



Transfer Navigator Reference Guide

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Transfer Navigator Reference Guide



COLORADO COMMUNITY
COLLEGE SYSTEM

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Arapahoe Community College
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Background

Funded through a Colorado State University Venture Capital Fund initiative to promote higher education innovation and collaboration, CO-PALS was a collaborative effort among the Colorado Community College System (CCCS), Colorado State University Global Campus (CSU Global), and CollegeInColorado (CIC).

With goals of developing and implementing seamless postsecondary advising and transition strategies to help students reach beyond their current associate's degree path and open doors to experience more than they thought possible, the CO-PALS program provided a convenient and affordable pathway for at-risk and under-represented students.

As associate of applied science and associate of general studies program students worked toward completing their degrees at the community colleges, transfer navigators located at the colleges provided intensive support services and facilitated individual career and academic planning (ICAP) as students explored baccalaureate opportunities and transitioned into CSU Global.

Encouraging collaboration and sustainability, partnering institutions included:

Colorado State University – Global Campus
Colorado Community College System
Arapahoe Community College – Littleton, Colorado
Community College of Aurora – Aurora, Colorado
Lamar Community College – Lamar, Colorado
Trinidad State Junior College – Trinidad, Colorado
Colorado Department of Higher Education – College in Colorado

The following strategies for seamless postsecondary transfer success were implemented and field tested during the CO-PALS project:

- **Career and college navigators at the community colleges to**
 - build program awareness with college administration, faculty, staff, and the local community;
 - develop and implement student outreach strategies;
 - provide intensive educational case management and student success support;



- guide students through the individual career and academic planning (ICAP) process; and
 - facilitate logistic and systemic transfer challenges from community college to CSU Global
- **Effective community college navigator and CSU Global advisor communication to ensure seamless student transition success**
 - **Individualized CSU Global enrollment, academic, and student services advisor support to foster transition and academic success**
 - **Approved AAS and AGS → BS articulation agreements to offer credit transfer ease**
 - **Tuition guarantee lock-in after completion of 30 credit hours at the community college and a 10% tuition discount scholarship through baccalaureate degree completion to manage education costs**

Dovetailing on a clear message from Colorado business and policy leaders that the economic and social well-being of our state is connected to the future educational level of our citizens, the CO-PALS partnership

- **offered an accessible and responsive learning environment and transition strategies to support personal and professional student goals;**
- **promoted 21st century workforce development needs; and**
- **aligned with the need to reduce the “Colorado Paradox” as well as save students and taxpayers money.**

This manual has been created to increase understanding of the transfer navigator position and provide resources to support future service to students. The following sections are included:

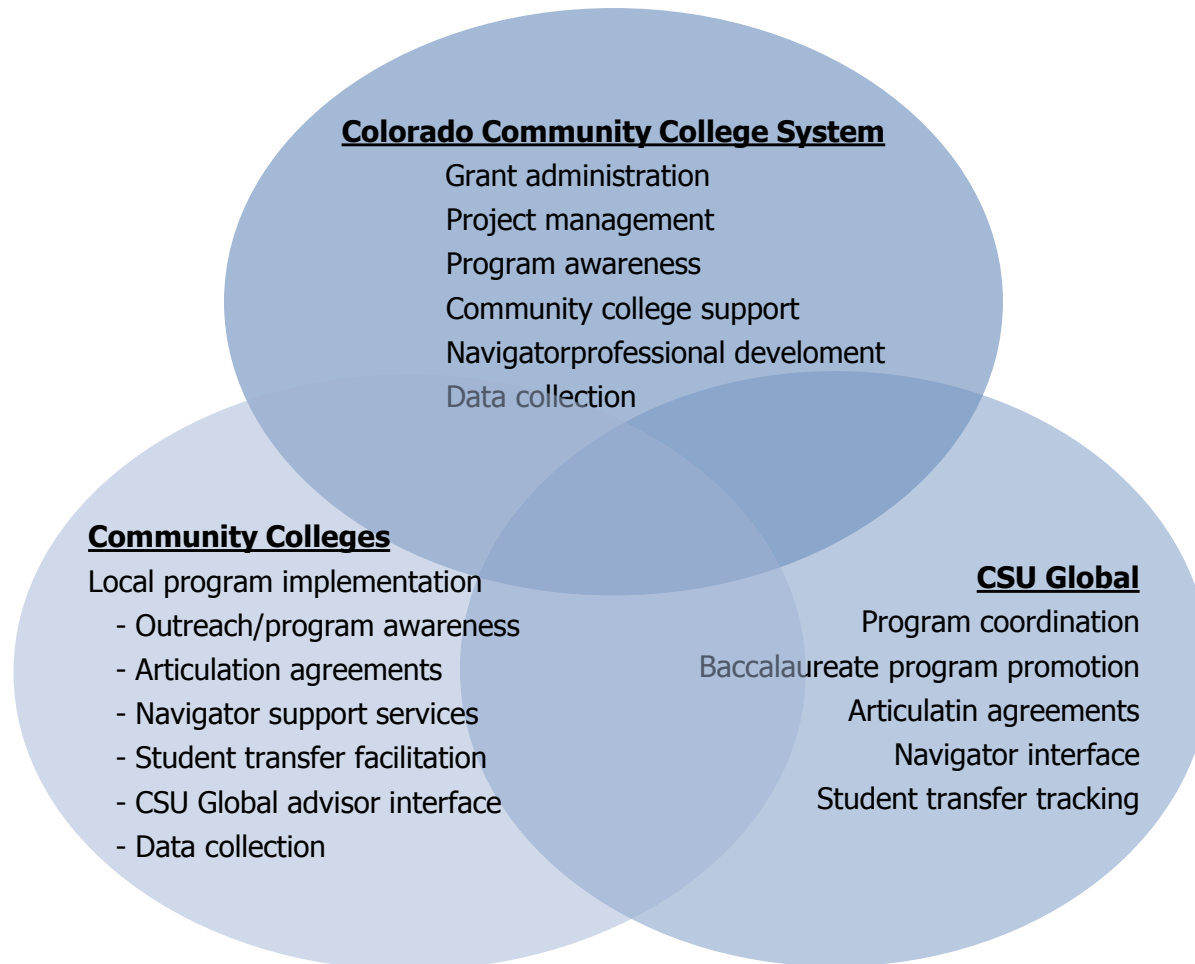
CO-PALS Transfer Navigator Role
 CO-PALS Transfer Navigator Resources
 Reporting Templates

Available in both electronic and binder and formats, the intent of this publication is to offer future 2-4 year transfer support programs a basis from which to continue compiling and developing resources for transfer navigators.

