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The Unsung Actors: Articulation Officers and their Role in Supporting the Transfer Function for
Community College Students

A dissertation proposal in partial satisfaction of the
requirements for the degree Doctor of Philosophy
in Education

by

Fernando Garcia

2026

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2026

ABSTRACT OF THE DISSERTATION

The Unsung Actors: Articulation Officers and their Role in Supporting the Transfer Function for
Community College Students

by

Fernando Garcia

Doctor of Philosophy in Education

University of California, Los Angeles, 2026

Professor Cecilia Rios-Aguilar, Chair

Community colleges serve as critical gateways to higher education, especially for racially minoritized, first-generation, and low-income students seeking to transfer to 4-year universities. Yet transfer remains uneven and difficult to navigate, with Black and Latinx students continuing to experience inequitable outcomes. While existing research has examined student experiences, transfer policy, advising, and institutional barriers, less attention has been paid to articulation officers (AOs), the professionals who maintain course agreements, interpret transfer requirements, and help determine how community college coursework applies across institutions. This qualitative, focused ethnographic study examines how 14 California community college AOs made sense of transfer, equity, and policy implementation within the California Community

Colleges system. Guided by Ching's (2023) equity sensemaking framework and Felix and Nienhusser's (2023) equity-centered implementation framework, the study draws on semi-structured interviews, observations of statewide and regional articulation-related professional spaces, articulation- and transfer-policy documents, field notes, and analytic memos. Findings show that AOs understood transfer equity to be embedded in the hidden infrastructure students are expected to navigate, including course applicability, catalog rights, articulation agreements, general education certification, and student-facing transfer information. Participants also described working through a changing policy environment shaped by Cal-GETC, Common Course Numbering, ADTs, C-ID, ethnic studies requirements, and intersegmental differences. Across these conditions, AOs reduced transfer risk by making coursework count, translating policy into local guidance, and protecting students from unnecessary units, repeated coursework, and delayed progress. This dissertation argues that articulation work should be understood as transfer equity work: technical, often invisible labor that shapes whether transfer policies reduce complexity or reproduce it.

The dissertation of Fernando Garcia is approved.

Ozan Jaquette

Robert T. Teranishi

Eric R. Felix

Cecilia Rios-Aguilar, Committee Chair

University of California, Los Angeles

2026

DEDICATION

For my mom, Albertina; my dad, Miguel; my brothers, Andy and Miguelito; my love, Cynthia;
and our Yuma.

For being my home. For holding me up when I could not hold myself up. For believing in me
when the road was long, when life became heavy, and when finishing this felt impossibly far
away. For loving me through every version of myself that it took to get here, and for never
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You are my home, my reason, and the love underneath all of this.

This is for you.

I love you, always.

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1. Vang, M., **Garcia, F.**, Vasquez, M., Harris, F. III, & Wood, J. L. (2017, November 2). Food insecurity and men of color. *Diverse Issues in Higher Education*.
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1. **Garcia, F.**, & Felix, E. (in progress). *Equity brokers: The role and agency of articulation officers in California's transfer reform* [Research brief in preparation].
2. **Garcia, F.**, Wright, B., Azurdia, D., Rowat, A., & Lee, E. (in progress). Cooking and conversations: A community-building intervention to foster belonging among STEM PhD students [Manuscript in preparation].
3. Estrada, C., & **Garcia, F.**, (in preparation). Life history as a CRT method for counterstorytelling in the study of higher education. Manuscript in preparation.

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2. 2025 Conference Co-Presenter
Garcia, F., Wright, B., & Shin, G. H. R. (2025, April 26). *Funds of labor knowledge: Community college STEM students making meaning of their work experiences*. Roundtable session presented at the Annual Meeting of the American Educational Research Association (AERA), Colorado Convention Center, Denver, CO, United States.
3. 2024 Invited Panelist
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4. 2023 Conference Co-Presenter
Estrada, C., & **Garcia, F.**, (2023). *Life History as a CRT Method for Counterstorytelling in the Study of Higher Education*. Paper to be presented at the American Educational Research Association (AERA) Annual Conference.

CHAPTER 1: INTRODUCTION

Community colleges occupy a unique and vital position in the American higher education system, offering accessible and affordable pathways to academic and professional success for millions of students (California Community Colleges Chancellor's Office, 2026b). As open-access institutions, they cater to a diverse demographic, including first-generation college students, working adults, and those from historically underrepresented backgrounds (Rios-Aguilar, 2018). Central to the mission of community colleges (CCs) is the “transfer function,” which involves entering a 4-year university through a CC (Bahr, 2012; Taylor & Jain, 2017). One incentive of the “transfer function” is to allow students to accumulate college credits at a lower cost at a community college before transferring to a 4-year university (Martinez et al., 2017). This pathway promotes educational attainment by enabling students to overcome financial and academic barriers and pursue higher education at an affordable cost (Jenkins & Fink, 2016).

While 80% of first-time community college students desire to transfer to a 4-year university, only 23% succeed within five years (AB 928, 2023; Horn & Skomsvold, 2011). This disparity becomes even starker when disaggregated by race and ethnicity, revealing persistent inequities that disproportionately hinder Black and Latinx students. In response to these challenges, California's legislature has implemented initiatives designed to create a “student-centered transfer approach,” aiming to address systemic barriers and support the success of all students in their pursuit of higher education (Fink et al., 2023; Gándara et al., 2012).

While existing scholarship on transfer has focused on challenges with food instability, unstable living conditions, and financial strains while trying to balance their responsibilities as students and primary caretakers (Goldrick-Rab et al., 2015; Vasquez et al., 2019; Wood & Harris, 2017) higher education scholars, practitioners and policymakers have begun to consider

how credit loss and inconsistent transfer requirements can disproportionately affect racially minoritized students and hinder overall completion rates (Monaghan & Attewell, 2015). Some scholars have noted how the ever-changing policies and practices surrounding the transfer function have created a complex system often called the “transfer maze” (Bustillos, 2017, p. 2). Notably, the COVID-19 pandemic further intensified these challenges, exacerbating inequities in access to advising, course availability, and credit transfer, particularly for Students of Color. As Mejia and colleagues (2023) highlighted, these disruptions have deepened systemic barriers, making an already intricate transfer process even more challenging. Specifically, these disruptions have highlighted the critical role of articulation officers, whose work in maintaining transparent and equitable transfer agreements has become even more essential to ensuring student success. Articulation officers are the individuals responsible for course articulation: the process of creating a formal, written contract that outlines how courses (or sequences of courses) from a sending institution (community college) align with or substitute for specific course requirements at a receiving institution (4-year university) (CIAC, 2013). The articulation process facilitates a student’s transition to the next level of instruction at the receiving institution.

Like academic advisors, transfer center directors, and financial aid counselors, articulation officers act as street-level bureaucrats (Lipsky, 1980; Rice, 2013) or individuals who interact directly with constituents and have substantial discretion in executing their work (Lipsky, 1980). These professionals play a key role in operationalizing equity-centered policies, such as California’s Associate Degree for Transfer (ADT) and the new CAL-GETC framework, by ensuring that transfer agreements prioritize accessibility and equity for Students of Color. Their role requires technical expertise, collaboration across institutional and state levels, and an equity-focused perspective to address longstanding disparities in transfer success. Integrating

these insights into research about articulation officers highlights their indispensable contributions and situates them within the broader ecosystem of higher education professionals working to promote equity and student success. While often unrecognized, these efforts illustrate how professional roles like articulation officers function as pivotal actors in mitigating the adverse effects of systemic inequities during crises.

Study Background

Community colleges play a critical role in the higher education ecosystem by providing accessible, affordable education to a diverse population, including nontraditional and first-generation college students. These institutions serve as entry points for students pursuing postsecondary education, particularly those from low-income backgrounds or otherwise underrepresented in 4-year institutions (Bailey et al., 2015). Community colleges' open-access policies, flexible scheduling, and career-oriented programs cater to students with varying academic and professional goals (Cohen et al., 2014). Additionally, they contribute to the democratization of higher education by offering remedial courses and developmental education, ensuring that students lacking college readiness skills have opportunities for success (Jain et al., 2019). Through workforce training, educational programs, and lifelong learning initiatives, community colleges support local economies and serve as inclusive spaces for upward mobility (American Association of Community Colleges, 2018).

Despite having high aspirations to transfer, Black and Latinx students face disproportionately lower transfer rates compared to other racial and ethnic groups (The Civil Rights Project, 2012; Lin et al., 2023). For instance, Black students are less likely than their white counterparts to transfer to a 4-year institution and complete a bachelor's degree. Latinx students fare slightly better in transfer rates but remain less likely to transfer than white students.

Efforts to address these disparities include legislative measures such as California’s Associate Degree for Transfer (ADT) initiative (SB 1440) and the recent development of a streamlined General Education transfer pathway (AB 928). These policies aim to simplify the transfer process and improve student outcomes. However, gaps in implementation and persistent inequities in support structures highlight the need for more targeted interventions.

In California, where this study is situated, policies and efforts have aimed to increase the success of students aiming to transfer. SB 1440 at the state level gave community colleges the authority to confer transfer-specific associate degrees (ADTs) and for the CSU to admit these students in junior standing (California State University, 2026). Building on this, efforts like AB 928 have created a statewide committee that is tasked with the “oversight of the Associate Degree for Transfer (ADT)” (AB 928, 2023), as well as creating a single transfer GE pathway called CAL-GETC. Assembly Bill 132 (2023) provided one-time funding to continue implementing the guided pathways efforts at CCs. Guided Pathways is an effort that urges CCs to offer “all students clear enrollment avenues, course-taking patterns, and support services” (California Community College Chancellor’s Office, *Guided Pathways* 2023) to increase the transfer success of CC students.

The transfer function manifests in many different ways for students. Transfer is usually discussed in terms of vertical transfer, or when students complete their required lower-division classes for a particular major at the community college and then transfer to a 4-year university (Taylor & Jain, 2017). The other forms of transfer that students navigate include lateral transfer, which includes when students transfer between institutions in the same system, from one CSU to another, or one community college to another (Taylor, 2016). Another form of transfer is reverse transfer, or when a student is enrolled at a 4-year university but ultimately returns to the

community college (Taylor et al., 2013). While transfer manifests differently, this dissertation focuses on vertical transfer because minoritized Students of Color do not transfer at equal rates to other populations.

Problem Statement

California has the largest community college system in the nation (California Community Colleges Chancellor's Office, 2026c), serving almost 2 million students, 67% of whom identify as Students of Color. Black students make up 5% of all students in the system, and Latinx students make up 48% of the total student enrollment. Data from the 2014–2015 student cohort at community colleges in California highlight an apparent disparity: 17.2% of Asian students transferred within a three-year window to a 4-year institution, 14.4% of white students transferred within that same window, while Latinx students transferred at a rate of 6.59% and Black students at a rate of 11.67% (California Community Colleges Chancellor's Office, 2026d, 2026e). Barriers to transfer for Students of Color have been studied and identified as including challenges with transportation, food, and housing insecurity, over-enrollment in remedial courses, the necessity to balance school and family obligations, and under-preparation in their K-12 education journey (Cuellar Mejia et al., 2023; Goldrick-Rab, 2010; Vasquez et al., 2019). Despite the ongoing disparities in transfer rates between white students and Students of Color, the state of California has enacted legislation to support community college students, such as AB 928, which simplifies and improves the transfer process by addressing challenges like complex transfer requirements and low student transfer rates (Lowe, 2023).

One critical yet understudied role within the transfer function is that of the articulation officer. Articulation officers are the foundation in maintaining and organizing legally binding agreements between community colleges and 4-year universities, directly shaping the transfer

pathways available to students. These agreements, known as articulation agreements, determine which community college courses will transfer to meet university requirements. By ensuring these pathways remain clear and accessible, articulation officers influence students' ability to navigate their educational journeys successfully. However, equity gaps persist within transfer rates, particularly for Students of Color, raising questions about how articulation officers' work might address these disparities.

Articulation officers' responsibilities include adding, deleting, and revising courses within the Intersegmental General Education Transfer Curriculum (IGETC) and other transfer frameworks, often at a scale that spans hundreds of courses and multiple institutions (California Articulation Policies and Procedures Handbook, 2013). For example, their work ensures that a Latinx student at a community college taking general education courses knows precisely which courses will transfer to meet requirements at a University of California or California State University campus. This clarity can reduce confusion and delays, enabling more equitable access to transfer opportunities.

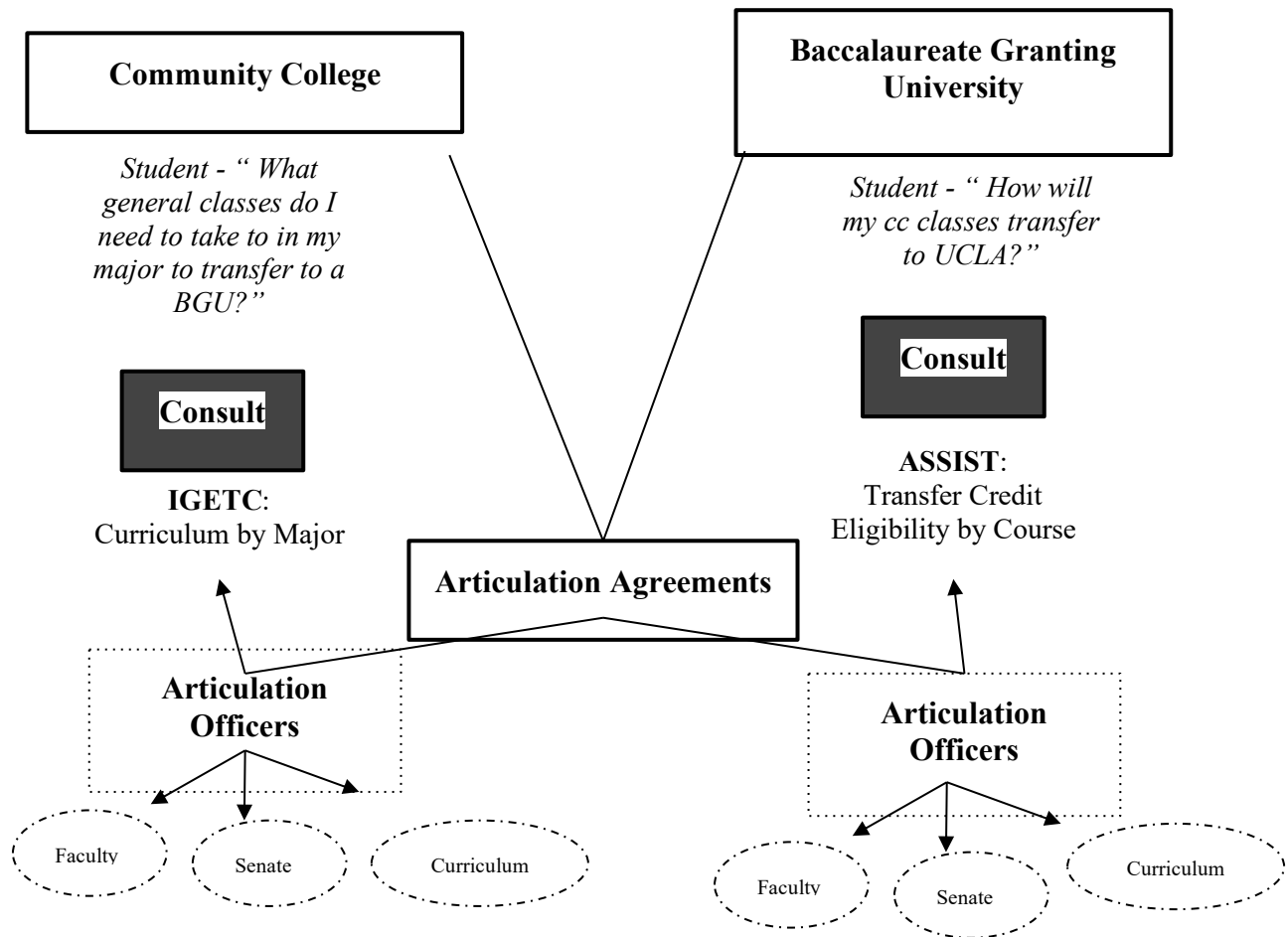
Despite their crucial role, articulation officers remain largely invisible in discussions about transfer equity. Their work requires technical expertise in understanding and applying state legislation like SB 1440. It involves collaboration with faculty, academic senate members, chief instructional officers, and curriculum chairs to advocate for curricular changes that reflect the needs of Students of Color. These efforts are essential for addressing racial equity in transfer rates, as they ensure that transfer pathways are designed to meet the needs of all students, not just those from more privileged backgrounds.

Understanding the role of articulation officers is critical for addressing systemic inequities in transfer rates. Their ability to align institutional policies with the lived realities of

Students of Color can directly impact whether these students achieve their transfer aspirations. By studying their experiences and approaches, this study examines how articulation officers contribute to a more equitable transfer landscape and highlights their role as institutional change agents within the broader community college ecosystem.

As outlined in Figure 1.1, between these processes are articulation agreements, which are legal documents that determine which community college courses are transferable to a 4-year university. Uncovering articulation officers' professional experiences and contributions to an ever-changing transfer landscape can help us better understand who these individuals are, what they are tasked with accomplishing, and how, if at all, their work reflects institutional approaches to supporting the transfer function for students with that aspiration. This study is significant, given the recent renewed efforts to streamline transfer via Associate Degree for Transfer (Sb-1440, 2010) and Streamlined GE transfer pathway (AB-928, 2021).

Figure 1.1. Articulation Officer Process Map.



Theoretical Framework

This study employs a dual theoretical framework: Cheryl Ching’s (2023) equity sensemaking and equity-centered implementation model (Felix & Nienhusser, 2023). Together, these frameworks provide a robust lens for understanding the experiences of articulation officers in California community colleges and their efforts to create equitable transfer pathways for Students of Color.

Equity sensemaking examines how institutional practitioners collectively interpret and enact equity within their unique contexts. As Ching (2023) proposed, this framework interrogates

how organizational dynamics, power structures, and personal identities influence interpretations of equity. This perspective sheds light on how articulation officers understand equity within the transfer function, interpret state policies like SB 1440, and navigate internal institutional challenges. The equity sensemaking framework emphasizes the complexity and ambiguity inherent in defining and operationalizing equity, highlighting the need for shared interpretations to drive meaningful action at the community college.

Equity-centered implementation emphasizes the deliberate acknowledgment of race and systemic inequities. Rooted in the work of Felix (2021) and Gonzalez et al. (2021), it challenges race-neutral approaches by emphasizing targeted interventions to address racial disparities. For articulation officers, this approach underscores the importance of actively interpreting and applying policies to dismantle barriers in the transfer process that disproportionately affect Black, Latinx, and Indigenous students.

These frameworks guided the analysis by examining how articulation officers define and operationalize equity in their roles. Specifically, these frameworks illuminate how officers make sense of their responsibilities, navigate institutional and state-level policies, and advocate for changes that support racially equitable outcomes. The frameworks also provide insights into how systemic inequities—manifesting as limited resources, institutional resistance, or policy constraints—shape their ability to fulfill these goals.

Central to this study's equity focus is the understanding that the transfer function is riddled with systemic barriers that disproportionately impact Students of Color. By employing equity sensemaking, this research explores how articulation officers conceptualize their roles in fostering equity within this process. The equity-centered implementation framework further emphasizes the importance of targeted, intentional actions to dismantle these barriers. Together,

these approaches ensure that the study highlights the challenges faced by articulation officers and identifies strategies for fostering racially equitable transfer outcomes.

Purpose

This study examined articulation officers' role in the transfer process. Specifically, I examined how these actors understood their ability to make the transfer function more effective and equitable within their organizational contexts. The study described what articulation officers do, how they make sense of their responsibilities, and how they understand their ability to support students, particularly Students of Color. I also examined how individuals have shaped the role and continue to reshape the position as new legislative mandates move through the California Community College system. Finally, this study explored how articulation officers operate within varied internal and external institutional contexts. With that, this dissertation was guided by the following questions:

1. According to community college articulation officers, from their perspective, how do they make sense of the transfer process for Students of Color?
 - a. What do articulation officers describe as the opportunities and hurdles to support Students of Color aiming to transfer?
2. How do articulation officers interpret and make sense of community college and/or equity policy mandates from the state, district, and institution?
3. What role do articulation officers play, if at all, in influencing the transfer process for racially minoritized students at their colleges?

Study Significance

This study provides an original contribution to higher education research by addressing a significant gap in the literature regarding the role of articulation officers in the transfer function

of community colleges. While substantial research has focused on student experiences and institutional policies related to the transfer process, articulation officers' specific contributions and challenges have been largely overlooked. Centering this study on the experiences and practices of articulation officers offers a unique and necessary perspective that enhances our understanding of the transfer process.

Findings from this study inform practice by showing how articulation officers navigate complex transfer requirements, interpret changing policy mandates, and reduce transfer risk through technical, relational, and discretionary work. Rather than pointing only to student-facing interventions, the findings show that transfer equity also depends on the institutional conditions that allow AOs to maintain articulation infrastructure, translate policy into local guidance, and identify where students are likely to encounter unnecessary units, repeated coursework, or delayed progress. These findings point to the need to position AOs earlier in curriculum, program planning, equity planning, and transfer reform implementation; strengthen communication among AOs, counselors, evaluators, faculty, and administrators; resource articulation labor; and track where transfer systems break down.

This research also has significant policy implications at both state and institutional levels. At the state level, the findings can inform policymakers about the practical challenges articulation officers face when implementing transfer legislation, such as AB 23, AB 1725, SB 121, and SB 1440 (Felix, 2020). More specifically, the findings point to the need for clearer statewide guidance, dedicated resources for articulation work, and earlier AO involvement in transfer reform design and implementation so that implementation burdens are not absorbed unevenly by individual campuses or passed on to students. At the institutional level, the findings suggest that colleges should prioritize articulation officers' roles, strengthen communication

among AOs, counselors, evaluators, faculty, and administrators, and ensure stronger alignment between local processes and state mandates.

This study illuminates the nuanced ways articulation officers shape the transfer process for Students of Color. Positioned across policy implementation, curriculum, articulation systems, and student-facing transfer information, AOs help determine whether transfer pathways are clear, accurate, and usable. Yet their work often takes place under significant constraints, including limited resources, institutional bureaucracy, uneven authority, and inconsistent support from higher administration. These constraints matter because the bureaucratic complexity of transfer pathways disproportionately affects Students of Color, who are often expected to navigate internal and external policies that may not align with their needs (Rendón, 1994; Stanton-Salazar, 1997). The lack of adequate institutional support for articulation officers, coupled with time and funding constraints, can limit their ability to address the specific transfer barriers racially minoritized students encounter (Gándara et al., 2012; Rios-Aguilar et al., 2023). By centering the experiences of articulation officers, this study shows how AOs make transfer pathways usable through work that is often hidden, underrecognized, and unevenly supported.

Additionally, this study underscores the importance of clear and supportive guidance for Students of Color, who often face unique challenges in navigating the “transfer maze.” The findings show that AOs help clarify transfer requirements, maintain articulation infrastructure, translate policy into local guidance, and protect students from unnecessary units, repeated coursework, and delayed progress. While this study does not measure student outcomes directly, it shows how AO labor shapes the conditions students rely on to transfer. These findings point to the need to position AOs earlier in curriculum, program planning, equity planning, and transfer

reform implementation; strengthen structured communication among AOs, counselors, and evaluators; resource articulation labor; and track where transfer systems break down.

Ultimately, this research advocates for more resources, training, and institutional support for articulation officers so they can better assist Students of Color in achieving their educational goals. It seeks to inspire policy changes and institutional practices that contribute to more inclusive and accessible pathways to 4-year institutions, thereby improving educational equity for all students.

CHAPTER 2: REVIEW OF THE LITERATURE AND CONCEPTUAL FRAMEWORK

In this chapter, I draw on scholarship on the community college's history, students' experiences navigating the transfer function, and the disparate outcomes for racially minoritized students. Next, I use research that interrogates education policies implemented to address the conditions and outcomes of students in community colleges who hope to transfer. Then, I describe scholarship focusing on the articulation process and articulation officers. Finally, this chapter describes the theoretical frameworks this study utilizes: sensemaking by Cheryl Ching (2023) and equity-centered implementation by Felix and Nienhusser (2023).

Community College History

Foundations of the Community College

The community college (CC) system in the United States was designed with many different priorities in mind (Brint & Karabel, 1989; Dougherty, 1994). One was to improve students' higher education opportunities by reducing costs and maintaining open access for all (Jain et al., 2020). The community college has been recognized as a gateway to further educational opportunities and a pathway for vocational training. It also helps protect state higher education budgets by directing students to the community college route, reducing the need for expanding 4-year universities (Dougherty, 1994). While the community college has evolved to include many different functions, it is necessary to understand how the priorities at the community college have shifted over time.

What differentiated the community college from the traditional "4-year" university was that it did not initially offer opportunities to obtain a bachelor's degree and instead focused on college-preparatory and vocational/technical training and basic academic skills development (Moore & Shulock, 2014). Over time, community colleges have become institutions of higher

education lauded for being accessible and for providing academic, social, and professional advancement opportunities for those seeking an educational opportunity (Johnson, 2010).

The community college we know today resulted from leaders such as William Rainey Harper at the University of Chicago seeking to reallocate the first two years of university instruction to another type of institution (Brint & Karabel, 1991). The idea was to move the first two years of university to a lower-level institution, like a high school. In 1892, Harper divided the University of Chicago into the Junior and Senior Colleges. The Junior College would expand to offer associate degrees in hopes of further diverting students from the Senior College (Brint & Karabel, 1991). Harper would continue his efforts by lobbying high schools to expand their offerings, including junior college lower-division courses and the general requirements expected in high school. It would take a little while for a school to adopt his proposal. In 1901, Joliet Junior College, under the direction of principal J. Stanley Brown, the college opened its doors as the nation's first independent public junior college (Eells, 1931).

The history and development of community colleges are crucial to understanding for anyone who hopes to conduct research within these spaces to improve conditions for community college students. As history progresses and we continue developing our educational institutions, community colleges have disproportionately become the place where many low-income, first-generation, and racially minoritized students begin their journey. Rios-Aguilar (2018) acknowledged that “community colleges are composed of mostly low-income students and students of color” (p. 127). Bailey et al. (2015) further emphasized community colleges' role in the U.S. education system, noting that while these institutions offer an accessible path to higher education, structural barriers often impede student success, particularly for marginalized groups. These barriers include complex and disconnected course offerings, a lack of clear academic

pathways, inadequate academic and career advising, remedial education systems, and financial barriers. Bragg (2001) underscored the historical evolution of community colleges, highlighting their initial mission of access and equity while noting that inequitable outcomes have undermined these goals. Hagedorn (2010) drew attention to the persistent achievement gaps faced by students of color, especially in transfer rates to 4-year institutions. Students who begin their journey at community colleges do not transfer to 4-year institutions at equitable rates, specifically when looking at racially minoritized populations. To better understand where we find ourselves today with the community college system in California, it is essential to understand the expansion of community colleges throughout the state.

Adoption throughout the rest of the nation took time. In California, Fresno City College was the first community college in the state to open its doors in 1910 (Fresno City College, 2026). Until 1921, many of the community colleges in the state received their funding from the high schools where they were located. After 1921, community colleges in California were “organized on a district basis” to ensure that several different communities would have the opportunity to be served by a single community college. By 1930, the state supported 13,392 students in 35 other community colleges (Brint & Karabel, 1991). Expansion continued for the following years, but a significant shift in how the state navigated higher education occurred in 1960 with the implementation of the California Master Plan for Higher Education.

Community colleges have long been recognized for their multifaceted mission to provide accessible education to a diverse population. They play crucial roles in higher education by focusing on transfer, vocational, developmental, continuing, and community service programs (Bragg, 2001). As open-access institutions, community colleges serve as vital pathways for students seeking to transfer to 4-year institutions, especially those from underrepresented or

marginalized backgrounds (Bailey et al., 2015; Floyd, 2005; Goldrick-Rab, 2016; Shaw, 2008). In addition to their transfer function, they offer vocational training to prepare students for immediate entry into the workforce, developmental education to support students who need to improve their academic skills, and a range of continuing education and community service opportunities that promote lifelong learning and local engagement. This broad mission enables community colleges to meet their communities' varied educational and economic needs while promoting social mobility and workforce development (Bragg, 2001). With these diverse functions in mind, the California Master Plan of Higher Education further cemented the purpose of the Community College and all of the separate educational systems in the state, including the CSU and UC, as well as private institutions.

The historical evolution of community colleges, both nationally and in California, highlights their role as accessible institutions that serve diverse populations, particularly low-income, first-generation, and racially minoritized students (Bailey et al., 2015). However, structural barriers and inequitable outcomes have often contradicted the original mission of access and equity, necessitating ongoing reforms that began in the 1960s and continue today (Felix, 2020). As the educational landscape evolved, California's unique approach to higher education, mainly through the landmark California Master Plan for Higher Education (Clark, 1960), sought to define and solidify the role of community colleges within a broader system. Understanding this plan and its implications is essential for analyzing the progress and persistent disparities within the state's community colleges, particularly regarding transfer pathways and equitable opportunities for all students. This historical context sets the stage for examining how the Master Plan reshaped California's higher education system.

The California Master Plan of Higher Education

In the 1960s, many states were concerned about the “postwar baby-boom generation” (Brint, 1991, p. 86) and their economic impact. States intervened by founding “new coordinating or governing boards” across the United States to expand available educational opportunities. The model for the nation to follow was set by the California Master Plan for Higher Education in 1960. The Master Plan was created in consultation with the University of California President Clark Kerr. This plan “recommended a hierarchically segmented system based on the allocation of students by high school grade point averages” (Brint, 1991, p. 86). This plan set forth that the University of California system (UC) would accept the top 12.5% of students in the state, the California State University system (CSU) would take the following 33% of students, and the remaining students would be served by the Community College (CC) (Boland, 2018). One of the main components of the Master Plan was that it set the expectation that one of the functions of the California Community College was to provide opportunities for transfer from a community college to a 4-year university (Callan, 2009; Douglass, 2010; Richardson et al., 1998). While aspirational and something to strive for, the transfer from the community college to a 4-year university remains an area that needs continued investigation, as navigating the transfer process presents apparent issues for racially minoritized students.

Throughout its history, California’s community colleges have played a pivotal role in diversifying higher education. Their open-access model has made them a critical gateway for underrepresented and marginalized populations. However, the pathway to 4-year institutions remains fraught with challenges, particularly for racially minoritized students. Efforts to address these disparities include initiatives such as the legislature’s focus on creating a “student-centered transfer approach” to streamline and improve student transfer rates, with particular attention to

equity gaps (AB 928, 2023; Horn & Skomsvold, 2011). This historical context underscores the significant progress and persistent challenges of California's community college system. It provides a foundation for understanding current initiatives to enhance equity and access in higher education.

The California Community College system serves approximately 1.9 million students statewide (California Community Colleges Chancellor's Office, 2026b). Given the sheer scale of this system, it is crucial to examine the demographic composition of its student population. Understanding the racial and ethnic makeup of these students sheds light on the unique challenges faced by specific communities as they navigate this educational space. Statewide, the student demographics are as follows: 48% identify as Latinx, 23% as white, 11% as Asian, 5% as African American, 4% as multi-ethnic, 2% as Filipino, and less than 1% as American Indian/Alaskan Native or Pacific Islander. Additionally, the racial and ethnic identity of approximately 5% of students is unknown (California Community Colleges Chancellor's Office, 2026b). Recognizing this reality provides deeper insight into how specific communities navigate their educational journeys. It highlights how the system can sometimes create additional challenges for them, as further elaborated in the following section.

Transfer Trends

Transfer Patterns

Before interrogating the inequitable transfer rates for those who strive to use the transfer function, it is necessary to discuss the many forms that transfer can take. It is essential to highlight how students engage in the transfer function (Taylor & Jain, 2017). The transfer function is not solely for community college students to navigate and experience. For example, lateral transfer includes students who transfer from one community college to another, as well as

4-year university students who transfer to another 4-year university for many reasons (Taylor, 2016). Reverse transfer is the next trend that refers to students who begin their higher education journey at a 4-year university and ultimately move to a community college. One example highlights that students sometimes do this because they have familial and other obligations that make it challenging to balance the responsibilities of attending a 4-year university (Estrada et al., 2023). The following form of transfer refers to students labeled as “swirlers and alternating enrollees” (Taylor, 2016, p. 276); these are students who attend more than two institutions, such as two community colleges in their area, to accumulate enough units/credits to transfer. This transfer form also refers to students who transfer from one community college to another.

