

Transfer Trajectories: A Longitudinal Qualitative Study of Community College Transfer Student Experiences

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Executive Summary Introduction

The current report, the next in our multi-year series examining community college-to-university (vertical) transfer student experiences in North Carolina, draws on two years of longitudinal qualitative (interview) data. In collaboration with institutional partners, the data captured from 2021 to 2023 include 103 first-year interviews of pre- and post-transfer students from seven community colleges, five private universities, and six UNC system campuses. In the second year, we re-interviewed 63 participants to explore their experiences, aspirations, and transfer progress. Participant data for this report come from students who participated in both years of interviews, and the sample reflects the diversity of the transfer population with just over half students of color, women, and first-generation college students. Additionally, students' academic backgrounds include those having earned or pursued traditional transfer degrees (Associate in Arts/Associate in Science; AA/AS) and degrees typically considered to be for workforce preparation (Associate in Applied Science; AAS).

The qualitative data analysis was driven by key questions involving personal, professional, and educational experiences that informed their higher education and transfer journeys and led to the development of four primary vertical transfer student profiles in North Carolina. While qualitative research presents diverse experiences, the findings are not intended to generalize to all transfer student experiences.

Transfer Student Profiles

The four student profiles that follow represent common transfer experiences and trajectories across our participant sample.

- **The Seamless Transfer:** *Seamless transfers* are post-transfer students who experienced mainly smooth transitions with little to no significant credit mobility challenges, surprises, or life events that altered transfer timelines or baccalaureate aspirations. Although seamless transfer students sometimes vacillated between majors, careers, and programs of interest, and may have even managed complex life events, their transfer trajectories were mostly uninterrupted. Many also exhibited elements of transfer capital gained through avenues such as advising, financial aid, and familial support, which they used to navigate the transfer process.
- **The Work-Driven Transfer:** *Work-driven transfers* are pre-transfer students who originally expressed a desire to transfer to a baccalaureate institution. However, by their second interview work-driven transfer students described decreased motivation to transfer due to a greater focus on career and workforce goals. These students explained that although transfer was still part of the long-term plan, they were driven to prioritize work based on their career goals and personal economic situations.
- **The Resolute Transfer:** *Resolute transfers* are pre- and post-transfer students who demonstrated an increased urgency and motivation to transfer as they narrowed educational and career goals. Resolute transfer students differ from work-driven transfer students due to strong career interests and opportunities that activated their budding transfer aspirations. Resolute transfers sought information about the transfer process and resources that expanded their major and career prospects. Others enrolled in more workforce-oriented associate degrees (e.g., AAS) and returned to college motivated to pursue a bachelor's due to various workforce experiences (e.g., income opportunities, new career information, supportive colleagues and supervisors).
- **The Resilient Transfer:** *Resilient transfers* are post-transfer students who faced transfer-related personal and institutional obstacles leading to delayed graduation timelines. Resilient transfers experienced what one participant described as “ghosts of the past,” or courses taken at the community college (CC) that conflicted with or were out of sync with their course plans at the post-transfer institution and credit mobility challenges. Despite these challenges, resilient transfer students remained committed by forging new pathways, relying on support networks, and developing revised timelines toward the baccalaureate.

Conclusions and Implications

- Students' transfer journeys are dynamic with major and minor turning points that inform their transfer experiences.
- Similar to our previous work, we find many students self-navigating with varied sources of information that include institutional, workplace, and familial support.
- Our most recent data reinforce the needs for uniform and transparent options for transfer as students navigate the complex ecosystem.
- Many pre- and post-transfer students' experiences and college decision-making are driven by work and career aspirations and often their economic realities. In addition to the uniform and transparent information about transfer pathways needed for students pursuing all transfer options (e.g., AA/AS, AAS), a complementary focus on careers could guide students toward relevant transfer journeys.



Introduction and Project Background

In Fall 2021, the Transfer Research Team at UNC Charlotte sought to examine the community college (CC) transfer student experiences in North Carolina (NC) using a multi-method approach consisting of large-scale qualitative data and national survey data from the Community College Survey of Student Engagement. This report draws on two years of longitudinal qualitative (interview-based) research to better understand vertical transfer student journeys.