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CO-PALS 2-4 Year Transfer Program Model





CO-PALS Transfer Navigator Role



CO-PALS Transfer Navigator Role

In order to understand the CO-PALS navigator role, it is helpful to have basic knowledge about two previously piloted navigator positions. Under the **Colorado Success UNlimited** (Colorado SUN) initiative (2007-2010), which focused on a holistic approach to prepare out-of-school youth and academically underprepared adults for college, the Colorado SUN navigator provided intensive, on-going case management and college transition support to cohorts of students participating in *College Connection* skill enhancement bridge programs.

Following is a listing of core Colorado SUN navigator duties:

Campus relationship building: foster relationships with college administration, faculty, and staff to build program and resource awareness in order to develop student opportunities (student services staff, academic advisors, financial aid counselors, education program directors, bookstore staff, testing center director, etc.)

Recruiting/outreach: develop marketing materials and identify and recruit appropriate GED completers, academically under-prepared high school graduates, and advanced ESL students for the *College Connection* program

Intensive 1:1 case management: identify and troubleshoot barriers to academic and career success and develop community service provider relationships for student connections: disability, legal, social, transportation, childcare, health, etc.

College and career success facilitation: teach AAA College and Career Success courses, which include career exploration and academic success skill development (goal-setting, motivation, study skills, assessment skills, time management, tutoring services, mentoring opportunities), or interface with faculty to support instruction

Academic advising support: assist students with researching “best fit” education programs and interface with academic advisors to understand program requirements, course sequencing, and transfer options

Enrollment process support: assist with and build knowledge regarding community college application, assessments, registration, bookstore, and billing processes

Financial aid process support: assist with FAFSA, scholarship, and grant applications; develop knowledge of financial aid maintenance responsibilities

Self-advocacy skill development: equip students and clients with the knowledge to seek, access, and manage college processes and academic and career resources for themselves



Transition and persistence support: conduct frequent follow-up with students during transition to college-level course work; foster academic persistence via motivation strategies

Data collection: collect student data and maintain records in database for record-keeping purposes and contribution to formative and summative program evaluation

Reporting and accountability: adhere to college or adult education center supervisory requirements; submit monthly navigator reports to management staff

Considered a successful practice of the Colorado SUN project by the external evaluator, the basic concept of the navigator was then applied to a subsequent project: the **College and Career Navigation Initiative (CCNI)** from 2010-2012. For this project, however, an advising – rather than cohort – model was utilized, offering opportunity to develop additional and customized strategies to help transition adult education students, community college students, and workforce center clients into postsecondary, career-focused education programs with support services from the local workforce center. CCNI navigators were co-located for this initiative, having workspace both at the college and the workforce center.

In addition to the above core navigator duties for the Colorado SUN Project, the CCNI navigators employed the following:

Fostering navigator relationships with local workforce center staff to build program and resource awareness in order to develop student and client opportunities for career exploration and academic preparation

Acting as liaison among community college, adult education center, and workforce center; collaborate on relationship building strategies to develop awareness of the postsecondary transition program

Building relationships with local businesses/industry to develop workplace touring and job shadowing opportunities for students/clients

Developing marketing materials for and recruit workforce center clients

Field testing an *individual career and academic planning (ICAP)* process for adult learners

Conducting academic support workshops or connect students and clients to resources related to goal-setting, motivation, study skills, assessment skills, time management, tutoring services, mentoring opportunities

Teaching employability skills and identify career maintenance and professional development opportunities



Drawing from the Colorado SUN and CCNI projects, a third navigator concept was applied to the CO-PALS pilot project: a 2-4 year transfer navigator. With the intent of supporting community college students interested in transitioning into baccalaureate degree programs at Colorado State University Global Campus (CSU Global), CO-PALS navigators were charge with these overarching goals:

- build program awareness with college administration, faculty, and staff; high schools; and the community;
- develop and implement student outreach strategies;
- provide educational case management and student success support;
- guide students through the individual career and academic planning (ICAP) process; and
- facilitate logistic and systemic transfer challenges from community college to CSU Global.

In more detail, the navigators

developed transfer-related marketing materials;

developed and implemented outreach strategies to community college students, high schools, an adult education center (TSJC), and workforce centers (TSJC and LCC);

interfaced with faculty and administration to increase awareness of opportunities at CSU Global, primarily focusing on AAS and AGS degrees with articulation to CSU Global BS degrees;

built awareness of the program to local high schools, businesses and workforce centers;

interfaced with academic advising and student service areas to determine program completion status and academic trajectories of their students;

interfaced with CSU Global staff to determine appropriate baccalaureate program pathways and implement seamless transition strategies;

interfaced with community support providers as needed;

continued developing the adult learner ICAP concept from previous projects – incorporating self-awareness, career exploration, academic planning and management, and financial literacy elements;

provided intensive student motivation and retention support;



fostered student self-efficacy and -advocacy skill development as needed;
ensured smooth enrollment process through frequent follow-up with students; and
collected student and program data.

A graphic on the following page illustrates how a navigator interfaces with various services areas.



***Navigator
Interface***

**CSU
Global**

**Recruiting/
Oureach
Registrar**

**Community
Services**

**Enrollment
Services**

**Adult Ed
Centers**

**CO-PALS
Navigator**

**Career
Services**

**Workforce
Centers**

**Financial
Aid**

**High
Schools**

**Testing
Center**

**Faculty/
Deans**

**Academic
Advising**



CO-PALS Navigator Job Description

Below is the basic navigator job description provided by project management to the colleges. Each college used this verbiage as a basis for customizing their local description.

The Colorado Community College System (CCCS) in conjunction with this institution, _____ seeks a college and career and college "Navigator" for the CO-PALS (Colorado Policy, Analytics, and Learning at Scale) grant-funded project, a collaborative effort among CCCS, Colorado State University Global Campus, and College in Colorado. This position will serve as the primary contact among transitioning students, community colleges, high schools, and CSU Global.