For this project, I am interested in the vertical transfer process, including students who begin their education at a Community College and transfer to a 4-year university within a given timeframe, which can range from 2 to 4 years (Reddy & Ryan, 2021). The reason for the focus on this specific transfer function is due to the reality that Students of Color, in particular Black and Latinx students, transfer at much lower rates than other student populations. While most community college students aspire to transfer to a 4-year university, the act of transfer is an exception to the rule, not something readily accessible for students. Today, we can see that transfer rates for the Latinx and Black communities trail behind groups of other ethnic and racial make-up (Strayhorn & Johnson, 2014; Tovar, 2015).

Transfer Maze

One reason the transfer process is so challenging to complete is the “transfer maze.” Suppose a CC student aspires to transfer. This requires almost immediate action by the student to ensure they are enrolled in the appropriate courses and on track to complete the transfer requirements for their selected major within an appropriate time frame. This process involves

connecting with a community college counselor to assist with class selection and planning.

Students can track their progress at the community college by using the Intersegmental General Education Transfer Curriculum (IGETC). This curriculum was adopted by the UC, CSU, and California Community Colleges (CCC) to establish a set of course requirements that satisfy the lower-division educational requirements for transfer from CC to the UC or CSU (Ruddman, 2000).

In addition to completing the IGETC requirements, students are expected to understand how their community college courses will earn them credit at a specific 4-year university. One resource for students to determine whether and how their CC courses will grant them transfer credit is ASSIST. As an online platform, ASSIST.org can help students understand which CC courses will transfer or provide equivalency to classes at each specific 4-year institution. Thus, to complete the transfer function at a CC, a student must meet regularly with a counselor, complete the IGETC, and use ASSIST for each campus they aspire to transfer to. Of concern is the reality that community college students are expected to be knowledgeable on each step of the transfer process while navigating their education, family, work responsibilities, and coursework (Jain et al., 2020). The balance of these responsibilities is only one of the many challenges that Community College students face.

The “transfer maze” concept shows the logistical challenges that community college students face. To meet transfer requirements promptly, students must immediately engage in course selection and planning with counselors. Resources like IGETC and ASSIST.org help students better understand how their credits will transfer. However, it is mainly up to students to navigate these resources (Jain et al., 2020). This literature describes the responsibility placed on

community college students to manage their academic planning independently and to balance their life obligations, all of which contribute to barriers to successful transfer.

Understanding the complexities of transfer patterns is the first step in addressing the inequities in transfer rates. While the diverse ways students engage in the transfer function shed light on their varied educational trajectories, these patterns do not exist in isolation. The challenges embedded within the transfer process, often described as a “transfer maze,” illustrate the systemic barriers that disproportionately impact Students of Color. This next section examines the logistical and institutional hurdles students must navigate, highlighting how these challenges exacerbate inequities in access and outcomes for transfer students.

Contributing Factors to Transfer Challenges

Extensive research has been done to better understand the plight of community college students who must navigate the transfer function from their community college to a 4-year receiving institution. One such center that has interrogated this student population is the Community College Research Center (CCRC) based at Teachers College, Columbia University. The CCRC has noted that one of the challenges community college students face is credit loss during transfer; in other words, students lose credits upon transferring to a 4-year university (Monaghan & Attewell, 2015). Students range in the rates at which their community college courses count towards credit at a receiving institution. For example, 14% of transfer students had less than 10% of their course credits count towards a degree at the receiving institution, 28% of students fell within 10% and 89% of their credits counting towards a degree upon transferring, and 58% of community college transfers were given credit for over 90% of their credits accumulated at the community college (Monaghan & Attewell, 2015, p. 83). A lack of credits poses a significant barrier to timely degree completion for these students upon transfer to their

receiving institution. They need to make up those units to get toward their ultimate goal of a bachelor's degree.

CCRC was also instrumental in advancing the “Guided Pathways” model to help students navigate the transfer process. The center found that community colleges must make pathways more straightforward for their students (Bailet et al., 2015). Students were often forced to navigate a system that offered too many choices and insufficient guidance as they pursued their education (Karp, 2013). The pathways toward student end goals also tended to be unclear or misaligned with students’ aspirations to transfer (Handel et al., 2012; Jenkins et al., 2014). This research center also uncovered that, at the community college, there are barriers to career advancement, with a significant contributor being that students are not aware of the varied occupational pathways available at their institution. This phenomenon exists partly because college counselors often direct younger students and those without goals to an academic transfer program (Jenkins & Trimble, 2011).

The Cooling-Out Phenomenon

Community college Students of Color also report experiencing what is referred to as “cooling out” while at the community college (Goffman, 1952). Cooling out refers to an individual being pushed out of an organization by actors within it (Clark, 1980, p. 17). The way this shows up for community college students is evident in how they “over-aspire” and hope to navigate the transfer process. Still, the institution moves them away from that goal by using testing upon arrival and placing students of color at disproportionate rates in remedial courses (Cuellar Mejia et al., 2023). Counselors also play a significant role by encouraging students to move away from the transfer path to something the counselor believes will increase their likelihood of success (Clark, 1980). The cooling-out function manifests when counselors “stress

the relative values of many kinds of persons and many kinds of talents other than the preferred choice,” in this case, transfer (Moore, 1975, pp. 578–579).

Clark (1980) highlighted five ways community colleges engaged in the cooling-out phenomenon: first, they used placement tests to over-enroll students of color in remedial classes; second, they required students to meet with counselors to register for their classes; third, they required students to attend orientation classes before enrolling in courses; fourth, they created academic warning notices and tracked students; and finally, they used academic probation.

Academic advisors and counselors play a central role in this process, subtly redirecting students with overambitious goals toward more attainable pathways, such as vocational programs or terminal associate degrees, thereby avoiding outright academic dismissal (Grubbs, 2020). While framed as supportive, this process raises concerns about perpetuating educational inequities and limiting social mobility. In Conway’s (2010) exploration of immigrant and Native students’ aspirations at an urban community college, she found evidence that the cooling-out function affected students’ educational trajectories. Immigrant students were often funneled into vocational or terminal programs despite initial aspirations for 4-year degrees. Conway highlights how academic advising and institutional practices influence these shifts, frequently reinforcing systemic barriers rather than overcoming them.

Nancy Acevedo’s (2020) research into the experiences of Latinx students underscores the structural inequities inherent in the cooling-out process. Many Latinx students, guided by underresourced high schools, are encouraged to enroll in community colleges as accessible alternatives to 4-year universities. However, they frequently encounter institutional agents who prioritize vocational tracks over transfer pathways, further cooling their aspirations. Acevedo

argued that these practices reflect and reproduce systemic inequities, leaving many Latinx students navigating cyclical and often discouraging pathways through higher education.

Bahr (2008) critiqued the role of advising within the cooling-out framework, suggesting that while counseling can benefit underprepared students, it also risks reinforcing racial disparities. Bahr found that advising outcomes often varied significantly by race, with historically marginalized groups, such as Black and Latinx students, receiving less benefit or even detriment compared to white or Asian peers. This racialized dimension of cooling out calls into question whether these institutional practices genuinely serve students' best interests or perpetuate inequitable structures.

In summary, the cooling-out function highlights a tension between community colleges' open-access mission and their role in reproducing social hierarchies. While intended to guide students toward realistic goals, the process often undermines their potential, particularly for students from marginalized communities.

Remediation

Remedial courses have also been associated with disparities for community college students (Melguizo et al., 2011; Scott-Clayton & Rodriguez, 2015). This work highlights that students placed in remedial courses need to be sufficiently prepared by those courses to develop the skills required to succeed in college-level courses. Students who attend community colleges are more likely to be placed in remedial/developmental courses, requiring them to expend more time, money, and energy before they can take transfer-level courses (Acevedo-Gil et al., 2015). Melguizo (2011) described how, rather than remedial courses to succeed, there need to be “reforms that accelerate learning and provide stronger academic support” for students at the community college. Students are placed into these courses based on standardized tests they were

required to take after applying and enrolling in the Community College. Students who scored below “college-level math or English” were required to enroll in developmental courses to bring them to a level where they could succeed in college-level courses. Legislation has since been introduced to address this challenge at the Community College, including AB 705 and AB 1705.

Melguizo has also described how institutional practices and state policies can support or inhibit students as they navigate the transfer function. She has advocated for policies that create clearer, more structured transfer pathways (Melguizo et al., 2013). More directly, she has stated that community colleges must establish articulation agreements with 4-year universities that are much clearer for students. She also advocates for providing “consistent advising” to students as soon as they enter the community college.

Several factors compound the barriers to transfer. Credit loss during transfer is a common issue, with varying degrees of recognition of transfer credit across institutions. This can delay graduation and add to students’ financial and time burdens (Monaghan & Attewell, 2015). Furthermore, the Guided Pathways model addresses these challenges by creating more straightforward pathways and providing structured guidance to streamline the transfer process (Bailey et al., 2015; Karp, 2013).

While academic and institutional factors present significant challenges for community college students navigating the transfer process, financial barriers further compound these difficulties. Many students face financial aid complexities, insufficient support, and systemic inequities that hinder their ability to persist (Cesar-Davis et al., 2024). These economic struggles intersect with the academic and structural challenges discussed, creating a set of obstacles that disproportionately affect Students of Color and first-generation students. Addressing these interconnected challenges holistically is crucial to fostering equitable student outcomes.

Financial Challenges

Financial barriers also significantly hinder students' ability to navigate their educational journey (Cesar-Davis et al., 2024). It has been noted that some of the most significant issues facing Community College Students of Color as they navigate their financial aid at their institutions are the prevention of financial aid qualification, the problems created by the delay of receipt of financial assistance, and finally, how the loss of financial aid contributes to disparate outcomes. One case study highlighted that students who submitted the FAFSA application encountered challenges in the process and received "little to no" support from the staff in the financial aid office (Cesar-Davis et al., 2024, p. 127). Students also reported feeling "dismissed and rushed" by the staff in the financial aid office, who are supposed to support students as they navigate their financial aid. Scholars have also found that the existing literature does not take into account how complicated and challenging the financial aid process is, particularly for first-generation and low-income students (Bird & Castleman, 2016; Goldrick-Rab & Han, 2011; Stuart et al., 2014).

Another contributing factor that impacts students' experiences at community colleges is that these institutions tend to be underfunded (Dowd & Shieh, 2013). With a mission of open access and accessibility, community colleges must balance their open access policies with fiscal pressures that limit educational opportunities. Pressures such as anti-taxation sentiments, the Great Recession, and continued pressure on state and federal budgets have unfortunately restrained public college and university budgets. The shift to performance-based funding in California has also increased the focus on graduation and degree completion rather than essential factors such as enrollment and retention. Students at the Community College also have below-average course and degree completion rates (Gonzalez, 2012). Gonzalez (2012) identified a

significant gap in college degree attainment between Latinx students in comparison to the rates of white students. Despite the increase in college participation by Latinx students, only 12% of those students between 25 and 29 hold a bachelor's degree, which is 25% lower than that of white students. This gap has continued to grow in recent memory.

Financial challenges represent a significant barrier, particularly for first-generation and low-income students who often encounter complex financial aid processes, inadequate support from financial aid offices, and frequent delays or loss of aid (Bird & Castleman, 2016; Goldrick-Rab & Han, 2011). Additionally, the underfunding of community colleges, combined with pressures from performance-based funding models, has limited resources for student support services, which, in turn, affects retention and completion rates, particularly for Latinx students (Dowd & Shieh, 2013; Gonzalez, 2012). Alongside these barriers, the transfer function presents another critical challenge for community college students. Organizations such as the Campaign for College Opportunity and the RP Group have dedicated their efforts to shedding light on the complexities of the transfer process and advocating for solutions. These efforts highlight the urgent need for streamlined pathways, enhanced guidance, and more substantial alignment between community colleges and 4-year universities to bridge the “racial transfer gap” and promote equitable student outcomes.

Community College Advocacy Organizations

The Campaign for College Opportunity is an organization that aims to bring together a consortium of people and groups that represent “business, labor, civil rights, religious groups, and civic organizations” (Shorette & Byrd, 2016, p. 2) to ensure that the state of California continues to prioritize and meet the promise of college opportunity. Reports by this group have continued to uncover and highlight the barriers that community college students must navigate.

One such report found that students are expected to navigate significant obstacles to the transfer process, including, but not limited to, “duplicative and inconsistent coursework, ever-changing requirements, an overwhelming number of transfer pathways, and insufficient guidance” (p. 2). Groups like this one are important for keeping the focus on this student population. Of the 2.3 million community college students enrolled in California, only 4% or 96,000 students transferred to a 4-year university in the 2013–2014 academic year.

The Research and Planning Group for California Community Colleges, also known as the RP Group, is a nonprofit organization focused on improving the success of California community college students, with an emphasis on equity, completion, and employment. It is a membership organization for Institutional Research, Planning, and Effectiveness (IRPE) professionals. It provides research, evaluation, and professional development services to improve decision-making and student outcomes in the California Community College system. In one report, *Through the Gate: Mapping the Transfer Landscape for California Community College Students*, Cooper et al. (2017) identified several critical findings regarding transfer students in California community colleges. First, they identified a continuum along which Community College students operate as they navigate the transfer function. This continuum is rooted in units completed, with the transfer explorers being the first group of students who intend to transfer by “completing 12–44 transferable units within 6 years of first-time enrollment” (Cooper et al., 2020, p. 3). Momentum students are interested in transfer and work toward it by achieving between 45 and 59 transfer units and maintaining a 2.0 GPA. This report then speaks to the students closer to completing transfer; they are known as students near the gate, including those who have earned more than 60 transferable units with at least a 2.0 GPA but are missing transfer English and Math. Next are students at the gate who have obtained an associate degree for

transfer and completed transfer-level English and Math. Finally, there are students known as transfer achievers who have accomplished the feat of transferring to any university (Cooper et al., 2020).

This report identifies the many steps a community college student may encounter when navigating the transfer process. This report further highlights similar challenges that community college students encounter as they navigate their experiences. Those are the “complexity of the transfer process, lack of transparency about how credits will transfer, and the clash of the different academic cultures” (Cooper et al., 2020, p. 18). This report also identified the limited capacity for community colleges to prepare and the ability of 4-year universities to admit transfer students; in other words, the disconnect between Community Colleges and 4-year universities, something that Jain et al. (2020) acknowledged as an area that needs to be addressed, with more synchronicity between the two systems.

The RP Group has continued this line of inquiry. In 2020, they published a follow-up to their original report and directly engaged students to learn about their experiences navigating the transfer function (Cooper et al., 2020). This report identified the following as the most significant worries of students regarding the transfer process. First, finances and the ability to afford a 4-year university are major concerns for students. Next, the interviewed students also mentioned the problem of navigating their responsibilities and balancing school and life. Students also expressed concerns about effectively navigating the transfer pathway; in other words, they need help understanding everything required to do so. Their support network is also something that students are conscious of; they want to know who the individuals at their college are who care about their transfer success and can be a beacon of information to help navigate the process (Cooper et al., 2020).

Organizations such as the Campaign for College Opportunity and the RP Group are crucial in identifying and advocating solutions to the transfer function's challenges. Reports from these groups have highlighted issues such as duplicative coursework, shifting requirements, insufficient guidance, and low transfer rates (Cooper et al., 2017; Shorette & Byrd, 2016). Research from these organizations underscores the "racial transfer gap" and calls for better alignment between community colleges and 4-year institutions to support transfer students (Castro & Cortez, 2017; Crisp & Nunez, 2014).

Community college Students of Color also experience inequitable transfer rates (Castro & Cortez, 2017; Crisp & Nuñez, 2014). Known as the "racial transfer gap," Black and Latinx students transfer at rates that are much lower than the overall population navigating the CC transfer function. The Community College Research Center (CCRC) reports that approximately 80% of CC students aspire to transfer to a 4-year university and ultimately earn a bachelor's degree. Unfortunately, only a third of those students successfully transfer to a 4-year university within 6 years of starting at a Community College (CCCSE, 2023; Horn & Skomsvold, 2011).

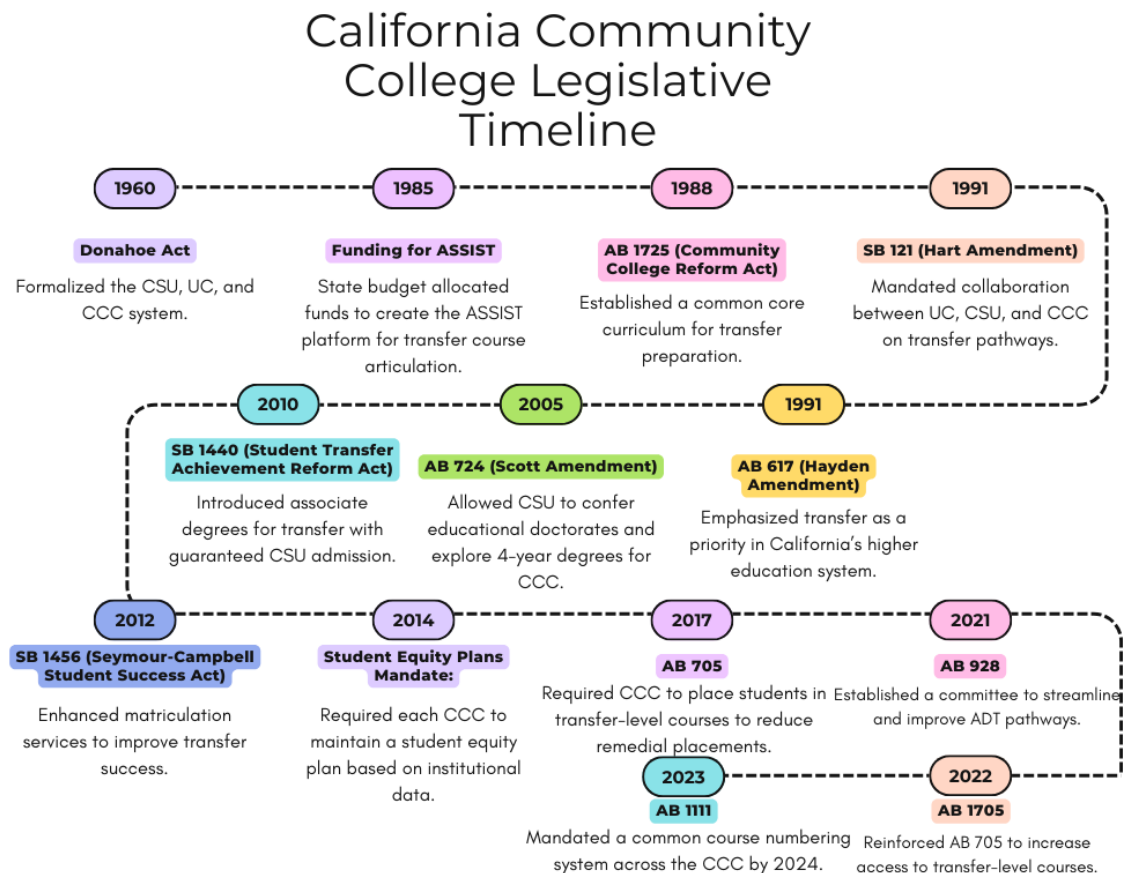
The literature on transfer barriers for community college students highlights complex structural, financial, and institutional challenges that disproportionately impact Students of Color. These challenges indicate a need for clearer pathways, better support systems, and a shift toward equity-oriented policies to improve transfer rates. While many challenges must be overcome by community college students when transferring to a 4-year university, it is also essential to discuss how California has sought to address this student group through legislative efforts.

State Policy Interventions to Improve Transfer

While transfer gaps persist for Students of Color, California has attempted to ease and improve them within our higher education institutions. Figure 2.1 illustrates the many legislative acts implemented to support the community college space and students, beginning in the 1960s and continuing through today.

AB 23, also known as the Donahoe Act of 1960, formally incorporated some of the Master Plan's recommendations. Specifically, it formalized the trifurcated system, which included the CSU, UC, and CCC (UCOP, n.d.). Since then, bills have been passed that focus on Community College students and their efforts to navigate the transfer process. These bills have ingrained a focus on developing and implementing more accessible transfer pathways and opportunities for students at the Community College hoping to transfer to a 4-year university.

Figure 2.1. California Community College Legislative Timeline.



AB1725, or the Community College Reform Act (1988), helped revise the goals and mission of community colleges. It directed all three educational systems in California, with their respective board of governors (CCC), Regents of the University of California (UC), and the Trustees of the California State University (CSU), to together develop “a common core curriculum in general education courses and lower division major preparation curricula for purposes of transfer” (AB1725). Shortly before this bill passed, funding was also set aside in the governor’s 1985-1986 budget to expand the Articulation System Stimulating Interinstitutional Student Transfer (ASSIST). ASSIST is a website that serves as the “official repository of articulation for California’s colleges and universities” (ASSIST, 2026). Students can utilize this

resource to learn precisely how courses they take at the Community College will transfer to a specific 4-year university.

SB121, also known as the Hart Amendment (1991), required the three California higher education systems to work together to create a strong transfer pathway for students who aim to pursue that purpose. This amendment also introduced formal transfer agreements, known as “community college transfer plans” (Felix, 2019). In the same year, AB617, or the Hayden amendment, advanced a set of 55 recommendations from a task force that revisited the Master Plan and placed specific emphasis on transfer to serve as the “central institutional priority” across the three systems in the state. It would be fourteen years before the following policy that impacted the Community Colleges system in California, AB724.

AB724, the Scott Amendment, allowed an exception regarding which degrees could be offered at which levels within the system. This amendment allowed for the CSU to confer educational doctorates. In addition, it established a committee to investigate community colleges’ ability to confer 4-year degrees (Felix, 2019). SB1440 in 2010 shook up the transfer landscape and how students navigated this experience, as it introduced the creation of new transfer degrees in conjunction with the CSU and the California Community Colleges. SB1440, the “Student Transfer Achievement Reform Act,” allowed California Community Colleges to confer an associate degree for transfer. Upon receiving this degree, CC students would be guaranteed admission to a CSU institution with junior status (Romero-Crockett, 2011). This bill has been instrumental in shifting how the transfer function operates in California. A report by the Public Policy Institute of California found that one of the reasons for inefficiencies and low transfer rates is due to the “complex process that relies on campus-to-campus rather than system-

wide course transfer agreements” (Moore et al., 2009)—highlighting the reality that the transfer function is still not simple to navigate for students who want that opportunity.

SB1456, the Seymour-Campbell Student Success Act, allowed for the creation of new matriculation processes in the CC towards the end of improving degree completion and transfer success; the way this act facilitated that was by implementing “effective orientation, assessment and placement, counseling, and educational planning services” (Felix, 2019). This more engaged approach to supporting students entering the community college was a positive step toward aiding students who are beginning at the Community College in hopes of transferring. Two years later, California amended the state’s education code, requiring each of the 116 community colleges to develop and maintain a “student equity plan.” These plans were created using institutional data to examine the students who are being served the least adequately. For many community colleges, this included some of the most marginalized communities: Black students, Latinx students, and Indigenous students. These plans specifically looked at “success indicators” for community college students’ pathways. This includes “access, course completion, ESL and basic skills completion, degrees and certificates awarded, and transfer rates” (California Community College Chancellor’s Office (2026f). Since 2014, a few more pieces of legislation have continued to impact how community colleges operate, specifically how they can support the transfer function for students who aspire to transfer.

In 2017, landmark legislation AB705 was passed to address the disparity that CC Students of Color were experiencing at the CC regarding placement in remedial courses. A report by the Public Policy Institute of California (2020) found that before this legislation, too many of California’s Community College students, particularly Students of Color, were required to start their higher education journey in remedial courses based on outdated testing standards.

Starting in remedial classes has been known to slow or halt students' academic progress; attrition was high, particularly for Latinx, Black, and Indigenous students (Mejia et al., 2020). With this, a few students could navigate out of the remedial courses to complete transfer-level courses that would be transferable to a 4-year university. Since passing this legislation, we have seen most community colleges remove remedial courses, and how they conduct placement tests has shifted to using other markers, such as most recent high school courses taken and high school GPA (Mejia et al., 2023). This legislation has been crucial in allowing more Students of Color to achieve their aims by starting their journey at their Community College in transfer-level math and English.

Since the implementation of AB705, outcomes for first-time English students have stabilized following significant initial gains in access and course completion. In contrast, outcomes for first-time math students saw improvement in fall 2022 after plateauing in prior years. As colleges near-universal access to transfer-level courses, they must focus on adopting additional strategies to ensure strong and equitable completion rates. Fortunately, some colleges have successfully increased completion rates and narrowed equity gaps, though outcomes for corequisite students continue to vary widely across institutions. Despite the challenges posed by the pandemic, longer-term outcomes such as “transfer rates, degree attainment, and unit accumulation” (Mejia et al., 2023) have remained steady.

AB1705 continued the work set forth by AB705 and further solidified into law that students who have an academic goal of transfer, certificate, or degree, and even undecided students, must be positioned to have the opportunity to maximize the probability of taking transfer-level English and Math within their first year at the college (Gonzales, 2023). Aside from providing avenues for students to navigate the community college as effectively as

possible, there has also recently been legislation that seeks to further simplify the transfer process for students. The following legislative actions impact students' experience aiming to transfer to a 4-year university from a community college and a critical position at each community college, articulation officers.

In 2021, the California State Legislature passed AB928, which created the "AB928 Associate Degree for Transfer Intersegmental Implementation Committee" (Lowe, 2023, p. 1). This committee was established to make recommendations to the legislature on improving and simplifying transfer opportunities for CC students. The bill makes this committee the primary entity overseeing ADT degrees to strengthen the California Community College transfer pathway. The legislation specifically centered around the following areas:

1. Reduce the number of excess units accumulated by California CC students before they transfer to a 4-year university.
2. Removing courses that community college transfer students would repeat upon transferring to a 4-year university.
3. Increasing the number of CCC students who transfer to a 4-year university using the ADT pathway (AB928, 2021).

In connection to this dissertation, this legislation directly impacts how articulation officers at community colleges will continue to navigate their roles and responsibilities. Currently, the articulation process between Community Colleges and 4-year universities requires Community College articulation officers to submit articulation agreements separately to the CSU Chancellor's Office (CSUCO) and the University of California Office of the President (UCOP). There are clear opportunities to improve how articulation is facilitated and approved.

Understanding the experiences of articulation officers is essential to better understand how they facilitate these agreements and relationships across different institutional types.

The next piece of legislation important for the Community College and articulation officers is AB1111. Assembly Bill 1111 will require that Community Colleges and, by extension, articulation officers implement a common course numbering system (CCN) across the CCC system by July 1, 2024 (AB1111). Doing so will “streamline transfer from two- to four-year postsecondary educational institutions and reduce excess credit accumulation” (California Community Colleges Chancellor’s Office, 2026a). The aim of moving in this direction is to support students as they build their academic plans, work towards a better understanding of how courses are transferable to the CSU and UC systems, and, finally, be as informed as possible when selecting their courses towards degree completion. This daunting operation will require the insight and participation of many different stakeholders. Still, the most important thing for this project is understanding how articulation officers in the community college navigate this and the previously mentioned legislative efforts.

The California legislative mandates designed to facilitate community college transfer to 4-year universities highlight a sustained commitment to improving educational access and outcomes for community college students, particularly for racially minoritized students. These policies, such as the Donahoe Act (AB 23) and the Community College Reform Act (AB 1725), aimed to streamline transfer pathways by establishing a common curriculum for general education and major preparation. Such frameworks show that California’s interventions focus on creating more accessible, structured transfer processes, which should ideally benefit students who may otherwise struggle to navigate these complex systems independently.

Additional legislation, such as SB 1440 and AB 705, directly addressed issues that posed barriers to equitable transfer outcomes. SB 1440 introduced the Associate Degree for Transfer (ADT), providing guaranteed admission to the CSU system for students completing a transfer-specific associate degree at the community college level. AB 705, on the other hand, tackled issues of inequitable placement into remedial courses, which disproportionately impacted Students of Color. This bill is intended to eliminate a common barrier that prolongs the transfer and degree completion time by mandating that students be placed into transfer-level coursework. These policies reveal an approach to dismantling institutional obstacles to ensure that all students, especially those from underrepresented communities, are provided equal opportunities to advance academically. Given the time elapsed between these legislative efforts, it would stand to reason that transfer rates would improve for all students. However, it is known that Students of Color transfer at disparate rates, as discussed earlier. These efforts have helped address the issue, but have not changed the reality that some students navigate the transfer function more efficiently.

For this study, examining these policies in the context of articulations officers' roles is critical. Articulation officers are central to implementing and navigating these legislative mandates at the institutional level, acting as the intermediaries who interpret, operationalize, and communicate these policies to benefit students. This legislative landscape underscores the significance of the articulation officer's role in shaping equitable pathways through transfer agreements and curricular alignment. By exploring the experiences of these officers, this study offers insight into how these policies are applied and the challenges AOs face in advancing accessible and equitable transfer pathways.

History of Articulation

Articulation is the alignment of curricula and policies to facilitate the smooth transition of students between educational levels (Mosholder & Zirkle, 2007). The origins of this process can be traced to the late 19th and early 20th centuries, when educational institutions began to align curricula to promote student transitions. The first iteration of this happening, as discussed in the introduction, was at the hands of William Raney Harper at the University of Chicago, where he pioneered the concept of dividing undergraduate education into junior and senior divisions, one of the first moments in higher education history that formalized an educational pathway (Kintzer, 1996). In California, the University of California at Berkeley established one of the earliest articulation models in the 1920s. This model allowed high schools to offer college-level courses for credit. The state legislature awarded this program legal status in 1921, and it became “perhaps the earliest example of an articulation agreement” (Kintzer, 1996).

The demand for articulation grew exponentially after World War II, driven mainly by the educational needs of returning veterans and the expanding workforce. The Truman Commission’s 1947 report, *Higher Education for American Democracy*, emphasized community colleges as a means to broaden access to higher education. The report explicitly called for “the expansion of the 2-year college system as an extension of the high school system” and encouraged articulation to integrate community colleges with 4-year institutions (Kintzer, 1996). California also led the way by developing a formalized 6-4-4 system. Institutions like Pasadena Junior College, now Pasadena City College, implemented a structure that housed grades 11 through 14, aiming to ease the transition from secondary to higher education (Robertson-Smith, 1990).

The California Master Plan for Higher Education, adopted in 1960, institutionalized articulation across the state's tripartite system of higher education: the University of California (UC), California State University (CSU), and California Community Colleges (CCC). The master plan emphasized "intersegmental transfer," allowing students who began at the community college to transfer to a UC or CSU campus. The Master Plan formalized policies to ensure transfer pathways, differentiate institutional missions, and foster alignment between segments (Gross & Goldhaber, 2009; Mosholder & Zirkle, 2007).

By the 1980s, articulation policies were scrutinized for perpetuating inequities for minoritized students. Critics argued that community colleges often "tracked" minority and low-income students into vocational programs, limiting their opportunities for transfer to 4-year institutions (Mosholder & Zirkle, 2007, p. 736). The California Association of Community Colleges (CACC) undertook studies to identify and address these barriers in the state. A 1985 report noted the "limited cooperation between faculty at high schools and community colleges" and recommended "formal articulation councils" to align educational priorities (Mertes, 1990). Legislative measures, such as those identified above, aimed to improve articulation by mandating clearer pathways for transfer students navigating higher education (Mertes, 1990).

In recent decades, California has continued to innovate in articulation. Programs like the Associate Degree for Transfer (ADT) guarantee students a pathway from community colleges to a CSU campus. Additionally, initiatives such as the "common course numbering system" instituted by SB 1440 help students navigate transfer requirements, minimizing credit loss and confusion (Gross & Goldhaber, 2009).

Despite these advances, challenges remain, and the articulation officer's role is missing from these conversations, necessitating this study and focus on this specific position at

community colleges. California's history of articulation exemplifies the evolution of educational reform in the United States. From pioneering efforts in the early 20th century to comprehensive statewide reforms like the ADT, California has set a national standard for improving access and equity. Yet, as barriers persist, the state must continue to refine its policies to address systemic inequities and support diverse student populations in their educational journeys.

Despite substantial research on the challenges and barriers that community college students, particularly Students of Color, face in navigating the transfer process, the role of articulation officers has been surprisingly absent from the literature. Articulation officers are pivotal in the transfer process, interpreting and implementing policies, maintaining articulation agreements, and ensuring curricular alignment between community colleges and 4-year institutions (California Articulation Policies and Procedures Handbook, 2013). Their work directly impacts the clarity and accessibility of transfer pathways, which are essential for equitable student outcomes.