Previous Research and North Carolina Context

Community colleges are the access point to higher education for many students, particularly students of color and those from low-income backgrounds who select the CC as a cost-efficient and convenient alternative to a baccalaureate institution. Over 80% of students who start at a CC nationally aspire to complete a baccalaureate degree, but fewer than 15% achieve that goal.¹ Common barriers include credit loss, incomplete information about the transfer process, and inadequate state-wide articulation agreements that do not always account for shifting student choices.^{2,3,4} Prior research underscores the impact of transfer student capital or the distinct set of knowledge and skills that students acquire and draw from to navigate the transfer process.^{5,6} Strong partnerships across community colleges, private and public colleges, and universities in NC have significantly improved the transfer ecosystem.⁷

Current Study and Participants

The Transfer Voices Project uses a longitudinal qualitative research design to understand NC transfer students' pre- and post-transfer experiences, allowing us to capture students' transfer processes and trajectories over two years (late 2021- early 2023). While qualitative research presents diverse experiences, it is not intended to generalize to all transfer students. Instead, we offer a snapshot of experiences captured through rigorous and systematic data analysis.

In Year 1 (2021-2022), in collaboration with institutional partners, we identified, recruited, and interviewed 103 pre- and post-transfer students from seven CCs, five private/independent colleges, and six UNC campuses. In Year 2 (2022-2023), we re-interviewed 63 of the students who participated in the Year 1 study (see Figure 1) to examine changes in students' pre- and post-transfer journeys through the data-driven transfer student profiles presented in this report. The data analysis was guided by key questions (i.e., what kind of personal or academic surges, epiphanies, or turning points occur through time; what increases/decreases through time; and what remains constant).

Figure 1. Demographic Profile of Year 2 Participants

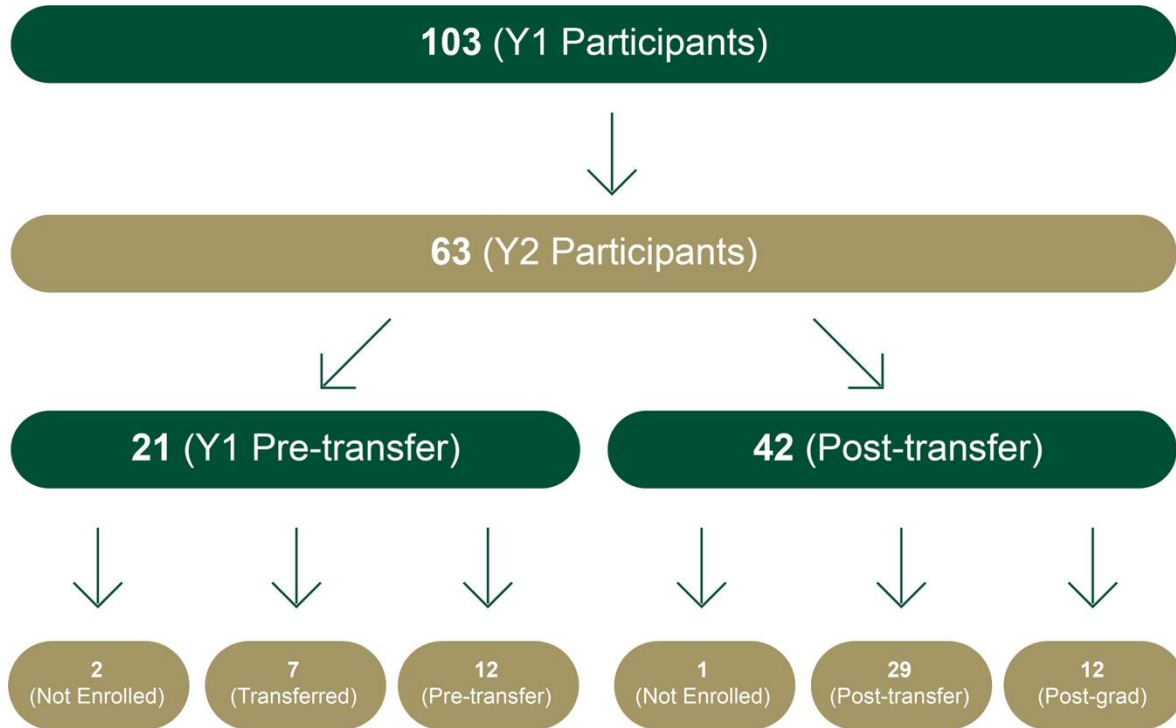
DEMOGRAPHIC PROFILE (N=63)



