

# How to Create and Sustain a Transfer Student-Centered Web Presence



mStoner

# Introduction

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**This guide equips institutions to radically improve a key touchpoint in the prospective transfer student journey — a college or university’s website.**

A transfer student is essentially anyone who has earned college credits at more than one institution before completing their undergraduate degree. Although the prevalence of transfer is well documented, transfer students are often underserved by higher education institutions that don’t fully acknowledge their needs or provide equitable access to resources that support those needs.

Given the variety of ways students move between schools and the many reasons behind their decisions, a lack of focused attention can compound an already difficult process. Worse, by ignoring transfer students’ unique needs, institutions contribute to longstanding degree attainment gaps based on race/ethnicity and income.

Institutions must have a clear understanding of who their transfer students are and which transfer pathways they take at the beginning of planning a transfer-focused site. In the pages that follow, we provide a comprehensive website blueprint to help institutions understand and serve their transfer population in a meaningful way.

Based on our research and findings, we’ve offered guidance for content, site structure, essential features, and governance. By following our best-practice recommendations and tailoring them to your needs, you will create a vibrant and sustainable web presence that supports your transfer students’ journeys and helps ensure their success.

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## ACKNOWLEDGEMENTS

Numerous students and experts in the field contributed to the insights included in this guide. From everyone at NISTS and mStoner, [thank you](#) for sharing your valuable time and providing us with a glimpse of your everyday experiences.

# How to Use this Guide

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This guide is designed for college and university personnel who want to make their institution's website more informative and easier to navigate for prospective transfer students. It provides a broad overview of today's most common transfer pathways and transfer student characteristics, as well as specific guidelines and recommendations for creating a comprehensive content, structure, and governance plan.

Although all institution types and sectors can benefit from the insights provided, this guide is primarily aimed at transfer-receiving schools since they hold the greatest responsibility for creating a smooth transfer transition experience. Likewise, professionals working at all levels in student affairs, academic affairs, and media relations are invited to read the guide; however, no one person or functional area should be solely responsible for implementing the suggested strategies.

Rather, because transfer students interface with a wide variety of departments throughout the transfer transition, we recommend that a broad group of representatives collaborate with their institution's website manager to design and implement their new or revised transfer-focused site. After reading this strategy guide, you should be able to:

- explain how prospective transfer students' primary website navigation goals might differ from traditionally aged first-time freshmen
- conduct a cursory evaluation of the depth and breadth of your institution's current transfer website
- recommend 1-3 priority website updates your institution should make immediately

## KEY TERMS

Due to the nature of this material, some transfer- and web-specific terminology is used throughout the guide. Where possible, we have included brief explanations for key terms. Some important definitions are included below for your quick reference.

- **transfer pathway** – how and where a student accumulates academic credits and moves them between different institutions
- **persona** – a set of characteristics that illustrate a specific group's needs and goals
- **transfer-receiving school** – institutions that accept incoming transfer students
- **transfer transition** – the unique manner in which transfer students navigate the personal, socio-emotional, financial, and academic considerations inherent to the transfer process
- **content strategy** – a process of identifying and prioritizing the essential and elective information a website should include
- **information architecture** – how related information is organized and distributed across multiple webpages
- **wireframes** – a visual representation of how information and graphics should appear on a webpage, i.e. a skeletal layout

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1.

# Transfer Defined

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# The Complexity of Transfer

To develop our transfer site strategy, we spoke to several transfer professionals and students across the United States, drew on higher education research, and analyzed several best-in-class websites.[9.1](#), [9.2](#)

Early on, we confirmed that transfer is incredibly complex. Students who transfer come from a wide range of backgrounds, experiences, and resources, and they follow a variety of paths to pursue their educational goals. Each institution they attend has a different set of “rules” and processes to navigate, yet many institutions do not make their information easy to find or understand. An absence of dedicated resources leaves students to manage the transition on their own and can jeopardize their academic success.

## Who are transfer students?

Just over one-third of today’s college population has transferred at least once.<sup>1</sup> Many transfer students,

especially those who start at a community college, are likely to identify with a historically underserved group, such as being students of color, low-income, first-generation, or adult learners who may be parents or breadwinners for their families.<sup>2</sup>

For various institutional and systemic reasons, transfer students do not receive equitable access to important transfer information. As a result, only a small fraction of those who plan to transfer go on to earn their bachelor’s degrees.<sup>3</sup>

In addition to the issues all new students face, transfers encounter additional barriers that can impact their success. Unlike students who attend just one institution, they must adapt to different cultural norms and academic expectations twice — sometimes multiple times — as they move from institution to institution.

A lack of clear information about transfer requirements, uncertainty about the applicability of previously earned credits, and unclear degree pathways can make the transition difficult.<sup>4</sup>

Unfortunately, even students who were successful at their previous institution might struggle to overcome these challenges.

Students transfer for many reasons, often unaware of the potential obstacles. Some plan to transfer from the very beginning of their college journey, usually to complete a specific academic program. Others hit an unexpected bump in the road that forces a change—maybe the institution wasn’t a good fit, or they faced a personal, family, or financial situation.

Post-transfer, most students seek a sense of community and belonging on campus. In our conversations, we heard that students were beginning to view their transfer experience positively, rather than feeling stigmatized by their institution for being a student who did not enter directly from high school. To help them persist and reach their goals, it is crucial for transfer students to feel seen, accepted, and supported.

# Transfer Pathways

Rising college costs and current economic and public health concerns indicate that transferring is poised to become an increasingly common choice for students seeking a degree. At the same time, students' academic journeys are increasingly varied, as are the supports they need along the way.

The vertical transfer, a long-held function of the community college, is becoming less typical among the multiple transfer pathways students may take. Transfer pathways include the following:<sup>5</sup>

- **Vertical:** Transferring from a traditionally two-year institution (i.e., community college or technical school) to a traditionally four-year institution (i.e., state college or university)
- **Lateral:** Moving from a four-year to a four-year or from one two-year to another two-year
- **Reverse:** Transferring from a four-year to a two-year
- **Swirling:** Alternating between these pathways, often taking time off between coursework

- **Dual Enrollment:** Some high school students take college-level course work, possibly even finishing an associate degree along with their high school diploma

Other pathways are relevant to the transfer experience, too:

- **Reverse Credit:** Transferring credits from a four-year back to the two-year, resulting in the retroactive awarding of an associate degree
- **Concurrent Enrollment:** Attending more than one institution at the same time
- **Transient Status:** Enrolling in an institution temporarily and then transferring those courses to the home institution

Transfer websites play a critical role in clarifying the transfer process and are crucial for creating equitable access to higher education. Yet students' diverse needs and identities, coupled with their previous college experiences, means that a "one size fits all" approach to web design will not work.

**The information you provide online must account for varied transfer student experiences and should illustrate a clear pathway to a degree.**