This study fills a critical void by centering on articulation officers' experiences with equity and policy implementation. It explores how these professionals navigate legislative mandates, institutional constraints, and their agency to enact equity-centered and equity-driven policies. By focusing on this under-researched group, this project aims to shed light on the nuances of policy sensemaking and operational challenges, providing a deeper understanding of how systemic inequities in transfer outcomes are perpetuated or mitigated. Articulation officers at the intersection of policy and practice play a unique and underappreciated role in addressing the racial transfer gap. Their expertise and perspective are crucial for identifying practical barriers and developing actionable strategies to enhance equity in the transfer process. This study

elevates their voices and contributes to the broader discussion on how institutional roles and structures can be leveraged to foster equitable educational pathways.

Theoretical Frameworks

This study used Cheryl Ching’s (2023) “equity sense” meaning-making and equity-centered implementation (Felix & Nienhusser, 2023) to understand the experiences of articulation officers and how they operate and make sense of their role across varied campus, local, statewide, and legislative contexts. Using these frameworks together allowed articulation officers to articulate how they make sense of their work supporting the transfer function for Students of Color and to describe how they navigate state policy expectations that impact articulation. This section begins with a brief background and history of sensemaking and how this theoretical perspective has been discussed in organizational and policy implementation contexts. Next, I review how scholars have advanced the notion of using policy implementation as a tool “to advance equity efforts” (Felix & Nienhusser, 2023).

Equity Sense Meaning Making

Cheryl Ching’s (2023) concept of “equity sensemaking” in community colleges refers to how practitioners, such as faculty, staff, and administrators, collectively interpret and define the meaning of equity within their institutional context. This involves understanding how these individuals make sense of equity-related policies and practices and how their interpretations influence the implementation of initiatives at their respective campuses. This concept is essential to this project because Ching emphasized that, although equity is a common term in higher education, it can have different meanings depending on the individual practitioner and their experiences. This framework explores how multiple interpretations of equity are shaped by organizational dynamics, power structures, and external influences, all of which are necessary

for practitioners to make sense of equity and to exercise their agency to enact it in their work. Utilizing a sensemaking framework allows for interrogating community college articulation officers, how they construct their understanding of equity, the factors influencing this process, and the implications for policy and practice.

Sensemaking provides a framework for understanding how individuals and groups interpret disruptions, such as new policies, and derive meaningful actions from these events (Ching, 2023). Rooted in organizational theory, sensemaking is both an individual and collective process shaped by “cues” or environmental signals influenced by personal identity, experiences, and worldviews (Weick, 1995). This process becomes collective when people engage in discussions, share interpretations, and collectively construct actionable visions (Maitlis & Christianson, 2014). Organizational and field-level influences, like institutional mission or state policies, provide context, guiding which cues are deemed relevant and which interpretations of equity gain prominence. For example, the California Community College Chancellor’s Office prioritizes equity-focused policies that encourage its campus leaders to adopt an institutional perspective on equity, framing it as an essential organizational goal (Coburn, 2001).

Sensemaking begins with “triggers,” events or shifts that expose gaps between the current and ideal states, prompting interpretive efforts (Maitlis & Christianson, 2014; Weick, 1995). These events lead to “equivocality,” where multiple interpretations coexist, fostering ambiguity (Weick, 1979). Ambiguity eases through categorizing interpretations and assigning labels, allowing for a clearer shared understanding to emerge and take shape (Weick et al., 2005). Labeling shapes the shared narrative, grounding it in organizational values and history and reinforcing its legitimacy and resilience to challenges (Weick et al., 2005).

Language and discourse are essential in sensemaking, as words, metaphors, and images translate abstract ideas into more understandable forms (Maitlis & Christianson, 2014). These tools influence how concepts like equity are perceived and legitimized, often reflecting underlying values (Cornelissen et al., 2010). Additionally, power dynamics within organizations shape the process, with authority figures potentially steering the meaning of equity in specific directions (Zilber, 2008). Power also operates systematically, reinforcing dominant interpretations and shaping what is considered legitimate, often privileging ideas aligned with established norms (O’Leary & Chia, 2007; Schildt et al., 2020). By acknowledging these dynamics, sensemaking helps illuminate how equity is interpreted, discussed, and enacted within organizational contexts, making it a valuable lens for understanding institutional change (Brown et al., 2015).

As proposed by Cheryl Ching (2023), equity sense-making was used in many opportunities at the site where this work was conducted, Los Robles Community College. First, it guided practical action for the college staff, faculty, and administrators by creating a working understanding of equity to consider as they engage in their work. For example, equity sense-making at Los Robles shaped decisions such as scheduling classes at times convenient for students (Ching, 2023). Through equity sense-making, Los Robles College also adjusted its institutional culture, allowing norms and expectations to shift in a more equity-focused direction. An example was when Los Robles College consciously decided to reframe its identity to become a college of both equity and excellence. This effort also allowed practitioners to understand their role in maintaining or dismantling inequity. This work enabled practitioners to adopt an “equity lens” through which they could reflect on practices and policies that might reinforce systemic inequality. Engaging in this practice also helps build resilience to ambiguity, as equity often

creates opportunities for ambiguous understandings. This is particularly useful in the early stages of implementing reforms, as it sets a common understanding as efforts progress. Equity sense-making is used to create actionable, shared understandings of equity that guide institutional efforts to promote inclusivity, fairness, and success for all students, especially those from minoritized backgrounds.

Using an equity-focused sense-making approach for this study is crucial because it directly aligns with the study's focus on understanding how articulation officers in California community colleges interpret and enact equity in their roles, particularly in facilitating the transfer function for Students of Color. Within the context of articulation officers and their efforts to create and sustain equitable transfer pathways, equity sense-making provides a framework to understand:

- How articulation officers make sense of the transfer process for Students of Color;
- How they interpret and implement state policies like SB 1440 as an institution and as individuals; and
- The ways that articulation officers see their roles as expanding transfer opportunities for racially minoritized students.

By utilizing equity sense-making, this study contributes to the theoretical understanding of how equity is interpreted and enacted in community colleges, but also provides practical insights into how policies and practices can be better aligned to support racially equitable transfer outcomes. This aligns closely with the study's goal of addressing systemic inequities and improving transfer pathways for Students of Color.

Equity-Centered Policy Implementation

Equity-centered policy implementation refers to the deliberate and explicit acknowledgment of race and racial disparities in policy-making and its execution to address and dismantle systemic inequities. This approach recognizes that race-neutral policies often fail to address structural racism and may inadvertently perpetuate inequities. According to Felix and Nienhusser (2023), equity-centered implementation entails leveraging policies to target and mitigate specific inequities faced by racialized groups, such as Latinx students in community colleges. Felix (2021) highlighted the importance of equity-centered leadership, which draws on “racialized-gendered identity, cultural intuition, and agency” (p. 7) to interpret and enact policies that benefit minoritized communities. This approach moves beyond technical compliance, aiming for a transformative equity-oriented change. Felix highlighted how policies are written using race-neutral language, such as “success for all” initiatives, which often obscure the specific needs of racially minoritized groups, perpetuating inequities rather than alleviating them, making equity-centered implementation more critical now than ever before.

Gonzalez et al. (2021) emphasized that equity-centered implementation is necessary to counteract the neutrality embedded in many policies that center on whiteness and fail to address the unique challenges faced by racially marginalized students. They argue that educational equity cannot be achieved without explicitly acknowledging and addressing racial inequality through targeted “policies, practices, and programs that are equity-conscious” (p. 8). By grounding reforms in an equity-centered framework, implementers can ensure that policies aim not merely for equality in treatment but equity in outcomes, actively working to dismantle systemic barriers and provide racially marginalized students with the support they need to succeed. This

perspective calls for implementers to assess how policies are enacted critically and to prioritize interventions that specifically address the unique needs of racialized groups.

The study of policy implementation has evolved significantly over time, with scholars and policymakers exploring how laws and policies are implemented and the factors that influence their success or failure (Anderson, 2003; Lipsky, 1978, 1980; Matland, 1995; Moulton & Sandfort, 2017; Rice, 2013). Early conceptualizations, such as top-down policy implementation, emphasize hierarchical control, in which those in power dictate how policies are implemented, often without input from affected groups (Matland, 1995). This approach is exemplified by Meter and Horn's (1975) model, which identifies six variables influencing implementation, including:

1. policy standards and objectives;
2. resources;
3. intergovernmental communication and enforcement activities;
4. characteristics of implementing agencies;
5. economic, social, and political conditions; and
6. disposition of the implementers.

Critics argue that top-down frameworks can perpetuate inequities by privileging the perspectives of those in power while marginalizing the voices of constituent groups (Felix & Trinidad, 2019; Young & Diem, 2018). In contrast, the bottom-up approach to policy implementation prioritizes grassroots engagement, in which street-level bureaucrats shape and enact policies by directly interacting with affected communities, making it a more democratic and context-sensitive method (Lipsky, 1980; Rice, 2013). Street-level bureaucrats are impacted “by their organizational context at every level (i.e., local, regional, statewide, national),” making it clear

that articulation officers are some of these individuals at these campuses. Despite its inclusivity, this approach has been criticized for its lack of mechanisms to hold implementers accountable to the public (DeLeon & DeLeon, 2002).

Acknowledging the limitations of top-down and bottom-up models, scholars have called for a hybrid or third-generation approach to policy implementation. This perspective integrates elements of both frameworks, focusing on the interplay between hierarchical directives and grassroots dynamics (Khan, 2016; Pulzl & Treib, 2007). The hybrid approach emphasizes the need for a more scientific, process-oriented understanding of implementation, thereby encouraging theory development and empirical testing (Khan, 2016). This model seeks to analyze how policies are experienced by various stakeholders across different levels, providing a more holistic view of implementation challenges and opportunities (Stewart et al., 2008). Despite these advancements, much of this research remains underexplored in higher education, highlighting a need for further investigation into policy implementation in this critical sector.

An equity-centered implementation framework has been utilized in the community college context for various opportunities. Perna et al. (2021) examined how community college promise programs aim to improve equity but are mediated by contextual factors such as geography, demographics, and leadership. Their findings suggest that eligibility requirements like full-time enrollment often limit access for Students of Color. The authors advocate eliminating barriers to participation, emphasizing that “to implement promise programs that improve equity, stakeholders should recognize how programmatic and organizational contextual conditions influence program coverage and content” (Perna et al., 2021, p. 4). This research highlights the critical need for equity-centered policies to achieve equitable outcomes.

Taylor et al. (2021) explored the initiative Degrees When Due (DWD), a program focused on students who have completed some college but not a degree. The study emphasizes degree reclamation strategies that aim to identify near-completers, reconnect them with educational opportunities, and provide the necessary support to complete their credentials. This initiative targets explicitly racially minoritized students, adults over 25, and Pell Grant recipients, who are disproportionately represented among near completers. The authors analyze the implementation experiences of seven community colleges in Michigan, highlighting how varying levels of institutional and individual capacity influenced the success of implementing these strategies. Colleges with greater capacity, measured by infrastructure, resources, and expertise, were more effective at implementing DWD and achieving equitable outcomes. Given the demographics of underserved populations in the community college, this study emphasizes the importance of building institutional capacity to advance equity.

Worsham et al. (2021) studied the effects of North Carolina's revised Comprehensive Articulation Agreement (CAA) on transfer outcomes for students of different racial and ethnic groups, using an equity-centered policy implementation lens, specifically Critical Policy Analysis (CPA). The 2014 revision to the CAA aimed to improve credit transfer efficiency, reduce time to degree, and increase baccalaureate degree completion. However, CPA revealed disparities: Black and Latinx students faced greater barriers compared to white students, including higher accumulation of excess credits and extended time to degree completion. Their findings suggested that the revised CAA disproportionality benefited white students, highlighting systemic inequities in transfer pathways and underscoring the need for policies that explicitly address racial and ethnic disparities in educational outcomes.

The rationale for using an equity-centered implementation in this study investigating articulation officers is rooted in the systemic inequities that pervade the transfer function and its disproportionately negative impact on racially minoritized students. Community colleges are often the starting point for low-income, first-generation, and Students of Color. Yet, these groups encounter significant barriers in transferring to 4-year institutions at equitable rates. As the literature emphasizes, race-neutral policies fail to address these structural disparities, inadvertently perpetuating the status quo of racial inequities within higher education (Felix, 2021; Gonzalez et al., 2021). Articulation officers, at the nexus of policy implementation and student advocacy, play a critical role in navigating and operationalizing transfer agreements and legislation, such as AB 928 and SB 1440, which aim to streamline and enhance transfer pathways. An equity-centered framework ensures that these officers not only comply with these policies but also actively interpret and implement them to address the unique challenges Black, Latinx, and Indigenous students face in achieving transfer success.

This study's focus on articulation officers provides a crucial lens to investigate how institutional practices and policies align (or fail to align) with equity goals. By incorporating an equity-centered implementation framework, this research acknowledges the historical and contemporary context of systemic racism in education. It prioritizes the needs of marginalized groups, aligning with the equity-focused mandates increasingly emphasized in community college reform efforts. This approach enables a deeper understanding of how articulation officers can leverage their roles to dismantle barriers, such as the transfer maze and inequities in course articulation, that disproportionately impact Students of color. This framework also highlights the necessity of intentionality in addressing these issues, as equity-centered frameworks can

transform equity from a theoretical ideal into actionable outcomes that directly benefit underserved student populations.

CHAPTER 3: RESEARCH DESIGN AND METHODOLOGY

Qualitative research uses interpretive approaches to examine how individuals, groups, and communities understand their experiences, relationships, roles, and social worlds (Ravitch & Carl, 2016). Because this dissertation examines how articulation officers make sense of transfer, equity, and policy implementation within the California Community College system, a qualitative design allows for close attention to the meanings and tensions that shape their work. Specifically, this study uses focused ethnography to examine articulation as a specialized professional practice situated within institutional routines, policy mandates, technical systems, and intersegmental relationships.

This study focuses on community college articulation officers because they occupy a critical yet often understudied position in the transfer process. Their work shapes how courses, requirements, agreements, and pathways are interpreted across institutions, making their role consequential for Student of Color navigating transfer. Working closely with this group of professionals offers insight into how they understand their responsibility, how they make meaning of equity, how internal and external forces shape their work, and how they enact articulation-related legislation at their respective colleges.

By addressing these questions, this study examines how articulation officers navigate their roles, policies, and the broader push for equity in higher education. This chapter outlines the study's research design and methodology, including the research questions, research sites, participant recruitment and selection, data collection, data analysis, and positionality.

Research Questions

1. According to community college articulation officers, from their perspective, how do they make sense of the transfer process for Students of Color?

- a. What do articulation officers describe as the opportunities and hurdles to support Students of Color aiming to transfer?
2. How do articulation officers interpret and make sense of community college and/or equity policy mandates from the state, district, and institution?
3. What role do articulation officers play, if at all, in influencing the transfer process for racially minoritized students at their colleges?

Research Design

This dissertation uses a qualitative, focused ethnographic design to examine how articulation officers make sense of transfer, equity, and policy implementation within the California Community College system. Focused ethnography is appropriate for this study because it supports close examination of a specific issue, practice, or professional activity within a broader social field (Andreassen et al., 2020; Knoblauch, 2005). Articulation work is a specialized professional practice that takes place across institutional routines, policy mandates, technical systems, curricular processes, and intersegmental relationships. This aligns with focused ethnography's attention to specialized and fragmented activities that do not unfold in a single bounded site or through a continuous form of interaction (Andreassen et al., 2020; Knoblauch, 2005). Rather than seeking to identify the universal essence of being an articulation officer, this study examines how articulation officers understand and enact their roles within a specific professional and policy context.

Focused ethnography is well-suited for studies that examine a clearly defined issue, practice, or professional activity within a broader social field. Knoblauch (2005) described focused ethnography as particularly useful for examining specialized and fragmented activities in contemporary society, where shorter field visits are paired with intensive data collection and

analysis. Andreassen et al. (2020) similarly explain that focused ethnography is useful for studying specific episodes, interactions, and phenomena that unfold across multiple locations and contexts rather than within a single bounded site. In this study, the bounded phenomenon is articulation work as it relates to transfer equity for Black and Latinx students. This includes how articulation officers interpret state, district, and institutional policy mandates; how they understand equity within their roles; and how they navigate institutional conditions that shape transfer pathways.

At the same time, I do not use focused ethnography to suggest a rigid divide between focused and traditional ethnographic approaches. Andreassen et al. (2020) cautioned that focused ethnography should be understood as complementary to traditional ethnography rather than in opposition to it. Trundle and Phillips (2023) further argued that many of the assumed differences between focused and traditional ethnography, including shorter timelines, narrower research questions, insider researchers, and applied outcomes, are often “imagined boundaries” that obscure the diversity and overlap between ethnographic approaches. Rather than relying on these binaries, I understand focused ethnography as a flexible ethnographic approach that supports close analysis of a specific professional practice within a complex institutional field.

The field for this study is not limited to a single campus. Instead, the field is the articulation function across selected California community colleges. This includes the people who perform articulation work, the policies and mandates that structure their responsibilities, the documents that formalize transfer pathways, and the institutional contexts that shape articulation practice. This framing aligns with Knoblauch’s (2005) description of focused ethnography as an approach that restricts itself to particular aspects of a field, including situations, interactions, activities, and patterns of social practice. By conceptualizing the field in this way, the study can

examine articulation work across multiple colleges while still maintaining a clear methodological focus.

This design also aligns with the study's conceptual frameworks. Ching's (2023) equity sensemaking framework helps explain how articulation officers interpret equity-related cues, policy mandates, institutional priorities, and professional responsibilities in their daily work. This framework is useful for a focused ethnographic design because it directs attention to how meaning is produced within specific organizational and policy contexts. Rather than treating equity as a fixed institutional goal, equity sensemaking allows this study to examine how articulation officers understand what equity requires of them, how they respond to ambiguity in state and local mandates, and how they translate broad equity commitments into the everyday work of articulation.

Felix and Nienhusser's (2023) equity-centered implementation framework further deepens this study by foregrounding how race and racism shape the interpretation and enactment of higher education policy. This framework is especially important because transfer policies are often framed through race-neutral language, even when their consequences are racialized. An equity-centered implementation lens allows this study to examine whether and how articulation officers name racial inequities, interpret policy in relation to Students of Color, and understand their own role in disrupting or reproducing inequitable transfer pathways. Together, equity sensemaking and equity-centered implementation support a focused ethnographic approach that examines articulation officers' accounts not as isolated individual experiences, but as situated within broader professional, institutional, and racialized policy contexts.

Research Site and Description

This study does not define the research site as one campus or geographic location. Given the focused ethnographic design, the field of study is the articulation function within the California Community College system. This field includes the articulation officers who perform this work, the statewide and institutional policies that shape their responsibilities, the technical systems and formal agreements that organize course transferability, and the professional spaces where articulation officers interpret, discuss, and respond to transfer reforms. This framing aligns with focused ethnography's attention to well-defined issues, interactions, and professional practices that unfold across multiple settings rather than at a single fixed site (Andreassen et al., 2020; Knoblauch, 2005). It also reflects Ravitch and Carl's (2016) point that qualitative sampling decisions may involve not only participants, but also groups, events, places, and points in time.

The California Community College system provides an important context for this study because articulation work is tied to statewide transfer policy, intersegmental coordination, and local campus implementation. Ravitch and Carl (2016) argued that site selection should be considered in relation to the study's goals and the research questions that guide it. In this study, the California Community College system is the appropriate context because articulation officers help maintain the formal agreements and curricular structures that determine how community college courses apply toward university requirements. Their work connects community colleges to the California State University, the University of California, independent institutions, local curriculum processes, counseling practices, evaluation procedures, and student-facing transfer tools such as ASSIST. Since this work occurs across campuses, statewide policy spaces, regional

meetings, and institutional documents, the site of this study is best understood as a professional and policy field rather than a single institution.

Initial access to this field came through attendance at the Academic Senate for California Community Colleges 2025 Curriculum Institute, where I attended sessions focused on articulation, curriculum, transfer policy, and statewide implementation issues. These sessions allowed me to observe how articulation work was discussed in a professional setting and to connect with articulation officers across the California Community College system. At the beginning of the articulation-related sessions, with permission from the presenters, I introduced myself, briefly described the study, and shared a link through which interested participants could submit their contact information. I later contacted individuals who completed the interest form to determine eligibility and schedule interviews.

The ASCCC 2025 Curriculum Institute became an important point of entry into the field by bringing together articulation officers, curriculum leaders, faculty, and statewide actors to actively discuss transfer policy and implementation. The articulation-focused sessions I attended offered direct insight into how AOs collectively discussed changes to Cal-GETC, Common Course Numbering, ADTs, C-ID, ethnic studies requirements, catalog rights, external coursework, and UC and CSU acceptance (the articulation infrastructure). These sessions helped situate individual interviews within the broader professional and policy environment in which articulation officers work.

In addition to interviews, this study drew on observations from statewide and regional articulation-related meetings and documents collected throughout the study. Observations from these articulation-focused professional spaces helped situate participant accounts within broader conversations about transfer policy and articulation practice. Documents collected during the

study included AO reports, curriculum committee materials, articulation summaries, UC transfer communications, Cal-GETC and Common Course Numbering resources, course-to-course articulation requests, local implementation tools, and statewide articulation materials. Together, these sources helped contextualize how articulation work was discussed, documented, and enacted across local campuses and statewide professional spaces.

This approach is consistent with the purpose of focused ethnography. The study does not attempt to capture the full culture of any single community college. Instead, it examines articulation as a specialized professional practice situated within transfer policy, curriculum governance, intersegmental relationships, and equity-oriented implementation. Defining the field this way enables analysis of how articulation officers make sense of transfer equity, interpret policy mandates, and describe the opportunities and constraints they encounter across California community colleges.

Participant Recruitment and Selection

Participants for this study were recruited through purposeful and snowball sampling. Purposeful sampling is appropriate for qualitative research when the goal is to identify participants who can provide rich, relevant, and situated knowledge about the phenomenon under investigation (Patton, 2015). In this study, the phenomenon of interest is articulation work within the California Community College system, particularly how articulation officers make sense of transfer, equity, and policy implementation. Participants were recruited because they had direct knowledge of articulation practices, transfer policies, curriculum processes, and statewide reforms affecting community college transfer.

Initial recruitment occurred through the Academic Senate for California Community Colleges 2025 Curriculum Institute. I attended articulation-related sessions focused on

curriculum, transfer policy, and statewide implementation issues. At the beginning of these sessions, with the presenters' permission, I introduced myself, briefly described the study, and shared a link to an interest form where potential participants could submit their contact information. Individuals who completed the interest form were later contacted by email to confirm eligibility and schedule interviews.

To participate in this study, individuals had to currently serve as articulation officers at California community colleges. Participants also needed to have direct responsibility for articulation work and be able to speak to how articulation functions at their institution in relation to transfer policy, curriculum, and equity. Although the initial study design anticipated recruiting participants with at least 50% of their appointment dedicated to articulation and at least two years of experience in the role, recruitment revealed that articulation responsibilities are structured differently across California community colleges. Some participants served as full-time articulation officers, while others held articulation responsibilities alongside counseling, curriculum, transfer, or coordination duties. Given this variation, I prioritized participants' direct involvement in articulation work rather than a fixed appointment percentage.

Snowball sampling was also used as part of the recruitment process. Snowball sampling identifies participants who meet the study criteria and then relies on their referrals to identify additional participants who may also offer relevant knowledge of the phenomenon under investigation (Patton, 2015). In this study, snowball sampling occurred after initial recruitment through the ASCCC 2025 Curriculum Institute. After completing interviews, several participants recommended other articulation officers whose experiences could add an important perspective to the study. Participants also referred me to statewide and regional articulation-related meetings,

professional networks, and documents that helped me better understand the field of articulation work.

This snowball process was appropriate because articulation officers are a specialized professional group whose work is organized through formal roles, professional networks, regional collaboration, statewide institutes, listservs, and shared policy implementation spaces. Rather than selecting colleges based on institutional transfer outcomes, this study recruited participants through the professional spaces where articulation officers gather, exchange information, and make sense of ongoing transfer reforms. This approach allowed the sample to develop iteratively while remaining aligned with the study's focus on articulation as a specialized professional practice within the California Community College system.

The final interview sample included 14 California community college articulation officers. Participants represented varied institutional contexts, appointment structures, and levels of experience with articulation work. This variation was important because articulation work is shaped by local staffing, district structures, curriculum timelines, administrative support, relationships with receiving institutions, and access to statewide guidance. The goal of recruitment was not to produce a representative sample of all articulation officers in California, but to gather rich qualitative data from practitioners positioned to describe how articulation work is understood, enacted, and constrained across different community college contexts.

Demographic and background information were collected through a brief pre-interview questionnaire to provide a general profile of the participants. The questionnaire file initially contained 15 submissions. One practice response from an individual who was not included in the final study sample and one duplicate submission were removed before the data were summarized, resulting in usable questionnaire data for 13 of the 14 interview participants. One

interview participant did not complete the questionnaire. Among the 13 participants with questionnaire data, nine identified as first-generation college students, and seven reported having attended a community college. Participants represented varied gender identities, with eight identifying as women or female, three as men or male, and two declining to report or not reporting a gender identity. Participants also represented varied racial and ethnic backgrounds, including Latinx, Chicanx, Mexican American, Hispanic, Vietnamese, Middle Eastern, Dutch-Indonesian, white, mixed-race/multiethnic, and participants who declined to state. Years in participants' current articulation-related roles ranged from approximately one year to 24 years..

I report these characteristics in aggregate to protect participant confidentiality, especially given the small and specialized nature of the articulation officer community in California. I do not link pseudonyms to specific demographic profiles unless that information is analytically relevant to the findings. Pseudonyms are used throughout the study, and identifying details such as college names, district names, exact role combinations, and highly specific demographic pairings are limited or removed when necessary to reduce the risk of deductive disclosure.

As articulation officer positions were structured differently across colleges, I also documented the organizational conditions surrounding participants' roles. Table 3.1 summarizes participants' years of experience, current articulation assignment, appointment context, organizational position, and access to dedicated articulation support. These characteristics were drawn from the pre-interview questionnaire, where available, and clarified through participants' descriptions of their roles during interviews. To protect participant confidentiality, organizational details are presented at a level that provides relevant context without identifying individual colleges or participants.

Table 3.1

Organizational Conditions of Articulation Officer Participants

AO Pseudonym	Years as AO	Current AO Appointment	Appointment Context	Organizational Position	Dedicated Articulation Support
Elena	1.75	90% AO/10% Counseling	Maintained 90% AO after a proposed reduction to 80%	Counseling Faculty	None
Rebecca	2	100% AO	Previously a 50% counselor reassignment; role redesigned as 100% AO	Office of Instruction	None
Marisol	2	100% AO	Increased 60% → 70% → 100%; full-time assignment supported through temporary funding	Counseling/Student Affairs	Limited specialist support (~4 hrs./week)
Adriana	24	100% AO	Began as 50% AO / 50% Transfer Center Director; later transitioned to full-time articulation	Counseling faculty; AO function situated in Academic Affairs	None
Daniel	15	80% campus AO + 20% district AO	Campus AO reassignment increased from 20% → 60% → 80%; additional 20% district assignment rotates among colleges	Counseling	None
Nadia	7	100% AO reassignment	Increased from 80% to 100%; must periodically reapply/interview for the reassignment	Counseling faculty; AO function situated within Curriculum	None at interview; hourly assistant planned/pending

				m	
Vivian	15	100% AO	Long-standing full-time articulation assignment	Counselin g Faculty	Full-time Articulation Specialist
Claudia	20	100% AO	100% AO from the beginning of her appointment; maintained after an attempted change	Counselin g Faculty	Not specified in interview
Gabriel	1	70% AO / 30% Counseling	First year in AO role; articulation remains combined with counseling responsibilities	Counselin g Faculty	None
Leticia	26	100% AO	Role began as a full-time staff AO position and was later converted to a counseling-faculty articulation assignment	Counselin g/Student Services	None
Patricia	15	100% AO	Full-time; assumed AO responsibilities after the prior AO left during a hiring freeze	Counselin g Faculty	No permanent staff; temporary semester- funded project assistance
Melissa	3	100% AO	11-month position; entered after several years without a permanent full-time AO	Academic Affairs/In struction	None
Antonio	2	100% AO	Continues required general counseling despite the 100% AO designation	Counselin g/Student Services	None
Camila	10	100% AO	Full-time assignment; recently questioned as a possible split AO/counseling assignment	Counselin g Faculty	None

As Table 3.1 illustrates, participants worked under varied organizational arrangements. Differences included the proportion of time assigned to articulation, whether that assignment had changed or been renegotiated over time, where articulation was situated within the college, and whether participants had dedicated support. These differences provided important organizational context for interpreting participants' descriptions of carrying out articulation work across their institutions.

Data Collection

Data collection for this study included semi-structured interviews with articulation officers, observations of articulation-related professional spaces, documents related to articulation and transfer policy, and researcher's field notes and analytic memos. This multi-source approach aligns with the study's focused ethnographic design by enabling the examination of articulation work across participant accounts, professional conversations, institutional documents, and statewide policy contexts. Together, these data sources provided insight into how articulation officers make sense of their roles, interpret equity and transfer policy, and navigate the institutional conditions that shape articulation work across California community colleges.

Semi-Structured Interviews with Articulation Officers

Semi-structured interviews served as the primary source of participant data for this study. Interviews were appropriate because they allowed articulation officers to describe how they understood their roles, interpreted transfer and equity policy, and navigated the everyday responsibilities of articulation work. Qualitative interviews are useful for understanding how participants make sense of their experiences, perspectives, and social worlds, particularly when the researcher seeks rich, contextualized, and individualized accounts (Merriam & Tisdell, 2016;

Ravitch & Carl, 2016). In this study, Interviews provided insight into how articulation officers interpreted their professional responsibilities, equity commitments, and policy mandates within a specific institutional and statewide context.

The interview process also aligned with the study's interpretive and relational commitments. Holstein and Gubrium (1995) described interviews as meaning-making encounters in which the interviewer and participant co-construct knowledge through interaction. Ravitch and Carl (2016) explained that qualitative interviews can generate deep, contextualized data while allowing researchers to examine both shared and varied meanings across participants. This was important for this study because articulation officers' work is shaped by local institutional conditions, statewide reforms, professional networks, and participants' own understanding of equity and transfer.

This study used a semi-structured interview protocol. Semi-structured interviews are especially appropriate when a study requires consistency across participants while also allowing flexibility in wording, sequencing, and follow-up questions (Merriam & Tisdell, 2016). Merriam and Tisdell (2016) explained that semi-structured interviews typically include specific information desired from all participants, while the larger interview remains guided by questions or issues to be explored rather than a fixed order or wording. This format allowed me to ask all participants about core areas related to the research questions, including their pathways into articulation work, role responsibilities, understandings of transfer equity, interpretations of policy mandates, and perceived opportunities and constraints in supporting Students of Color.

The semi-structured format also allowed for adaptive follow-up questions. Ravitch and Carl (2016) explained that semi-structured interviews use an interview instrument to guide the conversation while allowing tailored probes and follow-up questions within and across

interviews. This flexibility was important because articulation responsibilities vary across California community colleges. Some participants held full-time articulation roles, while others carried articulation responsibilities alongside counseling, curriculum, transfer, or coordination duties. Follow-up probes allowed participants to explain how articulation operated in their specific institutional context and to discuss emerging topics such as Cal-GETC, Common Course Numbering, ADTs, C-ID, local curriculum processes, and intersegmental relationships.

Observations of Articulation-Related Professional Spaces

Observations were conducted in articulation-related professional spaces, including sessions at the ASCCC 2025 Curriculum Institute and subsequent statewide or regional meetings to which I was referred during the study. Observations are useful in qualitative research because they allow researchers to gather firsthand accounts of the phenomenon of interest rather than relying only on participants' descriptions of events, settings, or interactions (Merriam & Tisdell, 2016). In this study, observations helped situate individual interview accounts within broader professional conversations about articulation, transfer reform, and policy implementation.

During these sessions, I attended to how articulation officers and related practitioners discussed reforms such as Cal-GETC, Common Course Numbering, ADTs, C-ID, ethnic studies requirements, catalog rights, external coursework, and UC and CSU acceptance. Observation notes focused on the topics discussed, the questions raised by practitioners, the tensions that emerged during implementation, and the ways in which equity was named, implied, or absent in professional conversations. These observations did not serve as evaluations of individual participants or institutions. Instead, they provided contextual data about the professional field in which articulation officers collectively interpret policy, exchange information, and make sense of changing transfer requirements.

