Making the Case for Holistic Credit Mobility

Use this tool when

Aligning your holistic credit mobility initiatives with strategic priorities, building a coalition of supporters and allies, using data to drive alignment, and piloting and scaling.

What you should leave with

A roadmap to address a defined learner problem that is aligned to ongoing strategic priorities, backed by data, and championed by supporters.

As we support states, systems, and institutions to advance holistic credit mobility frameworks, we consistently hear that building buy-in across stakeholders can be difficult even as they recognize the value of the approach. Putting the core principle—**all validated learning should count, and every student should be supported on the shortest, most efficient path from wherever they are to the credential they seek**—into practice can be expensive, time-consuming, and require significant collaboration and creativity. In the face of competing priorities, an ambitious credit mobility strategy can be difficult to prioritize over projects with more immediate or short-term results.

Overview

Holistic credit mobility is inherently ambitious and makes big asks of stakeholders: faculty are asked to evaluate learning outcomes instead of learning sources; admission and enrollment teams are asked to accept credit validated from another institution; and institutions are asked to test their previous assumptions and rethink the entire transfer process. By connecting initiatives that are often siloed, the framework requires stakeholders across multiple levels of authority and areas of expertise to work together in new ways. The challenge, then, is not simply securing agreement that credit mobility matters, but making the case that it is an essential strategy for advancing the outcomes institutions and systems already care about—including student success, enrollment, completion, and workforce outcomes.

Regardless of your context, five strategies consistently strengthen the case for holistic credit mobility:

1. **Align holistic credit mobility with existing strategic goals.** Show senior leadership how this work advances plans they are already committed to, rather than positioning it as a new or competing priority. Tying credit mobility to workforce and employer-facing results consistently strengthens casemaking with state, system, and institutional leaders focused on economic and career outcomes.
2. **Build a coalition of supporters and allies.** Bring in people across roles to understand shared challenges and competing priorities. This can include students, administrators, faculty, state leaders, or even policymakers.
3. **Use data to create alignment.** Ground your case in evidence: where is the misalignment, what are the knowns and unknowns, and how does the issue connect to metrics stakeholders already track, such as enrollment, retention, and completion? The Key Performance Indicators to Track Learner Success tool[1] can help you identify this

[1] See the Key Performance Indicators to Track Learner Success tool here: https://sr.ithaka.org/key-performance-indicators-to-track-learner-success.

evidence, and your institution's Self-Assessment[2] results can offer additional context on where practices or data may be inconsistent.

4. **Make progress visible and manageable.** Break long-term objectives into shorter-term milestones, co-created with stakeholders, so they can see the tangible progress being made along the way. After setting milestones, plan how to communicate that progress.
5. **Test before scaling.** Pilot a small-scale intervention before scaling up. Understanding what's working, what's resolved, where the blockers remain, and what data you have or still need can help you decide whether scaling makes sense. This is a pragmatic approach when resources or staff capacity are constrained, or when you need evidence to build buy-in and commitment.

This tool is designed to make the casemaking process feel viable, achievable, and targeted. In this resource, we provide workshop modules on strategies that support building genuine consensus and sustained buy-in from relevant stakeholders. Generating consensus is also about building a community where stakeholders are able to voice different perspectives, knowing their experiences and opinions matter and are taken seriously. Building, and maintaining, trust among stakeholders is key to co-owning the project's progress, developing a shared vision, understanding shared challenges, and seeing the relevance to longer-term goals.

Drawn from the Holistic Credit Mobility Acceleration Cohort and the case studies highlighted in *Credit Mobility Strategies in Action,* the modules that follow go deeper into specific casemaking challenges.[3] Use these if you need to work through a specific blocker in more depth. These modules are not intended to be followed sequentially or all at once. Instead, institutions and systems should start where it makes the most sense within their own context, considering existing relationships, governance structures, and priorities.

Before diving into a module, first define the learner problem you are trying to solve, then diagnose what's blocking buy-in to accomplish that change,

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[2] See the Self-Assessment tool here: https://sr.ithaka.org/holistic-credit-mobility-institutional-self-assessment/.