Findings

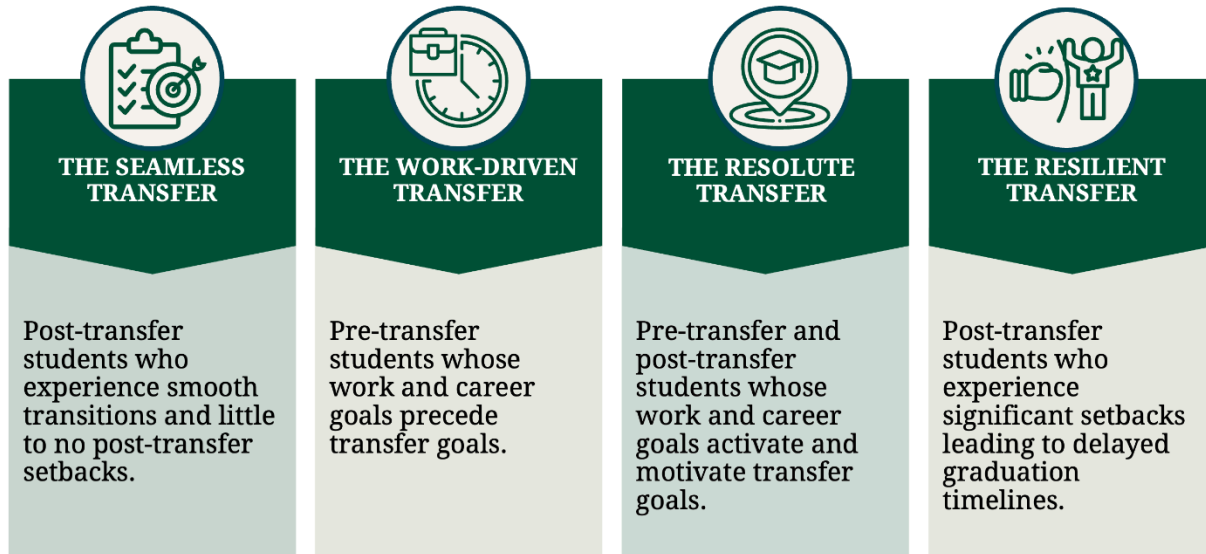
The Transfer Research Team followed the trajectories of the 63 students who were re-interviewed in Year 2 and found that 22 had a change in their enrollment status. These included seven pre-transfer students who transferred to a baccalaureate institution, two pre-transfer who were no longer enrolled, one post-transfer who was no longer enrolled, and 12 post-transfer who had earned a baccalaureate degree (Figure 2).

Figure 2. Student Trajectories



Given these transitions and other pre- and post-transfer experiences across Year 1 and Year 2, the Transfer Research Team identified four transfer profiles. These four student profiles represent common transfer experiences and trajectories across our participant sample (Figure 3).

Figure 3. Transfer profiles



In the next section, we expand on the four transfer types, including how each transfer type navigates and experiences the transfer process. We follow each transfer type with transfer student stories.



Transfer Type #1--The Seamless Transfer:

Post-transfer students who experience smooth transitions and little to no post-transfer setbacks that delay transfer timelines.

The *seamless transfer* student is the post-transfer student who experienced mainly smooth transitions with little to no significant credit mobility challenges, surprises, or life events that altered the timeline or aspiration to the baccalaureate. Although *seamless transfer* students sometimes vacillated between majors, careers, and programs of interest, this did not disrupt their projected graduation timeline nor derail their educational aspirations. While on the surface, these students' journeys projected a seamless transfer, many also managed complex life events that did not deter their baccalaureate plans. These students spoke about the positive impact of transfer advising, financial aid, and academic and social support on their pathway to the baccalaureate. We found that *seamless transfer* students had some forms of transfer student capital, such as advising and financial aid support, which they used to navigate the transfer process.

EXAMPLE 1: AA

In Year 1, Jayden, a 21-year-old Black man, attended a CC and pursued an Associate in Arts (AA) and had been admitted to a public university about 2 hours from home. In Year 1, he noted that the transfer went smoothly, with the most significant challenge related to transfer orientation. He and his grandmother made the 2-hour drive back and forth each of the two orientation days due to lack of resources for accommodations. Prior to transferring, Jayden received transfer advice from TRIO and other offices, such as the veteran and minority success office. Over time, Jayden continued seeking transfer resources and gathered information from diverse sources such as the transfer seminar course (ACA 122), transfer fairs, and university websites. As he moved closer to transfer, his access to transfer information remained consistent. Once at the university, Jayden faced the realities of college costs that differed from costs at the CC.