Essential Functions

Develop outreach strategies for at-risk student participation in the CO-PALS program

Develop 1:1, trusting relationships with at-risk high school, adult education, and associate degree students to foster education and career success skills through educational case management and academic and career guidance

Facilitate at-risk student transitions into associate's degree programs by creating informational and social networks, escorting them through college admissions processes, including financial aid and student services, and connecting students with campus support programs

Support transition processes in conjunction with CSU Global advising staff for students transferring from associate degrees to CSU Global baccalaureate programs

Provide guidance through development of individual career and academic plans (ICAPs) with students to identify career pathways and set goals to complete associate degree programs, transfer to CSU Global, and

Identify support resources and success strategies for academic success

Troubleshoot life barriers to support academic success

Foster motivational skills within the students in relation to college persistence

Follow up regularly with students to support college persistence and retention and to support eventual transfer to a CSU Global baccalaureate program

Develop strong relationships and interface with admissions, student services, and financial aid staff to build awareness of program and foster support for students

Develop strong relationships with college faculty to build program awareness and seek faculty/student mentoring opportunities



Develop strong relationships with CSU Global advising staff to ensure seamless transition for students completing associate's degrees and entering baccalaureate degrees

Travel among community colleges, high schools, and adult education centers for outreach purposes

Articulate processes and progress in written format with adherence to established timelines

Collect student data for internal project analysis

Travel to and participate in grant-related professional development opportunities

Minimum Qualifications

- Bachelor's degree from an accredited institution, preferably in a field of study that enhances the individual's ability to assist at-risk students in an academic environment
- One year of experience in an academic or educational environment working with at-risk students in one-on-one situations
- Strong interpersonal skills
- Strong organizational skills
- Experience with collecting data, tracking outcomes and/or writing reports
- Attitude of optimism and ability to inspire confidence
- Knowledge of financial aid processes as related to a student career and academic goals
- Two years of responsible professional experience that includes implementation of new processes and communication systems

Preferred Qualifications

- Master's Degree, preferably in Higher Education or a field of study that enhances the individual's ability to assist at-risk students in an academic environment from an accredited institution.
- Knowledge and skill for implementing Individual Career and Academic Planning strategies and advising techniques
- Knowledge of Banner and Microsoft office suite
- 2-5 years of student services experience, preferably in a community college setting
- Experience teaching in secondary and/or post-secondary adult education systems, teaching college and career success courses



CO-PALS Transfer Navigator Resources



Transfer Navigator Support

This following section provides resources to support 2-4 year transfer navigators in their efforts to build an understanding of their role with students. They include:

- CO-PALS 2-4 year transfer outreach and support process graphic
- CO-PALS navigator relationship building
- CO-PALS outreach and awareness-building strategies
- CO-PALS intake process
- Student motivation and retention – *Individual Career and Academic Planning*
- Navigator-Student Initial ICAP Discussion Checklist
- Motivational interviewing for effective navigator-student communication
- Micro-messaging awareness and integration
- Self-efficacy skill development
- Transfer-related web sites
- Joint articulation agreements
- *CollegeInColorado* Online Career and Academic Planning Web Site
- Arapahoe Community College Transfer Club
- CO-PALS Database – Case Management Tool
- Counseling Ethics Guidelines for Navigators
- CO-PALS navigator professional development
- Navigator Reference Guides



CO-PALS 2–4 Year Transfer Outreach and Support Process

Navigators identify and support students...

**Student outreach and
identification for
CO-PALS program**

**ICAP and transfer
guidance**

**Logistic and systemic
navigation**

**CSU Global
connections**

**Continued navigator
and CSU Global
advisor support**

Persistence tracking

...while continuously

building program awareness and conducting outreach

providing case management through associate's degree completion

interfacing with internal and external entities



CO-PALS Navigator Relationship Building

An essential function of the navigator was on-campus relationship development in order to build awareness of the program and engage faculty, staff, and administration for their support and contributions. Via face-to-face meetings, navigators built relationships with

- Deans, chairs and faculty of programs with joint articulation,
- Career and Transfer Center staff,
- Enrollment Services staff,
- Student Services staff,
- Academic advising staff,
- Financial aid staff, and
- Communications staff.

Constructing seamless transfer strategies included working closely with CSU Global as well. Navigators interfaced with CSU Global to ensure smooth transition strategies, forming relationships with

- the CO-PALS CSU Global Coordinator,
- transcript evaluators,
- enrollment advisors, and
- academic success advisors.

Some CO-PALS program participants benefited from wrap around services; therefore, it was important that navigators build relationships with community service providers for referrals and continued student support. Community support needs included

- Public transportation,
- Housing,
- Employment,
- Personal health, and
- Childcare.

(In previous projects, navigators have been connected to legal and mental health service providers.)

External outreach efforts varied from college to college, depending on the local community. Navigators in rural colleges formed relationships with high schools, workforce centers, local businesses, newspapers, one adult education center, one radio station, local government, and law enforcement.



CO-PALS Outreach and Awareness-Building Strategies

Throughout the CO-PALS project, navigators at the participating colleges focused significantly on developing strategies to build internal and external awareness as well as conducting outreach to potential students for the program. While strategy efficacy varied at each college, a comprehensive listing from the participating colleges is provided below for consideration for future similar programs.

Internal Outreach Strategies

Student outreach:

- CO-PALS/CSU Global promotional materials (flyers, brochures, etc.) posted/placed around campus
- CO-PALS “landing pages” on CSU Global web site – linked on community college web sites
- Notices on campus monitors
- Notices on Desire2Learn (LMS)
- Announcements via college social networking tools
- Email messaging to all students, online-student groups, program-specific students, and “30+ credit hour completion” students
- Individual direct contact with student organization and club members; scholarship recipients; PTK members; undeclared major students, incoming freshmen, transfer students, students in programs with CCCS/CSU Global joint articulation agreements; TRIO students
- Classroom visits to specific programs; general classrooms; combined developmental education/college-level classes
- Multi-service advising center communication – academic, career, and transfer guidance in one office (TSJC and ACC)
- Evening information sessions
- Testing site exit interviews
- Transfer student workshops
- Transfer student club
- Transfer Success Program
- Transfer scholarship reception
- Transfer fairs
- Career fairs
- Promotional booth in lobbies
- ICAP party/workshops
- College newsletter articles
- College newsletter promos



Note: Print promotional materials were provided by CSU Global, and additional local materials were developed for outreach and awareness purposes in conjunction with each college's communications department. College-developed materials included navigator business cards, CO-PALS-specific program promotion cards, and special event flyers and posters.