[3] Kyle Gray, Betsy Mueller, Emily Tichenor, Madeline Joy Trimble, "Holistic Credit Mobility Strategies in Action," *Ithaka S+R*, February 27, 2025, https://sr.ithaka.org/publications/holistic-credit-mobility-strategies-in-action/.

and finally go to the specific module that helps you strategize how to resolve that blocker.

Navigating this Tool

After having identified the learner-centric problem you are facing, what you're trying to achieve, and who you need support from to achieve your desired outcome, it's time to diagnose what's blocking you from securing buy-in. Use the following table to help guide you to specific exercises in this worksheet that are designed to help resolve your barrier.

Barrier	Go to...
Competing priorities, incentives, resources, or lack of authority	Module A — Align Initiatives with Strategic Priorities
Low trust, ownership, or shared purpose	Module B — Gain Commitment through Communication and Collaboration
Contested assumptions, evidence, or interpretation	Module C — Leverage Data to Convert Disagreement into Alignment
Scale, complexity, or lack of visible progress	Module D — Sequence the Work
Uncertainty, risk, capacity, or feasibility	Module E — Test before scaling: The Plan-Do-Study-Act (PDSA) Lifecycle

Defining the Problem

Regardless of your context, five strategies consistently strengthen the case for holistic credit mobility:

Step 1: Define the problem What is the learner friction you are trying to resolve or reduce?	
Step 2: Define the outcome What should be observably different for learners once this change is achieved?	
Step 3: Identify the principle *Which principle(s) does this change support?*	☐ Count validated learning regardless of source ☐ Avoid repeated learning of the same content ☐ Link learning across K-12, higher education, and workforce ☐ Provide clear guidance on how learning will count towards a specific degree ☐ Maximize program flexibility for diverse pathways
Step 4: Identify the supports *Which support(s) contribute to the desired outcome?*	1. Effective Policy 2. Supportive Technology 3. Responsive Practice 4. Active Collaboration 5. Data & Measurement
Step 5: Specify the commitment *Articulate the ask. What do you need commitment on?*	
Step 6: Who do you need commitment from? *Name the role, group, office, governing body, or partner*	



Quick check

If you cannot explain how collaboration will improve at least one principle for learners, the partnership goal is still too broad. Most high-value credit mobility efforts will touch more than one principle.

Module A: Align Initiatives with Strategic Priorities

Complete this module when you need higher level senior leadership buy-in. Helping leadership understand how initiatives align with system or institution organizational priorities can increase the chances of receiving a commitment.

Leadership buy-in increases when proposed holistic credit mobility initiatives are evidence-backed and aligned with existing strategic priorities. This activity is designed to help align initiatives that are championed from the bottom up to existing strategic plans and reframe objectives in a way that leadership values. Whether you currently have an existing initiative or are considering launching a new initiative, follow the steps below to connect its objectives to goals that already exist at the state, system, or institutional level, highlighting how it adds value. As you engage in this exercise, consider the following questions:

- *Would leadership already care about this goal if the initiative didn't exist?*
- *Does your initiative make it easier, faster, or more effective to achieve your state, system, or institutional goals?*
- *Can you point to measurable impact towards your strategic priorities?*

Step 1. List Existing Strategic Priorities			
Strategic Priority 1:			
Strategic Priority 2:			
Strategic Priority 3:			
Step 2: List Your Proposed Holistic Credit Mobility Initiatives			
Initiative 1:			
Initiative 2:			
Initiative 3:			
Step 3. Make the Connection and Strengthen with Evidence *For evidence to support your initiative, think about external (economic, policy) or internal (institutional) conditions that support your initiative and the strategic priority that could contribute to achieving the desired result.*			
Initiative	*Strategic priority*	*How your initiative aligns*	*Evidence supporting this connection*
Step 4: Reframe Your Proposal			
Rewrite your proposal using leadership priorities using the following template. Where possible, make the measurable outcome a KPI from *Key Performance Indicators to Track Learner*	*[Initiative] advances [strategic priority] by [what you are proposing to do], leading to [measurable outcome].*		
	[Initiative] advances [strategic priority] by [what you are proposing to do], leading to [measurable outcome].		
	[Initiative] advances [strategic priority] by [what you are proposing to do], leading to [measurable outcome].		