I'm just trying to cover the costs of my education. Since I'm at a university, it's different than [CC] where everything was...I had financial aid, everything was covered because you're not living on campus. And you got a whole big tuition at this school. Cost is a little bit more since it's a university.

Access to financial aid, particularly COVID-19 relief funds (Higher Education Emergency Relief Fund) at the CC allowed Jayden to accumulate savings to lessen the financial impact of costs at the university.

Well, definitely financial aid at [CC], because I still got a lot saved up still. ... That's it, but I got a job so...Plus with me getting more money this summer, I'll have more money, I know these resources, I'm probably going to build up on the savings I have from [CC] because they gave me a lot of refund checks every year and I was saving. Being smart as I am, I was able to save, keep saving every time I got it. It would be a thousand or 2,000 on every check I was saving. And my family was like, "Why are you saving?" And I didn't tell them why.

Lastly, although he was not admitted into his program of choice at the university, Jayden could pivot into another program of study that would allow him to pursue his dream career in animation. In Jayden's case, we note that his early exposure to the transfer process, varied sources of transfer knowledge, and financial aid were key to what he described as a seamless transfer. His ability to forge thoughtful social networks and engagement practices at the post-transfer institution is evident in his transfer journey.

While *seamless transfer* students experienced academic and personal turning points such as increased work hours or a change in major, they perceived smooth pathways to the baccalaureate. We find that *seamless transfer* students accessed transfer information from multiple sources and built connections across the pre- and post-transfer institutions as they formed and implemented transfer plans.

EXAMPLE 2: AAS

Celine is a 52-year-old African-American woman and a first-generation college student. Between interviews, Celine earned an Associate in Applied Science (AAS) in Human Services from the CC and transferred to a private university. Despite retaking a course, becoming a caretaker for her ill husband, and facing financial stressors, Celine perceived the transfer process as smooth. She experienced increased financial concern partly due to having to take out student loans. However, this was alleviated by a change in her FAFSA, allowing her to claim her mother as a dependent to become Pell-eligible. Although Celine's decision to pursue a bachelor's was not dependent on aid, she shared its importance in her enrollment decision:

That made a big difference in me continuing because I really honestly believe if I probably had not have gotten the financial aid, I probably would've been down to under half-time, probably, and paying for maybe just one course to attend college or whatever. But due to the financial aid, I've been able to maintain my full-time status.

Celine felt prepared to navigate the transfer landscape because of consistent access to advising and a network of peers that helped her understand the next steps and what questions to ask. Ultimately, Celine's transfer was smooth due to a transparent AAS transfer pathway between her CC and the private university where she enrolled, accessible advising, and robust support systems both in and out of the institutions.

I didn't really have a lot of issues with my transfer because when I contacted the [CC], when I contacted them to get my transcripts and all that kind of stuff like that, I got mine pretty fast. But I know some colleges don't work that way. You have to contact them, you might have to go there, and all kinds of stuff and whatnot. But mine was very smooth. So, some colleges, some community college levels, cannot be as smooth, I guess, as smooth a ride.

Like Celine, many students who completed an AAS *and* described a seamless transfer had transitioned to private or independent colleges or universities. This finding emphasizes the role of institutional type in considering time to degree, credit transferability, and student progress toward degree completion.

Transfer Type #2--The Work-Driven Transfer:

Pre-transfer students whose work and career goals precede transfer goals. Students in this profile include only those who were pre-transfer in Year 1 and Year 2.

The *Work-Driven Transfer* profile represents the pre-transfer students who, in Year 1, expressed a desire to transfer to a baccalaureate institution. However, in Year 2, they described a decreased motivation to transfer due to a greater focus on career and workforce goals. These students explained that although transfer was still part of the long-term plan, they wanted or needed to prioritize their workforce and career goals.