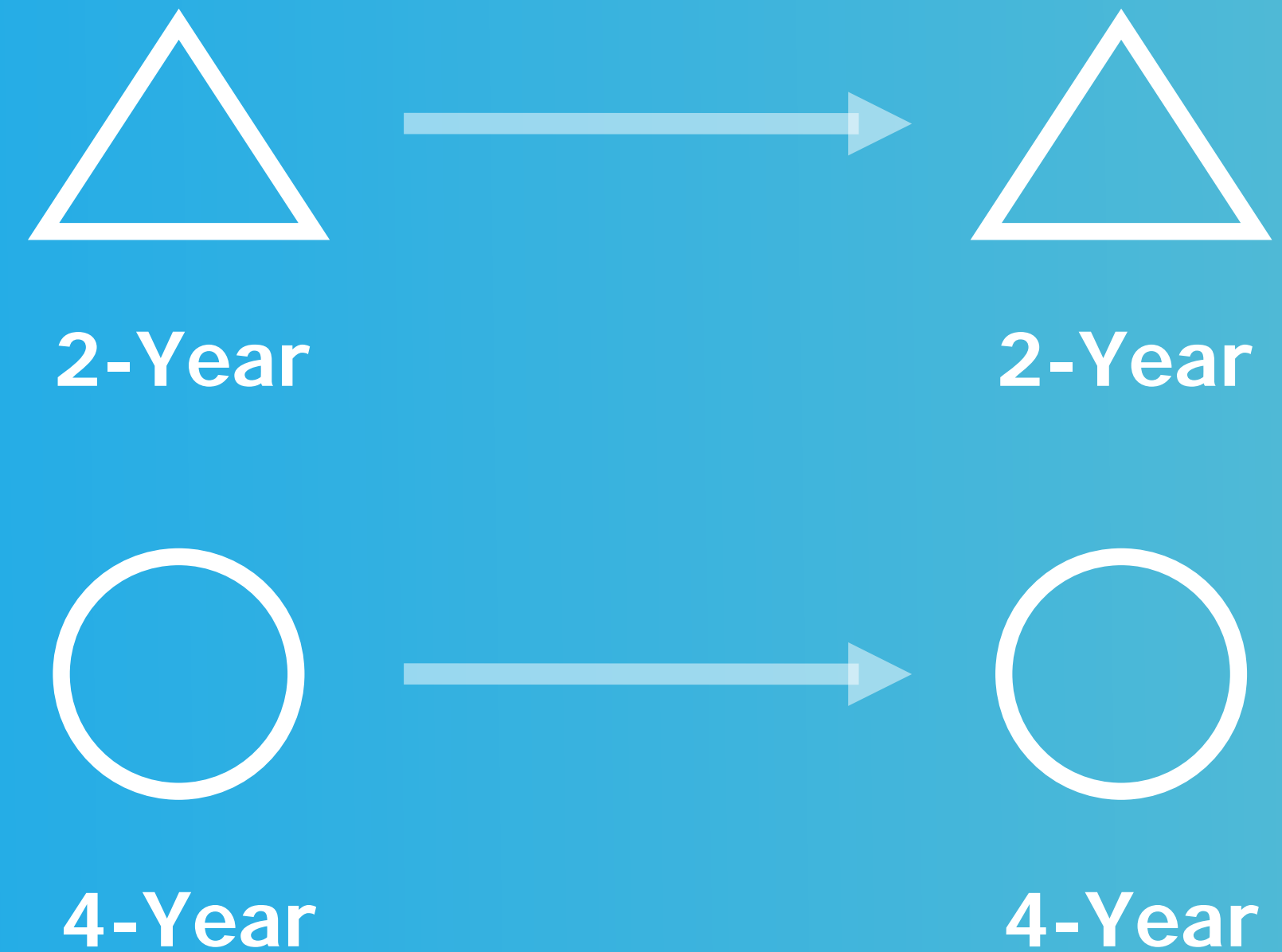


## Vertical Transfer



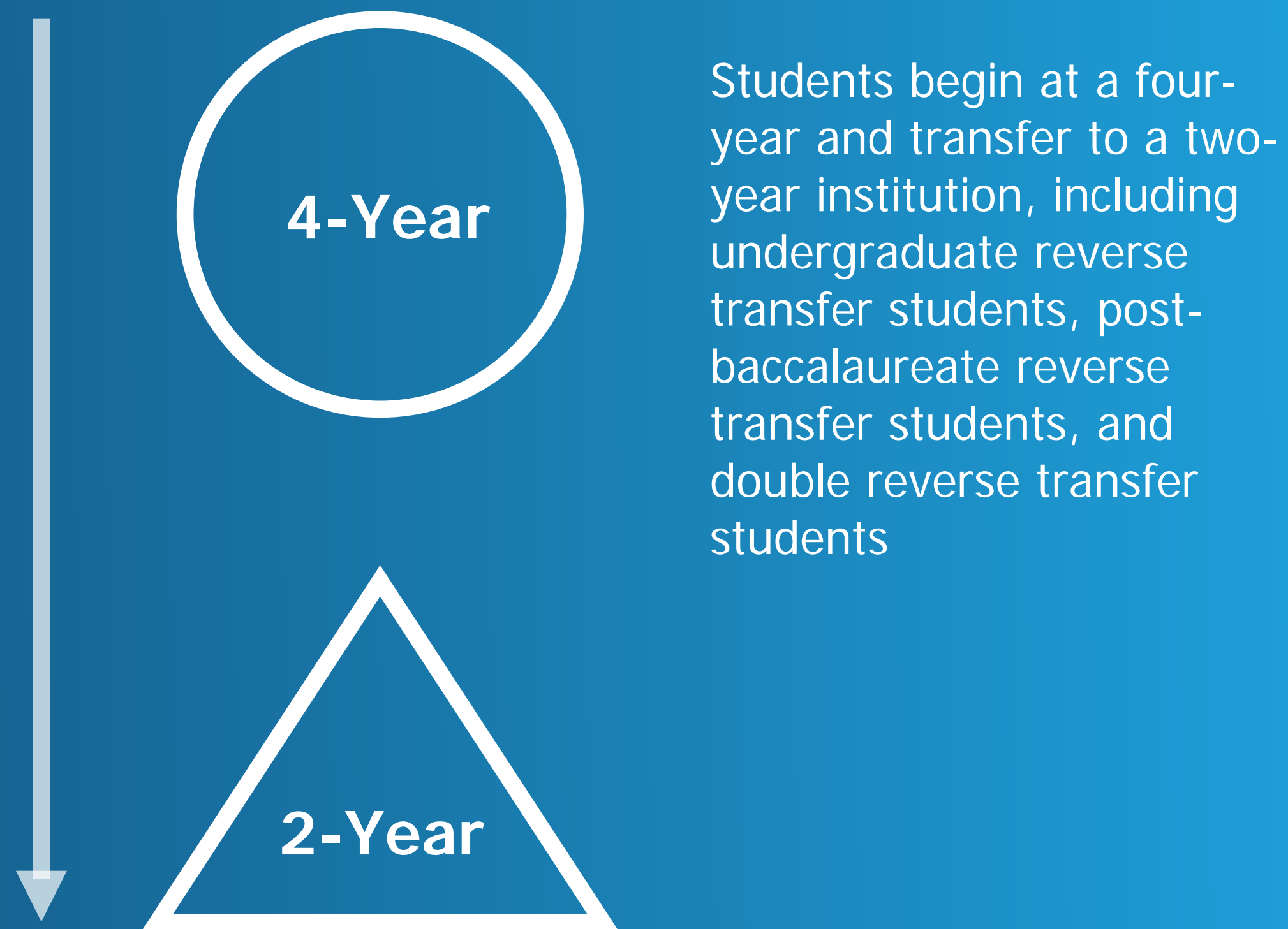
Students begin at a two-year and transfer to a four-year institution with or without an associate degree

