Technology score			*Divide by 12:*	_____

Total Responsive Practice score_____

(Maximum Responsive Practice score = 5)

Support 4: Active Collaboration

		Number selected	Multiply by:	To get:
	Unsure or Strongly Disagree	_____	1	_____
	Disagree	_____	2	_____
	Neither Agree nor Disagree	_____	3	_____
	Agree	_____	4	_____
	Strongly Agree	_____	5	_____
Total			*Sum up the final column:*	_____
Supportive Technology score			*Divide by 12:*	_____

Total Active Collaboration score_____

(Maximum Active Collaboration score = 5)

Support 5: Data & Measurement

Part A. Metrics & Data Sources

		Number selected	Multiply by:	To get:
	Unsure or Not Collected	_____	1	_____
	Planning to Collect	_____	2	_____
	Collected but not Monitored	_____	3	_____
	Collected and Monitored	_____	4	_____
	Collected, Monitored, & Used to Inform Decisions	_____	5	_____
Total			*Sum up the final column:*	_____
Data & Measurement, Part A Subscore			*Divide by 24:*	_____

Part B. Disaggregation by Source of Learning

		Number selected	Multiply by:	To get:
	Unsure or Not Applicable, or Not Collected	_____	1	_____
	Planning to Collect	_____	2	_____
	Collected but not Monitored	_____	3	_____
	Collected and Monitored	_____	4	_____
	Collected, Monitored, & Used to Inform Decisions	_____	5	_____
Total			*Sum up the final column:*	_____
Data & Measurement, Part B Subscore			*Divide by 16:*	_____

Total Data & Measurement score

Part A subscore + Part B subscore = _____
(Maximum Data & Measurement score = 5)

Total Score

Effective Policy score:	_____	+
Supportive Technology score:	_____	+
Responsive Practice score:	_____	+
Active Collaboration score:	_____	+
Data & Measurement score:	_____	
	=	
Total Score:	_____	



Interpreting your score

5.0 – 12.5: **Emerging:**
Foundational elements of holistic credit mobility are beginning to take shape, but substantial opportunities remain to strengthen and align policies, practices, technologies, partnerships, and data.

12.6 - 20: **Scaling**
Many elements of holistic credit mobility are in place, with opportunities to expand implementation, improve consistency, and strengthen alignment across the five necessary supports.

20.1 - 25: **Scaled**
Holistic credit mobility is well established across the five necessary supports, with policies, practices, and systems broadly aligned to advance learner mobility and support continuous improvement.

About Ithaka S+R

Through research, collaboration, and innovation, Ithaka S+R informs policy, guides strategies, and builds evidence-based tools to broaden access to postsecondary education, improve student and workforce outcomes, and advance scholarship.

Ithaka S+R is part of ITHAKA, a nonprofit with a mission to improve access to knowledge and education for people around the world. We believe education is key to the wellbeing of individuals and society, and we work to make it more effective and affordable.

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