Document Collection and Review

Documents were collected throughout the study to contextualize participants' accounts and better understand the policy and institutional conditions that shape articulation work.

Documents are a valuable source of qualitative data because they often exist independently of the research process and can provide insight into institutional context, history, formal communication, and organizational practice (Merriam & Tisdell, 2016). For this study, documents helped show how articulation work was formally represented, circulated, and enacted across local and statewide contexts.

Documents collected during the study included AO reports, curriculum committee materials, articulation summaries, UC transfer communications, Cal-GETC and Common Course Numbering resources, course-to-course articulation requests, local implementation tools, and statewide articulation materials. Document review helped trace how transfer policy, articulation requirements, and implementation guidance were represented across institutional and statewide settings. I approached these documents as part of the articulation process rather than as simple background materials. They showed how articulation work was organized, communicated, and implemented across local and statewide contexts. Reading them alongside interviews and observations allowed me to examine where participants' accounts aligned with formal policy language, where they complicated it, and where their everyday work revealed tensions that were not visible in the documents alone.

Field Notes and Analytic Memos

I maintained field notes and analytic memos throughout data collection. Field notes documented observations from professional meetings, recruitment interactions, interview context, emerging patterns, and questions that arose during the study. Analytic memos supported

ongoing reflection on how participants described articulation work, how policy reforms appeared across interviews and documents, and how my own prior knowledge of transfer and community college policy shaped what I noticed and interpreted.

During in-person interviews, my field notes also documented aspects of the physical and organizational settings in which participants worked. When participants invited me to walk through campus spaces or showed me tools used in their articulation work while in their office, I recorded these moments as contextual field notes, including where articulation was situated in relation to student-facing services and how participants interacted with the technical systems they described. These contextual observations helped situate interview accounts within local institutional and geographic conditions; they were not treated as independent evaluations of participants or their colleges.

These notes and memos were especially important given the study's focused ethnographic design. They helped connect interviews, observations, and documents while supporting an iterative approach to data collection and analysis. As new patterns emerged, memos helped identify areas for follow-up in later interviews and guided attention to recurring issues across the data, including implementation ambiguity, role invisibility, local variation, and the relationship between articulation work and transfer equity.

Data Analysis

Data analysis for this study was iterative and occurred alongside data collection. Interviews, observation notes, documents, and analytic memos were analyzed together to examine how articulation officers made sense of transfer, equity, policy implementation, and their professional roles within the California Community College system. This approach aligned

with the study's focused ethnographic design by allowing analysis to move across participant accounts, professional meeting spaces, policy documents, and institutional materials.

Interview Analysis

After each interview, audio recordings were submitted to REV.com for transcription. I reviewed each transcript for accuracy and made minor corrections when needed. Transcripts were then uploaded to Dedoose, a qualitative data analysis software, to support systematic coding, memoing, and data organization.

I began by reading each transcript multiple times to become familiar with participants' accounts and to document initial impressions, recurring concepts, and analytic questions through memoing. The first phase of coding used open coding to identify early patterns in the data. Open coding allowed me to remain close to participants' accounts while developing preliminary labels for concepts, experiences, and tensions that appeared across interviews (Ravitch & Carl, 2016). During this stage, I attended to how articulation officers described their role responsibilities, institutional conditions, interpretations of equity, relationships with counseling and curriculum processes, and experiences implementing statewide transfer reforms.

I then used a combination of in vivo, process, and values coding to deepen the analysis. In vivo coding was used to preserve participants' own language, particularly when they described equity, transfer, simplification, role invisibility, institutional constraints, and their relationships to students. This coding strategy was useful because articulation officers often used specific professional language to explain the technical and political dimensions of their work. Process coding helped capture the action-oriented nature of articulation, including how participants described interpreting policy, negotiating requirements, updating curriculum, communicating across offices, responding to reform, and advocating for students. Values coding

helped identify participants' beliefs, commitments, assumptions, and tensions regarding equity, equity-centered practice, professional responsibility, and the limits of their roles.

After the first cycle of coding, I grouped related codes into broader categories and compared patterns across participants. This stage of analysis focused on identifying recurring themes and tensions across the sample while also attending to variation by institutional context, role structure, years of experience, and proximity to curriculum, counseling, and transfer work. Analytic memos were used throughout this process to track emerging interpretations, document coding decisions, and examine how my own prior knowledge of transfer policy and community college systems shaped what I noticed in the data.

Observation and Fieldnote Analysis

Observation notes from the ASCCC 2025 Curriculum Institute and subsequent statewide or regional articulation-related meetings were analyzed alongside the interview data. These notes provided context for understanding how articulation officers collectively discussed transfer reform, implementation uncertainty, technical requirements, and institutional responsibility in professional spaces. I coded observation notes for recurring topics, questions raised by practitioners, implementation tensions, references to equity, and moments where policy language appeared disconnected from local practice.

Analyzing observation notes alongside interviews helped me situate individual participant accounts within broader professional conversations. For example, when participants described confusion or concern around the articulation infrastructure, observation notes helped identify whether these concerns were also circulating in statewide and regional articulation spaces. This analytic step helped distinguish between isolated participant concerns and broader field-level patterns.

Document Analysis

Documents were analyzed to understand how articulation work, transfer policy, and equity-related implementation were represented across local and statewide contexts. Documents included AO reports, curriculum committee materials, articulation summaries, UC transfer communications, Cal-GETC and Common Course Numbering resources, course-to-course articulation requests, local implementation tools, and statewide articulation materials.

I used qualitative content analysis to examine both the explicit language and the underlying assumptions in these documents (Merriam & Tisdell, 2016). Initial coding focused on how documents described transfer, articulation, policy compliance, student mobility, equity, institutional responsibility, and implementation timelines. As analysis progressed, I refined these codes to examine how documents framed the purpose of transfer reforms, what guidance was provided to colleges, what remained ambiguous, and whether Students of Color or racial equity were explicitly named. I approached these documents as part of the articulation process rather than as simple background materials. They showed how articulation work was organized, communicated, and implemented across local and statewide contexts. Reading them alongside interviews and observations allowed me to examine where participants' accounts aligned with formal policy language, where they complicated it, and where their everyday work revealed tensions that were not visible in the documents alone.

Thematic Development

After coding interviews, observation notes, and documents, I engaged in a second phase of analysis focused on theme development. I reviewed coded excerpts, analytic memos, and documents to identify patterns across the full data set. During this stage, I moved from

descriptive codes toward larger analytic categories that explained how articulation officers understood their work in relation to equity and transfer policy.

The study's conceptual frameworks also guided this stage of analysis. Ching's (2023) equity sensemaking framework helped me examine how participants interpreted equity-related cues, institutional expectations, and policy mandates. Felix and Nienhusser's (2023) equity-centered implementation framework helped me analyze whether and how race and racism were named, avoided, or made actionable in participants' accounts of transfer policy implementation. These frameworks did not predetermine the findings, but they shaped my interpretation of patterns related to meaning-making, policy ambiguity, institutional constraints, and racialized transfer inequities.

Through this process, I developed themes that captured both the technical and equity-related dimensions of articulation work. The final themes were supported by evidence across interviews, observations, documents, and analytic memos. Participant quotes were selected to illustrate central patterns, preserve participants' language, and show variation across the sample.

Positionality

My experience as a first-generation Chicano community college transfer student shaped my interest in transfer as both a personal and scholarly concern. I entered this study with an understanding that transfer is often framed as a pathway of opportunity, even though many students encounter it as a complicated, uneven, and institutionally mediated process. Successfully navigating transfer is neither equally supported nor equally accessible for all students, particularly for Students of Color, who must rely on course agreements, requirements, advising structures, and institutional guidance to make decisions about their educational futures. This background made me sensitive to the stakes of articulation work and the importance of

examining the professionals responsible for creating and maintaining many of the formal agreements that govern transfer between institutions.

I approached this study neither as a complete insider nor as a complete outsider to the field of articulation. I have not served as an articulation officer, and I do not claim the technical expertise that participants brought to the study. At the same time, my personal experience as a transfer student, my research on community college transfer and equity policy, and my professional work in California higher education gave me familiarity with the broader context in which articulation officers work. This position shaped how I entered the field, the questions I asked, and the issues I was especially attuned to during interviews, observations, and document analysis.

My time at UCLA also shaped this research agenda. I have worked on projects focused on supporting racially minoritized students as they navigate higher education, including research on Guided Pathways, AB 705 implementation, faculty-driven pedagogical reforms, and state-level attainment goals. These projects helped me see how institutional policy, local implementation, and everyday professional practice can either expand or constrain educational opportunity for Black and Latinx students. They also depended on my interest in the transfer function as a site where equity is not only stated as a value, but interpreted, negotiated, and enacted through institutional systems.

These experiences offered important insight, but they also required reflexivity. I entered the study with commitments to racial equity, transfer justice, and the educational success of Students of Color. Rather than trying to set these commitments aside, I treated them as part of my analytic position while remaining attentive to how they shaped what I noticed, asked, and interpreted. Throughout data collection and analysis, I used analytic memos to document my

assumptions, questions, and reactions to participant accounts. I paid particular attention to moments when participants complicate my expectations about articulation work, equity, policy implementation, or institutional responsibility. This reflexive practice helped me draw on my prior knowledge while remaining open to the complexity of participants' perspectives and the professional conditions that shape their work.

CHAPTER 4: FINDINGS

In this chapter, I examine how 14 California community college articulation officers made sense of their role in the transfer process, particularly regarding Students of Color. Interviews serve as the primary evidence for how AOs interpreted their work. I also draw on observations from statewide and regional articulation-related meetings and documents collected during the study, including AO reports, curriculum committee materials, articulation summaries, UC transfer communications, Cal-GETC and Common Course Numbering resources, course-to-course articulation requests, local implementation tools, and statewide articulation materials. These sources help situate participants' accounts within the broader transfer environment by showing how articulation work was discussed, documented, and enacted across local campuses and statewide professional spaces.

Although articulation officers are central to how transfer operates, their work is often hidden from students, misunderstood by colleagues, and treated as technical maintenance rather than equity work. Participants described a role that directly shapes whether students' coursework counts, whether requirements are navigable, and whether institutional policies create pathways or barriers. Through the articulation infrastructure, AOs help determine how transfer is experienced in practice. In their accounts, transfer equity lived in the machinery behind the student-facing process: which courses counted, which rules were explained, which exceptions were allowed, and which policies were translated into usable guidance.

Across interviews, participants described transfer as a process in which the most consequential rules were not always visible to students until something went wrong. A course that seemed transferable might not satisfy a particular requirement. A pathway that appeared streamlined might still depend on local interpretation, catalog rights, effective dates, or decisions

by the receiving institution. An additional class might seem minor from an institutional perspective, but for a student, it could mean another semester, lost work hours, more tuition, or a disruption in momentum.

Observations and documents reinforced that these concerns were not isolated to individual campuses. Statewide and regional conversations regularly centered on articulation infrastructure. Local documents similarly showed that AOs were responsible for making these policies and requirements usable through reports, timelines, curriculum materials, course review processes, and communication with faculty, staff, and administrators.

The findings that follow trace how AOs made sense of transfer equity across three levels of the transfer process. The first finding examines the hidden infrastructure students were expected to navigate, including the uneven distribution of transfer knowledge, the limits of streamlining, and the material consequences of extra requirements. The second finding turns to the policy environment surrounding articulation work, showing how overlapping state, district, and institutional mandates required constant translation and local sensemaking. The third finding examines AOs as consequential yet constrained actors whose technical, relational, and discretionary labor shaped transfer pathways, even as their authority remained constrained by institutional structures and intersegmental decision-making.

Across these findings, AOs emerged as consequential but constrained actors. They helped make transfer possible even as their roles were underrecognized, unevenly resourced, and only partially included in the policy decisions they were expected to implement. This chapter treats articulation work as a site where transfer equity is interpreted, enacted, and constrained. California's transfer system promises mobility, but that promise often depends on practitioners whose labor is largely invisible and whose authority does not always match the consequences of

their work. This tension runs throughout the findings, beginning with how AOs made sense of the hidden infrastructure students were expected to navigate.

Finding 1: The Hidden Infrastructure of Transfer Equity

This finding addresses the first research question, which asks how community college articulation officers make sense of the transfer process for Students of Color, as well as the related sub-question concerning the opportunities and hurdles AOs identify in supporting Students of Color aiming to transfer. Participants described transfer as a process that often appeared orderly on paper but became difficult in practice because students had to navigate rules, requirements, and institutional interpretations that were not always visible to them. In their accounts, the transfer process depended on more than completing courses or following an educational plan. It depended on whether students knew which courses counted, which requirements applied, which policies protected them, and which institutional actors could help interpret the rules before a mistake became costly.

Across interviews, AOs made sense of transfer equity through four related concerns. First, they described transfer knowledge as unevenly distributed, with students often expected to find, interpret, and act on information before they understood its consequences. Second, they questioned whether reforms meant to simplify transfer, including Common Course Numbering, Cal-GETC, and ADTs, actually resolved the complexity students encountered. Third, they emphasized that extra requirements were not a minor inconvenience, but material burdens that cost students time, money, financial aid eligibility, work hours, and momentum. Finally, participants varied in how directly they named race in relation to these barriers. Some explicitly identified racialized consequences for Students of Color, while others used broader language

about fairness, access, flexibility, first-generation status, continuing student status, and reducing unnecessary coursework.

The following sections show how AOs understood transfer equity as shaped by the hidden infrastructure of transfer: the rules, agreements, timelines, exceptions, and interpretations that determine whether students' prior learning is recognized and whether transfer pathways are usable. This infrastructure did not appear in one uniform way across participants' accounts. Some AOs focused on information students were expected to locate, others emphasized statewide reforms and local implementation gaps, and others pointed to the consequences of a single extra course or requirement. Their accounts move beyond visible student-facing supports to examine the institutional conditions that make transfer either navigable or costly. This finding begins with what students were expected to figure out before they could fully benefit from the transfer process.

What Students are Expected to Figure Out

Across interviews, articulation officers described transfer as a process that often required students to know what questions to ask before they understood the system well enough to ask them. AOs made sense of transfer equity by treating information access, unwritten rules, counseling availability, catalog rights, course applicability, and institutional interpretation as consequential to students' ability to transfer. Participants did not describe this hidden knowledge as a single problem. Some focused on whether students could locate information, while others emphasized whether students could interpret catalog rights, understand course applicability, access counseling, or recognize when an institutional exception might apply. Drawing on Ching's (2023) concept of equity sensemaking, this subsection shows how participants labeled hidden transfer knowledge as an equity issue, even when they did not always name it as a racial

equity issue. Felix and Nienhusser's (2023) equity-centered implementation lens further sharpens the analysis by asking whether seemingly neutral transfer practices place greater burdens on Students of Color, first-generation students, and students with less access to inherited knowledge of higher education.

Participants did not frame this as a student deficiency. They pointed out that transfer information was distributed across websites, catalogs, degree audit systems, articulation databases, counseling appointments, and institutional practices, and that it was not always easy for students to locate or interpret. Elena described this problem directly:

The biggest inequity to me is information. Just students getting access to the information and understanding it, actually understanding it, right? Oftentimes, I'll be in spaces at a conference or whatever, and like, oh, we have this wonderful website. Great. All the information there, that's fantastic. A, do students know about it? B, do they know how to use it? And C, do they know why it's important? . . . even some of the resources that are online counselors that I talk to aren't aware they're there.

Elena's reflection shows that the presence of information did not guarantee access to it. For her, transfer inequity emerged when institutions assumed that posting information was enough. The issue was not only whether students had access to a website or document, but whether they understood what the information meant, how it applied to their goals, and how it needed to be used. Through an equity sensemaking lens, Elena labels information itself as an equity issue. This is an important move because it shifts attention away from whether students are "informed" and toward whether the institution has made transfer knowledge usable. Her comment that "even some of the resources that are online, counselors that I talk to aren't aware they're there" also

suggests that transfer knowledge was not only uneven among students. It was also uneven among the practitioners whom students depended on for guidance.

The documents collected for this study make Elena's point concrete. Arroyo City College's *All Things Articulation* resource, created by the AO, includes guidance on Common Course Numbering, Cal-GETC scenarios, Area F, Area 7, ASSIST reports, CSU and UC curricular updates, private institution agreements, and course-to-course articulation. The existence of such a resource shows that transfer rules do not become usable simply because they exist. They must be organized, translated, and presented to students, counselors, faculty, and staff before they can act on them.

Where Elena emphasized whether transfer information was usable, Antonio connected hidden transfer knowledge more directly to Students of Color and first-generation students. He explained that some students benefit from having someone who already understands the hidden rules of transfer, while others do not.

We had an example of an AO who his daughter went through the process and they were told, "Hey, you got to do an area F" . . . and he's like, oh, let's do the catalog rights? . . . Obviously, their parent graduated with multiple degrees, and we know typically, usually our students of color are coming to the community college. A lot of them are first gen, and they don't have that AO . . . They won't all meet with me, or they won't all meet with a counselor, or they won't all meet with someone who knows that knowledge, and it's not written anywhere. You can't find it. . . . So I think it absolutely would impact more students of color.

Antonio's example makes visible how transfer systems reward proximity to institutional knowledge. The student in his example had access to an AO parent who knew to ask about

catalog rights. Antonio contrasted that with Students of Color and first-generation students who may not have someone in their family or network who can identify the issue, interpret the rule, and advocate for a favorable reading. His phrase, “it’s not written anywhere,” is especially important because it highlights knowledge that circulates informally among professionals yet is not always accessible to students. Where Elena focused on the usability of formal information, Antonio emphasized the informal knowledge students may need when formal information is incomplete, buried, or difficult to interpret.

Rebecca described a related version of this problem in counseling access. She called it an “opt-in problem.” Students who know how to seek counseling may receive support, but students who do not know how or when to ask for help can move through the system without realizing they are missing important guidance:

Advising, I think, would be one where, again, it’s the opt-in problem. The students who know to go to counseling, they do. . . . But not everybody has that background. And so if they just kind of sign up for classes and hope for the best, and maybe they just don’t know what they don’t know. And then when they do try to come to counseling, we have such impacted appointments that they often can’t get one.

Rebecca’s account highlights a central contradiction in student support. Counseling may be available, but access depends on students knowing that counseling matters, seeking it at the right time, and securing an appointment. Her description of students who “sign up for classes and hope for the best” shows how institutional systems can place responsibility on students before students know what is at stake. By the time some students realize they need guidance, they may have already chosen courses, missed deadlines, or moved further down a path that does not count the way they expected.

My visit to Pine River College gave additional context to Rebecca's concern. Of the colleges I visited, Pine River was one of the places where I most clearly experienced the rural setting surrounding the institution. At the same time, transfer-related services were closely connected within the campus itself. After our interview, Rebecca walked me to the nearby Transfer Center and introduced me to the student staff working at the front desk. One of the student staff members then walked me through a campus tour of several offices and spaces students regularly used. I had a conversation with the individuals working at the veterans center about where veterans who use the space transfer to after they complete their time at the college. The visit showed the importance of these internal connections at a college situated in a distinctly rural context. It also complicated the idea that physical proximity alone solved the "opt-in problem" Rebecca described. Transfer and counseling resources could be nearby, but students still had to know when and how to use them.

Marisol extended Rebecca's concern by questioning whether students can always name the problem they are experiencing. If Rebecca described the risk of an opt-in support model, Marisol focused on the moment before that, when students may not yet have the language to explain what is going wrong:

And then something that I struggle with is the fact that the student that asked the question is the one that's going to get help. And I struggle with that because sometimes there are students that don't even know how to put their problems into a question. They don't understand what to ask. They don't understand how they're lost to begin with. And so I feel that that's where, as an institution, we sometimes tell our students, is that we're not breaking down this information enough for them to understand it.

Marisol reframes the problem from student initiative to institutional responsibility. If help is activated only when students ask the right question, students who cannot yet articulate their confusion are less likely to receive support. Her statement that students may not “understand how they’re lost to begin with” captures the difficulty of navigating a transfer system where errors often become visible only after students have already taken courses, missed deadlines, or followed an incomplete path. Her account also shows why “knowing what to ask” cannot be treated as a neutral expectation. This framing advantages students who already have some familiarity with college systems and disadvantages those who are still learning how the transfer process works.

Adriana named another version of the same burden: students were expected to understand that courses could look similar across institutions but count differently depending on where and how they were taken. She rejected the assumption that students should decode this complexity on their own and linked that expectation to the unequal exposure of first-generation and underrepresented students to educational self-advocacy.

I think we always have to remember that first-generation underrepresented students have not had the good luck of being exposed to . . . navigate and self-advocate through their educational journeys. So we have to remember not to assume anything. It’s not fair to expect our students to know that what is the same course . . . counts differently depending on where they take it. That’s an inequity. That’s not fair. We can’t say, well, they need to know to look to ASSIST. I’m like, no, Nope. We need to change how we’re doing it.

Adriana’s account highlights the institutional unfairness of expecting students to know that courses with the same subject, number, title, and units may count differently depending on where they are taken, even after the adoption of Common Course Numbering. Her critique is not that

students need to work harder to understand ASSIST or other transfer tools. Instead, she argues that institutions need to change how they organize and communicate transfer information. In her account, inequity appears when course applicability is treated as something students should discover on their own rather than something institutions are responsible for making clear.

The documents strengthen Adriana's point by showing that inconsistent course meaning is not hypothetical. In the Metro Community College District course alignment materials, the District Academic Senate noted that students often enroll at multiple colleges within the district and may assume that courses with the same subject, number, and title have identical requirements. Students can later be denied applicability of that course at their home college, causing "confusion and anxiety" and sometimes requiring additional coursework. This shows that the problem participants described was not simply an individual misunderstanding. It was built into course alignment, local interpretation, and interinstitutional transfer rules.

These accounts show AOs assigning equity meaning to practices that could otherwise be treated as routine advising, counseling, or curriculum issues. Elena labeled usable information as equity. Antonio identified unwritten knowledge as a racialized burden. Rebecca named advising access as an opt-in structure. Marisol questioned a support model that only responds to students who can name the problem. Adriana challenged the expectation that students should decode the inconsistent applicability of courses on their own. These examples show that participants were not describing one single information gap. They were identifying several points where transfer knowledge could fail students: when information was posted but not usable, when rules circulated informally, when counseling depended on students opting in, when students could not yet name their confusion, and when course applicability varied across institutions. From an equity-centered implementation perspective, the issue extends beyond the difficulty of

understanding transfer information. The burden of interpretation falls most heavily on students who are least likely to have access to family knowledge, institutional insiders, or prior exposure to transfer systems. Across these accounts, AOs made sense of transfer equity by framing it as a burden on students to find, interpret, and act on information before they fully understood its consequences. What students are expected to figure out is not incidental to transfer equity. It is one way inequity is built into the transfer process itself.

The Limits of Streamlining

Statewide reforms promised to make the transfer process simpler, but AOs described the simplification as uneven and unfinished. This concern appeared most clearly in eight interviews, where participants described reforms such as Common Course Numbering, Cal-GETC, and ADTs as promising in intent but incomplete, confusing, or uneven in practice. AOs generally supported the goals behind these reforms. They recognized that these reforms were designed to reduce confusion, align requirements, and create more coherent pathways. Participants were not arguing against clearer pathways. They were asking whether the new rules could be used consistently by students, counselors, evaluators, and colleges. Participants evaluated these reforms less by their stated intent than by what they required in practice. They asked whether reforms actually reduced the interpretive burden on students or created new places where students could misunderstand what counted. This question matters for equity-centered implementation because policies framed as universal simplification can still reproduce inequity when implementation gaps are absorbed by racially minoritized, first-generation, and low-income students (Felix & Nienhusser, 2023).

Nadia captured this tension when reflecting on the idea of an “ideal” transfer process:

An ideal transfer process is, okay, this is a hard part because ideally it is simple, and simple is sometimes cookie-cutter, and not everybody fits to cookie cutter mold. So it would be great if things were streamlined and simplified, but we've seen over and over again with these initiatives that streamlining kind of ups the standard a little bit.

Nadia's account pushes against the idea that simpler automatically means more equitable. Her concern was that simplified pathways can flatten important differences across students, courses, and colleges. In her view, "simple" becomes "cookie-cutter" when reforms assume students are moving through transfer in the same way, with the same goals, timelines, and institutional supports.

Common Course Numbering surfaced repeatedly as an example of this tension.

Participants often supported its intent but worried that common numbers could create the appearance of equivalence without guaranteeing that courses would count the same way across institutions. For Melissa, the problem was that students could see the same number and reasonably assume the course carried the same value, even when articulation, GE approval, or major applicability still varied. Melissa made this distinction directly:

I think the way it's being implemented is wrong. I think it's too lenient right now, so it's truly not common courses. I think it's just common number, which is different, have a common number, but the course could be different, and that's okay.

She later expanded on this concern, "If we have that issue where they're all numbered the same, but they're not articulated the same, that's a detriment to students." Melissa's distinction between "common course" and "common number" reveals the hidden infrastructure beneath streamlining. From a student-facing perspective, a common course number may appear to communicate portability and consistency. From an AO perspective, the number itself does not

guarantee common articulation, common GE approval, or common applicability to major preparation. The danger is that students may reasonably assume a course will count because it carries the same number, only to learn later that articulation decisions still vary.

Leticia raised a similar concern, emphasizing that the public-facing promise of Common Course Numbering could move faster than the articulation agreements underneath it:

With common course numbering, it's kind of the cart before the horse because we have common numbers, but not common articulation. And that may hurt students, unfortunately, because if I'm a student, of course, I'm going to think those common numbers are really common when they're not.

Leticia identifies the student-facing risks associated with partial implementation. Even when a reform is intended to make transfer clearer, students can be harmed if the public-facing information is released before the underlying articulation systems are fully aligned. A student may choose a course because the number appears familiar, build it into an educational plan, and later learn that it does not meet the same requirement at the receiving institution. In those moments, students may believe they have a clear route forward, only to learn later that the system was not yet able to guarantee how their courses would count.

Local governance documents show that AOs and faculty bodies were already working to address these problems. The Metro Community College District course alignment task force was created in response to concerns that students taking courses across various Metro Community College District colleges could assume that courses with the same subject, number, and title would be counted identically, only to encounter inconsistent applicability later. The recommendations identified which course outline-of-record fields should be aligned across colleges, particularly in the context of AB 1111/Common Course Numbering and AB 928/Cal-

GETC. This artifact reinforces participants' point: streamlining requires sustained local work, not just statewide policy adoption.

Antonio's account helps clarify why AOs did not reject reform outright. He saw equity potential in policies that shorten pathways and reduce unnecessary coursework. At the same time, he argued that benefits depended on whether reforms reached the point where courses and requirements actually counted consistently across institutions. For Antonio, the promise of reform was real, but it remained unfinished as long as students still had to navigate the gaps between policy intent and course applicability.

I think the perfect version of them, yes. . . . AB 705, there's clear examples that it supported students, especially Students of Color because a lot more were coming here. It removed the five-year path to an associate degree. It shrunk it. So there's definitely benefits. And I think the perfect version, when we have CAL-GETC and AB 1111, actually realized where it counts the same. If we get to that point, it'll really serve. . . .

But in the meantime, while they're being realized, it's kind of messy."

Antonio's phrase "while they're being realized" captures the implementation space AOs described throughout the study. The promise of reform existed, but students and practitioners had to live through the messy period before systems, policies, technologies, and receiving institutions fully aligned. During that period, the same reform could reduce barriers for some students while creating new uncertainty for others whose courses, catalog rights, or transfer destinations did not fit neatly into the new structure.

Camila pointed to another implementation issue: even within the same district, students' options could depend on whether their college had secured the same approvals as other campuses.

Even within our district classes, counting for certain requirements and ones at other schools are not . . . just out of curiosity, I just started pulling agreements and just seeing within our district, which courses were different. And there's one particular school in our district that I was shocked. I was like, "Oh my gosh, this is so not fair for their students." They had so many less approvals than we did. . . . So the only reason it's not there is because you guys didn't submit it.

Camila's account shows that the limits of streamlining extend beyond intersegmental boundaries. Students' transfer opportunities may depend on whether their college has had the staffing, expertise, history, and capacity to secure approvals. The same course or pathway may appear available across campuses, but the underlying approvals that make those pathways usable can differ. Her example also shows why participants could not be treated as operating from identical institutional positions. AOs at colleges with fewer approvals were not only managing transfer information; they were also working from a thinner set of agreements than their counterparts elsewhere.

The statewide and regional articulation observations showed a similar tension. AOs often discussed transfer reform as a way to simplify the process, align requirements, and help students move more easily between institutions. At the same time, those conversations kept returning to unresolved issues within the articulation infrastructure. The observation data reinforced what participants described in interviews: streamlining depended on the local and intersegmental work required to make new rules usable. Calling a policy "simplified" was not enough to make it equitable. For students, these reforms only work when the systems behind them are stable enough for a course, requirement, or pathway to mean what it appears to mean.

AOs interpreted streamlining through the gap between what reforms promised and what they required in practice. Common Course Numbering, Cal-GETC, and ADTs entered articulation work as policy shifts that disrupted existing practices, created new ambiguity, and required AOs to determine what “simplification” meant, even as courses, requirements, systems, and receiving institutions still had to be aligned. Participants’ accounts were not uniformly skeptical of reform. Antonio and Claudia described policies such as AB 705 and AB 1705 as important equity interventions because they shortened remedial sequences and expanded access to transfer-level coursework. Nadia, Melissa, and Leticia emphasized the confusion that emerged when newer reforms such as Common Course Numbering and Cal-GETC were only partially aligned across courses or requirements. Camila added a related concern: even within the same district, students’ options could differ depending on whether their college had secured the same approvals as other campuses. Ching’s (2023) equity sensemaking framework helps name this interpretive work, while Ching’s (2022) attention to power and politics clarifies that not all interpretations carry the same authority within institutions. AOs labeled the limits of streamlining as equity concerns because they saw how reforms could promise clarity while leaving students to navigate unresolved complexity. Felix and Nienhusser’s (2023) equity-centered implementation framework further shows why broadly race-neutral reforms may still reproduce inequity when Students of Color and first-generation students are more likely to encounter gaps, delays, and unclear guidance. For these AOs, streamlining mattered only if students could rely on what the system seemed to promise: that a course, requirement, or pathway would mean what it said it would.

The Cost of an Extra Requirement

AOs also made sense of transfer equity through the consequences of extra coursework for students. In seven interviews, participants connected extra requirements, repeated coursework, or denied course applicability to material consequences for students. In their accounts, an additional course was not a small bureaucratic inconvenience. It could mean another semester, more tuition, reduced financial aid eligibility, lost wages, transportation costs, childcare arrangements, exhaustion, and diminished confidence. These consequences made time and units central to AOs' interpretation of transfer equity. AOs interpreted extra units and repeated courses as signals of institutional inequity rather than isolated advising errors. Building on equity sensemaking, they treated time, units, and repeated coursework as equity cues because these consequences revealed how technical transfer decisions became material burdens for students.

At Canyon Springs College, Daniel's organizational location was apparent as soon as I arrived for the interview. His office was located directly within the Counseling Center, and when I approached the front desk, staff initially asked where I was checking in for an appointment with a counselor. Daniel's articulation responsibilities extended into curriculum and district level articulation work, but his daily work environment remained physically situated within a student-facing counseling space. Meeting with him there helped situate his articulation work alongside the counseling process through which students would eventually experience many of the course applicability decisions he described.

Daniel offered one of the clearest examples of how a technical applicability decision could become an additional course for a student. He described a student who had already completed AP English, then coursework at UC Irvine, and then was still required to take another critical thinking course to transfer to Cal State San Bernardino:

I had a student who . . . had gone to UC Irvine, and they completed the full one-year sequence of writing at UC Irvine. That counts for their bachelor's degree. They also had AP English credit. . . . If they're going to another UC, they're done. . . . But the tricky thing is for Cal State . . . there are some Cal State campuses that said, "No, you didn't meet this critical thinking requirement for us . . ." The student submitted the syllabus, and they still said no, even if we certified it. . . . Then they had to take another critical thinking class to go to Cal State San Bernardino.

Daniel's example moves the analysis from policy to lived consequence. The student had already completed AP English and a full writing sequence at UC Irvine, but still had to take another critical-thinking course because Cal State San Bernardino did not accept that coursework for the same requirement. The syllabus review and general education certification did not resolve the issue. The student had done the work, but the work did not carry across institutions in the way they expected. Daniel then explained why this additional course mattered:

Because they have to pay to take another class, and if they took a three-unit class, that's 54 hours of instruction. So that's a lot of time and money. Maybe they could have been working those 54 hours, and instead they're here taking another class, and they're paying for more tuition.