## Lateral Transfer

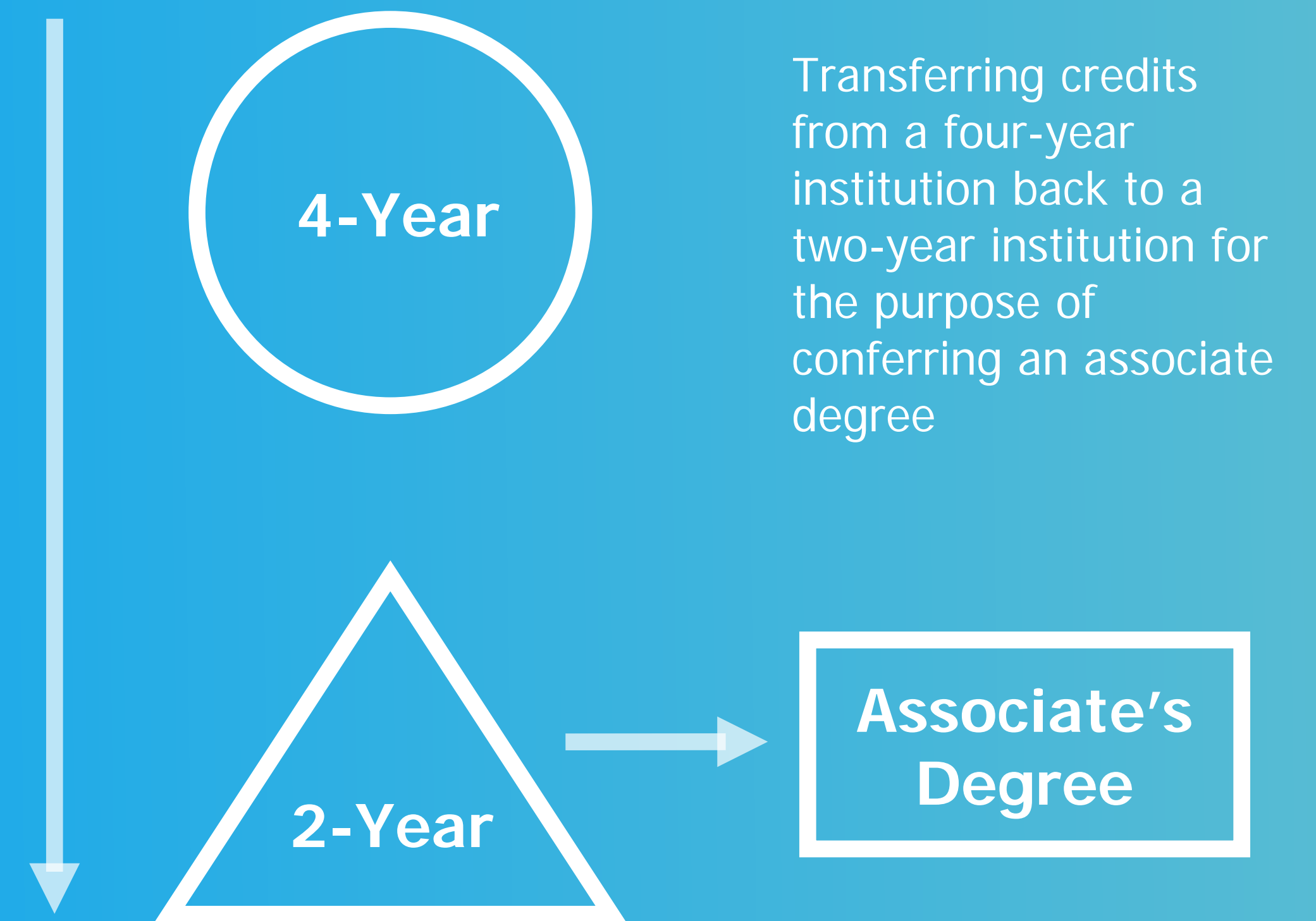


Students transfer from a two-year institution to a two-year institution, or a four-year institution to a four-year institution