Faculty, administrator, and staff awareness building:

- Email blasts to faculty
- Direct contact with individual faculty
- Faculty meetings/awareness sessions
- Meetings with dean of student services and staff
- Meetings with director of enrollment and staff
- Meetings with director of academic advising and staff
- Meetings with transfer coordinators and staff
- Meetings with student support coordinators and staff

External Outreach

Arapahoe Community College

- *ACC Insider* newsletter – program awareness - distribution to external partners
- Alumni – scholarship and program awareness email blasts; program awareness to paralegal graduates event, and new graduates “what’s next” workshop
- ACC web site – CO-PALS/CSU Global landing page
- ACC Facebook, Twitter – program awareness

Community College of Aurora

- Aurora Chamber of Commerce Young Professionals group – program awareness to members
- CCA web site – CO-PALS/CSU Global landing page
- CCA Facebook, Twitter – program awareness

Lamar Community College

- Prowers County Commissioners - awareness meeting
- *Lamar Ledger* newspaper – published article – distribution Lamar area
- *Tri-State Trader* newspaper – published article – distribution SE Colorado
- LCC *Pronghorn Pronk* news publication – program awareness – distribution to local area businesses
- KLMR FM 93.5 “Anything Goes” radio program – program awareness SE Colorado
- Area high schools – Lamar, Granada, Holly, Eads, Kit Carson, Wiley, Springfield, Walsh, Campo, Vilas, McClave – program awareness with counselors and ICAP planning



- Lamar Workforce Center Partnership
 - Student support – current job opportunities, job projection information,
 - Work shadowing opportunities, temporary placements
- Planning in progress for career guidance support at upcoming LCC/CO-PALS ICAP event
- Local businesses – program awareness – visits with representatives of banks, accounting offices, and law enforcement
- Alumni – program awareness via email blasts and additional email messages
- LCC web site – CO-PALS/CSU Global landing page

Trinidad State Junior College

- Area High Schools – Trinidad High School, John Mall High School, Goal Academy, Aguilar High School (and more) – program awareness presentations to staff and students; exit interviews
- Adult Education Center – program awareness presentations; navigator liaison
- Trinidad Workforce Center – program awareness, navigator liaison
- Trinidad Community Foundation – program awareness presentation at network council meeting for multiple community organizations
- Continuum of Care (homeless coalition) – program awareness to board members
- Colorado Department of Corrections – program awareness for ex-offender to regional re-entry and parole officer
- Local Newspaper – articles
- Alumni outreach – program, scholarship and CSU Global info session awareness via email messages
- Local newspaper article
- TSJC Facebook, Twitter
- TSJC web site – CO-PALS/CSU Global landing page

Colorado Community College System Administration Office Partnerships and Awareness-Building

College in Colorado

- Online ICAP tool technical assistance
- Guest speaker for navigator professional development – online ICAP tools
- Adult ICAP online tool development

Colorado Department of Labor and Employment

- Program awareness to staff
- Guest speaker for navigator professional development – labor market information

Colorado Department of Education

- Program awareness to staff

Colorado Council for High School and Community College Relations

- Program awareness – conference presentation

Colorado Career Development Association

- Program awareness – conference presentation

Colorado Association for Career and Technical Education

- Program awareness – conference presentation



Collegiate Career Services Association

- Conference program announcements

American Association of Community Colleges

- National convention presentation

Colorado Adult Learning Symposium

- Conference presentation

Colorado Community College System Web Site

- CO-PALS project overview and navigator resources



CO-PALS Intake Process

The CO-PALS student intake process was conducted primarily face-to-face, with navigators and students working together to enter student information into a database. The intake information consisted of the following information:

- Last Name, First Name, Middle Initial
- Student ID Number
- CO-PALS ID Number (computer generated)
- Address, City, State, Zip Code
- Phone Number
- Email Address
- Gender
- Race/Ethnicity
- DOB, Age (computer generated)
- Marital Status
- No. of Dependent Children Under 18
- First General Higher Education Status
- Veteran Status, Benefit Eligible
- Employment Status
- Highest Level of Education
- Credit Hours Completed
- Declared Major
- Certificate or Degree in progress and area of study
- Interest in pursuing a baccalaureate degree and overarching reason for doing so
- Public Assistance/Benefits
- Support Services Requested by Student (at intake)
- Pell Grant Eligibility Status
- Colorado Community College System Employee (for CO-PALS participation benefit)

For intake occurring away from a college-based computer, a paper intake form aligned with the information above was provided, giving navigators a tool to collect the information. They would then transfer that information to the database.

During intake, navigators began an informal interview process to engage students beyond specific questions related to the intake form. Examples of these questions are:

1. Tell me a little bit about where you're at in your educational journey.



2. What's your long-term career goal? If you aren't sure, are you familiar with the resources our Career & Transfer Center can give you to help explore your options?
3. What associate's degree are you pursuing? (This would often lead to an explanation of the differences between the AA/AS and the AAS, as many students didn't understand this.)
4. What schools have you considered in transferring?
5. Have you explored 4-year program options? Which ones? Which 4-year schools have your program? Have you considered these other options?
6. Are you familiar with the Colorado Department of Higher Education's website?
7. What questions do you have about financial aid? Scholarships?
8. Are you working now? Where?
9. How do you juggle your work schedule with school? Is your boss accommodating with your work schedule?
10. What do you feel has gotten in the way of your education or career success in the past? (Logistical: transportation, childcare, financial, etc.) Do you still have those issues?
11. What kind of support do you have from family, friends, and or your employer?
12. What kind of support would you like from me?



Student Motivation and Retention

Individual Career and Academic Planning

Dovetailing on Colorado's best practice of implementing individual career and academic planning (ICAP) for secondary students, as well as the Colorado Community College System's interest in further developing adult learner ICAP concepts from previous navigator-related projects, ICAP was employed in the CO-PALS project to promote comprehensive advising with a focus on meaningful career conversation and career literacy.

Broken down into five overarching components, the graphic below illustrates the holistic, cyclical ICAP approach for navigators and students. Starting with the central goal of students developing *postsecondary and workforce readiness* skills (PWR), navigators facilitated the ICAP process starting with self-awareness as the basis for students understanding themselves and how this core information affects and supports subsequent career exploration and identification, related academic planning and management (academic programs/Plans of Study and success), personal financial literacy (financial aid process, responsibility, and return on investment), and career development (during program completion).



Two important navigator objectives of ICAP were to:

- foster student understanding of the importance of identifying realistic career and related academic goals, and



- instill the practice of revisiting the ICAP process periodically to ensure academic and career “fit” as a student “evolves” during their academic career.

And considered a good ICAP facilitation practice, students were guided through meaningful career conversation through effective **motivational interviewing**. ICAP-related motivational interviewing resources are presented later in this section.