By calculating the instructional hours of the additional class, Daniel highlighted how institutions can treat these issues as administratively small. A three-unit course becomes 54 hours of class time, plus tuition, study time, transportation, scheduling, and lost wages. Calling it one additional course can make the consequence sound minor. Daniel's calculation shows how quickly that requirement becomes a semester-level demand on a student's life.

Vivian connected the cost of repeated coursework to students' limited time, especially for racially minoritized students who were also working or managing other responsibilities:

I think yes, because they don't have enough time. I mean, a lot of times they are working a lot, and now they have to repeat a course. Yeah, I don't think that's fair. . . . It just takes them longer to transfer.

Vivian's statement connects repeated coursework to time scarcity. Her phrase "they don't have enough time" shifts attention away from transfer as a purely academic process. Time is an equity resource. Students who work significant hours, support family members, commute long distances, or experience financial instability encounter an extra class differently than students with more flexible schedules and resources. For those students, repeating a course can mean rearranging work hours, delaying transfer by another term, or deciding whether the added time is still possible.

The AO documents collected for this study reinforce how much work goes into preventing unnecessary requirements from reaching students. Monthly articulation summaries from Canyon Hollow College documented ongoing work with pass-alongs, course substitutions, TES evaluations, catalog review, UC transfer follow-up, Cal-GETC updates, ADT revisions, and counselor/faculty resources. These documents show the routine labor behind the examples Daniel and Vivian described. These activities are often invisible, but they are directly connected to whether students are required to repeat coursework or can apply prior learning toward a requirement.

Patricia broadened the meaning of cost by focusing on credential loss. She described concern for STEM students who completed substantial coursework but left without an associate degree:

Most STEM majors were leaving without an associate's degree because they follow the seven-course pattern, especially when they're going to UC. But the biggest concern for me is that when that student transfers, and if they stop out and walk away, they have nothing for all that coursework. That's not easy. It can be challenging to some. So we needed to make sure this degree passed. . . . And so it benefits those students. . . . And the ones that I was more concerned about were the Latinos.

Patricia broadens the meaning of "cost." Students could complete significant coursework and still leave without a credential if the institution did not design pathways that recognized their completed coursework. Her concern for Latino students shows how racialized consequences can emerge through degree structure. Patricia was concerned that students could do substantial work, transfer or stop out, and still have no credential that reflected what they had completed. Transfer equity involved more than removing excess units; it also required recognizing student progress in ways that protected them if their educational path was interrupted.

This subsection shows that AOs understood transfer barriers materially. The hidden infrastructure of transfer shaped how much students had to pay, how long they had to remain enrolled, whether they could keep working, whether they could preserve financial aid, and whether they could maintain momentum. Daniel, Vivian, and Patricia each showed a different version of this cost: an additional course required after completed coursework was not accepted, repeated coursework for students who already had limited time, and the possibility of leaving with no credential despite substantial progress. AOs treated extra requirements as institutional signals that something in the transfer process was not working equitably. The equity-centered implementation question is who is most likely to be delayed, depleted, or pushed out when an added requirement is imposed. Formally equal rules can still produce unequal consequences

when students differ in time, money, access to advising, and capacity to recover from institutional error.

Uneven Language, Racialized Consequences

Participants varied in how directly they named race when discussing transfer barriers. In 10 interviews, AOs explicitly connected transfer barriers, policies, or support efforts to Students of Color, racially minoritized students, or named racial and ethnic groups. Two additional participants made more cautious connections, describing race as relevant but harder to name directly within technical articulation work. This unevenness is visible in the accounts of Melissa, Daniel, and Gabriel, who each connected articulation work to equity but did so with different levels of racial specificity. That variation helps explain why the first three sections of this finding cannot be read as only technical concerns. The hidden knowledge students were expected to figure out, the limits of streamlining, and the cost of an extra requirement all carried racialized consequences, even when participants did not always describe them in explicitly racial terms.

In this final subsection, the key issue is how AOs moved between race-conscious and broader equity language when interpreting transfer barriers. Felix and Nienhusser's (2023) equity-centered implementation framework helps frame that tension: implementation can be used to advance racial equity, but it can also remain at the level of generic, compliance-oriented change. In articulation work, this distinction was not always clean. Participants sometimes named race directly, but they also described racialized consequences through access, credit loss, course applicability, advising, geography, family responsibility, and institutional capacity. Transfer policies can carry racialized consequences even when the daily language of implementation remains technical, procedural, or broadly student-centered.

Melissa illustrates one form of this uneven language. She initially distanced her view of transfer from race-specific motivation, but then grounded her thinking in the experiences of Hispanic students, women, and family obligations:

I don't think my view of transfer has ever been racially motivated. I just think if they can transfer for one student, it can transfer for another. . . . But what I'm trying to think of when I start with my articulation process is we have a very large Hispanic population. We also have a larger female population. I myself am a Hispanic female. I know how much culturally family is ingrained, and you basically don't leave home.

Melissa's statement shows how uneven this sensemaking could be. She began with a universal claim that transfer should work the same way for every student, then immediately interpreted her work through the lens of Hispanic identity, gender, family, geography, and cultural expectations around staying close to home. Her account did not fit neatly into either a race-neutral or explicitly race-conscious category. She did not describe articulation as racially motivated, but she still used culturally specific knowledge about her students and community to think through what transfer access required. Felix and Nienhusser's (2023) identity-conscious tenet helps sharpen this point by emphasizing how implementers' social identities and lived experiences shape their understanding, interpretation, and response to reform.

Daniel showed a more cautious version of the same pattern. When discussing efforts to add culturally relevant course options, he hesitated to claim direct racial impact: "I don't want to say that that necessarily is going to help minority students, but I think it's probably nice for them to maybe find a course that maybe they feel they connect more with." Daniel's hesitation reveals the limits of what some AOs felt able to claim. He described a practice with relevance to racial equity, expanding courses in areas such as African American history, Chicano studies, and

Latinx politics, but framed the benefit in terms of student connection rather than direct racial impact. His account shows how equity work could be recognized through representation and belonging without being named as a direct racial equity intervention.

Gabriel named the racialized consequences more directly. Rather than focusing only on whether students saw themselves represented, he questioned whether institutions provided the support racially minoritized and first-generation students actually needed:

Now there's a lot of lip service, and a lot of times people may put flyers with, let's say, a diverse set of students on the flyer, and those are just pretty much actors . . . And so having a real understanding of the kind of supports that the students may need as a first-gen student . . . students . . . come back to see me. They feel like I can actually answer their questions while they go to the university, and they feel like either nobody cares about what they're asking or they don't find the support that they need. And so that's where I feel that racially minoritized students face there, especially if they're first generation.

Gabriel's account distinguishes symbolic diversity from institutional support. Diverse images on flyers do not address the conditions that racially minoritized and first-generation students encounter when they try to navigate transfer. His account also shows why AO work can become a source of continuity for students. Students returned to him because they trusted he could answer questions they felt were not being addressed elsewhere. Compared with Melissa's layered but indirect language and Daniel's cautious phrasing, Gabriel named the racialized stakes more plainly. In his account, representation was not enough if racially minoritized and first-generation students still could not find people who understood their questions and helped them move through the process.

The documents collected for this study show why race could be easy to lose in the daily language of articulation work. Many AO materials, including articulation reports, curriculum committee agendas, course review documents, and statewide articulation materials, rarely name race directly. They more often described transfer in terms of approvals, denials, timelines, submissions, course applicability, Cal-GETC areas, UC transferability, C-ID, and implementation workload. This document language helps explain the unevenness in the interviews. AOs were working in systems where the routine language of the role was largely procedural, even when the consequences of those procedures were not race-neutral. From an equity-centered implementation perspective, the absence of explicit racial language in technical documents does not mean articulation work lacks racial consequences. It shows how racial equity can become submerged beneath procedural language, even when the outcomes of those procedures shape access, delay, and credit recognition for Students of Color.

Across Finding 1, participants repeatedly identified mechanisms that can reproduce racial inequity: hidden information, opt-in advising, inconsistent articulation, extra coursework, unclear reforms, delayed approvals, and uneven institutional capacity. Melissa, Daniel, and Gabriel showed how differently participants named those mechanisms. Melissa moved between universal language and culturally specific knowledge about Hispanic students, gender, family, and geography. Daniel described culturally relevant course options but used cautious language about their racial impact. Gabriel named the racialized stakes more directly by questioning whether representation mattered if students could not find the support they needed. The unevenness in language does not weaken the finding. It shows how articulation work often moves through technical categories even when the consequences are racialized. AOs were making sense of

equity through course applicability, advising access, catalog rights, repeated coursework, and policy implementation, not only through explicit racial equity language.

Finding 1 shows that AOs located transfer equity in the infrastructure that students are expected to navigate but rarely see. They identified information access, policy interpretation, course applicability, credit loss, repeated coursework, and incomplete streamlining as central to whether transfer pathways were workable. AOs assigned equity meaning to technical practices that might otherwise be treated as routine features of articulation work. Their accounts also show why those practices cannot be understood as race-neutral simply because they apply to all students on paper. The interviews showed a range of racial specificity, from Gabriel's direct naming of racially minoritized and first-generation students, to Melissa's culturally grounded but less direct language, to Daniel's cautious framing of culturally relevant coursework. Across that range, participants still pointed to the same broader issue: transfer outcomes were shaped by institutional rules and interpretations that students often encountered too late. Finding 2 turns to the policy environment that produced much of this complexity, showing how AOs interpreted state, district, and local mandates as moving targets that required constant translation, negotiation, and local sensemaking.

Finding 2: Working Through a System that Keeps Changing

This finding addresses the second research question, which asks how articulation officers interpret and make sense of state, district, and institutional policy mandates related to community college transfer and equity. Finding 1 showed that AOs located transfer equity within the hidden infrastructure that students were expected to navigate. Finding 2 turns to the policy environment behind that infrastructure. Participants described articulation work as unfolding amid overlapping reforms, shifting guidance, uneven timelines, and intersegmental differences.

Policies such as Cal-GETC, Common Course Numbering, ADTs, C-ID, ethnic studies requirements, catalog rights, and external coursework rules were often framed as efforts to improve clarity, mobility, or equity. Yet AOs described these reforms as requiring substantial interpretation before they could be applied in local practice.

Across interviews, observations, and documents, AOs described policy implementation as an ongoing process of interpretation and translation. Participants shared this concern from different organizational positions and through different parts of the AO role. Claudia, Daniel, and Camila emphasized the pace and layering of statewide reforms, including Cal-GETC, Common Course Numbering, ADTs, C-ID, and Title 5 changes. Gabriel, Vivian, and Nadia focused on the campus-facing work of translating those changes for faculty, counselors, evaluators, administrators, and students. Patricia and Melissa foregrounded the local conditions that made implementation harder, including limited AO time, expanding role expectations, curriculum backlogs, and uneven campus capacity. Marisol added a related constraint: AOs were often expected to interpret and explain policy after it came down, rather than shape the policy conversation from the beginning.

AOs turned statewide and district mandates into local guidance. They worked through what new rules meant for curriculum review, counseling, evaluations, catalog timelines, district systems, and transfer partners. That work mattered because uncertainty could move quickly across campus. If guidance changed, arrived late, or left key questions unanswered, counselors, evaluators, faculty, and administrators were left to make decisions with incomplete information. Students could then choose courses or follow requirements based on guidance that was still being clarified.

This finding is organized into three sections. First, *When the Rules Keep Moving* examines how AOs made sense of constant policy change and uncertainty across reforms. Second, *Making Policy Make Sense* illustrates how AOs translated mandates into actionable guidance for counselors, faculty, evaluators, administrators, and students. Third, *Statewide Reform, Local Reality* analyzes how statewide policy goals depended on local capacity, institutional relationships, and campus-level implementation. Across these sections, I show that AOs were expected to make policy work even when they were not always included in the design, sequencing, or communication of reforms. This positioned AOs as both interpreters and implementers of equity policy, often without the authority, resources, or early involvement needed to keep confusion from reaching students.

When the Rules Keep Moving

For AOs, policy change became a moving target in three related ways. Claudia emphasized the front end of implementation: tracking legislation, Chancellor's Office updates, statewide webinars, and committee conversations while AB 928 and AB 1111 were still being interpreted. Daniel described the current moment as more compressed than earlier waves of reform, with several major changes arriving at once rather than unfolding gradually. Camila pointed to the confusion created when reforms that sound similar, such as C-ID and Common Course Numbering, remain separate systems with different purposes and implications. Together, these accounts show that AOs were not simply receiving policy updates. They were trying to understand how overlapping reforms interacted, what changed for local curriculum and advising, and what needed to be communicated before uncertainty reached students.

Policy implementation scholarship helps explain why Claudia, Daniel, and Camila experienced these reforms as moving targets rather than settled mandates. Implementation is

rarely a simple matter of applying policy as written; it is shaped by the people, contexts, histories, and organizational routines through which policy is enacted (McLaughlin, 2006; Spillane et al., 2002, 2006; Viennet & Pont, 2017). Felix and Nienhusser's (2023) equity-centered implementation framework is especially useful here because it draws attention to the space between what a policy promises and what local practitioners must do to make it workable. For AOs, that space included tracking legislation, interpreting statewide guidance, distinguishing new reforms from older ones, and determining what students, counselors, evaluators, faculty, and administrators needed to know.

Claudia described this work as a process of tracking legislation, interpreting guidance, and staying involved in statewide spaces:

How do we learn about it? So I try to keep track of legislative changes. And so AB 928 and AB 1111, AB 1111 for common course numbering. That one was a little tricky because . . . common course numbering came from a trailer bill. And with trailer bills, they can start one way and become something completely different. So sometimes legislation is really hard to track. . . . I've tried to join committees and be really active in terms of participating in webinars, participating in committees if I can statewide, and asking questions, advocating. And so it's really about being aware, being active within the system.

Claudia's account shows that implementation started before a reform became a settled campus requirement. She was not waiting for a final memo to tell her what to do. She was tracking legislation, following how the Chancellor's Office and ASCCC interpreted it, joining webinars and committees, and asking questions while the meaning of AB 928 and AB 1111 was still taking shape. Her example highlights one kind of AO labor that can be easy to miss: staying

close enough to policy as it develops to anticipate what the campus will eventually need to explain, revise, or implement.

A local implementation presentation reviewed for this study showed the same kind of policy layering Claudia described. The presentation placed Title 5 updates, AB 928/Cal-GETC, Common Course Numbering, local general education revisions, accreditation considerations, and course outline changes within the same implementation timeline. For AOs, statewide reform arrived as a set of overlapping tasks, each with its own deadline, guidance, curriculum implications, catalog effects, and advising questions. The presentation makes visible the local coordination required before statewide reform could become usable campus practice.

Daniel described the difference between earlier reforms and the current policy environment:

When I started . . . we were talking about the implementation of ADTs and C-ID. Those were the two things that were kind of newer things. . . . So I feel like, at least with that, it was kind of a little bit of a slow buildup. And some of the changes now are just like . . . multiple big things . . . that movie, *Everything Everywhere All at Once*, that kind of thing.

Daniel's comparison locates the current moment in a faster policy tempo. Earlier reforms such as ADTs and C-ID gave him a slower buildup; the current moment required AOs to work across several large reforms at once. His "Everything Everywhere All at Once" comparison captures the compression of implementation work: tracking multiple reforms, learning how they interact, and revising local guidance while existing systems remained in use. Felix and Nienhusser's (2023) equity-centered implementation framework helps name why this layering matters. AOs had to make sense of new mandates while older structures, including ADTs, C-ID, GE patterns, catalog

rules, and local curriculum processes, continued to shape what students, counselors, evaluators, faculty, and administrators needed to know.

Camila's account shifts the issue from speed to overlap. She was trying to make sense of why C-ID and Common Course Numbering remained separate systems when both appeared to address course alignment:

One that I don't understand is why we had C-ID, and then now we have common course numbering. I'm like, isn't that almost the same thing? But it's not, which I get, but I'm like, this is kind of similar, but it's not. . . . Why do we have both of them? Why don't we just get rid of C-ID now if we have common course numbering?

Camila's question captures a different kind of moving target. For her, the challenge was not only that reforms were arriving quickly. Newer reforms also sat beside older ones with similar language and different rules. C-ID and Common Course Numbering both promised alignment, but they did not require the same work or produce the same implications for articulation. As a result, AOs had to explain why two systems that sounded related could still affect curriculum review, articulation, and advising in different ways. Camila's account shows how policy layering created confusion not only for students, but also for the practitioners responsible for making these reforms coherent on campus.

The observation data placed these concerns in statewide professional spaces as well. In the ASCCC session, "Articulation Officers: The Chief Engineers of Curriculum," presenters described AOs as the people who connect community college curriculum to 4-year universities. They named translating curriculum into transfer language, aligning local curriculum with GE standards, C-ID descriptors, transfer pathways, ASSIST, and catalog accuracy, and tracking submission deadlines as central parts of the role. They also noted that AO responsibilities varied

by campus structure and reassigned time. In the ASCCC “CCCCO Updates” and “Common Course Numbering Update” sessions, Common Course Numbering appeared as an active implementation issue, with presenters discussing phase-one denials, inconsistent reviewer feedback, phase 2A and 2B templates, forthcoming guidance, additional template review, funding, technology needs, and longer-term sustainability. These observations show that moving rules created more than individual confusion. They required AOs to follow statewide updates, interpret unresolved guidance, revise local practices, and communicate changes across campus while the statewide process was still unfolding.

Felix and Nienhusser’s (2023) equity-centered implementation framework helps clarify why this layering mattered for equity. Articulation infrastructure all shaped what students could be told about their options. For AOs, the challenge was keeping these pieces aligned enough for counselors, evaluators, faculty, administrators, and students to act on them. When AOs lacked time, authority, clear guidance, or institutional support, policy uncertainty could move into the student-facing parts of transfer.

Across Claudia, Daniel, Camila, and the observation data, policy change appeared as layered and still in motion. Claudia showed the work of following legislation while its meaning was being interpreted. Daniel showed how several major reforms compressed that work into the same period. Camila showed how older and newer systems could sound similar while requiring different forms of implementation. Statewide sessions showed that these were shared professional concerns across the field of articulation. The equity stakes were practical: with limited time and support to keep pace, AOs had to prevent policy uncertainty from reaching students through catalog language, counseling conversations, degree audits, course substitutions, or transfer evaluations.

Making Policy Make Sense

Policy implementation scholarship helps explain why AO translation work mattered. Implementation is shaped by local sensemaking: how actors interpret policy through prior knowledge, professional communities, organizational context, and the everyday settings where policy is carried out (Coburn, 2001; Spillane et al., 2002, 2006). Felix and Nienhusser's (2023) equity-centered implementation framework further directs attention to the campus spaces where equity-oriented reforms are interpreted and applied. In this study, Gabriel, Vivian, and Nadia show three versions of that translation work. Gabriel emphasized the importance of moving Chancellor's Office guidance beyond the AO role so others on campus could act on it. Vivian described a staged process for Common Course Numbering that moved through task force meetings, curriculum committee, instructional councils, faculty emails, department conversations, catalog updates, counselor training, and evaluator guidance. Nadia focused on the student-facing edge of implementation, including catalog language, web FAQs, and draft messages for students. Together, their accounts show that policy became usable through the people, documents, meetings, and systems responsible for applying it locally.

Gabriel described this translation work as a responsibility to move policy information beyond himself:

There are memos that come from the Chancellor's Office, and so those are important to be able to read . . . and have an understanding about how this is going to affect us and being able to explain that to others. . . . If I'm the only one that knows about it, it's not going to work. I got to let other people know that this is happening.

Gabriel's account shows that AO sensemaking was only useful if it traveled across campus. He could read Chancellor's Office memos, track updates, and understand new requirements, but

implementation depended on whether that information reached the people who would apply it. Counselors needed guidance for student advising, evaluators needed to know how requirements affected records and petitions, faculty needed to understand curriculum implications, and administrators needed to anticipate operational changes. Gabriel's point was that policy knowledge could not sit with the AO alone. It had to become shared campus knowledge before students could receive consistent guidance.

Vivian described a more staged version of this work as her campus prepared for Common Course Numbering:

I sit on the task force. I know about it, right? . . . You kind of tell the curriculum committee what's going on. And then I presented at one of the instructional councils. . . where all the deans and the chairs are. . . . And then for phase one, I pull the main faculty who's going to be in charge of those. And then I give them a massive email, what's going on? And then I follow up with like, okay, let's meet. Let's now work on your course.

Vivian's account shows local sensemaking in practice. Common Course Numbering had to be discussed in task force meetings, reviewed through curriculum committee, communicated to instructional councils, explained to faculty, reflected in catalog and website language, and shared with counselors and evaluators. These were the everyday campus settings where policy meaning was worked out and made usable (Coburn, 2001; Spillane et al., 2002, 2006). Felix and Nienhusser's (2023) equity-centered implementation framework helps clarify why these spaces mattered: they were the local sites where a statewide reform became campus practice. Vivian's work turned policy into a communication pathway across the offices and groups that would eventually apply it, including faculty, counselors, evaluators, and students.

Vivian also named the systems and staff that had to be brought into the process:

For the catalog, I can make sure it's updated. . . . This is how we should say in our numbering system. And I would like to have a website of common course numbering. So I did that. And then of course, telling the counselors, training the counselors, making sure, and telling the evaluators. So those are kind of things that we did for phase one. This part of Vivian's account shows the breadth of policy translation. Common Course Numbering required catalog updates, website development, faculty communication, counselor training, and evaluator guidance. The work moved across multiple campus systems and staff roles, which meant that implementation depended on more than one person understanding the policy. Vivian had to help build the conditions for different groups to apply the change consistently.

Nadia described this work at the point where policy language became student-facing communication:

Student-facing communication, I try to be involved with, but it ultimately comes down to the group sending out the communication [to] students. I work heavily with our catalog, so the language that's in the catalog, I have a little bit of more control over . . . our web team is realizing that I'm someone that they can be consulting with on certain things. Like they created an FAQ page for common course numbering, and they asked me to review it before they published it. And then if there's something coming down the pipeline that needs to be communicated, like emailed out to students, I'll send a draft of what I think should be said to different people who are the contacts to those students, and hope that they take my suggestion in mind.

Nadia's account shows how AO sensemaking moved into the documents and messages students might actually encounter. Catalog language, web FAQs, and student-facing messages were part

of the local implementation process because they shaped how students understood changing requirements. Her work also shows that AOs were not always the final authors of student communication, but they often helped determine whether the information was accurate before it moved outward. In Felix and Nienhusser's (2023) terms, these communication spaces mattered because they were part of the local setting where policy became practice. For students, the difference between clear and unclear implementation could appear in the language they read, the guidance they received, and the requirements they believed they had to follow.

Documents collected from Canyon Hollow College showed this translation work in routine AO communication. In a December 2024 Cal-GETC submission email, the AO asked faculty to review courses scheduled for submission, identified the requested Cal-GETC areas, flagged courses that still needed curriculum committee approval, and explained that some new courses could not yet be submitted because they first had to complete UC Transfer Course Agreement review. In a later faculty email, the AO circulated a UC transfer proposal review list for courses scheduled for summer 2025 review and noted that approved courses would become effective in Fall 2025. The list organized courses by identifier, title, and action, distinguishing between new submissions and re-reviews. These documents show AO translation as concrete implementation labor. The AO organized timelines, identified dependencies, asked faculty to verify information, and connected curriculum processes to the future conditions under which courses would appear in advising, catalog language, and transfer applicability.

Observation data echoed this broader communication role across the field of articulation. In a statewide articulation-focused session, presenters described articulation results as information that had to move across departments, deans, curriculum chairs, transfer centers, counseling faculty, admissions offices, district offices, and student information systems. This

reinforced the point Gabriel, Vivian, and Nadia made in their interviews: articulation knowledge became useful when it reached the people and systems responsible for applying it. Course approvals, denials, and transfer attributes had to move into advising, degree audit systems, catalogs, curriculum records, and student-facing guidance before they could shape what students were told about their options.

Gabriel, Vivian, Nadia, the Canyon Hollow College documents, and the observation data show that making policy make sense was a distributed implementation process. AOs translated statewide guidance through meetings, faculty emails, review lists, catalog language, web materials, counselor training, evaluator guidance, and local systems. They also exercised judgment about when information was developed enough to share, who needed it, and how much detail was useful. Felix and Nienhusser's (2023) equity-centered implementation framework helps clarify why this translation labor mattered for equity: unclear implementation could move through the same campus channels students relied on for guidance. For AOs, the work was both technical and equity-oriented. They had to make sure that changing requirements became accurate, usable guidance before students made decisions about courses, requirements, and transfer pathways. When that translation broke down, students could be left acting on partial, outdated, or unclear information, especially students with fewer institutional resources or less access to insider knowledge.

Statewide Reform, Local Reality

Statewide reforms became real through local institutional conditions. Patricia, Melissa, Marisol, and Leticia showed that implementation depended on more than the content of state policy; it also depended on AO time, staffing, authority, campus infrastructure, curriculum systems, and when AOs were brought into policy conversations. Patricia and Melissa

emphasized the expanding scope of the AO role and the uneven capacity available to carry out that work. Marisol and Leticia pointed to a different constraint: AOs were often expected to interpret and implement decisions after major policy conversations had already taken shape. Their accounts show that statewide reform became local reality through institutional conditions that could either support or strain the AO's ability to make policy workable for students.

Felix and Nienhusser's (2023) equity-centered implementation framework helps explain why these local conditions mattered. Their framework directs attention to institutional complexity and to the campus spaces where policy is interpreted, organized, and carried out. Building from the previous section, this subsection shows that these local enactment spaces were unevenly resourced and differently organized across colleges. For AOs, statewide reform became actionable through local systems responsible for curriculum approval, catalog updates, degree audit systems, counselor training, evaluation practices, intersegmental communication, and student-facing guidance. The equity question was whether colleges had the capacity and conditions to implement reforms in ways that protected students from confusion, delay, or credit loss.

As Table 3.1 shows, participants worked under different organizational arrangements. Gabriel held a 70% articulation assignment, Elena held a 90% assignment, and Daniel's work was split between an 80% campus AO assignment and a 20% district articulation role, while many other participants were formally assigned to articulation full time. Yet the 100% assignments also differed. Marisol's full-time assignment depended on temporary funding, Nadia had to periodically reapply for her reassignment, and Camila described her full-time assignment as recently being questioned. Antonio was formally assigned to articulation full time but continued to carry general counseling responsibilities, while Melissa's full-time AO position also

included additional responsibilities as Curriculum Chair. The location of articulation also varied across colleges, including Counseling, Student Services, Academic Affairs, and Instruction. Staffing showed another important difference. Vivian was the only participant who worked with an established full-time Articulation Specialist; Marisol had approximately four hours per week of specialist support, and Patricia had temporary, semester-funded assistance. These differences show that the percentage assigned to articulation was only one part of local capacity. How stable that assignment was, what other responsibilities remained, where the role was situated, and whether additional staffing was available also shaped the work AOs could take on.

One site visit brought these institutional conditions into the fieldwork itself. I had planned to interview Elena at her college, but the campus lost power before our meeting. Elena explained that power outages occurred with some regularity, so I relocated the interview to an office I was able to secure at a nearby 4-year university. The disruption was temporary for the interview, but it provided context for the conditions surrounding her work. Much of articulation depends on access to digital systems, records, communication, and coordination across offices. In Elena's case, even basic campus infrastructure could interrupt that work.

Patricia's account illustrates how these organizational conditions shaped the work locally. Although she held a full-time AO assignment, the scope of her role extended well beyond course-to-course articulation into committees, meetings, partnerships, faculty support, administrative conversations, and local policy implementation. Reflecting on how much the role had grown beyond course-to-course articulation, Patricia explained:

I have felt over the years, pulled and pulled more in terms of being in these committees and meetings more than really doing what I have to do with articulation. That's what's really interesting about this job. I was hired to be the articulation officer to make sure I

articulate those courses, which I do the best that I can, but because I am so busy with this other stuff that they want me to do for the college and work with the faculty, work with administrators, it takes away.

Patricia's account shows that statewide reform did not simply add new tasks to the AO role; it changed the institutional reach of the role itself. Articulation work became tied to committee participation, faculty coordination, administrative planning, and local policy interpretation. This is important because each new reform required AOs to help the college understand what had changed, who needed to respond, and how local processes needed to adjust. Patricia's account makes visible a key local reality of statewide reform: implementation depended on AOs having enough time, recognition, and institutional support to absorb responsibilities that continued to grow.

Melissa's account adds another layer by showing how staffing, backlogs, campus silos, and role overload shaped local capacity. Although she held a 100% AO appointment, she also served as curriculum chair and described rebuilding local curriculum processes after years without a full-time AO. Even with a full-time AO role, she described the workload as difficult to sustain:

Even then, at a hundred percent, I'm like, there's still not enough time. So I've told my friends who are in a smaller percentage, I'm like, how the heck? What do you do? And they're like, I probably don't do as much as you do, obviously, because I don't have the time. So it's just, I guess, about identifying what their priority is for their campus.

Melissa's comment shows that statewide mandates did not land on equal ground. AOs with less appointment time had to prioritize, defer, or leave some work undone. Even a 100% appointment did not guarantee enough time when the AO was also addressing curriculum backlogs, rebuilding

processes, supporting faculty, tracking state deadlines, and managing local implementation. Statewide reporting reflected the same capacity problem. The California Community Colleges Chancellor's Office (2026f) reported that only 51% of AOs were assigned full-time to articulation, while 39% were half-time and 10% were less than half-time; 72% reported having no clerical support. The same report showed that 91% of AOs identified the expanding responsibilities of the role as a moderate to extreme challenge, while 79% identified the amount of AO time as a moderate to extreme challenge. These data strengthen Melissa's point: equity-centered implementation was shaped by institutional conditions, not policy intent alone. A reform designed to simplify transfer could still be implemented unevenly if colleges had unequal staffing, outdated systems, or limited capacity to absorb the workload.

The Metro Community College District Academic Senate resolution establishing a task force on course alignment, along with the district course alignment task force recommendations, reflected this layering of work in another local context. The resolution framed course alignment as a student-facing concern because students often enroll across multiple colleges in the district and may assume that courses with the same subject, number, and title are equally applicable. The task force recommendations translated that concern into district-level implementation work by reviewing Course Outline of Record fields, identifying which elements should be aligned, and outlining next steps for timelines, resources, course prioritization, and faculty guidance.

Arroyo City College's Articulation Resources: Curriculum & Instruction Processes and Timelines for Course Articulations to Universities showed how similar complexity operated at the campus level. The document identified several layers of transferability, including CSU elective credit, C-ID, UC elective credit, Cal-GETC, and course-to-course articulation, each with different decision-makers and timelines. Course-to-course articulation, for example, could take

“weeks, months, years, or never.” These documents make institutional complexity visible in the way Felix and Nienhusser’s (2023) framework describes. New reforms entered an already crowded system of curriculum routines, district alignment efforts, external review timelines, catalog cycles, and intersegmental approval processes. Implementation therefore depended on local actors’ ability to coordinate multiple moving parts at the same time.

Marisol added a different local condition: the timing and authority of AO involvement. She described AOs as responsible for interpreting policy after it came down from the state, rather than as actors with full voice in shaping the policy itself:

I think I feel still like we’re more a representative of policy, more so than the voice . . . I find myself more as the interpreter for policy once it comes down from the state, where I feel like my job is to educate my peers and work with my curriculum chair, with the academic senate to interpret and explain policies to other faculty and get our college up to speed with it. I don’t feel so much as we’re the ones running those policies quite yet... I feel like we’re more like at this point, we’re interpreting and trying to develop a plan to implement on our campuses.

Marisol’s account shifts the subsection from capacity to authority. Patricia and Melissa showed that implementation depended on role scope, staffing, and time, while the Metro and Arroyo documents showed the district and campus systems that had to absorb reform. Marisol focused on where AOs were positioned once policy decisions moved toward implementation. Her work was tied closely to implementation: educating peers, working with curriculum leadership and academic senate, explaining policy to faculty, and helping her campus develop implementation plans. Yet she distinguished between representing policy after it arrived and having a voice in shaping policy before implementation began. Her account illustrates constrained implementer

agency. AOs were close enough to understand how policy would affect local practice, but not always positioned early enough to shape the policy conditions they were asked to carry out.

Leticia described this late-inclusion pattern as something she had seen across multiple transfer reforms over more than two decades:

Discussion, decisions, et cetera happen at a very high level. And the articulation officers kind of see it coming and say, we see problems with that. They kind of try and get in the conversation sometimes successfully, but maybe a lot of times not. And then when it comes time to implement things, “Oh, well we really need to have the input of the articulation officers. They are the ones that sort of know how this all works.” . . . But then we kind of get like, “Okay, now make this all work.” And that’s been the pattern for . . . 25 years.