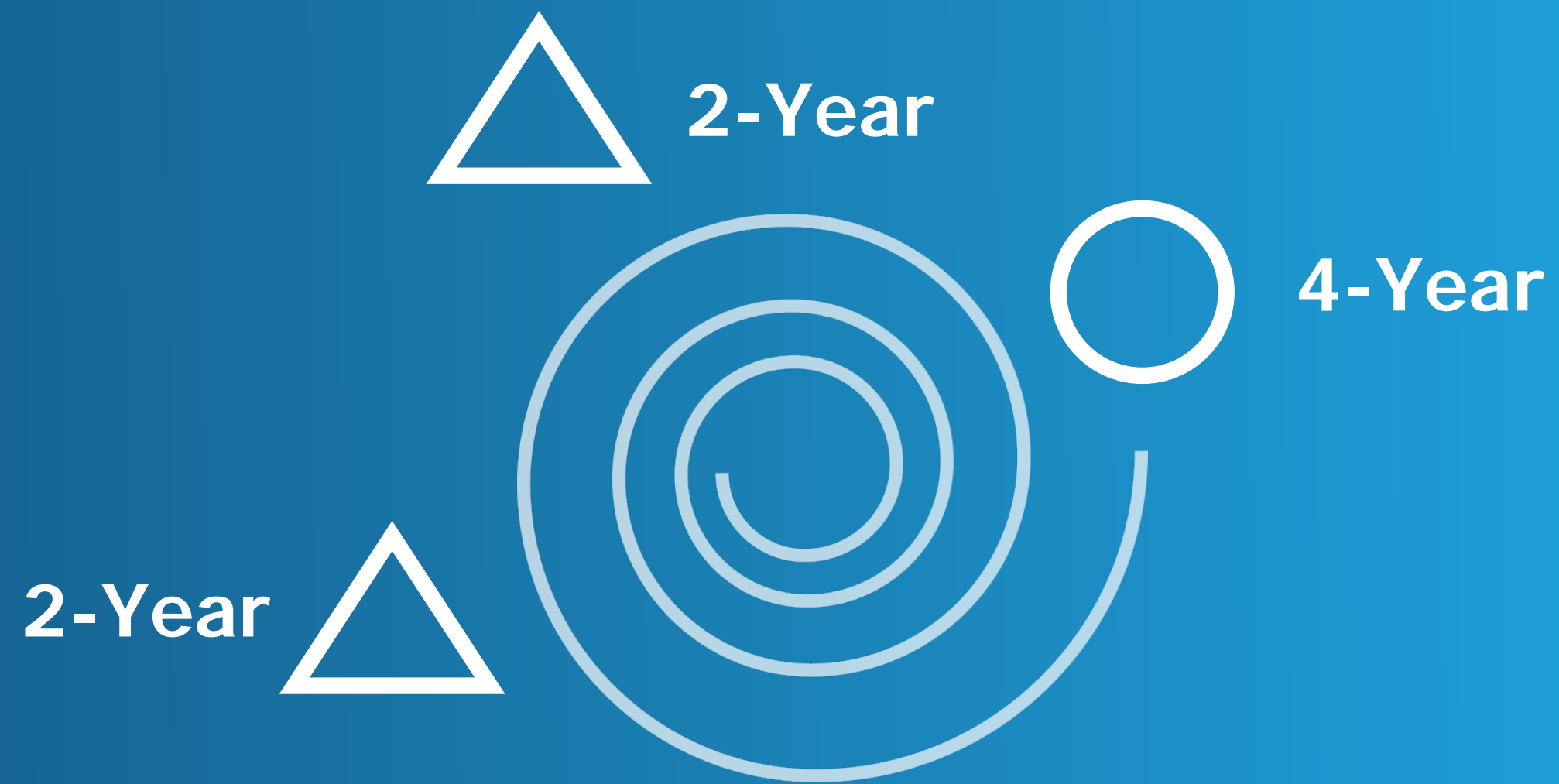
## Reverse Transfer



## Reverse Credit Transfer

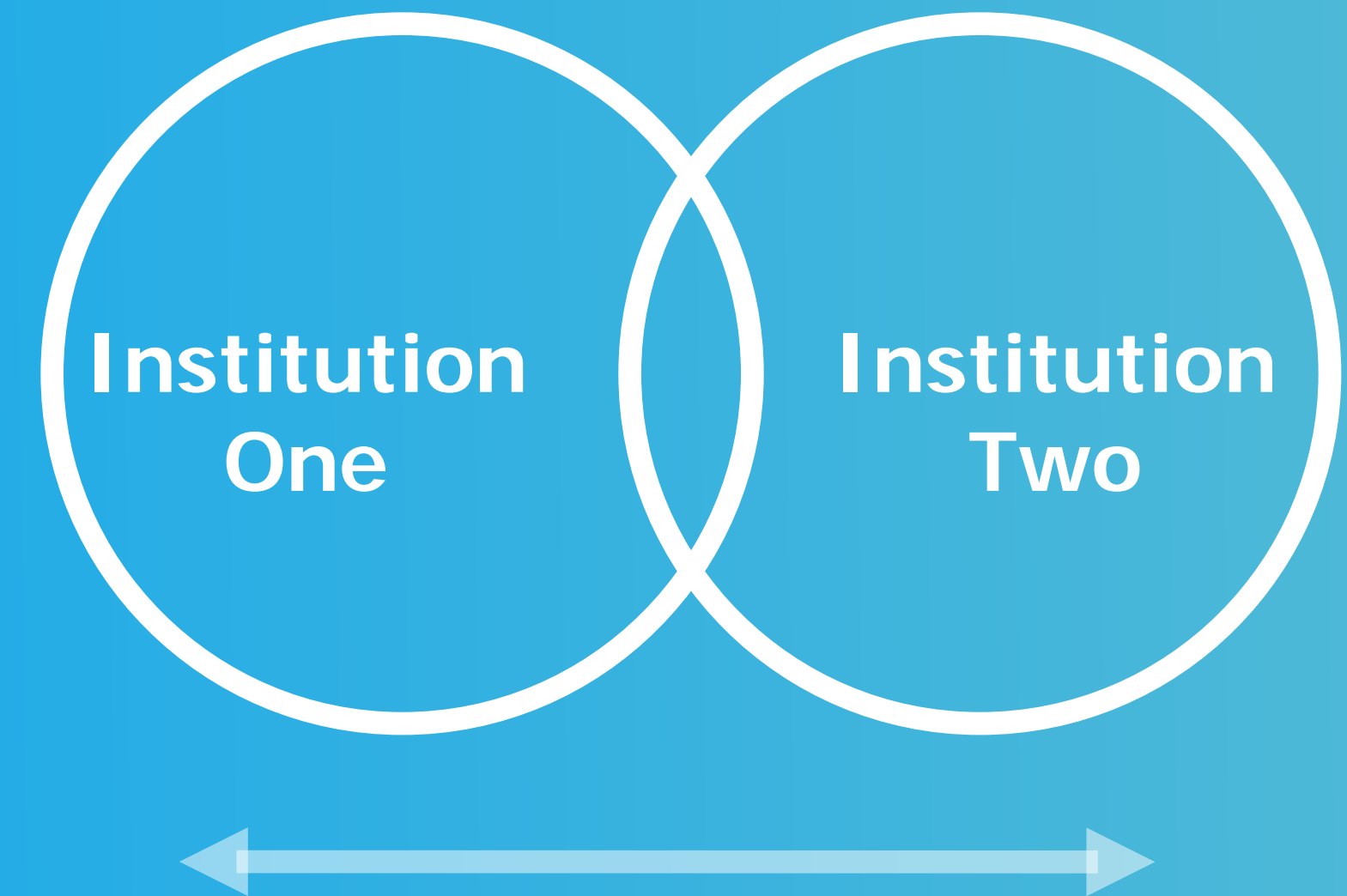


## Swirling and Alternating



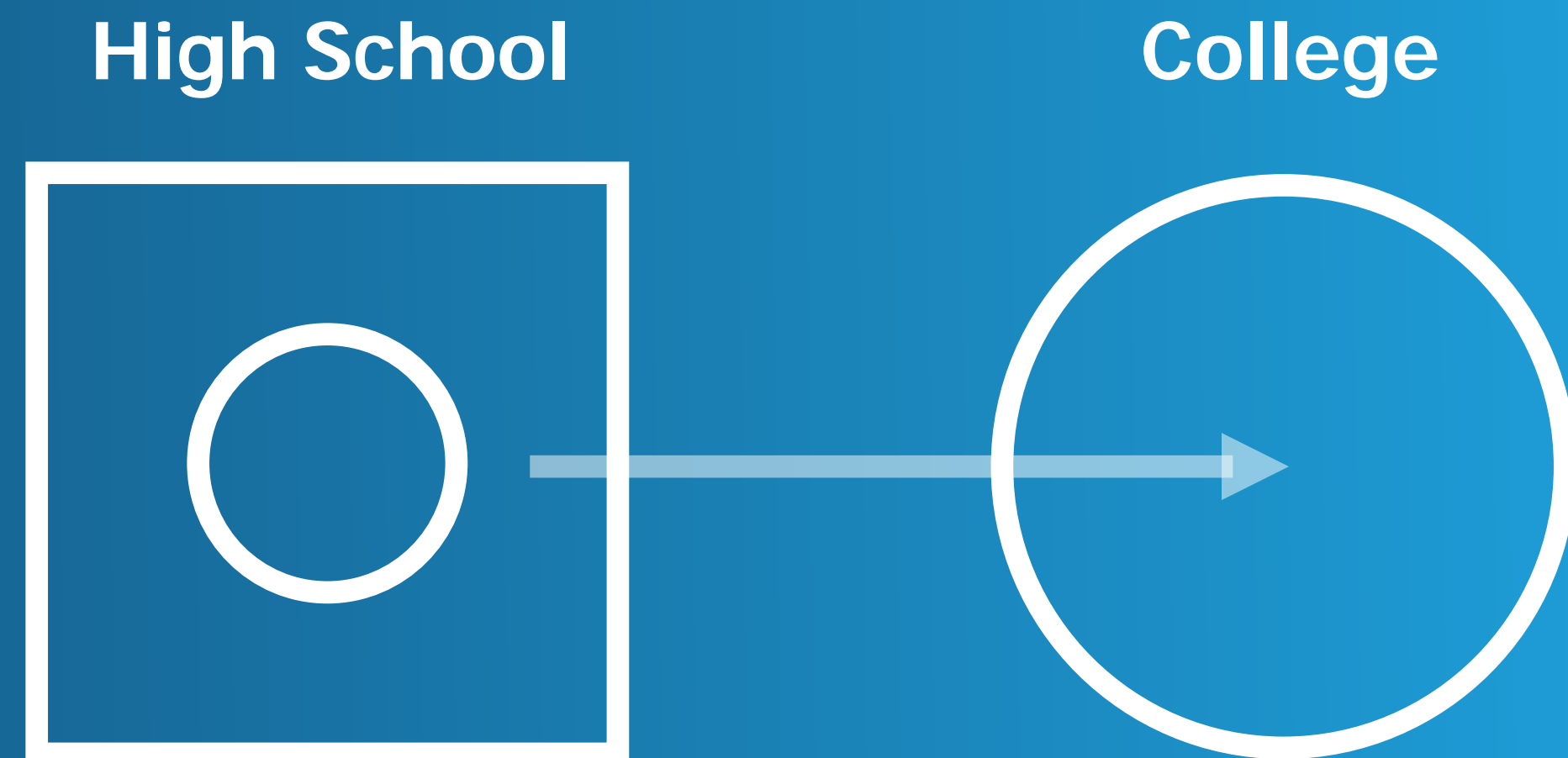
Students who attend and transfer courses between more than two institutions

## Concurrent Enrollment



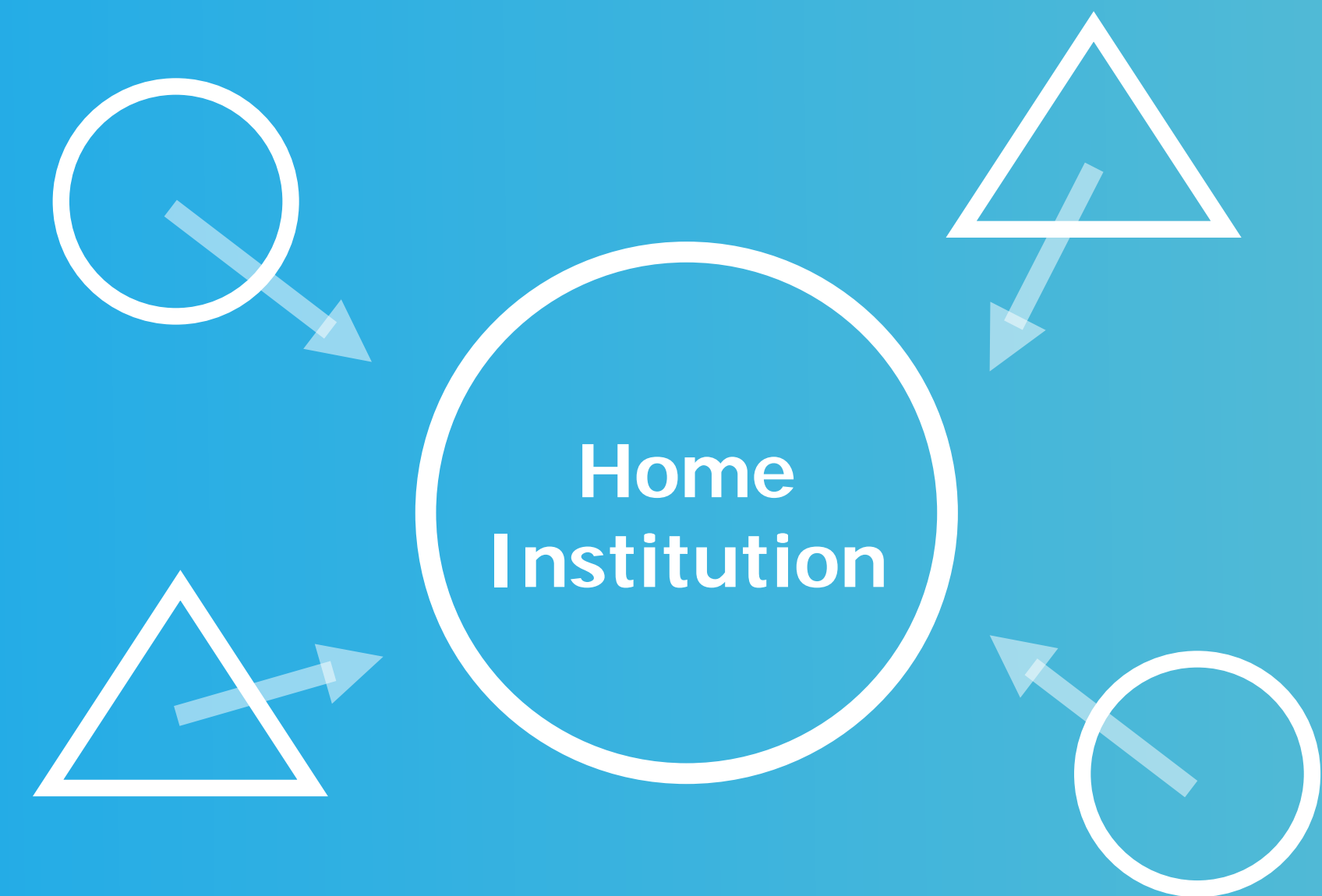
Students are enrolled at more than one institution at the same time