Adult Learner ICAP Quality Indicators and Standards

As part of the navigator ICAP concept development process, navigators and CO-PALS staff modified the secondary ICAP quality indicators for adult learners. Still considered in draft form, they include the following as of the date of this publication:

Adult Learner ICAP Quality Indicators	Standards for Adult Learner ICAP
Self-Awareness	
<p>Discover and understand unique interests, talents and aspirations and how they align with careers and interpersonal relationships and how individual thoughts and feelings get students excited about life and learning</p> <p>Understand how the adult’s academic, employment, and service-learning background can be applied to new academic and career goals</p> <p>Use tools such as career clusters, personality assessments, and learning style inventories to highlight individual strengths and capabilities</p>	<ul style="list-style-type: none"> • Interest surveys • Personality assessments • Aptitude assessments • Learning style assessments • Academic assessment scores and the student’s level of postsecondary and workforce readiness (PWR) • Transferrable skills, knowledge, and credit documentation • Goal-setting activities and a written postsecondary and workforce goal for the student • Financial impact of postsecondary education • Academic and personal support services utilized by the student • Self-reflection
Career Awareness	
<p>Know the difference between jobs, occupations and careers</p> <p>Articulate a wide range local, regional, national, and global career pathways and opportunities</p> <p>Consider economic and cultural influences and the impact of stereotypes on career choice</p>	<ul style="list-style-type: none"> • Interest surveys • Work value sorters • Labor market information • Cover letter and resume • Employment search tools • Professional organizations • Professional development opportunities • Workforce center resources



<p>Understand labor market information as it applies to career planning</p> <p>Identify realistic career options</p>	
<p>Career Aspirations</p> <p>Participate in career exploration activities centered on students' passions, interests, dreams and visions of their future self and perceived options</p> <p>Connect personality and careers for fit and alignment</p> <ul style="list-style-type: none"> • Interest surveys • Work value sorters • Personality assessments • Aptitude assessments • Use of labor market information • Understanding of the financial impact of postsecondary education 	
<p>Postsecondary and Career Options</p> <p>Be aware of and participate in a variety of postsecondary and career opportunities.</p> <p>Understand various "on-and-off ramps" within career pathways: prior learning assessment, transferrable credits, skills, badges, certificates, degrees, apprenticeships, and internships</p> <p>Understand transfer benefits, processes, and resources for smooth transition to higher levels of postsecondary education</p> <ul style="list-style-type: none"> • A written postsecondary and workforce goal for the student • Annual benchmarks for reaching goals • Transfer to higher degree options and transition resources • Career cluster and pathway models • Transfer and career fairs • Industry tours • Job shadowing 	
<p>Environmental Factors</p> <p>Consider how college, family, community, culture, employment, media, salary/benefits, and world view might influence the students' postsecondary success and career development</p> <ul style="list-style-type: none"> • The student's plans for and experiences in work and project-based learning (i.e., CTE, capstone, etc.) and service learning, if applicable • Activities performed by the student that establish connections between instruction and the world of work, careers and learning that occurs beyond the school itself • New and returning adult student success strategies identification and skill development 	



Academic Planning and Management

Apply the skills and knowledge necessary to map out and pass the academic courses required to achieve postsecondary and career goals

Understand transfer options, processes, and resources for seamless transition

Understand resources available for student support and academic success

- A written postsecondary and workforce goal for the student
- Annual benchmarks for reaching that goal
- An intentional sequence of courses reflecting progress toward the student's goals
- A Plan of Study
- Credit for prior learning
- Transcript evaluation (for transfers)
- Academic progress including the courses taken, any remediation or credit recovery, and any concurrent enrollment courses and credits earned
- Awareness of transfer benefits, options, pathways, and articulation agreements
- Identification of seamless transition processes, resources, and contacts with receiving institution
- Academic support resources
- Time management skill development
- Study skill development
- Work/family/school balance plan, if applicable
- Community support resources (wrap-around services)

Personal Financial Literacy

Recognize personal financial literacy, financial aid topics and vocabulary, and know what options are available to pay for postsecondary education

Understand and articulate personal financial literacy concepts, the cost of postsecondary options, return on investment, and financial responsibilities related to debt, and apply this awareness to the postsecondary career and academic planning process

Understand gainful employment concepts

Gain awareness of the importance of degree completion

- Student's understanding of the financial impact of postsecondary education
- Understanding of return on investment and gainful employment (debt-to-earnings ratio and employment demand)
- Use of debt-to-student loan ratio calculator/s
- Understanding of resources for scholarships, grants, and loans
- Postsecondary education budgeting
- Understanding loan repayment (and lack of repayment consequences)
- FAFSA application/Understanding of EFC
- The student's progress toward securing scholarships, work study, student loans and grants
- Degree completion awareness – understanding of negative financial impact of not completing



Employability Skills

Define, develop, and hone skills that increase the likelihood of becoming and remaining successfully employed and civically responsible citizens

Understand technical/hard skills

Understand soft skills

- A record of the student's cover letter resume
- Cover letter and resume modification skill development
- Job search skill development
- Soft skill development
- Employment application skill development
- Informational interview skill development
- Employment interview skill development
- Job shadowing opportunities
- Internship opportunities
- Apprenticeship opportunities

Career Transition and Success

Understand successful transition from school to employment

Understand professional behaviors in the workplace

Build awareness of professional organizations for career support and professional development

- Occupational Handbook
- Reference USA
- Professional organizations
- Colorado Career Development Association
- Career services office
- College in Colorado Career Planning Tab
- LinkedIn
- Job Shadowing
- Internships
- Apprenticeships



Navigator-Student Initial ICAP Discussion Checklist

In order to encourage student understanding of individual career and academic planning (ICAP) concepts, an initial ICAP discussion checklist was created. This checklist provided a beginning point so students could conceptualize ICAP components and goals without being overwhelmed by the detailed quality indicators and standards in the previous section. The initial discussion list includes the ICAP graphic to illustrate the five components, leading questions, and references to resources. It should be noted that it does not include career development questions as this ICAP component was added to the other components toward the end of the CO-PALS project and related activities may not apply to an initial discussion.

Navigator-Student ICAP Discussion Checklist



Individual Exploration/Self-Discovery

*Resources: Focus2, CIC

- Personal Interests
- Self-advocacy / Self-efficacy

Career Exploration

*Resources: ACC Website, Focus2, ACC CEW workshop, A Game Curriculum, CIC

- Career Interests
- Work Values



- Cover Letter & Resume writing
- Informational Interviewing
- Job Applications
- Interview Skills

Academic & Career Planning / Management

*Resources: DegreeCheck, AAA 109, 4-year university websites, CIC

- DegreeCheck
- 2-4 Year Process
- 4 year exploration
- Study skills, test taking skills, note taking skills
- Time Management, Organizational Skills
- Goal Setting
- Computer/Technical skills
- Plan of Study

Personal Financial Literacy

*Resources: CIC, AAA 109, Financial Aid Office, Financial Aid Website

- FAFSA
- Financial Aid Sources: Grants, Loans, Scholarships, Work Study
- Budgeting Skills

This checklist was meant to be an awareness builder for the students, as well as a vehicle to begin creating an ICAP action plan for assignments and further planning and discussion facilitated by the navigator.