Success.[4]	
Step 5. Anticipate Objections You may encounter pushback to your proposal. Use *Centering Learners in Credit Mobility Policy and Practice*, Part VIII to help you anticipate and address common objections.[5]	
Step 6. Reflect and Identify Your Strongest Entry Point	
Which strategic priority most strongly aligns with a credit mobility principle you are trying to align? *This is what you will use to initially ground critical conversations.*	

[4] See the Key Performance Indicators to Track Learner Success tool here: https://sr.ithaka.org/key-performance-indicators-to-track-learner-success.
[5] See the Centering Learners in Credit Mobility Policy and Practice report here: https://sr.ithaka.org/publications/centering-learners-in-credit-mobility-policy-and-practice.

Module B: Gain Commitment through Communication and Collaboration

Complete this module if the change you're seeking depends on stakeholders you don't have authority over or you want to create shared alignment when policy directives don't exist.

If your organization or system does not have formal governing authority, mandating change may likely generate resistance. Instead, building consensus, and creating space for voluntary alignment and shared interpretation allows stakeholders to collaborate more effectively. This can look different in various contexts, but the goal is always understanding stakeholder needs to create shared commitment and a drive towards accomplishing a greater vision. Moreover, framing an initiative around a shared problem rather than a solution invites stakeholders to co-own the "why" before answering the "how".

When you lead with the intention to listen, communicate often, and incorporate different perspectives, your initiative will more likely gain traction and get the buy-in you need to advance your goals. In systems where influence is relational rather than regulatory, encouraging adoption through best practices or principles is effective, especially when policies, priorities, and governance structures vary. This matters most when the real blocker isn't disagreement over the goal itself, but low trust or a lack of shared ownership among stakeholders.

This exercise can help clarify intent, understand stakeholder experience and friction points, and identify opportunities to build consensus for your holistic credit mobility initiatives. This should be an interactive and iterative process where you engage your stakeholders and that you revisit regularly over time to ensure relevance and priority.

Prompt	Example	Response
1: Define the Collective Aim ● What are you working to achieve?	*Every institution must accept and apply a CPL credit to a major or degree requirement, or at least an elective*	
2: Clarify the Intent ● Why should we work together to achieve this aim? ● What outcomes do we want to achieve? ● What problems will we solve?	*Learners should be able to confidently transfer their learning and not be asked to repeat that same learning because it didn't come from a traditional college course*	
3. Identify Friction/Challenges ● Where might this create burden, confusion, or misalignment with existing processes? ● Which stakeholders are essential to overcoming opposition? ● Which offices have the ability to rectify broken processes? ● Are there places where shared alignment exists?	*Faculty are skeptical of the institution's course assessment. Learners have inaccurate and incomplete information about how their courses will be treated. Equivalencies are not properly recorded or there is no data infrastructure to record equivalencies.*	
4: Distill Collective Aim into Guiding Principles ● Translate the goal into a flexible principle that preserves intent while allowing for different approaches to implementation	*Honor CPL assessments by peer institutions, and properly record equivalencies to expedite future transcript evaluations and build a data infrastructure.*	

5: Create a Feedback Loop ● Solicit feedback on your guiding principles and continue to iterate with relevant stakeholders. ● Consider how different audiences may interpret, apply, or experience the principle in practice.	*Consider the following:* ● *Who needs to review or respond prior to implementation?* ● *What concerns or barriers could emerge?* ● *What additional guidance or examples could support adoption?* ● *How can we create a feedback loop to ensure relevance and effectiveness over time?*	
6. Incorporate Feedback and Iterate ● Use feedback conversations to identify areas of confusion, hindrances, or opportunities for greater flexibility and alignment. ● Develop and distribute revised guiding principles.	*Consider the following:* ● *When should we next review this guiding principle?* ● *Who is responsible for ensuring relevance and alignment to the broader collective aim?* ● *What mechanisms can we put in place to gather continuous feedback?*	

Module C: Leverage Data to Convert Disagreement into Alignment

Complete this module to help you uncover the evidence you need to turn disagreement into shared understanding.