## Dual Credit, Dual Enrollment



Students take college-level courses during high school and credit is later transferred to post-secondary institution

## Transient Status



Students temporarily enroll at another institution with the intention of transferring credits back to their home institution

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# Transfer Student Personas & Journey Map

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# Developing Empathy

**“Empathy is about understanding ... what’s going on in a person’s head and heart ... and acknowledging her reasoning and emotions as valid, even when they differ from your own.”**

— *Indi Young, Author of Practical Empathy*<sup>6</sup>

Although prospective transfer students have some previous college experience, you cannot assume they have acquired all the transfer knowledge they need to be successful. Their personal backgrounds, skills, and abilities, combined with their prior experiences with faculty and staff, make a big difference in how they will approach your website.

To deliver web information that truly meets your transfer students’ needs and expectations, it is imperative you spend time exploring what the transfer process might feel like for diverse prospective students. Among the best tools we have to help us develop this kind of understanding are personas and journey maps.

Personas are descriptions that represent different segments of a target audience, in this case our transfer website users. Instead of presuming everyone will navigate the site in exactly the same way, personas force us to consider the variety of questions and concerns users might expect the website to address. Including broad personal details and a storyline for each of the most common types of users helps us move beyond assumptions and better identify with the specific challenges and goals of each group.

Similarly, journey maps can help us visualize how users might interact with our website over time. Using the business world’s four-stage framework of the “complex sale” as a guide, we can illustrate answers to this key question: What are transfer students thinking, feeling (both positive and negative), and doing as they explore their transfer options, apply, commit, and transition to their next institution?

In developing the transfer personas for this project, we leaned heavily on NISTS expertise and insights from the Education Design Lab's Seamless Transfer Pathways design challenge.<sup>7</sup> In creating the journey map, we drew on interviews with transfer students from different institutions across the nation. We then extended this work by identifying the information a website must provide to fully support student needs at key points of the transfer process.

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# Transfer Student Personas

**We've grouped our personas into three categories. The first two are transfer students, while the third includes professionals who support them:**

1. Staying Highly Directed
2. Overcoming Obstacles
3. Trusted Advisors

Please note that our list of transfer personas is not exhaustive. You can, and should, consider creating your own personas to capture the unique characteristics of the transfer students on your campus.

It's also important to note that students can embody the traits of multiple personas at the same time, and they may even switch between them throughout the transfer transition.

As you expand and apply these personas to your particular context, it might be helpful to create more nuanced, "layered" personas that include characteristics such as "struggles with strained finances" or "has a limited support system." Adding demographic information can also provide perspective, i.e., race/ethnicity, income level, first-generation status, parent/caregiver, veteran, immigration status, etc.

Developing detailed personas — and supporting your work with relevant institutional data and first-hand student stories — can help you better understand the impact intersecting identities can have on the transfer student experience.

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# “Staying Highly Directed” Personas

**Definition:** These students have well-defined aspirations and goals and rely on transfer sites to support their decision-making process. They refer to sites frequently to educate themselves on the transfer process and stay up-to-date on requirements and deadlines.

## GOAL-ORIENTED AND DETERMINED

From high-school, the student has planned to transfer from a two-year to a four-year institution. They had access to academic advisors who could help them plan their major coursework and are very clear about what they want to do.

## THE JUGGLER

The student has a strong desire to succeed but is balancing multiple priorities — family, work, school, and other obligations — and might feel their progress is too slow.

## FOCUSED BUT FRUSTRATED

The student is excited about their major or career choice because they have some relevant life experience. They’re doing their best to plan ahead but are struggling because the institution keeps throwing them curveballs.

## DEFLATED AND DETACHED

The student has dreamed of attending a particular institution since childhood. Unfortunately, the experience isn’t as expected, and they need to relocate for personal, social, financial, or academic reasons.



	Primary Need	Roadblocks and Pain Points	Goals & Expectations
<b>Goal-Oriented &amp; Determined</b>	The student doesn't want to fall behind or get off-track, so they need an accurate list of required classes and the order in which they should take them.	<ul style="list-style-type: none"> <li>• Knows the new institution will 'feel' different both in and out of class but doesn't know exactly what to expect.</li> <li>• Nervous that one academic misstep will ruin their eligibility for future opportunities.</li> <li>• Concerned about funding the tuition differential.</li> </ul>	<ul style="list-style-type: none"> <li>• Throughout community college, have the ability to stay in touch with advisors on both sides to ensure program requirements are being met.</li> <li>• Participate in a high-value experience, such as an internship or undergraduate research, that can set them apart from other students and job candidates.</li> <li>• Have assurance that students who attend their prospective university are successful after they graduate.</li> </ul>
<b>Focused But Frustrated</b>	To maintain their momentum toward a degree, the student needs to feel that the institution and their major department are fostering a strong connection with them.	<ul style="list-style-type: none"> <li>• Anxious about making a mistake that could derail their long-term plans.</li> <li>• Might feel skeptical about how much support is available for transfer students.</li> <li>• Concerned they've chosen the wrong institution to help them meet their goals.</li> </ul>	<ul style="list-style-type: none"> <li>• Find a program that aligns with their interests and career aspirations.</li> <li>• Receive regular check-ins and updates on where they are in the transfer process from empathetic and knowledgeable professionals.</li> <li>• Have the opportunity to connect with peers and professional mentors in their chosen program/field.</li> </ul>
<b>The Juggler</b>	The student needs clear guidance on which classes to take and in what order. They need courses to be available at a time that fits their busy work/life schedule.	<ul style="list-style-type: none"> <li>• Might find it difficult to get to campus for help during regular business hours.</li> <li>• Worried about the consequences of missing class if another life commitment takes priority.</li> <li>• Generally feels exhausted and is concerned they'll lose motivation and momentum.</li> </ul>	<ul style="list-style-type: none"> <li>• Enroll in a program that provides convenient and flexible courses, possibly in a hybrid setting with both in-class and online instruction.</li> <li>• Have access to resources and services that are available in the evening and on weekends.</li> <li>• Have assurance that students in similar situations and programs have achieved their educational and career goals.</li> <li>• Find resources on earning college credit through alternate means, such as credit by examination or prior learning assessment.</li> </ul>
<b>Deflated &amp; Detached</b>	Transferring was never part of the plan, so the student needs a clear and easy connection to the support services that can help them quickly adjust to their new school.	<ul style="list-style-type: none"> <li>• Planning and applying for transfer with limited time, probably during an already stressful time in the semester.</li> <li>• Concerned they might have a repeat disappointing experience, or won't recover from the last one.</li> <li>• Worried that transferring will cost them additional money and delay their graduation date.</li> </ul>	<ul style="list-style-type: none"> <li>• Have assurance they can pick up their major right where they left off, or receive proactive guidance to help them get on-track.</li> <li>• See students who look like them having a good experience in class and on campus.</li> <li>• Find a club or program that helps them connect with the campus community as a transfer student.</li> </ul>

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# “Overcoming Obstacles” Personas

**Definition:** Students who want to transfer but might not have a clear path to follow due to a lack of resources at their previous institution. They explore the site to find proactive guidance and tangible support for navigating the transfer process.

## DECIDEDLY UNDECIDED

The student has an array of skills and talents and is interested in multiple disciplines. As a result, student is struggling to commit to a particular career and/or degree program.

## TRANSITION TROUBLES

The student is working hard to make the right choices but is having trouble navigating the system due to unfamiliar policies and processes or lack of (or mis-) information.

## MAJOR MISMATCH

The student has dreamed of a specific career for years but is realizing they are unlikely to be admitted to their preferred program. Student feels sad and confused about next steps.

## UNSURE/QUESTIONING

The student isn't sure if attending college right now is the best choice. They are enrolled because it is what they are “supposed to do” and may not be committed to finishing a college degree.