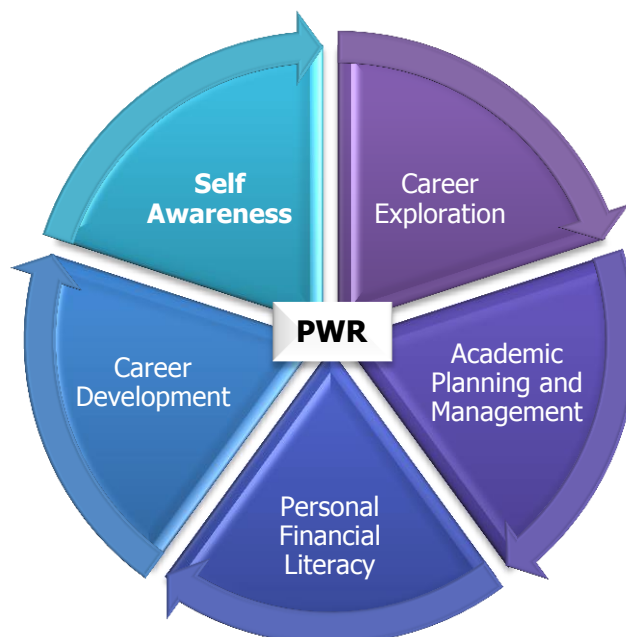


Motivational Interviewing for Effective Navigator-Student Communication

Building on an important navigator-student communication strategy from previous projects, CO-PALS navigators received professional development on motivational interviewing (MI) and applied the concept to adult learner individual career and academic planning (ICAP).

While the aforementioned navigator-discussion checklist provides a guide for initial interviewing with students, it was also helpful to refer to more in-depth interviewing questions for continued communication. CO-PALS navigators, therefore, developed the following ICAP-based sample questions.

Sample ICAP-related MI Questions



Self-Awareness – Individual Exploration/Self Discovery

Student Profile:

Refer to

- college or department intake form/apply referral resources
- Grit assessment (McCann assessment – CCPT)
- *SmarterMeasure* assessment
- Personality assessments
- Aptitude assessments
- Learning styles indicators/tools



Tell me a little bit about why you're here today?
What is your current situation – are you in school/working?
What are some of your goals – short/long term?

Where do you see yourself in ____ years?
What are you passionate about?

What activities do you enjoy doing in your free time/at work/in school?

Tell me about times when you have felt successful?

What can you think of that comes up periodically in your life that stands in the way your achieving your goals?

What are strategies you use for overcoming obstacles that arise in your path?

If fear weren't a factor, and you knew you couldn't fail, what would you do?
What do you want to do (not be)?

How well does your major align with your actual interest/goals/passions? (current students)

Career Exploration

Resources: College website, personality/interest inventories
(Focus2/CollegeInColorado/A Game curriculum, etc.)

Career Interests:

What work are you really passionate about? What are your professional interests?

Work Values:

What is important to you in your work and lifestyle preferences? Consider time, work hours, work environment, salary potential, etc.

Who or what are your support systems for planning your career?

- Career Interests – *What work are you really passionate about? What are your professional interests?*
- Work Values – *What is important to you in your work and lifestyle preferences? Consider time, work hours, travel, salary potential, etc.*
- Cover Letter & Resume writing – *What do you consider your key strengths? Include specific skills, competencies, and experiences.*
- Informational Interviewing – *If you had a chance to sit down with a professional in your future career, what are key questions you'd want to ask?*
- Job Applications – *In what areas of completing a job application have you struggled in the past?*
- Interview Skills – *What have your interview experiences been in the past? What do you do to prepare for an interview?*



Academic and Career Planning and Management

*Resources: DegreeCheck, CDHE transfer page, AAA 109, 4-year university websites, CIC

How will you get to your end goal/s?

When will each step occur?

Who should be involved?

Have you identified the plan of study or academic advising check sheet for your major?

- DegreeCheck – *Where are you at in completing your Associate's? What's your completion plan look like?*
- 4 year exploration - *What degree are you considering? What type of 4-year school do you want to attend? Where?*
- 2-4 Year Process – *Tell me what you know about the process of transferring to a four-year. What's your timeline for connecting with a Transfer Counselor and applying to the 4-year?*
- Study skills, test taking skills, note taking skills – *How do you take notes in class and prepare for exams? What are study habits you can improve?*
- Time Management, Organizational Skills – *How do you manage your time and prioritize your tasks?*
- Goal Setting – *How will you get to your end goal? When will each step occur? Who should be involved?*
- Computer/Technical skills – *In what areas do you need to grow in your computer/technical skills?*

Personal Financial Literacy

- FAFSA – *Tell me about your experience with FAFSA and financial aid in the past.*
- Financial Aid Sources: Grants, Loans, Scholarships, Work Study – *Have you considered all the various financial aid sources? Tell me about your knowledge of the options.*
- Budgeting Skills – *How comfortable do you feel in creating and maintaining a budget? If your budget goes in the red, what are changes you make to improve?*

Career Development – Transition to the Workplace

Tell me about any resources you have accessed at workforce center.

Have you or are you interested in participating in a Career and Technical Education Student Organization?

What professional affiliations, if any, are you a member of?

What is your idea of a realistic internship opportunity?

Have you identified any apprenticeship programs that are of interest to you?

Suggest MI Resources:

MINT – Excellence in Motivational Interviewing

<http://motivationalinterviewing.org/>



Center for Evidence Based Practices-Motivational Interviewing

<https://www.centerforebp.case.edu/practices/mi>

Australian Institute for Professional Counselors

<http://www.aipc.net.au/articles/principles-and-techniques-of-motivational-interviewing/>



Micro-Messaging Awareness and Integration

In addition to motivational interviewing as an integral aspect of comprehensive advising, an area to build awareness of and incorporate into navigator support strategies was micro-messaging – “... *small, subtle, often subconscious messages we send and receive in our communication with others in the form of a gesture, word choice, treatment, or even tone of voice.*” (National Alliance for Partnerships in Equity - NAPE) In addition to general research on this topic, navigators benefited from micro-messaging professional development via a keynote presentation at a Colorado Association for Career and Technical Education conference. The PowerPoint presentation is available in the Practitioner Support/Counseling Strategies section of the CCCS ICAP resource repository here: <https://resources.cccs.edu/education-services/career-college-readiness/icap-repository/> Additional resources can be found on the Internet and on the NAPE web site: <http://www.napequity.org/professional-development/teacher-training/>

Self-Efficacy Skill Development

An essential duty of navigators in earlier projects was to foster self-advocacy skills with at-risk students. The CO-PALS navigators worked on this as well; however, an additional skill development area that pairs with it is student self-efficacy – “*the belief in one’s capabilities to organize and execute the courses of action required to manage prospective situations.*” (A. Bandura) The Colorado Community College System office provided navigators with professional development on self-efficacy; a PowerPoint presentation is available in the Practitioner Support/Counseling Strategies section of the CCCS ICAP resource repository here: <https://resources.cccs.edu/education-services/career-college-readiness/icap-repository/> Many additional resources are available on the Internet as well.