Disagreements often stem from unclear incentives or inconsistent practices. Data can make it easier to surface root causes and identify opportunities for improvement. In many cases, differences in how data is interpreted can lead to resistance for important and strategic holistic credit mobility efforts. Rather than introducing data because they support a desired result, explore available data together with all your stakeholders without presuming the outcome.

When working across stakeholders, it's important to first diagnose the source of disagreement, identify what is known and unknown, and then decide how to move towards alignment. Use the following step-by-step guide to diagnose the issue and support more productive, data-informed conversations.

Step 1: Identify Misalignment 1. Where is there disagreement or lack of alignment? 2. What decisions or outcomes are being debated?	
Step 2: Take Inventory of Available Data *Use the Key Performance Indicators to Track Learner Success reference table to identify which recommended KPI speaks to this disagreement or your Institutional Self-Assessment, and note whether the data is merely collected, actively monitored, missing, or used in decisions.* 1. What data or evidence already exists? 2. What sources can you draw from (e.g., institutional data, surveys)? 3. What student records, feedback, or interviews, can show how the issue is experienced by learners?	
Step 3: Identify Gaps in Data and Stakeholder Understanding 1. What information is missing or unclear? 2. Where do assumptions exist without supporting evidence?	
Step 4: Review, Interpret, Decide 1. What patterns are unclear and what uncertainties remain? 2. What evidence would cause each stakeholder to reconsider their current assumptions or concerns? 3. How does the evidence address the concerns, questions, or competing interpretations of various stakeholders? 4. Based on what you now know, what action should you take next and/or what additional evidence or input is needed to move forward?	

Module D: Sequence the Work

Complete this module when progress on goals feel too large, too slow, or invisible to the stakeholders you need on board.

Holistic credit mobility initiatives can take months or years to develop and sustain. To help ensure momentum and provide visibility, sequencing work into staged milestones can make them more manageable, provide a sense of ownership, and make progress feel more achievable. Backcasting is a design thinking exercise that helps teams identify a long-term objective or a desirable future. This approach helps to set manageable goals, provide a sense of ownership, and make progress feel more achievable. The team works backwards to connect the desired future to the present and identify necessary actions and next steps to get there.[6]

This activity is designed to translate long-term goals to practical, near-term actions. Instead of starting from today, you will start with a future success state and work backward to identify the key milestones required to achieve your long-term objective or future state.

Step 1. Define your future goal or desired outcome.

Refer back to Defining the Problem, found at the beginning of the worksheet, to craft your shared learner outcome statement.

Shared Learner Outcome

By engaging [*step 6 stakeholders*], we will [*step 5 the ask*] so that learners [*step 2 outcome*].

[6] Jim Kalbach, "Marching Backwards into the Future with Backcasting: Interview with Ephraim Bhatoo," *Mural*, December 6, 2016, https://www.mural.co/blog/marching-backwards-into-the-future-with-backcasting-interview-with-ephraim-bhatoo.

Step 2. What must be in place for this future state to exist?

Support	What must be in place
Effective Policy	
Supportive Technology	
Responsive Practice	
Active Collaboration	
Data & Measurement	

Step 3. Work backward from the goal

Assume the goal has already been achieved. Working backward from that future state, identify three milestones that would create evidence or unlock a decision to keep progress going.

1 year before the goal	6–9 months before	3–6 months before	0–3 months before
1.	1.	1.	1.
2.	2.	2.	2.
3.	3.	3.	3.

Step 4. Next steps

For each identified milestone, develop 2-3 specific actions that must be taken. Start with the milestones identified in the "0-3 month goals" and continue to work backwards.

