

2-Year/4-Year Institution Transfer/Articulation Agreement Collaboration Toolkit

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Template for Initial Contact Emails from 2-Year Institutions to 4-Year Institutions:

Dear [INSERT RECIPIENT NAME],

My name is [INSERT YOUR NAME], and I serve as [INSERT YOUR TITLE] at [INSERT YOUR 2-YEAR INSTITUTION]. I'm reaching out to explore opportunities for collaboration to strengthen transfer student success between our institutions. By establishing a strong partnership, we can not only increase the number of our students who continue on to complete a four-year degree, but also increase the number of students who enroll in your [INSERT NAME OF RECIPIENT COMPUTER SCIENCE/INFORMATION TECHNOLOGY/OTHER PROGRAM] program. The benefits are two-fold, creating a “win-win” situation for all.

We are interested in improving alignment, clarifying pathways, and ensuring students transition smoothly, persist, and complete their degrees. I believe there may be meaningful opportunities for us to coordinate efforts in ways that benefit both our students and our institutions.

Would you be open to scheduling a brief meeting in the coming weeks to discuss potential areas of collaboration? Upon your reply, I'd be glad to coordinate a time that works best for you.

Thank you for your consideration, and I look forward to connecting.

Sincerely,

[INSERT YOUR NAME]

[INSERT YOUR TITLE]

[INSERT YOUR 2-YEAR INSTITUTION]

[INSERT YOUR PHONE NUMBER]

[INSERT YOUR EMAIL]



Template for Initial Contact Emails from 4-Year Institutions to 2-Year Institutions:

Dear [INSERT RECIPIENT NAME],

My name is [INSERT YOUR NAME], and I serve as [INSERT YOUR TITLE] at [INSERT YOUR 4-YEAR INSTITUTION]. I'm reaching out to explore opportunities to collaborate in strengthening transfer student success between our institutions.

We are interested in working together to better align pathways, clarify transfer processes, and support students as they transition from your institution into our [INSERT NAME OF YOUR COMPUTER SCIENCE/INFORMATION TECHNOLOGY/OTHER PROGRAM] bachelor's degree programs. By coordinating our efforts, we can help ensure students experience a seamless transfer process, persist, and complete their degrees.

Would you be open to scheduling a brief conversation in the coming weeks to discuss potential areas of collaboration? I would be glad to coordinate a time that works best for you and any colleagues involved in advising, student success, or academic leadership.

Thank you for your time and consideration. I look forward to connecting.

Sincerely,

[INSERT YOUR NAME]

[INSERT YOUR TITLE]

[INSERT YOUR 4-YEAR INSTITUTION]

[INSERT YOUR PHONE NUMBER]

[INSERT YOUR EMAIL]

Sample Template for Initial Meeting Agenda:

Transfer Student Success Collaboration & Strategy Meeting

Attendees: [2-Year Institution Representatives], [4-Year Institution Representatives]

Date:

Location / Virtual Link:

1. Welcome & Framing (10 minutes)

Objective: Establish shared purpose and tone.

- Welcome and introductions (name, role, connection to transfer students)
 - Brief context: Why this conversation, why now?
 - Meeting goal: Identify 2–3 priority areas to strengthen transfer student success and define next steps.
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2. Shared Purpose & Success Vision (15 minutes)

Objective: Begin creating shared vision and capture common language for a shared vision of success.

Discussion Prompt:

“If our transfer partnership were working optimally, what would students experience?”

Consider discussing the following as key themes:

- Structure of clear pathways?
 - Fewer credit losses?
 - Processes for coordinated advising?
 - Higher persistence and graduation?
 - Improved equity outcomes?
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3. Current State Snapshot (20 minutes)

Objective: Develop shared understanding before jumping to solutions.

Each institution briefly shares:

- Transfer enrollment trends
- Persistence and completion patterns
- Known barriers (policy, advising, financial, cultural)
- Existing articulation agreements and pathway tools
- Current advising and onboarding practices

Follow-up discussion questions:

- Where do students struggle most?
 - Where do we see momentum or strengths?
 - What surprises us?
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4. Key Focus Areas (25 minutes)

Depending on size of group, discuss on or more of the areas below in small break-out groups or as a full group:

Potential Focus Areas:

- Articulation and curriculum alignment
- Advising coordination and messaging
- Data-sharing and progress tracking
- Student belonging and onboarding support
- Equity gaps in transfer and completion
- Communication between institutions

Groups identify:

1. One barrier to address
 2. One opportunity to build on
 3. One quick win (within 6–12 months)
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5. Prioritization & Action Framework (10 minutes)

As a whole group:

- Identify 2–3 priority initiatives
- Clarify ownership (who leads what?)
- Determine what information or data is needed
- Agree on early deliverables

Optional structure:

- Form small working groups (Articulation, Advising, Data, Student Experience)
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6. Timeline & Next Steps (5–10 minutes)

- Determine follow-up meeting cadence
 - Identify point people at each institution
 - Set immediate next action (e.g., policy review, data exchange, pathway mapping session)
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Optional Next Steps to Consider:

Data Deep Dive

- Review credit loss patterns
- Map top 3 transfer majors
- Compare curriculum sequencing

Student Voices

- Gather student feedback
- Plan listening sessions or surveys