Transfer-Related Web Sites

CO-PALS Landing Pages

A strategy to promote the seamless transfer process was to develop web pages on the CSU Global web site for each CO-PALS participating college. These pages included contact information for both the CSU Global CO-PALS coordinator and navigator, transcript submission and evaluation information, *Letter of Intent to Transfer* submission and tuition-lock-in information, and links to additional transfer details. Each community college had a CO-PALS web page as well with a link to the CSU Global CO-PALS landing page.

[CSU Global and CO-PALS transfer web page with Letter of Intent, CO-PALS navigator contact information, and tuition lock-in information](https://csuGlobal.edu/undergraduate/admissions/transfer-info/community-college-transfer/affiliate-community-college/ccs-system/)

<https://csuGlobal.edu/undergraduate/admissions/transfer-info/community-college-transfer/affiliate-community-college/ccs-system/>

Other Transfer-Related Web Sites

Below is a listing of additional web pages for transfer information and support:

[General CSU Global transfer web page](https://csuGlobal.edu/undergraduate/admissions/transfer-info/)

<https://csuGlobal.edu/undergraduate/admissions/transfer-info/>

[CSU Global transfer web page with links to joint articulation agreements between CCCS colleges and CSU Global – Click on Affiliate College](https://csuGlobal.edu/undergraduate/admissions/transfer-info/community-college-transfer/)

<https://csuGlobal.edu/undergraduate/admissions/transfer-info/community-college-transfer/>

[Colorado Department of Higher Education guaranteed transfer and guided pathways web page](http://higherred.colorado.gov/academics/transfers/students.html)

<http://higherred.colorado.gov/academics/transfers/students.html>



Joint Articulation Agreements

CSU Global and the Colorado Community College System have joint articulation agreements for many AA, AS, AAS, and AGS degree programs. An on-going activity of the CO-PALS project was regular course sequence updating and development of new agreements and course sequences. The course sequences are easily accessed by both students and navigators on the CSU Global and Colorado Community College System web sites.

CollegeInColorado Online Career and Academic Planning Web Site

The Colorado Department of Education's *CollegeInColorado* (CollegeInColorado.org) online planning tools for adult learners were utilized with CO-PALS students. A majority of the students created accounts on the site and accessed interest inventories, work value sorters, labor market information, financial aid planning tools, etc. while working through the ICAP process. For reference, the site is available here: <https://secure.collegeincolorado.org/>

Arapahoe Community College Transfer Club/Program

The Arapahoe Community College has a transfer club to support students interested in transferring to a 4 year institution. Students focused on CSU Global received support services in this club related to general transfer processes, application, enrollment and financial aid processes, research tips, and leadership training seminars hosted by the ACC Student Affairs staff.

CO-PALS Database – Case Management Tool

A database was designed specifically for CO-PALS program student record-keeping and data collection. Built into the database was a case management tracking system that included appointment-making and navigator notes functions. Navigators were able to schedule and keep track of student appointments and apply them to their Outlook calendars as well as enter notes pertaining to each student's case.



Counseling Ethics Guidelines for Navigators

While navigators are not required to be licensed counselors, it is beneficial for them to have ethics guidelines to be mindful of as they advise and support students. The National Career Development Association (NCDA) offers a code of ethics deemed appropriate for both standard and unusual or difficult navigator-student advising situations. This Code of Ethics is referenced on the NCDA web site:

<http://www.ncda.org/aws/NCDA/pt/sp/guidelines>

A PowerPoint presentation conducted during a professional development session on ethics in advising is available in the CCCS ICAP resource repository Practitioner Support section here: <https://resources.cccs.edu/education-services/career-college-readiness/icap-repository/>

CO-PALS Navigator Professional Development

Below is a topic and provider listing of professional development opportunities CO-PALS navigators participated in during the project. Most professional development costs were leveraged through higher education partnerships.

Project Inception - Individual face-to-face meetings or conference calls:

- Navigator Core Duties and Services – Colorado Community College System (CCCS) Office
- CO-PALS Database Navigation and Data Collection Processes – CCCS Office
- CSU Global Overview – CSU Global

Navigator Face-to-Face Professional Development Days:

- CSU Global Advising and Support Services – CSU Global
- CSU Global Orientation and Portal Functions – CSU Global
- CollegeInColorado Online Planning Tools for Adult Learners – Colorado Department of Higher Education (CDHE)
- PowerUpColorado.org Energy Field Online Planning Tool – CDHE
- PlanYourHealthCareer.org Healthcare Online Planning Tool – CDHE
- LMI Gateway Labor Online Market Information Tool – Colorado Department of Labor and Employment
- Motivational Interviewing – Community College of Aurora (CCA) Career Services
- Postsecondary and Workforce Readiness (PWR) Overview – CCCS Office
- Plans of Study – CCCS Office
- Academic Advising – CCA Academic Advising Department
- Career Interest Inventory and Value Assessment Interpretation – Arapahoe Community College (ACC) Career and Transfer Center
- Prior Learning Assessment and Credit – CCCS Office
- Goal-Setting Activities – CCCS Office
- Student Self-Efficacy – CCCS Office
- Time Management Skill Development Activities – Lamar Community College
- Ethics in Counseling – ACC Career and Transfer Center



- Financial Aid Policy Update – CCCS Office

Conference – Colorado Association for Career and Technical Education (CACTE)

- Leadership Skills (Keynote)
- Micro-Messaging (Keynote)
- Counseling and Career Guidance Strategies
- Career and Technical Education (CTE) – multiple sessions

Navigator Reference Guides

Navigator guides were developed under the Colorado SUN and College and Career Navigation Initiative projects. While focused on transitioning out-of-school youth and academically under-prepared adults into community colleges, the guides may be useful to develop an understanding of the history and evolution of the navigator position and their relation to the 2-4 year transfer navigator role. The guides are posted to the Practitioner Support/Counseling Strategies section of the CCCS ICAP resource repository here: <https://resources.ccs.edu/education-services/career-college-readiness/icap-repository/>



Reporting Templates



CO-PALS Project Reporting Templates

***Colorado Policy, Analytics, and
Learning at Scale***

Navigator Monthly Report

(Due 2 weeks after end of reporting month)

Community College:

Navigator:

Date:

Please provide information pertaining to challenges/solutions, needs, promising practices, and successes for the following:

Program Implementation:

Recruiting/Outreach:

Support Services:

Postsecondary ICAPs:

Lessons Learned:

Please comment on the following as appropriate:

Professional Development and/or Technical Assistance Needs:

Resources for Dissemination:

Future Planning:

Other (advice, suggestions, wish list, etc.):



Site Coordinator Quarterly Report

(Due 2 weeks after end of reporting quarter)

Community College:

Quarter Ending:

Report Date:

Please provide comments for the following aspects of your CO-PALS program.