Leticia’s account broadens Marisol’s point historically. The issue was not only that AOs interpreted policy after it came down from the state, but that this pattern had repeated across reforms such as CAN, C-ID, and newer transfer initiatives. Leticia described AOs as practitioners who could often see implementation problems early, but whose expertise was more likely to be sought once a reform had to be made workable. Her account shows why policy histories matter in equity-centered implementation: AOs inherited not only new mandates, but also a recurring structure in which their technical knowledge became most visible after major decisions were already underway. This left AOs responsible for making reforms work locally, even when they had limited influence over the design and sequencing of those reforms.

Across the organizational variation summarized in Table 3.1, participant accounts, documents, and statewide data, statewide reform reached colleges as unfinished work that AOs had to make actionable within uneven local conditions. Patricia showed how articulation work

expanded across committees, partnerships, faculty support, administrative conversations, and local policy implementation. Melissa showed that even a full-time AO appointment could be strained by curriculum backlogs, campus silos, role overload, and rebuilding local processes after years without a full-time AO. The California Community Colleges Chancellor's Office data placed Melissa's account in broader context by showing uneven AO time, limited clerical support, and widespread concern about the expanding responsibilities of the role. The Metro and Arroyo documents showed that local implementation also depended on district alignment, course outline review, external approval timelines, catalog cycles, and intersegmental processes. Marisol showed how AOs interpreted reforms they did not fully control, while Leticia showed that AO expertise was often recognized late, after decisions had already been made and implementation problems had surfaced.

These local realities mattered for equity because implementation capacity shaped how quickly, clearly, and accurately transfer information reached students. When AO time, staffing, curriculum systems, district coordination, or external review timelines were stretched, colleges had less capacity to catch problems before they appeared in advising, evaluation, catalog language, or student-facing guidance. For Students of Color, first-generation students, returning students, and students with fewer institutional resources, these gaps could become more than administrative delays. They could affect which courses students took, whether credits counted, how long students remained enrolled, and whether transfer pathways remained usable.

Statewide reforms could expand possibilities for transfer equity, but these possibilities depended on the local conditions under which reform was implemented. Felix and Nienhusser's (2023) framework helps explain why: equity-centered implementation depends on the conditions under which implementers work, the policy histories they inherit, the local enactment zones they

move through, and the agency they have to shape policy in practice. AOs occupied the space between statewide promises and campus realities. They interpreted mandates, translated guidance, coordinated local actors, identified risks, and tried to keep students from encountering avoidable confusion. Yet they often did this with uneven authority, limited staffing, compressed timelines, and late inclusion in policy conversations. In this sense, AOs were managing the distance between what reform promised and what local systems could actually deliver.

Finding 3: Reducing Transfer Risk without Full Authority

This final finding addresses the third research question: what role do articulation officers play, if at all, in influencing the transfer process for racially minoritized students at their colleges? If Finding 2 showed how AOs made sense of changing policy environments, Finding 3 examines how they used that knowledge to reduce transfer risk for students. Their influence appeared in two related forms. In the first, Leticia, Vivian, and Elena showed how AOs reduced risk before students encountered errors by making course applicability clearer, maintaining articulation infrastructure, and helping counselors and evaluators rely on documented agreements. In the second, Gabriel, Antonio, and Camila showed how AOs intervened when formal systems were incomplete, delayed, or shaped by receiving-institution decisions they could not control. Across interviews, observations, and documents, AOs described their influence as consequential, but often indirect. They did not always work directly with students, and they never controlled the entire transfer process. Their influence appeared in the conditions students relied on to transfer: courses that counted toward requirements, clarified expectations, accurate information for counselors and evaluators, and protection from unnecessary units, repeated coursework, or delayed progress.

This influence mattered because transfer mistakes are not experienced evenly. A course that does not count, an outdated agreement, an unclear GE requirement, or a delayed evaluation may appear to be a technical institutional issue. For students, those issues can lead to additional semesters, financial aid complications, repeated coursework, or uncertainty about whether transfer is still possible. Students with more time, money, institutional knowledge, or access to advocates may be better positioned to recover. Racially minoritized students, first-generation students, returning students, and students balancing work, family, and financial pressures often have fewer opportunities to learn from these errors. In this way, AOs influenced transfer by reducing the institutional risk students otherwise had to carry themselves.

Ching's (2023) equity sensemaking framework, grounded in organizational sensemaking scholarship, helps explain how AOs understood this influence. Sensemaking describes how people interpret events that disrupt normal routines, notice cues from their environment, and move from ambiguity toward action (Maitlis & Christianson, 2014; Weick, 1995). In this study, AOs made sense of equity through the practical consequences of transfer policy: unclear requirements, incorrect advising, courses that did not count, and delayed information, all of which disrupted students' progress. Rather than treating these as isolated technical problems, participants interpreted them as signs that transfer risk was accumulating somewhere in the system. Their equity sensemaking emerged through the technical spaces of transfer, where decisions about articulation, course applicability, catalog rights, substitutions, GE approvals, and counselor guidance could either reduce or reproduce student-facing risk.

Felix and Nienhusser's (2023) equity-centered implementation framework further clarifies the conditions under which AOs could act. They argue that implementation lies between reform promises and eventual outcomes, as institutional actors translate what is promised into

what is practiced. For AOs, this middle space mattered because transfer reforms did not automatically reduce inequity once they reached a campus. Their discretion allowed them to make transfer policy usable locally through interpretation, communication, documentation, and follow-up. Their authority, however, remained limited by intersegmental decisions, staffing conditions, curriculum timelines, and governance structures that shaped whether courses ultimately counted. This meant that AOs could reduce transfer risk, but they could not eliminate the systems that produced it. AOs used policy implementation to reduce transfer risk for students, even as their authority remained partial and unevenly recognized.

The organizational conditions summarized in Table 3.1 also help situate this influence. Participants entered this work with different amounts of articulation time, different levels of stability in their assignments, and uneven staffing support. These conditions shaped how much time and capacity AOs had to maintain articulation systems, respond to problems, and intervene before transfer risk reached students. The sections that follow trace this influence across two forms of risk reduction. First, I show how AOs helped make coursework count before students lost time by clarifying course applicability and maintaining the articulation infrastructure that counselors, evaluators, and students relied on. Second, I show how AOs advocated for students when transfer systems fell short by using discretion, documentation, and relationships to respond to problems they could not fully control.

Making Coursework Count Before Students Lose Time

AOs influenced transfer by keeping course-counting processes clear enough for students, counselors, and evaluators to use with confidence. This role was often indirect. AOs were not always student-facing, yet their work was deeply student-centered. Students might never see the articulation request, the course outline review, the ASSIST update, or the consultation with

faculty. Those decisions still determined whether a course met a major requirement, satisfied general education, counted as elective units, or needed to be repeated after transfer.

This course-counting work mattered because transfer pathways are difficult to navigate when students and their advisors must interpret multiple layers of requirements with unclear or inconsistent information (Soliz & Mesa, 2023). Transfer research has also shown that articulation policies are intended to clarify movement across institutions, but their effectiveness depends on how these policies are structured, communicated, and implemented locally (Gross & Goldhaber, 2009; Taylor & Jain, 2017). For racially minoritized students, first-generation students, returning students, and students balancing work, family, and financial pressure, a course that did not count could mean more than an academic adjustment. It could mean another term enrolled, another set of fees, another shift rearranged, or another delay in reaching the university. In California, this risk is especially consequential because transfer has been described as bureaucratic, inconsistent, and confusing, with students sometimes paying \$36,000 to \$38,000 more to earn a bachelor's degree than students who begin directly at a UC or CSU (Campaign for College Opportunity, 2017). This is why the preventive side of AO work mattered: clearer articulation reduced the chance that students would discover too late that a course had not moved them closer to transfer.

This student-centered purpose was clear in Leticia's description of the AO role. Leticia offered the clearest statement of the preventive work at the center of this subsection: articulation was about making course applicability visible to students and counselors before they made decisions. She explained:

The purpose of my role [is] to help to ensure the courses and the curriculum is connected so that when a student is choosing a course, when a counselor is putting a course on an ED plan, that they know how that is going to count for their major. For GE, is it elective

units? We need to have that in writing, needs to be clear to everybody ultimately to help the student achieve their goals in the most efficient way. They're not repeating courses. They know that [they] can have some guarantee that what they're taking is going to help them meet their goals.

Leticia's account names the central form of AO influence in this section: making coursework legible before students lose time. Her emphasis on the importance of course applicability "in writing" matters because transfer decisions often depend on documentation that students do not control. A counselor can add a course to an educational plan with greater confidence when the articulation record is clear. An evaluator can apply external coursework more consistently when the agreement is documented. A student can make a course-taking decision with less risk when the institution has already clarified how the course counts. In this sense, Leticia's account functions as more than an individual example; it establishes the broader purpose of articulation as preventive infrastructure. AOs reduced transfer risk by shifting uncertainty from students to institutional systems, where it could be resolved earlier.

Observation data from a statewide articulation-focused session reinforced this student-centered purpose. In the session, presenters described AOs as the practitioners who "make that connection" between community college curriculum and 4-year universities. They explained that the point of articulation was to allow students to receive lower-division university credit for completed community college coursework so that "when they transfer, they don't have to repeat." In that professional framing, AO work determined "how far and how fast" students could move because articulated lower-division coursework brought them closer to upper-division major requirements without duplicating courses. The outcome was a pathway that allowed students to carry forward the progress they had already made at the community college and avoid

repeating coursework after transfer. This observation extends Leticia's point by showing that the preventive purpose she described was also conveyed in statewide professional spaces.

Vivian's account helps explain the technical systems behind that student-centered outcome. Where Leticia described the purpose of making coursework count, Vivian described the infrastructure required to do it. Her role included updating ASSIST, working with faculty to keep courses current, submitting articulation requests to 4-year institutions, and attending to general education, course-to-course articulation, C-ID, transfer degrees, Cal-GETC, local degrees, and Common Course Numbering. She described this work as a "domino effect" because one articulation responsibility pulled her into several related curriculum and transfer systems:

So my main goal is to, of course, update ASSIST, to manage that, to work closely with our faculty to make sure their courses are updated, and to submit those requests to the 4-year schools articulation... make sure our courses are submitted for general education, make sure we get the course-to-course articulation, the major articulation. . . . And then tied to that is then we have the C-ID, right? The C-ID courses, you've got to make sure it's updated, make sure it's submitted. And tied to that are the transfer degrees. . . . So it's like a domino effect. . . . So, really helping faculty with pretty much the A-to-Z curriculum.

Vivian's account shows why making coursework count required more than submitting individual articulation requests. A course had to move through several systems before students could rely on it: local curriculum review, ASSIST, UC transferability, Cal-GETC, C-ID, ADT templates, catalog language, and course-to-course agreements. Her "domino effect" captures the layered infrastructure required for coursework to retain value across institutions. Her account adds organizational texture to Leticia's broader claim: course applicability depended on linked

systems, timelines, approvals, and records that students rarely saw. Ching's (2023) equity sensemaking framework helps name the equity work inside these technical decisions. AOs were interpreting how curriculum choices, effective dates, and approval processes shaped students' ability to complete transferable coursework without losing credit or momentum. Equity sensemaking emerged through the practical question of whether a course would actually help students move forward.

During my visit to Westbridge College, Vivian went beyond describing these systems and showed me one of the tools she used to carry out the work. Sitting beside her computer in her office, I watched as she opened TES and walked me through the dashboard used to research and maintain course equivalencies. She showed me how equivalencies were organized across institutions and how the system supported the evaluation work taking place behind the scenes. Seeing the platform while Vivian explained her work gave greater context to the "domino effect" she described. What may appear to a student as a single determination about whether a course counted rested on a much larger collection of institutional records, prior evaluations, course information, and continued review.

Documents from Canyon Hollow College make the kind of infrastructure work Vivian described visible. Monthly articulation summaries listed ADT updates, faculty consultations, UC TCA uploads, UC transfer follow-up, pass-alongs and course substitutions, TES evaluations, TES database equivalencies, counselor consultation, and updates to counselor resources. These activities may appear procedural, but each one could affect whether a student's prior or current coursework applies toward a requirement. The documents also showed that this work required coordination with faculty, department chairs, discipline experts, curriculum committees, counselors, and evaluators. Together, Vivian's account and the Canyon Hollow College

documents show that making coursework count required ongoing maintenance across several campus systems before students, counselors, and evaluators could rely on course-counting information.

Elena connected this technical infrastructure to student progress. Her account shifts the focus from maintaining course applicability to what that maintenance made possible for students: planning within a reasonable unit range.

Ideally, again, depending on the student's goal . . . we can make plans that are cookie-cutter. This is ideal, but at the end of the day, the student I'm in front of in their life. . . .

The ideal transfer pathway, if they're working towards a baccalaureate degree, is to get out of the California community college in 60 units, 70 at the most . . . if we can get the ideal transfer plan to include in those 60 to 70 units, all of their lower division general education . . . and majority of their lower division major prep, that is ideal. And the only

way that happens is with articulation agreements. Otherwise, it's just a big question mark.

Elena's description of transfer becoming a "big question mark" without articulation agreements captures why AO work mattered for racially minoritized students. When articulation was unclear, students had to make decisions without knowing whether a course would satisfy GE, major preparation, elective units, or transfer certification. Students with more institutional knowledge or access to informed advocates were better positioned to recover from that uncertainty. Students with fewer resources could be left with excess units, repeated coursework, or delayed transfer. Elena's account adds the planning dimension to this subsection: articulation agreements helped turn uncertain course-taking into a pathway students and counselors could actually use. Her account links articulation agreements to the reduction of transfer risk because they gave students and counselors a clearer basis for planning within a reasonable unit range.

Felix and Nienhusser's (2023) equity-centered implementation framework helps clarify how this work functioned as influence without full authority. Across Leticia, Vivian, the Canyon Hollow College, and Elena, AOs influenced transfer by making course applicability more reliable before students encountered the consequences of an error. AOs could not control every external review, the receiving institution's decision, or the statewide timeline that determined whether coursework counted. Their discretion operated through earlier points of intervention: identifying gaps, tracking approvals, consulting faculty, updating records, reviewing substitutions, and communicating applicability to counselors and evaluators. These actions helped move transfer policy from promise to practice through the everyday maintenance of articulation infrastructure. In this way, AOs reduced transfer risk for racially minoritized students by making counselors, evaluators, faculty, and student-facing offices less likely to pass uncertainty onto students.

Advocating for Students When Transfer Systems Fall Short

AOs influenced transfer by advocating for students when formal systems left students exposed to risk. Even when AOs worked to make course applicability more reliable, transfer systems remained vulnerable to breakdowns they could not fully control. Transcripts were delayed or lost, receiving institutions declined articulation requests, articulation gaps appeared in ASSIST, or students had to rely on course substitutions after transfer. In these moments, AOs could not always change the structure that produced the problem. Their influence appeared through discretionary action: warning students, helping them preserve documentation, following up with receiving institutions, using relationships to open doors, and stepping beyond the expected boundaries of the role to keep students from carrying the consequences alone.

Gabriel described a misalignment between what the transfer process required and what his college's infrastructure could support. His example shows the most direct form of advocacy in this subsection: stepping in when a basic transfer process was unreliable. As his college did not have eTranscripts, students had to rely on mailed transcripts. If the transcript was delayed, lost, or not processed, students might not know something had gone wrong until confusion had already accumulated. Gabriel explained:

I think that there's going to be a misalignment in terms of when the work doesn't get done, it hurts our students, and it's going to hurt the students who will come from racial minoritized backgrounds. So if let's say that right now we don't have eTranscripts, I think it's crazy that we don't have eTranscripts and so they have to mail out the transcripts, but if they don't do it or it gets lost in the mail, so sometimes I would actually, I tell the students to give me their transcripts and I would deliver it myself to Cal State San Bernardino because then I know that that got delivered. But if it doesn't happen, they don't communicate that to the students, and then things can, the students may not be aware, and then it's going to cause more confusion and frustration for those students.

Gabriel's account frames advocacy as direct intervention. He could not create an eTranscript system, control the mail, or require the receiving institution to notify students when records were missing. He could identify where the process was likely to fail and act before that failure became the student's burden. Driving transcripts to a receiving institution was not part of a formal articulation workflow. It was extra labor used to protect students from a system that lacked reliable infrastructure. His statement that these gaps "hurt our students" and especially students from racially minoritized backgrounds makes the equity stakes explicit. A missing transcript

could lead to a delayed evaluation, an unresolved admission step, confusion about next steps, or another moment when students lose momentum. Gabriel's example shows that AO advocacy sometimes took the form of physically moving documents through a system that could not be trusted to move them reliably.

Gabriel's example also shows what "without full authority" looked like in practice. Felix and Nienhusser's (2023) equity-centered implementation framework helps explain Gabriel's discretionary action through the concept of the zone of tolerance, or the latitude local implementers have to act within systems that both enable and restrict their agency. Gabriel's authority did not extend to fixing transcript technology or requiring clearer interinstitutional communication. Still, he used the discretion available to him to reduce the likelihood that students would be left unaware of a failed transfer step. His intervention operated inside a narrow zone of tolerance: he could not redesign the transcript system, but he could use local knowledge and personal action to make one vulnerable transfer step more reliable for students.

Antonio described a more anticipatory form of advocacy. Rather than stepping in to move a document through the system, Antonio prepared students and counselors for an articulation gap he expected them to encounter later. He explained that San Diego State did not articulate with colleges outside the San Diego area, which meant students could be required to pursue course substitutions after transfer. Since Antonio could not compel the receiving institution to establish articulation agreements, he developed a documentation strategy for students and counselors.

San Diego State, I have a problem with San Diego State. . . . They do not articulate with anyone outside of San Diego. . . . I tell every single one of my students and all the counselors: if you're going to San Diego State, keep every syllabus, show them how to look up our [course outlines], or let me know if they're my student. Then I'm like, just

tell me. Because every time they transfer, there's certain courses that they'll say, okay, that's fine. But the other ones, they have to go through a course substitution process. Antonio knew students might encounter missing articulation after transfer, so he told them to keep syllabi and course outlines before they needed them. This strategy mattered because articulation gaps often become visible too late, after students have already left the community college and are trying to prove the value of coursework they completed elsewhere. By telling students and counselors which documentation to preserve, Antonio gave students something they could use later in a course-substitution process. His strategy did not eliminate the receiving institution's practice. It reduced the chance that students would enter that process without supporting documentation. Antonio's example shows advocacy as preparation: he could not remove the articulation gap, but he could help students carry evidence into a system that might later ask them to prove their coursework should count.

Camila made the receiving-institution dynamic more explicit. Her account adds a structural layer to Gabriel's and Antonio's examples by showing how receiving-institution priorities, geography, and feeder status shaped which articulation requests were reviewed.

There are certain schools that, if you don't send students, a lot of students to them, or if you're not in the local area, you're kind of on the back burner, and you don't really have any articulation that can be found on ASSIST. There's a lot of holes. And there's one particular school that I don't even send requests to. They told me we're not going to review the request.

When asked whether this was San Diego State, Camila confirmed that it was and explained, "You are not a top feeder school. And I'm like, okay, is this the chicken or the egg? Because if I had articulation, maybe I would have more students to send you." Camila's account shows how

student opportunity can be shaped by geography, feeder status, and institutional capacity. If a receiving institution deprioritizes articulation requests from colleges outside its feeder network, students at those colleges encounter a thinner pathway. ASSIST may show “holes” where agreements should be, leaving students and counselors with less information to plan from. Camila’s “chicken or the egg” question captures the cycle: a college may not send many students to a university because articulation is missing. In contrast, the university may decline to build articulation because the college does not already send many students. Students inherit the consequences of institutional relationships they neither see nor can influence. Her account adds a structural layer to the advocacy examples: AOs were not only responding to isolated breakdowns, but to intersegmental patterns that shaped which students had clearer transfer pathways available to them.

Observation data from regional AO meetings showed that these breakdowns were not isolated to individual participants. In one Metro Community College AO meeting, AOs worked through how to evaluate competency-based coursework when statewide GE policy offered no clear guidance and the transcript did not provide enough curricular information to support certification. The discussion showed AOs weighing student benefit against the risk of applying credit without a defensible policy basis. In another regional meeting, an AO named communication as the one change, beyond staffing, that would most improve the role, explaining that universities sometimes changed requirements without community college AOs or counselors knowing until students were denied. Together, these observations show AOs using peer consultation to interpret risk when formal guidance or interinstitutional communication was incomplete. These observations reinforced the same pattern found in interviews: when systems

were unclear, delayed, or disconnected, AOs tried to protect students by interpreting risk, seeking peer confirmation, and deciding what guidance could be responsibly offered.

For racially minoritized students, first-generation students, returning students, and students with fewer resources, these gaps matter because missing articulation can shift the burden of proof onto the student. Students with access to knowledgeable counselors, institutional insiders, or the confidence to challenge a decision may be better positioned to pursue substitutions after transfer. Students without those resources may accept the missing agreement as final, repeat coursework, delay progress toward their major, or change their transfer plans. Ching's (2023) equity sensemaking framework helps explain how AOs interpreted these breakdowns as equity issues. Across Gabriel, Antonio, Camila, and the regional observations, AOs noticed different cues that transfer systems were failing students: a transcript process that could leave students unaware their records had not arrived, missing ASSIST agreements that made transfer pathways harder to plan, receiving-institution silence when articulation requests were submitted, repeated reliance on course substitutions after transfer, transcripts that could not be evaluated cleanly, and communication gaps that left counselors learning about changed requirements only after students were denied. AOs interpreted these cues by asking who would absorb the consequences when the formal system did not provide a clear pathway. Their sensemaking turned technical warning signs into equity concerns because the likely costs were student-facing: lost time, repeated coursework, delayed evaluations, uncertainty, and the burden of proving that prior learning should count.

These examples show advocacy as a form of transfer repair. Gabriel physically delivered transcripts when document systems were unreliable. Antonio prepared students and counselors to preserve syllabi when the receiving institution's articulation was limited. Camila identified how

feeder status and geography created gaps in articulation that could restrict student mobility. The regional observations showed AOs using peer consultation to navigate unclear policy and communication breakdowns before students were left with unsupported decisions. These were different forms of advocacy: direct intervention, anticipatory preparation, structural diagnosis, and collective sensemaking. Each example shows AOs working from a constrained position. They did not control transcript systems, receiving-institution priorities, intersegmental articulation practices, or statewide policy guidance. Their influence appeared in how they anticipated harm, developed workarounds, and sought to prevent institutional failure from becoming an individual student's problem.

AOs influenced the transfer process for racially minoritized students by reducing risk at points where transfer systems became unreliable. Their advocacy was often practical and local: a transcript delivered by hand, a syllabus saved for later, a course outline shared, a receiving institution contacted, a student warned before a problem surfaced, or a peer group consulted when policy guidance was unclear. Across both subsections, this influence appeared in prevention and repair: making coursework count before students lost time and intervening when formal systems left students exposed to risk. These actions did not resolve the structural inequities of transfer. They show how AOs used limited authority to protect students from avoidable loss of time, credit, and momentum. In this sense, AOs were consequential because they operated at the points where policy, infrastructure, and students' actual transfer experiences intersected.

CHAPTER 5: DISCUSSION AND IMPLICATIONS

Returning to the Promise and Limits of Transfer

California community colleges have long been understood as an entry point to higher education and social mobility. Within California's higher education system, transfer is one of the primary ways community colleges fulfill that role, especially for students who begin their postsecondary education outside a 4-year institution. Transfer allows students to complete lower-division coursework at a community college before moving to a university, making the baccalaureate more accessible and affordable for many students (Taylor & Jain, 2017). The reality is, transfer does not work equally well for all students. Students continue to encounter confusing requirements, excess units, credit loss, unclear advising, and inconsistent pathways across institutions (Campaign for College Opportunity, 2017; Fink et al., 2023). These challenges are especially consequential for racially minoritized, first-generation, low-income, returning students and student parents, who often have fewer resources to absorb delays, repeated coursework, or misinformation.

This dissertation examined one group of institutional actors whose work is central to the transfer function but often overlooked in transfer equity conversations: articulation officers. The study asked how articulation officers make sense of the transfer process for Students of Color, what opportunities and hurdles they identify in supporting Students of Color who aim to transfer, how they interpret state, district, and institutional policy mandates, and what role they play, if any, in influencing the transfer process for racially minoritized students. Drawing on interviews with 14 California community college articulation officers, observations of statewide and regional articulation-related professional spaces, and articulation and transfer policy documents,

this study examined how AOs understood their role within California's changing transfer landscape.

Across the findings, articulation officers appeared as important actors in the infrastructure of transfer. Their work was not limited to paperwork or technical requirements. It shaped whether courses counted toward general education, major preparation, elective credit, transfer degrees, and university requirements. AOs interpreted policy changes, maintained articulation agreements, worked with faculty and curriculum committees, updated transfer records, supported counselors and evaluators, and communicated with receiving institutions. Through this work, they helped determine whether transfer policies became actionable for students or remained a set of complex requirements that students had to navigate on their own.

The central argument of this chapter is that California's transfer promise depends on articulation infrastructure and AO labor that are consequential for racial equity, unevenly supported in practice, and often overlooked in transfer policy and student success conversations. Statewide reforms such as Associate Degrees for Transfer (ADTs), Cal-GETC, Common Course Numbering, and AB 928 are intended to simplify transfer and reduce barriers for students. However, these reforms do not become clear or usable simply because they are adopted at the state level. They depend on local interpretation, documentation, communication, coordination, and repair. Articulation officers carry much of this work across curriculum processes, academic senate governance, counseling, evaluation, district systems, ASSIST, and UC/CSU intersegmental expectations.

In this chapter, I discuss what the findings mean for transfer equity, articulation work, and policy implementation. I first synthesize the study's three findings through the theoretical frameworks guiding this dissertation: Ching's (2023) equity sensemaking framework and Felix

and Nienhusser's (2023) equity-centered implementation framework. I then discuss four broader claims that emerged from the study. First, the transfer maze is an infrastructure problem that is built into the systems students are expected to navigate. Second, streamlining policy does not automatically produce transfer equity. Third, articulation officers function as equity implementers in technical roles. Fourth, race-conscious work can be submerged in procedural language. Finally, I conclude by discussing the study's contributions to the literature, implications for policy and practice, limitations, and directions for future research.

Transfer equity depends on what happens before students ever encounter a pathway, meet with a counselor, or submit a transfer application. It depends on whether courses count, requirements are clear, policies are translated, and institutional systems protect students' time and momentum. Their work shapes how the structural inequalities built into transfer are carried into practice, including whether they are caught early, reduced, or passed on to students as delays, excess units, and unclear pathways.

Summary of Findings and Theoretical Framing

This study examined how California community college articulation officers understood transfer, equity, and policy implementation within a changing statewide transfer landscape. Across the findings, AOs described transfer as more than a pathway students follow or a set of requirements they complete. Transfer was instead shaped by institutional systems that determined whether courses counted, requirements were clear, records were accurate, and policies could be used in practice. Course agreements, general education certification, catalog rights, local exceptions, curriculum timelines, ASSIST updates, receiving-institution decisions, and communication across counseling, evaluation, faculty, administration, and intersegmental partners all shaped how transfer worked for students.

Table 5.1 synthesizes the study’s three findings and one cross-cutting theme. The table connects what AOs described across the data, how those findings are interpreted through the study’s theoretical frameworks, the bodies of literature extended by the study, and the equity stakes that emerged from the analysis.

Table 5.1

Synthesis of Findings, Frameworks, Literature, and Equity Stakes

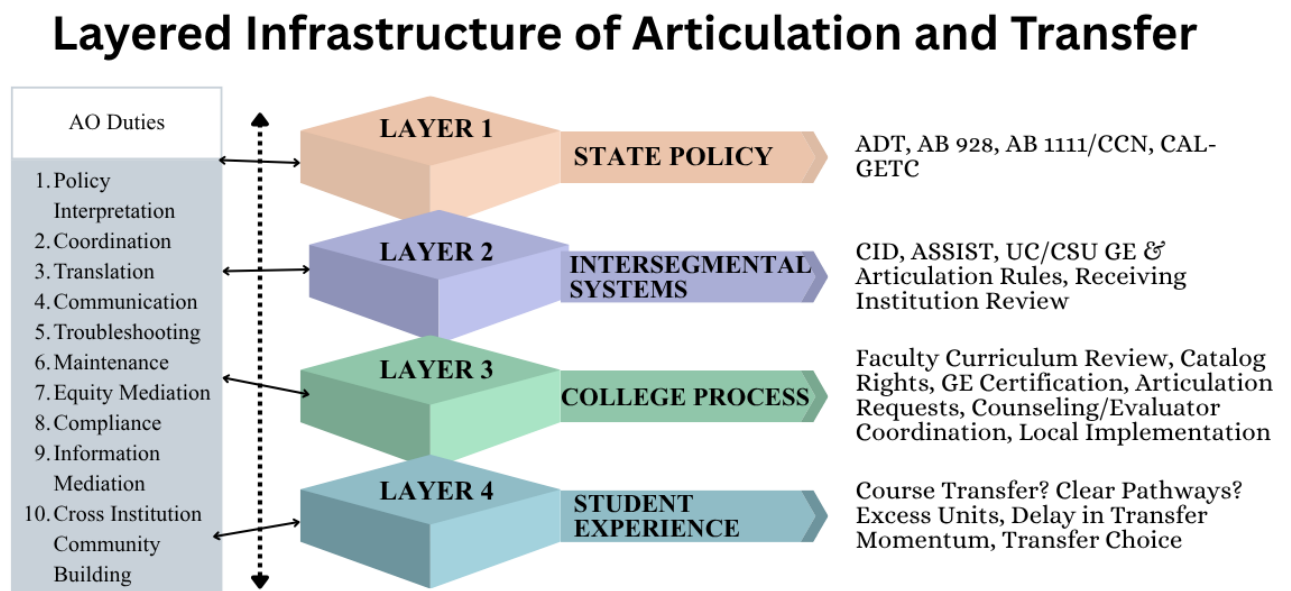
Finding	What AOs described	Framework Lens	Literature Extended	Equity Stake
Hidden infrastructure of transfer equity	Transfer depended on: 1. course applicability 2. catalog rights 3. GE certification, articulation agreements 4. ASSIST 5. degree audits 6. course substitutions 7. unwritten rules	Ching (2023): AOs made equity sense through technical breakdowns Felix & Nienhusser (2023): Policy promises depended on local implementation conditions.	Extends 1. transfer maze 2. credit loss 3. transfer receptive culture 4. articulation literature by locating transfer complexity in institutional infrastructure (Campaign for College Opportunity, 2017; CIAC, 2013; Fink et al., 2023; Jain et al., 2020; Monaghan & Attewell, 2015; Taylor & Jain, 2017).	Unclear information shifted transfer risk onto students, especially those with fewer resources to absorb lost time, units, aid, or momentum.
Layered policy environment	AOs worked through overlapping reforms, including: 1. Cal-GETC 2. Common	Ching (2023): AOs interpreted ambiguity and translated changing rules. Felix and Nienhusser	Extends transfer policy and implementation literature by showing how reforms depend on AO interpretation, coordination, and	Streamlining could create new confusion when guidance, staffing, systems, and timelines lagged behind policy

	Course Numbering 3. ADTs 4. C-ID 5. Ethnic studies 6. Catalog rights 7. UC/CSU expectations.	(2023): Layered reforms moved through local enactment zones shaped by capacity, timing, and authority.	campus capacity after legislation is adopted (Gross & Goldhaber, 2009; McLaughlin, 2008; Soliz & Mesa, 2025; Spillane et al., 2002; Viennet & Pont, 2017; Worsham et al., 2021).	design.
Bounded upstream discretion/ Reducing transfer risk without full authority	AOs helped: 1. Make coursework count 2. Supported counselors and evaluators 3. Worked with faculty 4. Updated articulation systems 5. intervened when transfer systems broke down	Ching (2023): Equity sense became action through problem-solving. Felix & Nienhusser (2023): AOs exercised agency within constraints created by resources, role authority, technology, and receiving institution decisions.	Extends street-level bureaucracy and articulation literature by identifying AOs as technical implementers whose discretion often occurs before students encounter transfer barriers (CIAC, 2013; Lipsky, 1980; Rice, 2013).	AOs could prevent avoidable barriers, but prevention depended on whether they were included, resourced, and authorized early enough.
Cross-cutting theme: race-conscious work submerged in procedural language	AOs varied in how directly they named race. Some named racialized consequences; others used language of fairness, access, flexibility, unnecessary units, and student	Ching (2023): Equity meanings varied across practitioners and local contexts. Felix & Nienhusser (2023): Equity-centered implementation	Extends equity sensemaking and equity-centered implementation literature by showing how racial equity work can be embedded in procedural decisions where race is unevenly	Race-neutral procedures can hide unequal burden. Naming race makes transfer system failures easier to see and address.

burden.	requires attention to racialized effects, even in technical policy work.	named (Ching, 2023; Felix, 2021; Felix & Nienhusser, 2023; Felix & Trinidad, 2020; Gonzalez et al., 2021)
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Figure 5.1 presents transfer as a layered infrastructure that moves from state policy, to intersegmental systems, to college processes, and finally to student experience. The figure positions AO labor and articulation work as the connective tissue across these layers. State reforms such as ADTs, AB 928, AB 1111/Common Course Numbering, and Cal-GETC move through intersegmental systems such as C-ID, ASSIST, UC/CSU articulation rules, and receiving-institution review. Those systems are enacted through college processes, including curriculum review, catalog rights, GE certification, articulation requests, counselor and evaluator coordination, communication, local implementation, and faculty consultation. Students experience the results of this infrastructure through questions of pathway clarity, course applicability, excess units, delay, transfer momentum, and transfer choice. The AO labor band highlights the connective work that makes these layers function together.