	Primary Need	Roadblocks and Pain Points	Goals & Expectations
<b>Decidedly Undecided</b>	The student is running out of time to declare and complete a major and might not realize all the implications associated with accumulating too many or the wrong credits.	<ul style="list-style-type: none"> <li>• Genuinely likes everything and feels pressured to decide even though they're not ready.</li> <li>• Worried the "wrong" choice will lead to a job that isn't fulfilling or doesn't pay a life-sustaining wage.</li> <li>• Hesitant to choose a program that might require different classes in an area of the core they've already fulfilled.</li> </ul>	<ul style="list-style-type: none"> <li>• Find support in choosing a program that aligns with their interests and has a wide variety of career paths.</li> <li>• Have the flexibility to change majors without impacting the overall timeline too much.</li> <li>• Connect with faculty, peers, and professionals to get first-hand accounts of their experiences with various majors.</li> </ul>
<b>Major Mismatch</b>	To regain a sense of hope and excitement about their future, the student needs to find an alternate program that fits their talents and aligns with their career interests.	<ul style="list-style-type: none"> <li>• Grieving the loss of their dream makes it hard to see viable career alternatives.</li> <li>• Concerned that their family members and friends will be disappointed in them.</li> <li>• Might resent the institution for rejecting their program application.</li> </ul>	<ul style="list-style-type: none"> <li>• Find support in exploring other major or career paths that utilize the course credits they've already earned.</li> <li>• Have assurance they can still be personally and professionally successful, both in college and after graduation.</li> <li>• Find opportunities to demonstrate their skills and leadership within the new major/college.</li> </ul>
<b>Transition Troubles</b>	The student needs to feel like they matter and belong and not have their intelligence questioned or feel like they are wasting people's time.	<ul style="list-style-type: none"> <li>• Isn't aware of what they don't know and might not ask enough of the "right" questions to the "right" people.</li> <li>• Worried they're not college material or that it isn't worth the hassle.</li> <li>• Might receive conflicting messages about the value of a college degree from family and friends.</li> </ul>	<ul style="list-style-type: none"> <li>• Have assurance that someone friendly and trustworthy will help them throughout the transfer process.</li> <li>• Find clear and easy to read planning guides, checklists, and degree maps.</li> <li>• Connect with students who have similar backgrounds and are enjoying their college experience.</li> </ul>
<b>Unsure/Questioning</b>	The student needs to decide whether taking a break or making adjustments to their current major/schedule is the best option.	<ul style="list-style-type: none"> <li>• Scared to take on too much debt when they're not certain college is a good use of their time.</li> <li>• Worried they can't help their family as much as they should if they're in college.</li> <li>• Left unchecked, waning momentum might negatively affect their academic performance.</li> </ul>	<ul style="list-style-type: none"> <li>• Find resources that can help with career exploration, financial planning, and time management.</li> <li>• Have assurance they can successfully complete a degree, even if they need to temporarily stop out.</li> <li>• Have access to a variety of course formats that can facilitate a flexible schedule and completion timeline.</li> </ul>

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# Trusted Advisors Personas

**Definition:** Advisors and counselors who support students throughout the transfer process. They use this site to learn about institutions, educate themselves on up-to-date information, and share resources with students.

## SECONDARY SCHOOL COUNSELORS

Help high school students decide which path works best for their goals and needs. They advise on the decision between community college and university and introduce students to dual enrollment and transfer pathways.

## COMMUNITY COLLEGE ADVISORS

Advise students on potential programs and career paths and walks them through the process of transferring to other community colleges and universities.

**Community college advisors rely heavily on their partner institutions' sites for information.** In fact, many colleges try to match their website's transfer information – including processes and language – to the university's site and will link to the university's site as much as possible.

## UNIVERSITY ACADEMIC ADVISORS

Advise students on the transferability of their academic credits, as well as the requirements they must meet to be admitted to their preferred degree program.

University academic advisors must be well-versed in a number of college and program requirements, as well as general institutional policies and procedures.

	Primary Need	Roadblocks and Pain Points	Goals & Expectations
<b>Secondary School Counselors</b>	As a key influencer, the counselor needs to explain all the options students have when choosing a college, including the possibility of transfer.	<ul style="list-style-type: none"> <li>• Uncertain that the information they're providing to students is accurate or up-to-date.</li> <li>• Might feel overwhelmed by the number of schools they should be familiar with.</li> <li>• Concerned about some students' home lives and the lack of support systems to keep them motivated.</li> </ul>	<ul style="list-style-type: none"> <li>• Find an overview of the differences between community colleges and universities, including the cost of attendance and types of programs available.</li> <li>• Know about community college and university open houses and college fairs.</li> <li>• Quickly find easy-to-understand information about dual enrollment options and the transfer process, including who to contact with questions.</li> </ul>
<b>Community College Advisors</b>	The advisor needs access to detailed, robust, and accurate information to help students proactively plan their coursework and degree timeline.	<ul style="list-style-type: none"> <li>• Frustrated by the lack of transfer information on college and university websites.</li> <li>• Worried that students might think transferring is too difficult or confusing, causing them to stop or drop out.</li> <li>• Concerned that the timing of some students' decision to transfer means they won't meet all the relevant deadlines.</li> </ul>	<ul style="list-style-type: none"> <li>• Connect with a transfer-specific contact at nearby two- and four-year schools.</li> <li>• Easily locate transfer planning guides, including links to transfer requirements, degree/program maps, and articulation agreements.</li> <li>• Be privy to transfer admission, policy, and program changes at their top sending/receiving institutions, as well as upcoming transfer events.</li> </ul>
<b>University Academic Advisors</b>	To chart the most viable and efficient degree options, the advisor needs a deep understanding of their school's transfer admission and program requirements.	<ul style="list-style-type: none"> <li>• Concerned they'll be left out of discussions about program changes and policy updates.</li> <li>• May be constrained by policies that limit in-depth advising for transfer-intending students.</li> <li>• Can't collaborate with community college counterparts as often as they'd like.</li> </ul>	<ul style="list-style-type: none"> <li>• Access up-to-date degree/program maps, including information that clearly outlines the implications of changing majors.</li> <li>• Find resources to assist students in the transition between institutions, including those specific to certain student populations (i.e., adult learners, veterans, students of color, etc).</li> <li>• Have insight into the credit appeal process, in the event a student's request is delayed or denied.</li> </ul>

# Web Opportunities for Transfer Student Personas

## TRANSFER PREPARATION

- **Transfer Planning Guides and Checklists:** Step-by-step instructions and easy-to-use checklists that outline specific steps of the transfer process and help students understand and prepare for what's required by their prospective institution.
- **University-Sponsored, Transfer-Specific Events:** Calendar that showcases when and where students can meet with university officials, such as college fairs and open house events.

## ACADEMIC PLANNING

- **Advising:** Easy navigation to content and support services related to short- and long-term course planning that students can use before, during, and after acceptance into their transfer destination.
- **Degree/Program Maps:** Updated maps that show the course curriculum and other requirements for specific majors. Making them clear and easy to find will help students anticipate what courses they will need to take and in what order.
- **Course Equivalency Database:** System that allows transfer students to research which credits from their previous institution will transfer, based on courses that have transferred in the past.

## DEGREE OPTIONS

- **Program Filters:** Showcase and allow for filtering of programs based on area of interest, duration, and format (including online/hybrid programs).
- **Program Flexibility:** Content surrounding flexibility in program selection and details on changing major.
- **Career Outcomes:** Showcase career paths within program pages to demonstrate an array of attainable careers. Additionally, highlight the opportunity to advance or change careers.
- **Student & Alumni Stories:** Showcase success stories of students and alumni from diverse backgrounds.

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# Web Opportunities for Transfer Student Personas

## COSTS AND BUDGETING

- **Tuition & Financial Aid:** Robust content surrounding transfer-specific tuition, financial aid, and resources for external funding.
- **Financial Resources:** Links and content regarding scholarship opportunities, work-study, campus employment, and money management centers.

## NAVIGATING THE TRANSITION

- **Transition Support:** Practical guidance related to navigating the campus, including where to park and how to use the bus system. Also includes wellness resources such as disability, health, and counseling services, and the campus food/clothing pantry.
- **Academic Support:** Links and content related to adjusting to different class sizes, formats, and academic expectations. Include easy to navigate links for tutoring, libraries, and high-value activities like undergraduate research, study abroad, and internships.
- **School Spirit & Student Life:** Video, photography, and rich copy specifically for transfer students that demonstrate pride, community, and the benefits of getting involved. Additionally, a full listing of clubs/organizations at the institution.