Project Roll-Out Progress to Date:

Obstacles/Barriers to Program Implementation:

Successes:

Policy Issues Related to Successes or Challenges:

Comments, Questions, and Requests for Technical Assistance:

In-Kind Contributions

Please check any in-kind contributions related to implementation and support for your College Connection program. Provide specific descriptions if necessary, and give estimated values if possible.

	Description	Estimated Value
	Personnel	
	Workspace	
	Other Facilities	
	Equipment	
	Supplies/Materials	
	Travel	
	Other	
	Other	
	Other	



COPALS Navigator Final Report

Name:

Community College:

Date:

*Please provide responses to the following questions concerning the COPALS program.
Please write N/A if a question does not apply.*

- 1. Please list any programmatic challenges you encountered in the last quarter of this program.**
- 2. Please list any programmatic successes in the last quarter of this program.**
- 3. Please list all successful transfer student support strategies developed and implemented throughout your local COPALS program that contribute to our understanding of an effective 2-4 year transition model?**
- 4. Please discuss challenges and successes pertaining to relationship development between your community college and CSU Global during COPALS implementation.**
- 5. Please describe any observable changes in your college's 2-4 year transfer practices, including communications and collaborations among navigators/staff/faculty/administrators, as a result of the COPALS program.**
- 6. To help us understand the transfer navigator role, what recommendations do you have for future projects should they arise?**
- 7. What recommendations do you have for transfer projects/programs in general should similar projects arise in the future?**
- 8. Please share any other insights or thoughts that you would like to add.**



COPALS Site Coordinator Final Report

Name:

Community College:

Date:

*Please provide responses to the following questions concerning the COPALS program.
Write N/A if a question does not apply.*

- 1. Please list any programmatic challenges you encountered in the last quarter of this program.**

- 2. Please list any programmatic successes in the last quarter of this program.**

- 3. Please share your thoughts on the efficacy of having a staffed transfer navigator (providing intensive support services) at your college.**

- 4. Please describe any observable changes in your college's 2-4 year transfer practices, including communications and collaborations among navigators, staff, faculty, and/or administrators, as a result of the COPALS program.**

- 5. If applicable, please discuss challenges and successes pertaining to relationship development between your community college and CSU Global during COPALS implementation.**

- 6. Do you plan to continue offering a similar 2-4 year transition program? If so, what aspects of the COPALS project will you adopt and/or adapt based on what you learned from the COPALS project? If not, please share the reason(s).**

- 7. What recommendations do you have for transfer projects/programs should similar projects arise in the future?**

- 8. Please share any other insights or thoughts that you would like to add.**



Colorado Policy, Analytics, and Learning at Scale Program

Informed Consent



Dear Student/Community College Employee,

As a student or community college employee of the Colorado Policy, Analytics, and Learning at Scale (CO-PALS) program, you are invited to participate in a research project that is being conducted by the Colorado Community College System. This project is funded by the Colorado State Venture Capital Venture Capital Fund in conjunction with Colorado State University-Global Campus. The purpose is to study strategies for assisting students in preparing for college and careers and transitioning into baccalaureate programs at Colorado State University-Global Campus.

The research project begins February 1, 2014 and concludes June 30, 2015. By participating you will help us gain a greater understanding of how to serve students who want to go to college and develop a career. There is no risk to you. Your participation is voluntary, and you may withdraw at any time without negative consequences.

Your participation in the research will entail responding to questions through surveys and interviews, as well as utilizing your data maintained on a secure server at the Colorado Community College System. All student/community college employee information obtained from this research study will be kept confidential. Any information released to the general public (for example, statistical tables) will be designed so there is no possibility of identifying specific individuals. The data will be used only for research purposes and will not be disclosed or used in identifiable form for any other purpose.

I understand that the purpose of the release of my personally identifiable information is to assist in obtaining reporting information regarding the preparation of students and community college employees for college and careers.

I understand that the Colorado Community College System may share my information with CSU Global Campus and the CSU Venture Capital Fund.

I understand that the analysis will contain information and statistics about the post-secondary education of students in Colorado, and that no specific or personal information about me will appear in any report.

I am 18 years of age or older and I agree to participate in the study.

Name (Print)

Date

Signature

Date

This disclosure statement fulfills the requirement of the Family Educational Rights and Privacy Act of 2974 [20 United States Code 1232g]. For questions or concerns regarding this study, please contact Kendra Rodriguez, Principal Investigator, Colorado Policy, Analytics, and Learning at Scale Project Manager, 720-858-2203, or the Colorado Community College System Institutional Review Board Office of the Provost, at 720-858-2759.



Notes



Appendix

- CO-PALS External Communications Materials
- Sample Navigator Outreach Materials
- Navigator Coaching and Support Resources
- Navigator/Student Resources

For copies of the following additional resources, please contact:

Kendra Rodriguez, CO-PALS Project Manager
kendra.rodriguez@cccs.edu
720-858-2203

The COPALS logo is positioned at the top right of the page. It features the letters 'COPALS' in a white, sans-serif font. A white starburst graphic is placed between the 'O' and 'P'.The title 'Transfer Navigator Reference Guide' is written vertically in a bold, yellow, sans-serif font along the right edge of the page. The background behind the text consists of overlapping, semi-transparent geometric shapes in shades of blue and white, creating a dynamic, abstract pattern.A large, white COPALS logo is centered on the left side of the page. It features the letters 'COPALS' in a sans-serif font with a white starburst graphic between the 'O' and 'P'.

Developed under the
Colorado Policy, Analytics, and
Learning at Scale Project

Colorado State University Global Campus
Colorado Community College System
Arapahoe Community College
Community College of Aurora
Lamar Community College
Trinidad State Junior College

[CCCS.EDU/COPALS](https://cccs.edu/copals)