EXAMPLE 1: AAS

Preston is a 22-year-old White man, a continuing generation (non-first-generation) student who received college advice and funding from family members with prior college experience. We first spoke to Preston in February 2022 when he was enrolled at the CC to complete an AAS in therapeutic massage and a bachelor's degree in sports medicine. Preston worked part-time, and most of his time was spent on coursework at the CC. We spoke to Preston again in February 2023, and he was no longer enrolled at the CC after completing two certificate programs in therapeutic massage. He passed the state board exam in May 2022 and earned a license to practice therapeutic massage in August 2022.

I still am planning to go in the fall of 2023, but it might get pushed back another year just because I didn't expect to enjoy where I am currently [working]. I think it would be difficult for me to transfer but also keep up the enthusiasm I have for work. I think as long as I'm excited to work, I'll probably keep putting it off a little bit or at least not go full-time because, originally, I had thought I'm going to go full-time and just ride it out and just do it as quick as I can. But now with work I'm just more so thinking I'll go part-time and do it in the evenings or whatnot, to slowly get that four-year degree. ... I think a lot of people expected me to shoot higher, but for me I'm really happy with where I am and I don't think I could see myself doing any other job at this point.

EXAMPLE 2: AS/AAS

In Year 1, Annette, a 19-year-old White woman, was attending a CC and pursuing both an AS and an AAS with plans to complete a bachelor's in health sciences. In Year 1, Annette explained that an Associate in Science (AS) degree would be a backup plan should she pursue a degree outside of Health Information Technology. By Year 2, Annette's plan to transfer was put on hold due to the death of a family member and the new financial reality of having to self-support. Between Year 1 and Year 2, Annette gathered more information about the Health Information Technology job market and found that this degree would lead to high-demand jobs in medical coding. This information and her financial distress placed her transfer plans farther away. She explained:



I think it does give me a little bit of a nudge for the workforce side of things, and I think at least it would help give me experience in something like work wise so that way by the time I go in the four year and maybe I'm doing it in a way I can juggle a job in school.

Although Annette had proactively sought out and collected information about the transfer process and was well-positioned to transfer, her greatest challenge was navigating the transfer process alone *and* as a first-generation college student.

I don't have the background of someone who comes from a family where the mom and the dad are there and they have PhDs already. They probably would have more funds. They could allow the student at the very least for support. But with me it's, well, fund wise, there's not a whole lot, I don't think really. Even with mom's passing, I just don't want to be extra on anyone because it's, well, if y'all are supposed to manage yourselves, I'll figure it out. I don't want to be extra on anyone because I'm already living under someone's roof and I'm not paying rent or anything yet or contributing to the household costs. So, it's, well, we'll just see when we get there on that one.

In this case, Annette's transfer plans included an increasing concern around cost and affordability and a decreasing motivation to transfer in the short term due to an immediate need to enter the workforce.

The *work-driven* transfer students in this study had strong aspirations to complete a bachelor's degree but prioritized career and work goals. Despite increasing information about the transfer process, students were missing critical information about cost and affordability, credit mobility, and access to advisors that could help reroute students according to their circumstances.

Transfer Type #3--The Resolute Transfer:

Students whose work and career goals and access to institutional supports activate and motivate transfer goals. Students in this profile include both pre- and post-transfer students across Year 1 and Year 2.

The *Resolute Transfer* describes students who demonstrated an increased urgency and motivation to transfer as they narrowed educational and career goals. The *resolute transfer* students differ from the *work-driven* transfer students due to strong career interests and opportunities that activate their budding transfer aspirations. *Resolute transfer* students actively sought information about the transfer process and had access to campus resources that expanded their major and career prospects. In other cases, *resolute transfers* were students who enrolled at the CC, completed what they considered a terminal degree, entered the workforce, and then returned to college to pursue a bachelor's degree. These students spent some time in the workforce and were motivated to pursue higher education by various workforce experiences (e.g., increased income opportunities, new career information, pay ceilings, supportive colleagues and supervisors).

EXAMPLE 1: AS

Katy is a 19-year-old Russian immigrant woman who enrolled at the CC with plans to complete an AS before transferring to pursue a bachelor's in chemistry. As the designated family interpreter, Katy's family offered moral support but little guidance on navigating higher education. In Katy's second interview, we found that she increased her linguistic confidence and involvement in the CC. She joined a transfer honor society, thus growing her peer network and access to faculty and staff, leading to constant support from transfer advisors and faculty who offered letters of recommendation and went *above and beyond* by not limiting the time of her advising appointments. She explained:

So pretty much [transfer advisor] helped me to fix all the schedules and usually the advisor appointment is 30 minutes-ish. We're sitting there for hours until we're done with the whole schedule and we spoke to all the professors. She gave me a really good idea of actually calling [public university] and setting up an appointment with someone in admissions.