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# Web Opportunities for Trusted Advisors Personas

Trusted advisors need the same information as student personas, but they would also benefit from having access to these resources:

- **Why Transfer:** Content related to why high school students might want to start at community college before attending a 4-year university.
- **Transfer Liaisons:** Content and easy navigation to transfer-specific liaisons.
- **Printable Handouts:** Easily accessible, downloadable, and printable handouts for college/university-specific financial aid info, checklists, programs and majors, etc.
- **Articulation Agreements:** Access to updated articulation agreements to ease the transfer process for students who meet guaranteed acceptance parameters.



# The Transfer Student Journey

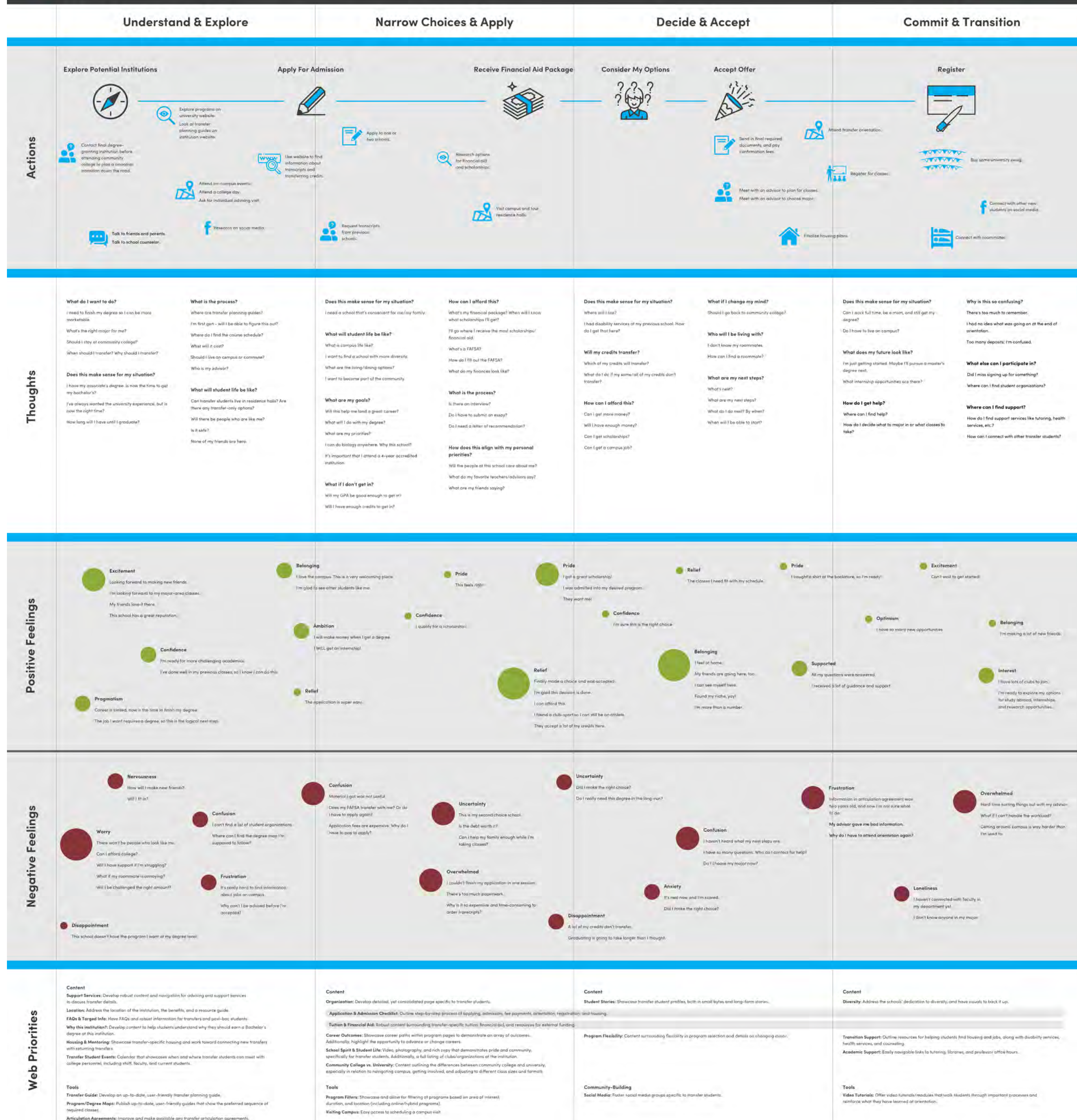
A journey map works in conjunction with personas to help us understand the transfer process and identify both high-tech and high-touch opportunities to support the transfer student journey.

In our research, we've found that all students — regardless of the level or type of degree — move through a four-stage process of “the complex sale.” The process begins with exploration, moves to a narrowing of choices and applying, progresses to deciding and accepting, and finally culminates in fully committing and transitioning to a new institution.

We've outlined key actions, thoughts, and feelings for each phase of the journey, and we've identified the web priorities we see for each stage.

**Ideally, a website provides transfer students the right information at the right time and in the right context.**

[Download the Full Map](#)



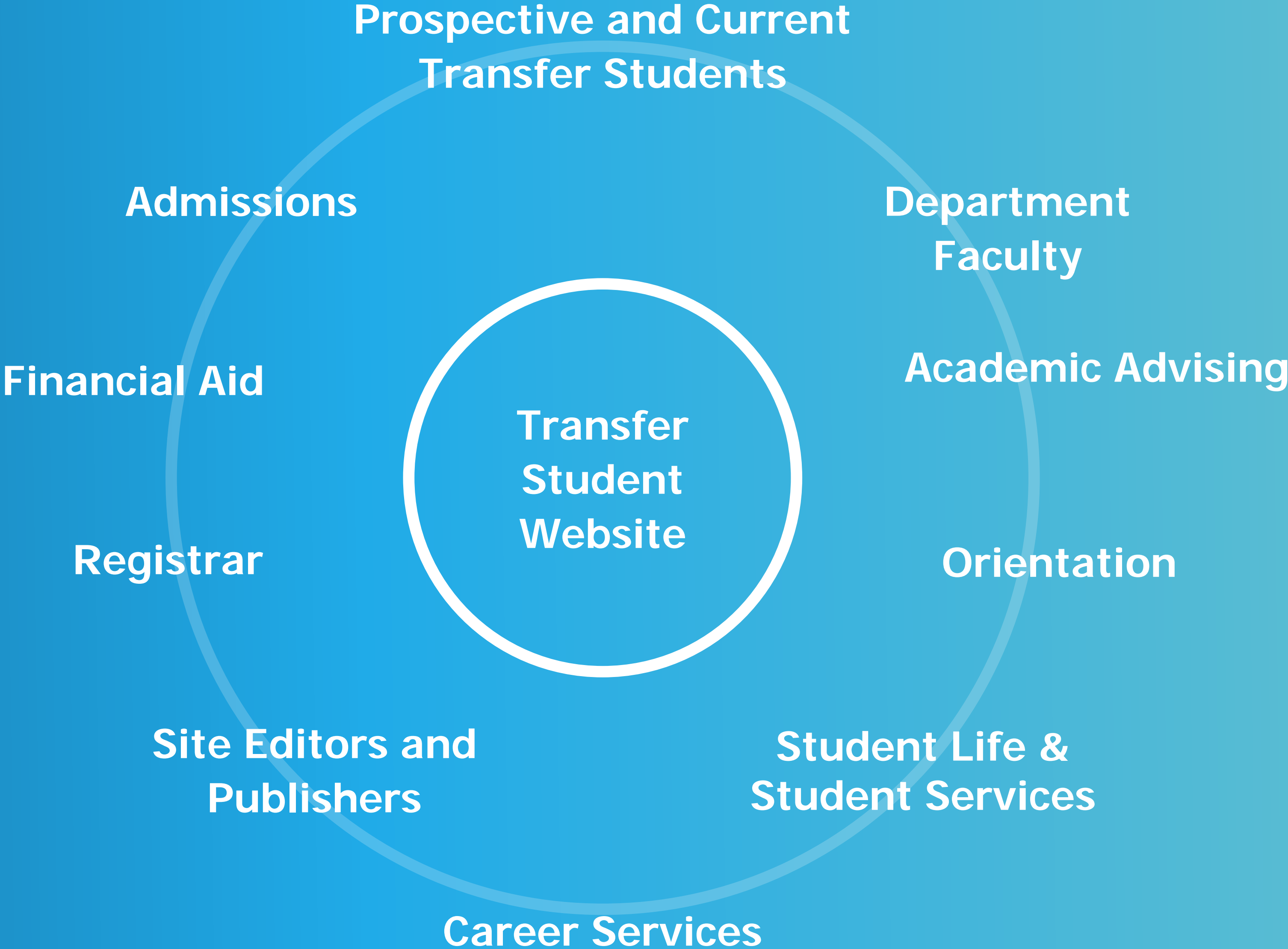
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# Preparing Your Institution

# The 360-Degree Stakeholder Loop

Creating and sustaining a great transfer website requires ongoing feedback and support from multiple stakeholders across multiple institutions. Involving all stakeholders at the outset of the project is essential in ensuring success.