Figure 5.1. Layered Infrastructure of Transfer and Articulation.



Note. This conceptual diagram shows AO labor as the connective tissue linking state policy, intersegmental systems, college processes, and student experience. The arrows indicate points of translation and dependency across layers, not a linear or causal sequence.

This synthesis builds on transfer scholarship documenting unclear requirements, credit loss, inconsistent pathways, and uneven access to transfer information (Campaign for College Opportunity, 2017; Jain et al., 2020; Monaghan & Attewell, 2015; Taylor & Jain, 2017). The contribution of this study is that it brings attention to the institutional labor behind those conditions. Transfer equity was located in students' aspirations and advising encounters, and in the systems and professional practices that made students' coursework count, protected them from avoidable delays, and translated complicated requirements into accurate information.

The first finding centered on the hidden infrastructure students were expected to navigate. AOs described transfer as a process that could appear orderly from an institutional perspective, while remaining difficult for students to understand in practice. Students had to know which

questions to ask, where to find information, how to interpret requirements, and when policies such as catalog rights or course applicability might protect them. Participants identified uneven access to information, unclear requirements, opt-in advising structures, incomplete streamlining, and extra coursework as equity concerns because these conditions could cost students time, money, financial aid eligibility, work hours, and academic momentum. This extends research on the transfer maze by showing that transfer complexity is not solely a student-navigation problem. It is also an infrastructure problem shaped by articulation agreements, course applicability, general education certification, and intersegmental communication (Fink et al., 2023; Gross & Goldhaber, 2009; Jain et al., 2020; Taylor & Jain, 2017).

Ching's (2023) equity sensemaking framework helps explain why AOs treated these technical details as equity issues. In Ching's work, equity sense refers to a working understanding developed by practitioners as they interpret problems in their local context, rather than a formal definition handed down through policy. In this study, AOs made sense of equity through the routine details of transfer work: missing articulation, unclear applicability, conflicting guidance, delayed approvals, and students taking courses that did not move them closer to transfer. These were technical problems with equity consequences. For AOs, they were signs that institutional systems could either reduce or increase the burden on students.

The second finding focused on the policy environment surrounding articulation work. AOs were not implementing one transfer reform at a time. They were working through overlapping mandates and reforms related to Cal-GETC, Common Course Numbering, ADTs, C-ID, ethnic studies requirements, catalog rights, district processes, and intersegmental expectations. Although many of these reforms were intended to simplify transfer, participants described the work required to make them understandable and usable locally. They tracked

legislation, attended statewide and regional meetings, interpreted guidance, updated curriculum processes, communicated changes to counselors and evaluators, and helped determine how reforms would be enacted on their campuses.

Policy implementation scholarship helps explain why these reforms did not move from legislative intent to institutional practice in a clean or automatic way. Reforms are interpreted and enacted through local routines, institutional conditions, professional judgment, and the people responsible for making policy reliable in practice (Felix & Nienhusser, 2023; McLaughlin, 2008; Spillane et al., 2002). Transfer research also shows that layered policy environments and inconsistent information can limit the effectiveness of reform, and that articulation reforms can produce uneven racial consequences when implementation does not account for institutional variation and student outcomes (Soliz & Mesa, 2025; Worsham et al., 2021). Felix and Nienhusser's (2023) equity-centered implementation framework is especially useful here because it treats implementation as the space where policy promises are interpreted, negotiated, and put into practice. For AOs, the equity potential of a reform depended on the conditions surrounding implementation: staffing, authority, timelines, communication structures, and the professional expertise needed to make policy useful for students.

The third finding showed that AOs reduced transfer risk even when they did not control the full transfer system. Participants maintained articulation agreements, reviewed curriculum, communicated with receiving institutions, supported counselors and evaluators, interpreted policy changes, and intervened when a course, requirement, or institutional interpretation threatened to delay a student's progress. Their work was technical, but it was also relational and discretionary. AOs had to know the rules, understand the local context, build relationships across institutions, and decide when and how to advocate for students.

AOs were often responsible for making transfer policy work but were not always included early in policy design, campus planning, or intersegmental decision-making. This complicates any simple view of AOs as compliance actors. The California Articulation Policies and Procedures Handbook describes course articulation as foundational to California's transfer function and identifies AOs as the campus professionals who coordinate and facilitate the articulation process (California Intersegmental Articulation Council, 2013). Yet transfer equity scholarship has paid far less attention to the professional labor of AOs than to students, policies, advising, and institutional barriers. By centering AOs, this study broadens the understanding of articulation work. Rather than a purely procedural function, articulation work is interpretive, relational, and consequential in determining whether transfer policies are usable for students.

Across the three findings, AOs emerged as equity implementers working through technical systems. Their equity work did not always take the form of direct student support or explicit racial equity programming. It often appeared in practices such as reviewing course outlines, maintaining articulation records, clarifying catalog rights, updating ASSIST, explaining transfer applicability, and ensuring that local curriculum decisions aligned with transfer requirements. These practices are important because transfer inequity is often produced through institutional details that become visible to students only after something has gone wrong. A course does not count. A requirement changes. A student follows outdated guidance. A pathway that was supposed to be streamlined still requires another class. For students with less time, money, institutional knowledge, or access to advocates, these moments can become serious barriers. This insight extends scholarship on street-level bureaucrats by showing how AOs exercise discretion and professional judgment within a highly technical policy environment (Lipsky, 1980; Rice, 2013).

The findings also reveal a tension in how race was named. Some AOs directly identified the racialized consequences of unclear transfer systems for Students of Color, particularly first-generation, low-income, and returning students. Others used broader language about fairness, access, flexibility, unnecessary units, and student burden. That variation matters because it shows how equity work can be present even when race is not named directly. Articulation spaces often rely on terms such as approvals, timelines, submissions, course applicability, certification, and transferability. These terms may sound race-neutral, but the consequences of these procedures are not experienced evenly. Prior research on equity-centered implementation warns that broad or race-evasive policy language can obscure the specific needs of racially minoritized students and move institutions toward generalized solutions for specialized problems (Felix & Trinidad, 2020; Gonzalez et al., 2021). Felix (2021) further showed that race-conscious implementation depends on practitioners' ability to name racial inequity, draw on their identities and professional judgment, and use policy as a tool to address inequitable conditions.

Together, Ching's (2023) equity sensemaking framework and Felix and Nienhusser's (2023) equity-centered implementation framework help explain what was happening beneath the surface of articulation work. AOs made meaning of equity through the problems they repeatedly encountered in transfer systems: missing articulation, unclear applicability, conflicting guidance, delayed approvals, excess units, and reforms that required local translation before they could benefit students. AOs also implemented policy under conditions shaped by layered reforms, uneven local capacity, intersegmental dependencies, and institutional constraints. Their ability to advance equity depended on their own commitments as well as the time, staffing, authority, and access their institutions gave them to shape implementation before problems reached students.

The findings also included cases that tested the boundaries of the argument. AO labor was not hidden in the same way at every college. Rebecca described an AO role that was already “baked into” curriculum committee, technical review, program planning, and task force spaces, where she could bring a “transfer lens” to program proposals, program revisions, and policies that could affect students before decisions were finalized. Marisol described building a similar kind of visibility through weekly communication with the curriculum specialist and through her position between curriculum, admissions and records, and counseling; for her, articulation information affected students directly and needed to appear in counseling and education planning before the “tail end when they’re graduating.” These examples push against any simple claim that AOs were always institutionally invisible. The race-talk findings also complicate a uniform account of AOs as explicitly race-conscious implementers. Rebecca said she did not usually think about inequity “in terms specifically of race or ethnicity,” even as she questioned why different groups of students were treated unequally. Camila and Leticia’s accounts leaned more heavily toward procedural or compliance-oriented descriptions, with equity concerns folded into curriculum, requirements, approvals, implementation, and fairness. These cases sharpen the argument. AO labor is consequential for transfer equity, but its visibility, authority, and racial explicitness varied across colleges. The ability of AOs to prevent transfer barriers depended on how early institutions positioned them to shape decisions and whether technical transfer problems were connected to their racialized consequences.

The discussion that follows builds from this central claim: student navigation, advising, and statewide policy design matter, but transfer equity also depends on articulation infrastructure and the labor required to make transfer pathways accurate. AOs do not control every part of the transfer system, but their work shapes whether students’ coursework, time, and momentum can

carry across institutions. That is why articulation work should be understood as transfer equity work. The sections that follow develop this argument through four claims about transfer infrastructure, streamlining reform, AO labor, and the procedural language through which race-conscious work can become submerged.

The Transfer Maze as an Infrastructure Problem

Transfer scholarship often describes the transfer process as a maze students must navigate. This framing captures the confusing and uneven process community college students encounter as they identify courses, interpret general education and major preparation requirements, use transfer tools such as ASSIST, meet with counselors, and make decisions across institutions whose expectations may not always align (Campaign for College Opportunity, 2017; Fink et al., 2023; Taylor & Jain, 2017). For racially minoritized, first-generation, low-income, and working students, mistakes in this process can carry serious consequences, including excess units, delayed transfer, credit loss, depleted financial aid, and additional financial burden (Campaign for College Opportunity, 2017; Fink et al., 2023; Jain et al., 2020; Monaghan & Attewell, 2015).

The findings extend that literature by showing that the transfer maze is also an infrastructure problem. Students experience the maze when they are making course-taking and transfer decisions, but the conditions that make transfer difficult are often produced before students ever meet with a counselor or open ASSIST. They are embedded in articulation agreements, curriculum approval timelines, general education certification, catalog rights, course applicability, local substitutions, intersegmental communication, and the ways transfer information is maintained across systems (California Intersegmental Articulation Council, 2013;

Gross & Goldhaber, 2009). When these pieces are not aligned, students are the ones left trying to make sense of the gaps.

A key part of this infrastructure problem is the uneven authority between community colleges and receiving institutions. Jain et al. (2020) located transfer responsibility at the university level, arguing that a transfer-receptive culture requires baccalaureate-granting institutions to support community college students as they navigate coursework, apply, enroll, and complete the bachelor's degree. Their framework also centers race and racism in the vertical transfer process, which makes institutional receptivity a racial equity issue rather than a general transfer commitment. This study extends that framework into the technical infrastructure of articulation. Community college AOs could prepare requests, document course comparability, maintain ASSIST, advise around missing agreements, and warn students or counselors about possible substitutions after transfer, but receiving institutions retained the authority to review, delay, deny, or decline those requests. Camila's account makes this asymmetry visible: some receiving institutions placed colleges outside local or feeder networks on the "back burner," leaving gaps in ASSIST and, in some cases, refusing to review articulation requests. Receptivity begins before students arrive at the university. It is built into the earlier decisions that determine whether students can see a clear pathway, trust that their coursework will count, and choose among institutions without being constrained by where articulation already exists. When receiving institutions privilege familiar feeder networks, students at other community colleges may encounter thinner pathways, less reliable information, and greater pressure to adjust their transfer plans around what a university has chosen to recognize.

Fink et al. (2023) showed that effective transfer requires both clear pathways and comprehensive advising. This study extends that argument by showing that student-facing

support depends on the articulation infrastructure that ensures pathways are accurate and up to date. Counselors, transfer centers, and advising tools are necessary, but they cannot compensate for missing, outdated, or inconsistent articulation agreements. A student cannot confidently follow a pathway if course applicability is uncertain or if information differs across ASSIST, local catalogs, degree audit systems, and receiving-institution expectations. When these systems break down, students with fewer resources are often least able to absorb the consequences.

These breakdowns often become visible to students only after a decision has already been made. A student may learn too late that a course does not apply, that a requirement has changed, or that an agreement was not updated in time to protect their progress. At that point, the problem is no longer abstract. It can mean another term of enrollment, another course to pay for, or another delay in reaching the university. In this way, the transfer maze is built, maintained, and sometimes left unrepaired by institutions, even as students are asked to move through it.

By centering AOs, this study shows that transfer equity depends on the institutional labor required to make transfer pathways accessible. AOs help determine how difficult the transfer maze becomes by maintaining agreements, clarifying rules, and repairing gaps that students later experience as transfer barriers. Their work helps determine whether students' coursework can carry across institutions or whether students are left responsible for decoding a system that was supposed to be simplified for them.

Streamlining Policy Does Not Automatically Produce Transfer Equity

California has repeatedly turned to statewide reforms to make the transfer process more coherent. Earlier transfer research and policy reports show why these reforms have remained a priority: students have long faced confusing requirements, inconsistent pathways, unclear course applicability, and uncertainty about whether their coursework will count across institutions

(Campaign for College Opportunity, 2017; Gross & Goldhaber, 2009). Reforms such as the Associate Degree for Transfer, Cal-GETC, Common Course Numbering, C-ID, and ethnic studies requirements can be understood as part of this broader effort to simplify transfer and reduce uncertainty for students. The stakes are especially high because credit loss after transfer can reduce students' likelihood of completing a bachelor's degree (Monaghan & Attewell, 2015).

The findings from this study show that streamlining policy does not automatically produce transfer equity. For AOs, statewide reforms entered practice as new layers of work that had to be interpreted, aligned with existing agreements, and translated into guidance students and practitioners could actually use. Participants described tracking legislation, attending statewide and regional meetings, updating curriculum processes, communicating with counselors and evaluators, and determining how new requirements interacted with existing articulation agreements, catalog rights, local systems, and intersegmental expectations. Chapter 4 showed this most clearly in AOs' accounts of AB 928, AB 1111, Cal-GETC, C-ID, ADTs, and UC/CSU acceptance all moving through the system at once.

Figure 5.2 illustrates the policy-layering environment AOs described. The figure is not meant to show policies as ending in 2027, but to show the implementation window examined in this chapter.

Figure 5.2. Overlapping Transfer Policy Implementation Layers, 2010-2027.

POLICY	2010	2015	2020	2025	2030
C-ID	2010-2027				
ADT / SB 1440	2011-2027				
AB 705 / AB 1705			2019-2027		
Ethnic Studies			2021-2027		
AB 928				2022-2027	
AB 1111 / CCN				2025-2027	
Cal-GETC				2025-2027	

Note. Bars represent the selected implementation window shown in the figure, not the expiration of each policy or reform. The timeline begins around 2010 to capture the period of intensified transfer reform and ends in 2027 because AB 1111/Common Course Numbering is scheduled for full implementation by that point. The purpose of the figure is to show how AOs managed overlapping policy layers rather than a single linear reform.

Policy did not become practice on its own. Reforms were taken up through local routines, institutional conditions, and the people responsible for interpreting them (McLaughlin, 2008; Spillane et al., 2002; Viennet & Pont, 2017). In this study, AOs were among the practitioners doing that interpretive work. Even when a reform was designed to reduce complexity, unclear guidance, compressed timelines, limited staffing, and misaligned systems could create confusion before students experienced any greater clarity. Whether streamlining advanced equity depended on colleges' capacity to make the reform work in practice.

The findings also challenge the assumption that standardization alone produces equity. Standardized requirements can reduce variation across institutions, but they do not erase differences in local capacity, information access, student populations, or institutional context. Soliz and Mesa (2025) showed that overlapping transfer policies and inconsistent information can limit the effectiveness of reform, while Worsham et al. (2021) showed that a race-neutral

statewide articulation reform produced differential outcomes along racial and ethnic lines. In this study, AOs understood that reforms meant to simplify transfer still required careful local work to protect students from losing time, units, or momentum during the transition.

Streamlining depends on whether colleges have the capacity to carry out the reform. New requirements have to be entered into local systems, explained to counselors and evaluators, reconciled with existing articulation agreements, and communicated before students make decisions based on incomplete information. AOs do much of this translation and coordination. Their labor helps determine whether statewide reforms become clearer pathways or another layer of requirements that students must interpret on their own.

Articulation Officers Are Equity Implementers in a Technical Role

Articulation work often appears technical from the outside. AOs review course outlines, submit and maintain articulation agreements, monitor ASSIST, interpret general education rules, track catalog rights, coordinate with curriculum committees, and communicate changes to counselors, evaluators, faculty, and receiving institutions. These responsibilities can look like compliance work because they involve forms, deadlines, systems, approvals, and documentation. The California Articulation Policies and Procedures Handbook also describes AOs in procedural terms, as the campus professionals who coordinate and facilitate the articulation process (California Intersegmental Articulation Council, 2013). Yet describing the role only in procedural terms understates what is at stake. Articulation work determines how institutional decisions become transfer possibilities or transfer barriers for students. A course outline, ASSIST entry, general education certification, or local curriculum decision may seem removed from students' daily experiences, but these are the mechanisms through which students' coursework is recognized across institutions.

The findings from this study show that this technical work carried equity consequences. AOs helped determine whether courses would count, whether requirements were clear, whether students could rely on catalog rights, and whether a local curriculum decision would create transfer problems later. When articulation was missing, unclear, delayed, or interpreted differently across institutions, students could be left with additional units, repeated coursework, delayed timelines, or uncertainty about whether they were making progress. Participants understood these problems as more than administrative errors. They saw them as moments when the burden of institutional complexity could be shifted onto students.

AOs should be understood as equity implementers in a technical role because their work shaped whether transfer rules protected students or exposed them to additional risk. Equity moved through the everyday practices of articulation: catching problems before they reached students, clarifying course applicability, protecting students from excess units, communicating policy changes, and helping others understand how transfer rules affected student pathways. These actions mattered because students were not equally positioned to absorb mistakes in the transfer system. Students with less time, fewer financial resources, limited access to advising, work or family responsibilities, or less familiarity with higher education bureaucracy were more likely to be harmed when information was unclear or requirements shifted.

Implementation scholarship helps explain why this technical role involved judgment rather than simple compliance. Lipsky (1980) argued that public workers interpret rules and exercise discretion under constrained conditions, while Rice (2013) showed that this discretion is shaped by organizational settings, professional identities, institutional environments, and available resources. AOs worked within similar constraints, even though much of their work was less visible than direct student service. They interpreted requirements, managed ambiguity,

coordinated across offices, and made judgment calls that shaped what students later experienced as transfer policy. Articulation work carried equity consequences because these judgments helped determine whether transfer rules became clear, usable, and protective of students' progress.

That discretion was bounded. Participants could advocate, interpret, clarify, and repair, but they did not control every part of the transfer system. Receiving institutions could deny or delay articulation. Statewide reforms could arrive with compressed timelines or unclear guidance. Local curriculum decisions could move forward without fully considering transfer consequences. Campus leaders could leave AOs out of early planning even when their expertise was necessary. Staffing levels, technology systems, and institutional silos also shaped what AOs could do. These constraints show why equity implementation cannot depend solely on individual commitment.

Understanding AOs as equity implementers broadens the way transfer equity is usually discussed. Equity is often associated with student-facing programs, counseling, basic needs support, learning communities, or formal student equity planning. Those efforts matter, but this study shows that transfer equity is also produced through technical infrastructure. A course approval, articulation update, catalog interpretation, general education certification decision, or communication to evaluators can shape whether students' prior work is honored or whether they are asked to spend more time and money proving their readiness.

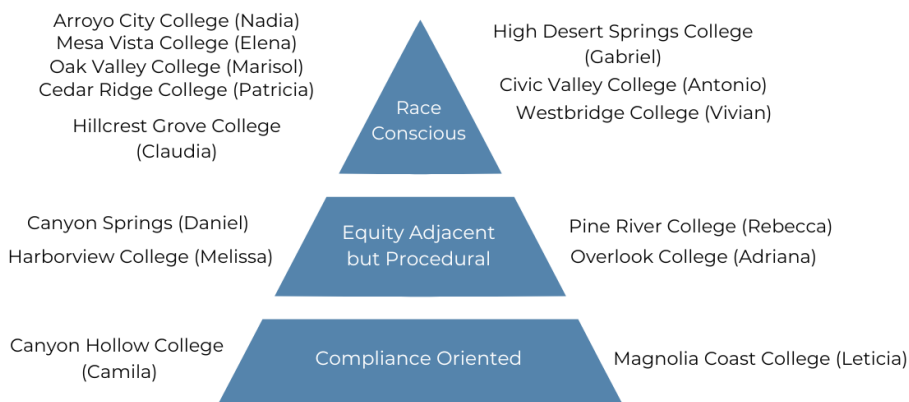
Race-Conscious Work Can Be Submerged in Procedural Language

AOs varied in how directly they named race. Some participants explicitly discussed the racialized consequences of transfer complexity, especially for Students of Color, first-generation students, low-income students, and students with less access to institutional knowledge. Others

described equity in broader terms, including fairness, access, student burden, unnecessary units, flexibility, clarity, and consistency. That variation is important because it shows how race-conscious work in articulation can become submerged within procedural language.

To examine this variation more closely, I mapped participants' accounts along a continuum of race talk. The continuum ranges from explicitly race-conscious descriptions, to equity-adjacent procedural descriptions, to primarily procedural or compliance-oriented descriptions with equity recognition. Explicitly race-conscious descriptions named race, racially minoritized students, Students of Color, specific racial or ethnic groups, or racialized consequences. Equity-adjacent procedural descriptions emphasized access, fairness, first-generation status, student burden, unnecessary units, flexibility, culturally relevant curriculum, or institutional responsibility without consistently naming race. Primarily procedural or compliance-oriented descriptions located the AO role mainly in implementation, curriculum, requirements, approvals, legislation, district systems, transfer evaluation, and compliance, while still recognizing equity concerns.

Figure 5.3. Continuum of Race Talk in Articulation Officer Accounts.



Note. College and participant pseudonyms are used to protect confidentiality. The figure represents the dominant pattern in each AO's account, not a ranking of participants, a measure of

institutional commitment, or evidence of policy impact. The continuum captures how AOs described race, equity, and transfer barriers; it does not indicate whether participants had the authority, resources, or institutional conditions needed to address the inequities they identified.

The continuum shows different degrees of directness in how AOs named race. Eight AOs offered explicitly race-conscious descriptions, connecting transfer barriers, articulation work, or policy implementation to racially minoritized students, Students of Color, Latino students, Black students, Native students, disproportionately impacted students, or racialized consequences. Four AOs described equity in more equity-adjacent but procedural terms, emphasizing access, fairness, first-generation status, underrepresented students, culturally relevant curriculum, student burden, unnecessary units, flexibility, and institutional responsibility. Two AOs leaned most heavily on procedural or compliance-oriented descriptions of the role, discussing equity primarily through implementation, curriculum, requirements, approvals, legislation, district systems, transfer evaluation, and technical process.

Explicit race-consciousness in an AO's account did not necessarily mean that the AO had the authority, resources, or institutional conditions needed to address the inequity they identified. A more procedural account also did not mean the absence of equity concern. The continuum captures how participants interpreted and described transfer barriers, not whether they could resolve those barriers through policy or institutional change. AOs could recognize racialized consequences and still be constrained by the policies, systems, and infrastructure through which articulation work had to move.

I compared the continuum with participants' questionnaire responses where available, and interview accounts to see whether race talk clustered by identity, institution type, district structure, appointment structure, or years in the AO role. In this sample, it did not. AOs who named race directly were not concentrated in one racial or ethnic group, one type of college, one

district structure, or one level of experience. The same was true for AOs whose accounts leaned equity-adjacent or more procedural. The lack of a clean pattern is part of the finding. Race talk in articulation could not be explained by saying that certain kinds of AOs named race while others did not. What appeared more consistently across the data was the language of the role itself. Articulation work moves through curriculum review, catalog rights, ASSIST updates, C-ID, Cal-GETC, Common Course Numbering, approvals, deadlines, and compliance expectations. Those are the terms AOs are expected to use when they identify problems and move solutions. As a result, AOs could recognize racialized transfer barriers while still translating those concerns into the procedural language required to act on them.

Procedural language is central to articulation work. AOs work through terms such as course applicability, articulation approval, catalog rights, general education certification, ASSIST updates, C-ID descriptors, Cal-GETC requirements, Common Course Numbering timelines, local substitutions, and intersegmental review. These terms are necessary for the role, but they can make the equity stakes harder to see. A delayed approval may sound like an administrative problem. A missing agreement may sound like a technical gap. A confusing requirement may sound like a communication issue. For students, however, these procedural breakdowns can result in additional units, delayed transfer, loss of financial aid eligibility, or another semester of enrollment. When those burdens fall unevenly on racially minoritized students, the language of procedure can hide racialized consequences.

This study highlights how technical policy spaces can make race-conscious work harder to recognize. Ching's (2023) equity sensemaking framework is useful here because it shows that practitioners develop working meanings of equity through local interpretation, and that equity-minded practice involves centering race even when a policy or reform is not explicitly race-

specific. In articulation, that means equity may be pursued through technical decisions that are not always named as racial equity interventions. When AOs questioned excess units, clarified confusing requirements, corrected inaccurate information, or pushed for policy changes to be communicated before students were harmed, they were often addressing conditions that contribute to racial inequity in transfer. Yet because the work was framed by procedures, timelines, and requirements, its racial-equity significance was not always visible.

Race-conscious implementation scholarship raises a related concern. Felix (2021) and Gonzalez et al. (2021) emphasized that equity-oriented implementation must move beyond broad or generic approaches to student success by explicitly addressing racial inequity. Felix and Trinidad (2020) similarly warned that racial equity can become diluted as policy moves through implementation. Worsham et al. (2021) showed why this matters in articulation policy specifically: a race-neutral statewide articulation reform produced differential outcomes along racial and ethnic lines. The findings from this study extend that concern into the daily work of articulation. AOs may be working to reduce barriers that disproportionately affect racially minoritized students, but when those barriers are discussed only as technical problems, the racial structure of the transfer system can remain unnamed.

The procedural language of articulation should not be dismissed as empty or merely bureaucratic. For AOs, this language was the medium through which they could act. They used technical expertise to make courses count, protect students from unnecessary repetition, interpret policy changes, and help colleges avoid transfer consequences that students might otherwise experience later. The concern is that technical language can make equity work harder to recognize, support, and evaluate. If colleges treat articulation work as only procedural, they may overlook one of the spaces where racial equity is being shaped.

The tension is that procedural language can both obscure and enable equity work. It can dilute racial equity by making racialized consequences harder to see. When barriers are described only as delayed approvals, unclear requirements, missing articulation, catalog complications, or transfer rules, the racialized burden on Students of Color can disappear from view. Yet procedural language can also function as a survival strategy for equity work. For AOs, changing a requirement, clarifying course applicability, protecting catalog rights, expanding substitutions, or reducing unnecessary units could advance equity within spaces where direct race talk was not always expected, supported, or institutionally available.

For transfer equity, these technical details matter. Course requirements, institutional timelines, credit applicability, and access to accurate information all shape whether students can move through transfer without losing time, units, or momentum. When equity is discussed only in broad student success terms, colleges may miss how these routine procedures distribute opportunity unevenly. Articulation work makes this visible. Racial equity is not always named in the moment it is being shaped; sometimes it is embedded in the decisions that determine whether students' coursework is honored and their progress is protected.

Contributions to the Literature

The central contribution is that transfer equity is shaped through technical, relational, and interpretive work that often happens before students encounter transfer barriers directly. This study contributes to transfer equity literature, policy implementation literature, and equity sensemaking/race-conscious implementation literature by centering articulation as a site where transfer equity is shaped. Rather than treating articulation as a technical background function, this dissertation shows that AO labor is part of the infrastructure that determines whether transfer policies become usable for students.

Contributions to Transfer Equity Literature

Transfer equity scholarship has documented the complex conditions community college students encounter as they move across institutions, including unclear requirements, inconsistent information, racial transfer gaps, credit loss, and transfer structures that do not adequately support Students of Color (Campaign for College Opportunity, 2017; Jain et al., 2020; Monaghan & Attewell, 2015; Taylor & Jain, 2017). This dissertation adds to that literature by examining the infrastructure behind those student experiences. It shows that transfer complexity is produced and managed through articulation agreements, course applicability, general education certification, catalog rights, curriculum timelines, ASSIST updates, and intersegmental communication.

Centering AOs identifies articulation work as an underexamined part of transfer equity. Transfer barriers often appear when something does not count: a course, a requirement, a catalog year, a substitution, or a pathway. This dissertation connects those moments to institutional systems and to the labor required to maintain them. The contribution is a broader account of transfer equity that includes the technical infrastructure protecting, or failing to protect, students' prior coursework, time, and momentum.

Contributions to Policy Implementation Literature

Policy implementation literature has shown that policy is interpreted and enacted through local actors, organizational settings, institutional relationships, implementation capacity, and practitioner sensemaking (McLaughlin, 2008; Spillane et al., 2002; Viennet & Pont, 2017). This dissertation adds AOs to that conversation. AOs are transfer policy implementers whose work has been largely invisible in discussions of statewide reform. They interpret guidance, coordinate across institutional spaces, maintain technical systems, and help determine whether reforms such

as Cal-GETC, Common Course Numbering, C-ID, ADTs, and ethnic studies requirements become clear enough to use.

The theoretical contribution to policy implementation literature is the concept of upstream/infrastructural discretion, which extends Lipsky's (1980) theory of street-level bureaucracy in the context of transfer policy implementation. Lipsky shows that public workers exercise discretion under constrained conditions and that their decisions, routines, and workarounds shape how people experience policy. This study builds from that insight but locates discretion earlier in the implementation process. AOs are not always street-level actors in the classic sense because much of their consequential work occurs before students directly encounter a transfer barrier. Their professional judgment is exercised through curriculum review, articulation maintenance, catalog interpretation, course applicability, ASSIST updates, transfer reform implementation, and communication across offices and institutions. This discretion is upstream because it happens before a student learns that a course counts, that a requirement has changed, or that an agreement is missing. It is infrastructural because it operates through the technical systems that determine whether coursework is recognized across institutions. By naming upstream/infrastructural discretion, this study extends street-level bureaucracy beyond direct service encounters and shows how hidden implementation decisions can shape equity before students know a decision has been made.

Contributions to Equity Sensemaking and Equity-Centered Implementation

This dissertation also adds to equity sensemaking and equity-centered implementation scholarship by showing how racial equity is interpreted in a technical transfer role. Ching's (2023) equity sensemaking framework explains how practitioners develop working meanings of equity through local interpretation. Equity-centered implementation scholarship shows that

equity work requires attention to racial inequity, institutional conditions, implementation capacity, and the ways race can become diluted as policy moves into practice (Felix, 2021; Felix & Nienhusser, 2023; Felix & Trinidad, 2020; Gonzalez et al., 2021).

The contribution here is showing how that tension appears in articulation. AOs varied in how directly they named race. Some described transfer barriers in explicitly race-conscious terms, while others used broader procedural language about fairness, access, student burden, unnecessary units, flexibility, and clarity. This variation shows that racial equity can be shaped through technical decisions even when race is not always named directly. In articulation, equity can be embedded in decisions about whether courses count, whether requirements are communicated clearly, whether catalog rights protect students, and whether policy changes are translated before students are harmed.

Taken as a whole, these contributions reposition articulation as transfer equity work. Transfer equity is shaped through advising, student services, and formal equity initiatives, and it is also shaped through the technical systems that determine whether students' coursework is honored across institutions. By making AO labor visible, this dissertation shows why technical implementation should be treated as part of transfer equity rather than background administrative work.