Next, we found that throughout high school and CC years, Katy was exposed to experiential learning opportunities and access to career information that sharpened her major and career interests. Katy's strong interest in working in a crime lab helped her to define a college list that included post-transfer institutions outside of her home radius:

So pretty much I was just spending hours on internet and just researching on all the colleges [that offer] a forensic science program.

Early career exposure, experiential learning opportunities, increased academic and social engagement, and constant access to pre- and post-transfer advisors strengthened Katy's transfer resolve.

EXAMPLE 2: AAS

When Michelle, a 29-year-old White woman, started her post-secondary journey, she had no plans to transfer. As a first-generation high school graduate and college student, Michelle enrolled at the CC to earn an AAS in workforce leadership to increase her job prospects as an administrative assistant. After a successful internship at a local utility company, Michelle learned that a bachelor's would improve her job prospects *and* that the company would pay for the degree. Therefore, she returned to the CC to pursue an AA to transfer. At that time, she realized that there was another pathway:

So then, the director over the office administration program, she went out of state for some kind of conference, and they had talked about the Workforce Leadership and Development program and how...they can take an AAS and they can apply it to the four-year degree ... I was in the process of going back to [CC] and doing an Associate of Arts so that I would have that taken care of. I was going to graduate three times, doing way more work, until this opportunity came open and I realized I didn't have to work that hard, I could apply most of my AAS credits to this program. It just worked out so perfectly.

Michelle was driven to pursue a bachelor's degree because of her employer's financial support and a strong interest in human resources, shaped by supportive colleagues and company leadership. She explained:

I could see the good work that human resources does for an organization, and I remember calling my sister and like, "Can you see me working in a corporate office with a desk and with people who wore blazers?" And it was a really big thing.

For Michelle, increased social and academic connections at the post-transfer level and increased career aspirations strengthened her baccalaureate and graduate school plans. What remained constant was her ability to self-advocate, high academic expectations of self, and access to education champions like TRIO advisors and CC faculty.

We found that *resolute transfer* students have defined career goals that largely influence their transfer college choice and timeline. *Resolute transfer* students are mostly self-navigating, and as their transfer aspirations heat up⁸ they seek information from institutional agents, peer networks, and college websites. *Resolute* transfer students described various institutional supports that connected major and career aspirations to relevant programming and transfer pathways. They can, however, miss information about the transfer process, such as credit transferability, cost, and the transfer admission process.

Transfer Type #4--The Resilient Transfer:

Post-transfer students who experience significant credit surprises leading to delayed outcomes. Students described in this profile include those who transferred between Year 1 and Year 2 and those who had transferred at the outset of the study in Year 1.

The *resilient transfer* students in this study include students who, at the post-transfer stage, faced transfer-related personal and institutional obstacles leading to delayed graduation timelines. *Resilient transfers* experienced what one participant described as “ghosts of the past,” or courses taken at the CC that conflicted with or were out of sync with their course plans at the post-transfer institution and credit mobility challenges. Other students grappled with identity-based issues that challenged their sense of belonging post-transfer. Despite these challenges, *resilient transfer* students remained committed by forging new pathways and timelines toward the baccalaureate.

EXAMPLE 1: AA

Rosie, a 19-year-old Latina woman and first-generation college student, dreamt of becoming a commercial flight pilot. When we first spoke to Rosie, she was headed toward that goal at a private, 4-year college. A year later, Rosie experienced a drastic turning point. The flight school faculty advised her that she was academically deficient due to what they perceived to be a language barrier. She decided to change her major to business. Still, given her parents' significant investment in flight school labs and tuition, she and her family thought it would be more cost-efficient to transfer to a public university where more of her credits from the CC would transfer. Rosie experienced an increased awareness of her marginalized identity, given the severity of what she identified as a racially motivated incident.

Okay, so back to when I was an aviation major, they were saying that they kind of used me being Hispanic as the reason why I couldn't fly an airplane as much. Well, they were like, this is the quote they said, "Maybe you can't fly the airplane as well because English isn't your first language, and you mostly speak Spanish at home, so maybe it's harder to comprehend it." But English was almost like my first language as well, because I learned it more from my sister, and then my parents would sometimes talk about it, and yeah.