	Task 1	Task 2	Task 3
Milestone 1			
Milestone 2			
Milestone 3			

Step 5. Plan how progress will be communicated

	Consider the following:
Core Questions	● *Who are the key audiences that need to see this progress?* ● *What evidence or examples demonstrate the impact of this progress?* ● *What format or channel will be most effective for sharing this update?* ● *How frequently should you share updates to maintain momentum and engagement?*
If your project involves cross-institutional partnerships	● *How are you aligning messaging about progress across partners and is the messaging consistent?* ● *What differences in priorities or timelines might affect how progress is shared?* ● *What joint artifacts (e.g., co-branded materials, shared dashboards, presentations) can reinforce the partnership?* ● *How can you coordinate communication so updates reinforce, rather than compete with, each other?* ● *What opportunities exist to share progress publicly to strengthen the partnership's visibility and credibility?*

Module E: Piloting to Scaling: The PDSA Lifecycle

This module is intended to help you decide whether your intervention will work when scaled. Testing a potential intervention at a small scale can help you determine whether to implement it system- or institution-wide.

Piloting an initiative is one way to reduce risk and gain confidence in your approach. We suggest using improvement science methods, which center continuous inquiry and learning as the core objective, to design a pilot. At its core, improvement science helps organizations understand where breakdowns occur and what actions can be taken to improve overall performance. Its systematic approach allows stakeholders to gather evidence to confidently implement a change or a new approach at a larger scale.

A primary tool under the umbrella of improvement science is the Plan-Do-Study-Act (PDSA) cycle. PDSA cycles are similar to mini-experiments, where one tests a hypothesis, documents what happens, compares results to predictions, and then decides what to do next. This approach emphasizes small scale testing to allow for rapid learning and adjustments at minimal costs, helping teams identify ways to achieve positive results efficiently and at scale.[7]

The following exercise adapts the PDSA approach to support systems and institutions in planning to test new holistic credit mobility approaches before full scale implementation.

[7] Rel West, "Introduction to Improvement Science," *Institute of Education Sciences*, December 1, 2017, https://ies.ed.gov/learn/blog/introduction-improvement-science.

Step 1: PLAN - Define Your Pilot

Prompt	Response
What are we trying to improve for learners? *(Refer back to the beginning of this worksheet where you identified the learner problem you are trying to resolve.)*	
What is the smallest version we can test? *(Examples: one department, pathway, partner, learner population, workflow, or data process)*	
What exactly will we do and for how long?	
What do we predict will happen and why?	
What learner outcome measures will we collect? *(Refer back to the Key Performance Indicators tool to help identify possible metrics.)*	
What implementation measures will we collect? *(Examples: turnaround time, staff effort, data completeness, adoption, error rate)*	
Whose feedback will we collect?	☐ Student ☐ Faculty ☐ Staff ☐ External partners (workforce, partner institutions, K-12, etc.) ☐ Other
What support must be in place for the test to succeed?	1. Effective Policy 2. Supportive Technology 3. Responsive Practice 4. Active Collaboration 5. Data & Measurement

Step 2: DO and STUDY - Conduct the Pilot and Capture Learning

DO: Conduct the Pilot	
1. Conduct the pilot. 2. Document problems and unexpected observations. 3. Collect data and feedback.	
STUDY: Capture Learning	
1. What data or feedback did you collect during or immediately after the pilot? 2. How do the results compare to your original prediction? 3. What did you learn from the pilot? Focus on learning, not proving. 4. Which stakeholders (students, faculty, staff) did you capture feedback from? 5. Which aspects should be retained, adjusted, or dropped before the next cycle? 6. Is this new approach more or less complicated than before and could it be scaled? 7. Who needs to review the results and when?	

Step 3: ACT - Scale, Adapt, Repeat, or Stop?

Decision Criteria	Response
Learner value: did the test reduce lost credit, repeated learning, unclear guidance, delay, or other friction?	
Operational feasibility: can the work be sustained without unreasonable burden?	
Support readiness: what policy, technology, practice, collaboration, or data conditions must change before scale?	
Decision: Scale / Adapt and Retest / Stop Scale: The pilot resolved the learner problem you were looking to improve and can be scaled more broadly, department wide or across the institution. Adapt and Retest: The pilot made progress on the learner problem, but the improvements can't yet be confidently scaled up. Consider adapting certain elements and retesting again. Stop: The pilot did not produce a measurable impact on the learner problem you were seeking to improve.	

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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