Implications for Policy and Practice

The findings from this study shift attention from transfer reform as policy design to transfer reform as implementation work. Clearer pathways, stronger advising, and statewide reforms matter, but students benefit from those efforts only when the underlying infrastructure works. Articulation work is part of that infrastructure. AOs maintain the systems that determine

whether courses count, requirements are clear, and reforms can be implemented locally. Their role should therefore be understood as equity work, not simply technical support.

The recommendations that follow begin with low- and no-cost governance changes because many barriers identified in this study were shaped by when AOs were included, whether their expertise was recognized, and whether transfer consequences were considered before decisions were finalized. Colleges can begin by giving AOs formal seats in curriculum, program planning, and equity planning spaces; requiring articulation review before curricular changes are finalized; and establishing structured communication among AOs, counselors, and evaluators. These changes do not require new statewide legislation or large new programs, but they would move articulation expertise closer to the decisions that shape students' transfer pathways.

Other recommendations require system-level action. The Chancellor's Office, receiving institutions, CIAC, the Legislature, and statewide transfer governance bodies all have roles to play in making transfer infrastructure more visible, better resourced, and more accountable to racial equity. This should include formal representation of articulation officers in the development and implementation of statewide transfer reforms, including decisions about implementation timelines, funding, and resource allocation. CIAC already provides an intersegmental structure through which articulation officers from California's higher education segments address transfer and articulation issues, making it a potential mechanism for bringing practitioner expertise into statewide decision-making rather than consulting AOs only after policies have been developed. Current transfer initiatives demonstrate that AOs can be brought into statewide implementation work, but that participation should be more consistently built into the governance of reforms that depend on articulation. Doing so would move articulation expertise upstream, allowing the practitioners responsible for making transfer policy work across

institutions to help identify implementation problems, resource needs, and intersegmental consequences before they are passed to colleges and students.

Table 5.2

Concrete Recommendations for Strengthening Transfer Equity Infrastructure

Actor	Recommended Action	Feasibility	Equity Purpose
College presidents and senior leaders	Give AOs formal seats in curriculum, program planning, transfer reform implementation, and equity planning spaces.	Low/no cost, with workload protections	Positions AOs before transfer barriers reach students
Academic senates and curriculum committees	Require articulation review or AO sign-off before curricular changes are finalized	Low/no cost, with workload protections	Helps prevent new courses, program revisions, or GE changes from creating excess units, unclear applicability, or transfer delays.
Counselors and evaluators	Establish scheduled communication with AOs around policy changes, substitutions, catalog rights, articulation updates, and recurring transfer issues.	Low/no cost, if built into existing meeting structures	Makes transfer information more consistent across the professionals students rely on.
CIAC and statewide transfer governance bodies	Establish formal representation of CCC, CSU, and UC articulation officers in statewide transfer reform design, implementation, and resource-allocation decisions.	Low/moderate cost; primarily a governance change.	Moves articulation expertise upstream so implementation barriers and resource needs are addressed before they reach colleges and students.
Receiving institutions	Review articulation requests beyond established feeder networks and communicate reasons for denials or non-review	Low/moderate cost	Reduces inequity tied to institutional recognition, geography, and uneven transfer networks
Chancellor's	Track statewide articulation	Moderate cost	Supports the labor

Office	review timelines, unresolved requests, and recurring implementation issues.		required to make transfer reforms usable across colleges with different levels of capacity.
Legislature	Build realistic implementation timelines, transition guidance, racial-impact reporting, and implementation funding into transfer statutes.	Moderate/higher cost	Prevents new reforms from shifting implementation burden onto under-resourced colleges, AOs, and students.

Note. Low- and no-cost recommendations refer to changes that can be made through existing governance, planning, and communication structures. They are not capacity-free. Colleges should pair these changes with workload recognition, protected time, reduced duplication, or other supports that make AO participation feasible.

Move Articulation Work Upstream

The most immediate changes can happen through local governance when colleges pair earlier AO involvement with workload recognition, protected time, and clear authority. College presidents, academic senates, curriculum committees, program planning bodies, and equity planning groups should include AOs earlier in decisions that affect transfer while also adjusting workload, meeting expectations, and timelines so that participation is feasible. The purpose is to move AO expertise upstream so colleges can prevent transfer problems instead of asking AOs to repair them later. Articulation expertise is frequently added only after curriculum has been revised, policy has been adopted, or transfer problems have already reached students.

Participants' accounts showed why timing matters. Rebecca described being “baked into” curriculum committee, technical review, program planning, and task force spaces so that she could bring a transfer lens to decisions about new programs, program revisions, and student-facing policies before they were finalized. Marisol similarly described working between curriculum, admissions, records, and counseling, explaining that articulation information affects students directly and should appear in counseling and education planning rather than “at the tail

end when they're graduating." These examples support earlier AO involvement, while also showing that upstream inclusion requires institutional capacity. If colleges want AOs in these spaces, they need to provide the time, authority, and support required for that participation to be meaningful.

Colleges can begin by formalizing practices that some AOs are already carrying out informally or unevenly. College presidents and senior leaders can make AO participation in curriculum, program planning, transfer reform implementation, and equity planning part of the formal governance structure. Academic senates and curriculum committees can build articulation review into existing curriculum timelines instead of treating it as a late-stage correction. Counselors and evaluators can establish scheduled communication with AOs around policy changes, substitutions, catalog rights, articulation updates, and recurring transfer issues so that this coordination does not depend only on individual relationships or emergency problem-solving. These changes are low cost, but they are not capacity-free. Colleges should embed them into existing governance calendars, reduce duplicative consultation, and recognize AO participation as part of the formal workload. Done well, these changes would make existing AO labor more visible, consistent, and supported while moving articulation expertise closer to the decisions that shape whether courses count, requirements are clear, and transfer barriers are prevented before students encounter them.

Resource the Labor Behind Transfer Reform

Moving articulation work upstream depends on whether AOs have the time, authority, and tools to participate meaningfully. Formal seats in governance matter, but they will have limited impact if AOs are expected to absorb more meetings, more policy interpretation, and more reporting without changes to workload. Colleges and state systems should treat articulation

capacity as part of transfer reform itself. The work of interpreting policy, maintaining articulation systems, communicating changes, and protecting students from transfer consequences requires institutional support.

Claudia's account illustrates this resource gap. She explained that most colleges do not provide AOs with a dedicated operating budget and recalled that the Chancellor's Office once allocated \$5,000 per campus for articulation, a support that ended. Even modest funding mattered because it helped AOs attend conferences, participate in professional learning, and stay connected to the statewide articulation community, especially at smaller colleges with fewer resources. Restoring a modest per-campus articulation allocation would help support the infrastructure behind transfer reform. Dedicated funding could support travel, training, statewide participation, local tools, and the professional learning AOs need to keep pace with changing policy.

Articulation officers should also have a more formal role in decisions about how implementation resources are distributed. Participants in this study described the workload created when statewide reforms reached colleges, but those responsible for absorbing that work were not necessarily positioned where timelines, implementation expectations, or resources were determined. CIAC and articulation officers from the CCC, CSU, and UC segments could provide an implementation perspective when statewide transfer initiatives and their accompanying resources are being developed. Their inclusion would help connect funding decisions to the actual labor required to translate policy into curriculum, articulation agreements, institutional systems, and usable transfer pathways.

The Legislature can also reduce implementation burden. New transfer statutes should include realistic implementation timelines, transition guidance, racial-impact reporting, and

implementation funding. Participants described reforms such as Cal-GETC, Common Course Numbering, ADTs, C-ID, and ethnic studies requirements as layered onto existing responsibilities. When reforms arrive with compressed timelines or unclear guidance, AOs, counselors, evaluators, curriculum committees, and students are left to absorb the confusion. Transfer policy should account for the local work required to make statewide reform usable.

Resourcing articulation work means more than assigning someone the AO title. Colleges need to provide adequate release time or full-time appointments, support staff where possible, updated technology, professional development funds, and clear authority to participate in implementation decisions. Without those conditions, reforms designed to simplify transfer still depend on under-resourced practitioners to make them work. A reform's equity potential depends on whether the people responsible for implementation have the time, tools, and authority needed to protect students from avoidable transfer barriers.

Track Where Transfer Systems Break Down

Colleges need to know where transfer breaks down before those problems become invisible or normalized. The most important points to track are the places where students lose time, units, financial aid eligibility, or momentum: courses that do not count, unclear requirements, catalog rights that are difficult to apply, missing or outdated articulation agreements, long review timelines, denied requests, unresolved submissions, and pathways that still require excess units. Each issue may look small on its own, but together they show where the transfer system shifts risk onto students.

Gabriel's account shows how a basic transfer process can become an equity issue when institutional infrastructure fails. Because his college did not have eTranscripts, students had to rely on mailed transcripts, and he sometimes physically delivered them himself to ensure they

arrived. For Gabriel, this was more than an administrative inconvenience; when the work did not get done, he believed it hurt students, especially those from racially minoritized backgrounds.

Other breakdowns came from intersegmental relationships that students did not see. Antonio described preparing students and counselors for missing articulation by telling them to keep syllabi and course outlines when transferring because some courses would have to go through a course-substitution process after transfer. Camila described a related structural problem, explaining that some receiving institutions deprioritized colleges outside their local or feeder networks, leaving “holes” in ASSIST and, in some cases, refusing to review articulation requests. In these cases, transfer opportunity was shaped by institutional recognition as well as student preparation. Students could complete the necessary coursework and still face gaps because their community college was not part of a receiving institution’s expected transfer network.

These breakdowns should be documented as transfer equity data. AOs and CIAC could help identify common categories for tracking articulation submissions, review lag, denials, unresolved requests, and repeated transfer problems. The Chancellor’s Office could support this work by developing shared templates or statewide reporting tools, rather than leaving each AO to create a separate local system. Receiving institutions could report review timelines, reasons for denials or non-review, and whether requests are reviewed beyond established feeder networks. This kind of tracking would make technical transfer barriers harder to ignore and easier to address across institutions.

Institutional research and equity planning should include technical transfer indicators alongside broad outcomes such as transfer rates or degree completion. Colleges could examine where students accumulate excess units, where substitutions or exceptions are most common,

where course applicability is unclear, where articulation requests are denied or left unresolved, and which groups of students are more likely to experience delayed transfer or repeated coursework. Camila's practice of tracking articulation submissions and the time it takes to receive a review offers one starting point, but this work should not depend on individual initiative alone. These patterns should be disaggregated by race, income, first-generation status, age, and other relevant student characteristics. Colleges should ask where the transfer system made students' pathways harder than they needed to be, rather than stopping at whether students eventually transferred.

Make Race Visible in Procedural Transfer Work

Technical transfer problems should be treated as equity signals. AOs in this study often described equity through procedural concerns: excess units, unclear requirements, delayed approvals, missing articulation, inconsistent information, and student burden. These concerns shape who loses time, money, financial aid eligibility, or momentum. When they are discussed only as technical problems, their racialized consequences can be overlooked.

Making race visible means asking racial equity questions about routine transfer processes. When a requirement changes, who is most likely to be affected? When articulation is delayed, who is most likely to lose time? When pathways require additional units, who is least able to absorb that cost? When receiving institutions delay, deny, or ignore articulation requests, do those decisions reinforce inequities tied to geography, feeder status, institutional reputation, or student population?

This kind of accountability cannot fall only on individual AOs. Colleges, the Chancellor's Office, and the Legislature should require transfer implementation reports and technical transfer indicators to be examined by race, income, first-generation status, age, and

other relevant student characteristics. These reports should include the procedural points where transfer equity is shaped: articulation delays, unresolved requests, excess units, repeated coursework, substitutions, catalog rights issues, and gaps in receiving-institution review. Without that level of detail, colleges may know whether students transferred while missing where the system made transfer harder than necessary.

Antonio's account makes this point clear. He described how some students benefit from having someone who already knows the hidden rules of transfer, while many Students of Color and first-generation students may not have access to someone who can identify a catalog rights issue, interpret the rule, or advocate for a favorable reading. In his words, some of this knowledge is "not written anywhere," making it especially difficult for students without institutional insiders to access. Vivian similarly connected repeated coursework to time scarcity, explaining that racially minoritized students who are working or managing other responsibilities may not have the time to repeat a course, even when the requirement appears neutral on paper.

AOs also need to be included in racial equity conversations. They often see where policy, curriculum, and transfer systems create barriers before those barriers appear in outcome data. Their perspective can help colleges identify how inequity is produced through technical systems that are usually treated as race-neutral. The goal is to make procedural transfer work more accountable to the students most likely to be harmed when requirements are unclear, articulation is delayed, or coursework is not honored.

Reframing the Work

Transfer equity depends on the infrastructure students encounter before they ever apply to transfer. Articulation work is part of that infrastructure. AOs help maintain the course agreements, catalog rules, curriculum processes, ASSIST updates, and intersegmental

relationships that determine whether students' coursework is honored across institutions.

Treating articulation as transfer equity work means making AO labor more visible, supported, and accountable. It also means bringing AO expertise into governance and planning, building articulation review into curriculum timelines, tracking delays and denials, requiring receiving institutions to review requests beyond feeder networks, and connecting transfer implementation to racial-impact analysis. The goal is to recognize where transfer barriers begin. When AOs are brought in late, under-resourced, or treated as back-office compliance staff, colleges lose opportunities to prevent avoidable barriers from reaching students.

Limitations

This study offers an in-depth examination of articulation officers and their role in supporting the transfer function in California community colleges. As a qualitative study of 14 AOs, the findings provide rich insight into articulation work, policy implementation, and equity sensemaking, while also reflecting the specific scope of the study. First, the sample does not represent the full range of AOs across California's 116 community colleges. AOs work in different institutional contexts, including single-college districts, multi-college districts, rural colleges, urban colleges, large transfer-sending institutions, and colleges with fewer direct relationships with nearby universities. A larger sample may have surfaced additional variation in how articulation work is organized, resourced, and understood across the system.

Second, this study centers on the perspectives of California community college AOs. This focus was intentional because community college AOs occupy a critical position in the transfer process, but it also means that the study does not fully capture the perspectives of articulation professionals at the CSU, UC, private, or independent college segments. Several findings point to the importance of receiving-institution decisions, including how universities review courses,

prioritize articulation requests, communicate changes, and determine which community colleges are included in established transfer networks. Learning from articulation professionals across all segments would provide a fuller picture of how intersegmental transfer infrastructure is built and maintained.

Third, participants were recruited through professional networks and articulation-related spaces, which may have shaped the sample. AOs who participate in statewide or regional meetings, respond to recruitment, or agree to be interviewed may be more professionally engaged, more connected to articulation networks, or more willing to reflect on equity and policy than those who did not participate. Their accounts are valuable, but they may not capture the experiences of AOs who are more isolated, newer to the role, under-resourced, or less connected to statewide professional communities.

Fourth, the study captures articulation work during a period of significant policy change. Participants were making sense of reforms such as AB 928, Cal-GETC, Common Course Numbering, and ethnic studies requirements as these policies were still unfolding. As a result, the findings reflect a particular moment in implementation rather than the long-term effects of these reforms. Future research may find that AOs' responsibilities, authority, and challenges shift as these policies become more fully implemented.

Finally, this study focuses on AO perspectives, documents, and professional spaces rather than directly examining student experiences or measuring transfer outcomes. The findings show how AOs understand and respond to transfer barriers, but they do not establish causal relationships between articulation work and student transfer outcomes. Nor do they capture how students themselves experience articulation gaps, course applicability, catalog rights, or receiving-institution decisions. Future studies that connect AO work with student-level data and

student narratives could deepen understanding of how articulation infrastructure shapes transfer equity in practice.

Future Research

This study opens several directions for research on articulation, transfer policy, and equity. One important direction is to examine articulation work across all segments of California higher education. While this study centered on California community college AOs, transfer infrastructure is built through relationships among community colleges, the CSU, UC, private nonprofit institutions, and other receiving institutions. Including articulation professionals across segments would provide a fuller understanding of how transfer infrastructure is negotiated, where power lies, and how decisions at receiving institutions affect students across different colleges.

Future research should also examine transfer destinations, rather than focusing only on transfer rates. Transfer outcomes are often measured by whether students move from a community college to a 4-year institution, but that measure can miss how articulation infrastructure shapes where students are actually able to go. This study suggests that missing agreements, delayed reviews, uneven ASSIST information, and receiving-institution decisions may channel students toward institutions that already recognize their coursework, even when those institutions are not students' preferred destinations. A student may appear successful in transfer data while still having adjusted their plans around gaps in course recognition, feeder-network patterns, or institutional refusal to review articulation requests. Research on transfer destinations could ask who transfers where, which institutions students originally hoped to attend, which pathways were made visible or invisible through articulation, and whether racially minoritized students are more likely to have their transfer choices narrowed by uneven course

recognition. This would move transfer equity research beyond access to transfer and toward a fuller account of whether students have meaningful choice in where their coursework can carry value.

Another area for future study is the student experience of articulation. Students encounter articulation through course-taking decisions, advising, ASSIST, degree audits, transfer applications, substitutions, and credit evaluations after transfer. Research that follows students through these moments could show how they make sense of articulation information, where they encounter gaps, and what happens when courses do not count as expected. This work would be especially important for racially minoritized, first-generation, low-income, returning, and working students, who may have fewer resources to absorb delays, excess units, or unclear requirements.

Future research could also examine how articulation work is organized and resourced across different institutional contexts. AOs work within varied campus conditions, including single-college districts, multi-college districts, rural colleges, urban colleges, high-transfer colleges, and colleges with fewer established university relationships. Comparative studies could examine staffing models, reporting structures, technology systems, relationships with counseling and evaluation, and the extent to which AOs are included in equity planning and in the implementation of transfer reform. This would help identify the institutional conditions that allow AOs to address transfer barriers before they reach students.

AI was largely absent from participants' accounts of articulation work, although the interview protocol did not ask directly about its use. That absence warrants attention as computational tools are increasingly being developed to reduce the labor involved in identifying potential course equivalencies (Kwak et al., 2026; Pardos et al., 2019). Pardos et al. (2019) used

enrollment patterns and course descriptions to generate potential articulation matches for professional review, while Kwak et al. (2026) incorporated articulation staff and faculty feedback into AI-assisted recommendations across the SUNY system. This work shows the potential for AI to narrow the pool of courses requiring review and make the search for possible equivalencies more manageable (Kwak et al., 2026; Pardos et al., 2019). It also shows the limits of treating articulation as a matching problem. Kwak et al. (2026) found that articulation staff and faculty rejected recommendations based on superficial textual similarity and identified meaningful differences in course content and institution-specific language. Even with improved prediction, final articulation approval remained a policy-driven, sociotechnical process requiring faculty and staff oversight. Kwak et al. referred broadly to “articulation staff,” but do not examine how the organizational position, authority, workload, or discretion of these professionals shapes the articulation process. The findings of this dissertation make those conditions difficult to separate from the use of new technology. AOs described barriers involving policy interpretation, institutional authority, receiving-institution decisions, intersegmental coordination, and negotiation among professionals. More accurate course matching may reduce some of the labor involved in identifying possible equivalencies, but it does not remove the institutional decisions required to make coursework count (Kwak et al., 2026; Pardos et al., 2019). Research on AI-assisted articulation should examine how these tools reshape AO labor and discretion, which decisions remain under human and institutional control, and whether they reduce transfer barriers or shift consequential decisions elsewhere in the transfer infrastructure.

The current transfer reform environment also calls for longitudinal research. Policies such as AB 928, AB 1111, Cal-GETC, ADTs, and ethnic studies requirements continue to reshape the transfer landscape. Studies that follow these reforms over time could examine how they are

interpreted, institutionalized, and experienced across colleges and segments. This work should examine whether reforms reduce excess units, improve clarity, protect catalog rights, and narrow racial inequities in transfer outcomes.

Finally, more research is needed on how race-conscious work operates in technical policy spaces. This study highlights that AOs sometimes advanced equity through procedural practices that were not always named in racial terms. Similar dynamics may be present in the work of evaluators, curriculum specialists, degree audit staff, institutional researchers, and transfer center professionals. Examining these roles would deepen understanding of how racial equity is shaped across institutional spaces, including the routines, technologies, and policy interpretations that determine whether students' progress is protected.

These future directions reinforce the central argument of this dissertation: students should not be expected to navigate transfer alone. Transfer equity also depends on the systems and professionals responsible for making transfer navigable in the first place.

Conclusion

This dissertation began with a persistent contradiction in California higher education. Community colleges are central to the state's promise of access, mobility, and affordable pathways to the baccalaureate, yet transfer remains difficult to navigate and unevenly experienced. For racially minoritized, first-generation, low-income, returning, and working students, the transfer process can require more than academic preparation or individual persistence. It can require knowing how to interpret requirements, when to ask for help, which courses will count, how policies apply, and how to recover when institutional systems do not align. These conditions show that transfer equity depends on the systems students are asked to navigate. Student aspiration and advising support matter, but they are insufficient when

institutions have not built and maintained systems that enable transfer without requiring students to take on unnecessary risk.

By centering articulation officers, this study brings attention to the professionals who work within that infrastructure. AOs maintained articulation agreements, interpreted policy changes, clarified course applicability, coordinated with curriculum committees, supported counselors and evaluators, communicated with receiving institutions, and helped translate statewide reforms into local practice. Their work was technical, but it was not merely procedural. It shaped whether students' coursework was honored, whether requirements were clear, whether excess units were avoided, and whether reforms designed to simplify transfer actually became usable. In this sense, AOs worked in the space between policy promise and student experience.

The findings also show that this work is consequential precisely because it is often hidden. When articulation works well, students may never know that an agreement had to be maintained, a course had to be reviewed, a catalog issue had to be clarified, or a policy change had to be translated before it reached them. When articulation breaks down, however, the consequences become visible quickly: a course does not count, a student repeats coursework, a pathway requires more units than expected, or a transfer plan loses momentum. For students with fewer resources to cope with delays, these moments can become barriers to equity.

This dissertation, therefore, argues that articulation work should be understood as transfer equity work. AOs do not control every part of the transfer system, and their ability to act is shaped by staffing, authority, technology, policy timelines, campus structures, and decisions at receiving institutions. Still, their labor helps determine whether transfer policies reduce complexity or reproduce it. Their role also shows that racial equity is sometimes shaped in technical spaces where race is not always named directly. Course requirements, articulation

approvals, catalog rights, ASSIST updates, and intersegmental decisions may appear race-neutral, but their consequences are not experienced evenly.

The larger contribution of this dissertation is a shift in the location of transfer equity. Student navigation, advising, and statewide policy design are part of transfer equity. So is the institutional infrastructure that determines whether students' prior work, time, and momentum are protected. If California is serious about improving transfer, then the work of maintaining that infrastructure cannot remain invisible. The unsung actors of transfer are not peripheral to equity. They are part of how the transfer promise is either made real or left for students to figure out on their own.

APPENDIX A: RECRUITMENT MATERIALS

Recruitment Email for Articulation Officers:

Subject: Invitation to Participate in Research on Articulation Officers and Equity in Transfer Pathways

Dear Recipient's Name,

I hope this message finds you well. My name is Fernando Garcia, and I am a doctoral candidate at UCLA. I invite you to participate in a research study exploring the pivotal role of articulation officers in shaping equitable transfer pathways for community college students, focusing on supporting racially minoritized populations.

As someone who plays a critical role in facilitating the transfer process, your insights and experiences are invaluable. This study aims to understand how articulation officers navigate their responsibilities, interpret and implement state policies, and advocate for equity within the transfer function. Your contributions will help illuminate the challenges and opportunities within your role and guide future strategies for supporting students.

Participation Details:

- What: An interview lasting approximately 60–90 minutes.
- When: At a time that is convenient for you.
- Where: Interviews will be conducted virtually via Zoom.

Eligibility Criteria:

- You currently serve as an articulation officer at a California community college.
- At least 50% of your professional appointment is dedicated to articulation.
- You have held this role for at least two years.
- Your participation in this study is entirely voluntary, and all responses will be kept confidential. The findings will be shared in a manner that ensures anonymity.

If you are interested in participating, please complete the following interest form [insert link]. To learn more about this research study, please do not hesitate to contact me at fergarcia@ucla.edu

Thank you for considering this opportunity to contribute to research that enhances equity in higher education. Your work is essential, and I want to include your perspective in this study.

Warm regards,
Fernando Garcia
Doctoral Candidate

UCLA
fergarcia@g.ucla.edu | 951-990-8161

Google Interest Form for Articulation Officers:

[Title of Study]

Thank you for your interest in participating in this research study.

This study explores the pivotal role of articulation officers in shaping equitable transfer pathways for community college students, focusing on supporting racially minoritized populations.

If you want to participate in this research study, please fill out the questions below.

These questions will determine your eligibility to participate in the study. All questions will only be viewed by me—the lead researcher—and they will remain in a password-locked location. The questionnaire should take less than 5 minutes. If you can participate in this study, I will email you to schedule a date and time for the interview.

Interviews will last 60-90 minutes and will be conducted by myself, Fernando Garcia. If you would like to continue, please submit this interest form.

Thank you,
Fernando

1. Full Name:
2. Gender Pronouns:
3. Age:
4. Email Address:
5. Phone Number:
6. Preferred Method of Contact:
7. What is your gender identity?
8. What is your racial/ethnic identity?
9. How long have you been an articulation officer?
10. Is articulation at least 50% of your appointment at your college?
11. How do you describe the primary responsibilities within your role?
12. Who do you regularly work alongside when engaging in tasks related to articulation?
(List individuals and positions if possible)
13. Is there anything else you would like to share?

Thank you for expressing interest in this research study. If you are eligible, I will contact you as soon as possible to schedule an interview. If you have any questions, you can email me at fergarcia@ucla.edu.

APPENDIX B: INTEREST GOOGLE FORM

Email to Potential Participants who Completed Interest Form:

Subject: Follow-Up: Participation in the Articulation Officer Study

Dear [Participant's First Name],

Thank you for your interest in participating in this study. Attached, you will find the information sheet detailing the study's purpose, scope, and what participation entails. As a reminder, your participation in this study will remain confidential, and your identity will not be disclosed in any reports or publications resulting from the research.

If you have any questions or need further clarification, please do not hesitate to reach out to me at fergarcia@g.ucla.edu

To schedule your interview, please let me know your availability, including preferred days and times, and I will do my best to accommodate.

Thank you once again for your willingness to share your experiences and insights for this critical study.

Best regards,

Fernando Garcia

Doctoral Candidate

UCLA

fergarcia@g.ucla.edu | 951-990-8161

APPENDIX C: STUDY INFORMATION SHEET

University of California Los Angeles Study Information Sheet

Fernando Garcia, a PhD student, and Dr. Cecilia Rios-Aguilar, PhD, from the Higher Education and Organization Change Division of the Department of Education and Information Studies at the University of California, Los Angeles (UCLA), are conducting a research study.

You were selected as a potential participant in this study if you are an articulation officer at a community college in California. Your participation in this research study is voluntary.

Why is this study being done?

This qualitative study explores the experiences of articulation officers at California community colleges to deepen our understanding of their critical role in supporting equitable transfer pathways, particularly for racially minoritized students.

What will happen if I take part in this research study?

If you volunteer to participate in this study, the research lead will ask you to complete a one-time 60–90-minute interview. You will also be asked to verify your answers and review the findings to ensure that we are capturing your lived experiences as an articulation officer. Interviews will be recorded for data analysis and appropriately secured to maintain confidentiality.

How long will I be in the research study?

Participation in the interview will take 60-90 minutes. After the interviews are transcribed, I will follow up with you via email or a quick 10-15-minute call via Zoom to check for accuracy. After the interview has completed the data analysis portion, I will contact you again (if you wish) to review the themes and categories found in the study and check for accuracy again. Participation in the complete study should take no longer than 90 minutes.

Are there any potential benefits if I participate?

You will not benefit directly from your participation in this study. Results, however, may contribute to research and practice. Through research, it expands the literature on the role of articulation officers in the transfer pathways that students navigate. It can enhance equitable practices for individuals who serve as articulation officers through practice.

Will information about me and my participation be kept confidential?

Confidentiality will be maintained, as only the research lead will have access to all data related to this study. Your information will remain anonymous and not be used or distributed for future

research studies. Interviews and sensitive information will also be stored in a password-required folder that only the lead researcher can access.

What are my rights if I take part in this study?

- You can choose whether to participate in this study, and you may withdraw your consent and discontinue participation at any time.
- Whatever decision you make, there will be no penalty to you and no loss of benefits to which you were otherwise entitled.
- You may refuse to answer any questions that you do not want to answer and remain in the study.
- Interviews will be audio recorded, and you can review, edit, and erase the recordings of your research participation.

Who can I contact if I have questions about this study?

You can contact the research lead, Fernando Garcia, at fergarcia@ucla.edu, the faculty advisor, Cecilia-Rios Aguilar, at riosaguilar@gseis.ucla.edu or (310) 794-7914.

UCLA Office of the Human Research Protection Program (OHRPP):

If you have questions about your rights as a research subject, you have concerns, or you want to talk to someone other than the researchers, you may contact the UCLA OHRPP by phone: (310) 206-2040; by email: participants@research.ucla.edu or by mail: Box 951406, Los Angeles, CA 90095-1406.

APPENDIX D: INTERVIEW GUIDE ARTICULATION OFFICERS

Introduction:

Welcome the participant and provide an overview of the study's purpose. Explain the format of the interview, emphasizing its semi-structured nature. Assure confidentiality and explain how data will be used and stored. Obtain verbal consent to record the interview and remind participants of their right to skip questions or withdraw.

Section 1: Background information:

1. Can you describe your current role and responsibilities as an articulation officer?
2. How long have you served as an AO, and at which institutions?
3. What led you to take on this position, and how does it align with your professional goals?

Section 2: Understanding the Role in Equity

1. How do you perceive your role in expanding transfer opportunities for racially minoritized students?
 - a. Can you provide examples?
2. What does equity mean to you in the context of your work?
 - a. How did this definition come to be?
3. How does your understanding of equity inform your approach to your role as an articulation officer?
 - a. Can you share when your understanding of equity evolved or shifted in your work? What triggered that shift?
4. Can you share specific examples of activities where you have actively worked to promote equity in the transfer process?

Section 3: Navigating Policies

1. How do internal policies at your institution impact your ability to create equitable transfer pathways?
2. Can you discuss how state-level policies (e.g., SB 1440; AB 705, and AB 928) have influenced your role?
3. Does your role allow you to interpret state policies like SB 1440 and AB 705 through an equity-conscious lens?
 - a. What challenges or opportunities arise?
4. Do you find these policies enable or constrain equity-conscious policy implementation? Why or why not?
5. Have there been instances where you felt the policies you were implementing failed to address the specific needs of racially minoritized students? How did you respond?

Section 4: Challenges and Opportunities

1. What are your biggest challenges in your role, particularly regarding equity?
2. What role do power dynamics play in your ability to enact equity-conscious policies?
3. How do external forces (e.g., legislative changes and resource constraints) shape your work?
4. How do you reconcile conflicting interpretations of equity when collaborating with colleagues or stakeholders?
5. What opportunities do you see to improve the transfer process to support Students of Color better?

6. Can you think of a time when an external challenge (e.g., new policy or legislative change) prompted a shift in your approach to equity?

Section 5: Collaboration and Institutional Dynamics

1. How do you work with stakeholders to co-create a shared understanding of equity in transfer policies?
2. What institutional practices or structures have been most supportive in your role?
3. What institutional practices or structures have been most hindering in your role?
4. How do you navigate power dynamics within your institution to advocate for equitable policies?

Section 6: Reflection and Future Directions

1. Reflecting on your experience, what has been the most impactful aspect of your work?
2. What advice would you give to new articulation officers committed to promoting equity?
3. How do you envision the role of articulation officers evolving in the next 5-10 years?

Section 7: Documents and Artifacts Supporting Equity Work

1. What documents, resources, or artifacts do you regularly use to understand and advance equity in your role?
 - a. Can you please share copies of these resources with me?
2. How do these documents influence your approach to promoting equitable transfer pathways?
3. Have you encountered any limitations or gaps in the documents or artifacts you use? If so, how do you address those challenges?

Closing:

1. Is there anything you would like to add or emphasize that we have not discussed?
2. Thank the participant for their time and contributions

APPENDIX E: DOCUMENT COLLECTION/ANALYSIS PROTOCOL

- What is the document about?
- Who is the document created for?
- When was the document created?
- Where is this document housed? (e.g., specific office on campus, online, etc.)
- How is equity defined and operationalized in these documents?
- What does the document say?
- Is the language confusing or complicated to understand?
- Do the documents reflect an institutional commitment to improving transfer rates?
- What systemic or logistical barriers are highlighted?
- Are there innovative practices or frameworks to streamline transfer processes?
- What is missing from the document?

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