Between Year 1 and Year 2, we also found that Rosie developed an increased need to self-advocate, and she encouraged other transfer students to do the same. What remained constant for Rosie was her motivation and resilience to complete a bachelor's and ultimately return to a flight school program to fulfill her lifelong dream of flying.

I would recommend trying to fight for your credits as well, because if some of the credits aren't transferring, and maybe try to fighting for them, and try talking to the registrar lady, or whoever's doing the register for the credits, and see what you could do, or what they can help you to do.

EXAMPLE 2: AAS

Leo is a 32-year-old Native American and first-generation college student who transferred to a public university close to home. Although a bachelor's was not an initial plan after earning an AAS, he realized that a career in game design would require a bachelor's degree. In Year 1, Leo explained that he completed 80 credit hours at the CC and only 30 transferred, a major setback. Leo was determined to complete a bachelor's despite the massive credit loss.

I went ahead, and just took my lumps, and was like, "Okay, I'll start with 30 credits and move on." But it did sour my overall experience with [public university].

A year later, Leo experienced a range of personal turning points, including a breakup, new employment and caretaking responsibilities, and mental health struggles. Academically, Leo received what he described as a *devastating blow* that would prolong his time to a degree by a full year and exacerbate his financial distress. Leo had the understanding that a course he had taken at the CC would count as the required portfolio course in his baccalaureate degree plan. He explained:

So, when I was signing up before the spring semester, I went to my advisor and asked him if I got everything done, could I graduate this December? And I was told, yeah. I get notification from my FAFSA and my student loans and everything that I'm done in December. I'm not receiving any more help. So, I'm like, okay, I'm on track to graduate. I'll have everything I need. Yesterday my professor comes in and goes, you're going to have to take a portfolio class next spring. And that was to me a devastating blow, because I have been struggling financially for years now to chase this. And my one class may determine whether or not I get a degree or not.

Leo drew inspiration from this identity to manage adverse transfer conditions, and remains steadfast in his commitment to completing a bachelor's degree. *Resilient transfer* students, like Leo, were highly motivated to achieve their educational goals and relied on familial ties and their resourcefulness to navigate the transfer landscape, despite significant challenges with the transfer system.

Conclusion

Overall, we found that students' transfer journeys are dynamic and marked by major and minor turning points that alter how they experience the transfer process. While each transfer type presented in this study is unique, we found similarities. Much like earlier findings, we noted that students are self-navigating through the transfer process and building new information networks over time. We also identified gaps in information that are not filled over time. The gaps in resources and information are most prominent amongst first-generation students and racially minoritized groups in higher education who navigate the transfer process with limited access to transfer capital. However, we found that familial support stays constant. Whether a student is moving away from the transfer goal, staying on the path, prioritizing work, or returning to the transfer goal, system and institutional assets along with families and personal networks continue to be pillars of support and constant motivators on the student's journey through college and careers.

Implications for Policy and Practice

Given the experiences of *seamless transfer* students and the systematic barriers experienced by *resilient transfers*, the findings from this study emphasize a need for earlier and increased exposure to diverse transfer pathways. In [previous reports](#), we have emphasized the need to focus on *uniformity* of pathways and enhanced *transparency* about transfer and credit mobility options as we mapped out North Carolina's transfer assets and liabilities. The second-year qualitative data reinforce that need. The findings of this report, however, support an additional layer of consideration when it comes to working with transfer students—the connection between vertical transfer and students' career and economic goals.

Work-driven and *resolute transfer* students demonstrate how require specific consideration of how work and careers directly influence transfer decisions. In some cases, success and focus found through work while attending the community college can be a deterrent to immediately pursuing further education, while in other cases, work experience through jobs and experiential learning can lead to heightened interest in further education. Strong institutional support structures like those modeled in TRIO Student Support Services, career advising coupled with academic and transfer advising, and the presence of clear and seamless pathways from traditional transfer (AA/AS) and AAS degree programs can help to draw connections between community college programs, university transfer options, and careers. Additionally, pre- and post-transfer institutions may consider expanding career services to include career mentoring and networking opportunities. The principle of transparent options must extend beyond higher education and into careers.

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