# Building Awareness and Alignment

Because alignment among multiple stakeholders across institutions is essential for a successful long-term transfer site, creating awareness and a shared vision at the outset is important. Four main ways to gather data to support this effort include:

- 1. Enrollment trends at your institution.** By looking at the number of transfer applications and matriculations from year to year, you may be able to argue that transfer students represent a growing segment or an area of opportunity for your institution.
- 2. Google Analytics.** Your website data will help you to decide how effective your current site is for transfer students. By examining time on site, bounce rates for pages, user paths through the site, and key conversion rates for calls to action, you'll identify where you need to make improvements.

- 3. Usability studies.** With as few as five to 10 individual sessions with diverse site visitors, you'll be able to gather actionable information for your site. You should record these sessions. Showing senior leadership clips of actual students trying to use your site is one of the most effective ways to build a case for financial and political support.
- 4. Stakeholder sessions and focus groups.** By talking with transfer counselors, faculty in departments, and recently enrolled transfer students, you'll uncover a number of pain points and opportunities.

These four information sources will not only help you to build a case for support, they'll also help you to avoid the number-one failing of most transfer sites—namely, taking an organization-focused approach.

**Keeping your transfer site visitors at the center of your work and making decisions that will serve them best should be a core, driving philosophy.**

4.



# Content Strategy

# Writing for Transfer Students

Despite their familiarity with college, not all prospective transfer students know the many steps and decisions involved in the transfer process. They need to keep track of significantly more information than the average incoming freshman and may not have received adequate transfer guidance along the way.

By providing comprehensive and detailed content about the transfer journey – from planning through degree completion – you'll clarify potentially confusing information for all the transfer student and advisor personas and help students maintain their academic momentum.

Online resources should be clear, straight-forward, and jargon-free to ensure that all students understand them, regardless of their prior transfer knowledge.<sup>9.3</sup> When drafting your material, it may be helpful to periodically pause and ask yourself, “What concepts or terms do I understand that a student might not?” to uncover insider knowledge that needs further clarification.

Also, take time to consider how the words and pictures you use might impact different transfer populations, particularly students of color who have experienced exclusion, marginalization, discrimination, and oppression. Reflecting on your content using the equity-minded practices for websites<sup>8</sup> developed by the Center for Urban Education at the University of Southern California is a useful approach.

In short, the words, images, tone, and design of your transfer website should be:

- **Welcoming:** show that all students are welcome and will be cared for
- **Demystifying:** communicate policies in clear and approachable ways
- **Creating a Partnership:** demonstrate that the institution is mutually responsible for student success
- **Validating:** actively support and encourage students' ability to be successful

- **Representing:** reflect a range of racial/ethnic identities and experiences
- **Deconstructing:** counter the common presentation of 'whiteness' as the norm

## Prioritizing Content

In the following pages, we have organized key transfer website topics and tools into two categories based on their importance. Essential Content must be available. Feature Content is not required but including it can significantly enrich students' overall website experience.

In both cases, it is imperative to monitor and update information regularly, as finding out-of-date content is a common student and advisor complaint. Some content should be updated in real-time, as details can change daily. Other materials can be updated monthly, quarterly, or annually depending on the topic.

# Essential Content

CONTENT TYPE	NOTES	REVIEW & REFRESH RHYTHM
<b>Transfer Planning Guides and Checklists</b>	A planning guide that outlines the specific steps of the transfer process is one of the top resources that prospective transfer students are seeking. Providing step-by-step instructions and easy-to-use checklists can help students understand and prepare for your institution's requirements.	Real-time
<b>Degree/Program Maps</b>	These maps show the course curriculum for specific majors and often illustrate the preferred pathway between partnering institutions. Making them clear and easy to find will help students anticipate what courses they need to take and in what order.	Real-time
<b>Academic Advising</b>	Because transferring credits and choosing a major is high stakes for transfer students, advising information must be clear and readily available. Advisors should be accessible in real-time or by appointment to help students troubleshoot credit issues and plan for a course load that allows them to graduate in a timely manner.	Annual
<b>Course Equivalency Database</b>	This tool allows transfer students to explore which credits from their previous institution will transfer, based on courses that have transferred in the past. This information is strongest when paired with degree/program maps that show students exactly which courses "count" toward a degree and which are considered "extra" electives.	Real-time
<b>Articulation Agreements</b>	These formal agreements between colleges/universities document guaranteed acceptance parameters based on specific course requirements, such as 2+2 or 2+3 programs. These documents are important to share but generally aren't student-friendly and should not be used in place of transfer planning guides or degree/program maps.	Real-time
<b>Deadlines and Guidelines</b>	Readability and plain language are key to helping students plan for (and understand the implications of missing) key admissions and financial aid deadlines. Use checklists to help applicants organize their information and ensure they have all necessary documents.	Annual
<b>Transition Support Resources</b>	Each campus has a unique learning curve, so showcase resources that make it easy for transfer students to ask for help. In addition to academic, health and wellness, and money management services, be sure to highlight the campus food pantry and clothing closet, childcare resources, nursing stations, and family or gender-neutral bathrooms, if available. Some students may also need guidance on where to park, how to use the bus system, and where to apply for campus jobs.	Annual
<b>Transfer Resource Center (if applicable)</b>	For institutions that have spaces on campus for transfer students to socialize, meet advisors, or get help, include location information, what the hours are, and an overview of services and amenities available. You can also point out adult learner, veteran, multicultural, and LGBTQ+ spaces if you have them.	Annual

# Feature Content

CONTENT TYPE	NOTES	REVIEW & REFRESH RHYTHM
<b>Student and Alumni Success Stories</b>	Success stories help ease prospective transfers' fears and anxieties because they can see that students in a similar set of circumstances have had a positive, valuable experience. Stories also give a human touch to your site and can help differentiate you from other institutions a prospective transfer may consider. Tell stories through video, photos paired with quotes, or short written stories, depending on your available assets.	Annual
<b>Search Engine Optimized (SEO) Marketing-Oriented Content</b>	This sort of content includes blogs, articles, and feature stories developed specifically for transfer students who may not be familiar with a specific institution but who may be searching for topics like "benefits of transferring" or "community college vs. university." By creating well-written, clear, and valuable content around key topics, institutions can simultaneously educate prospective students and build a preference in audiences' minds. In addition, use SEO keywords to ensure that your most welcoming and helpful transfer planning webpage is the top result for those searching for your institution's transfer information.	Monthly
<b>University-Sponsored, Transfer-Specific Events</b>	This is a key piece of information to keep transfer students engaged and moving through the admissions and enrollment process. Showcasing transfer-specific events on your site, such as transfer admission days or transfer orientation, establishes your site as an authoritative source for information and shows prospective students that you understand the unique needs and challenges transfer students face.	Quarterly
<b>Career Exploration Resources</b>	Aptitude tests, skills assessments, and employment outcomes can help incoming transfer students select a major that aligns with their career goals. Pairing this information with a link to the career center can help students plan to maximize resources such as job boards, job fairs, internship placement, resume reviews, and mock interviews.	Annual
<b>Interactive Tools:</b> <ul style="list-style-type: none"> <li>- Tuition Calculators</li> <li>- Budget Planning Tools</li> <li>- Time Management Tools</li> </ul>	Interactive tools like the <a href="#">time donut</a> on <a href="#">stemtransfer.org</a> are highly popular with prospective students who need help planning their time and budget in a new context.	Annual



5.



# Recommended Information Architecture

## Overview

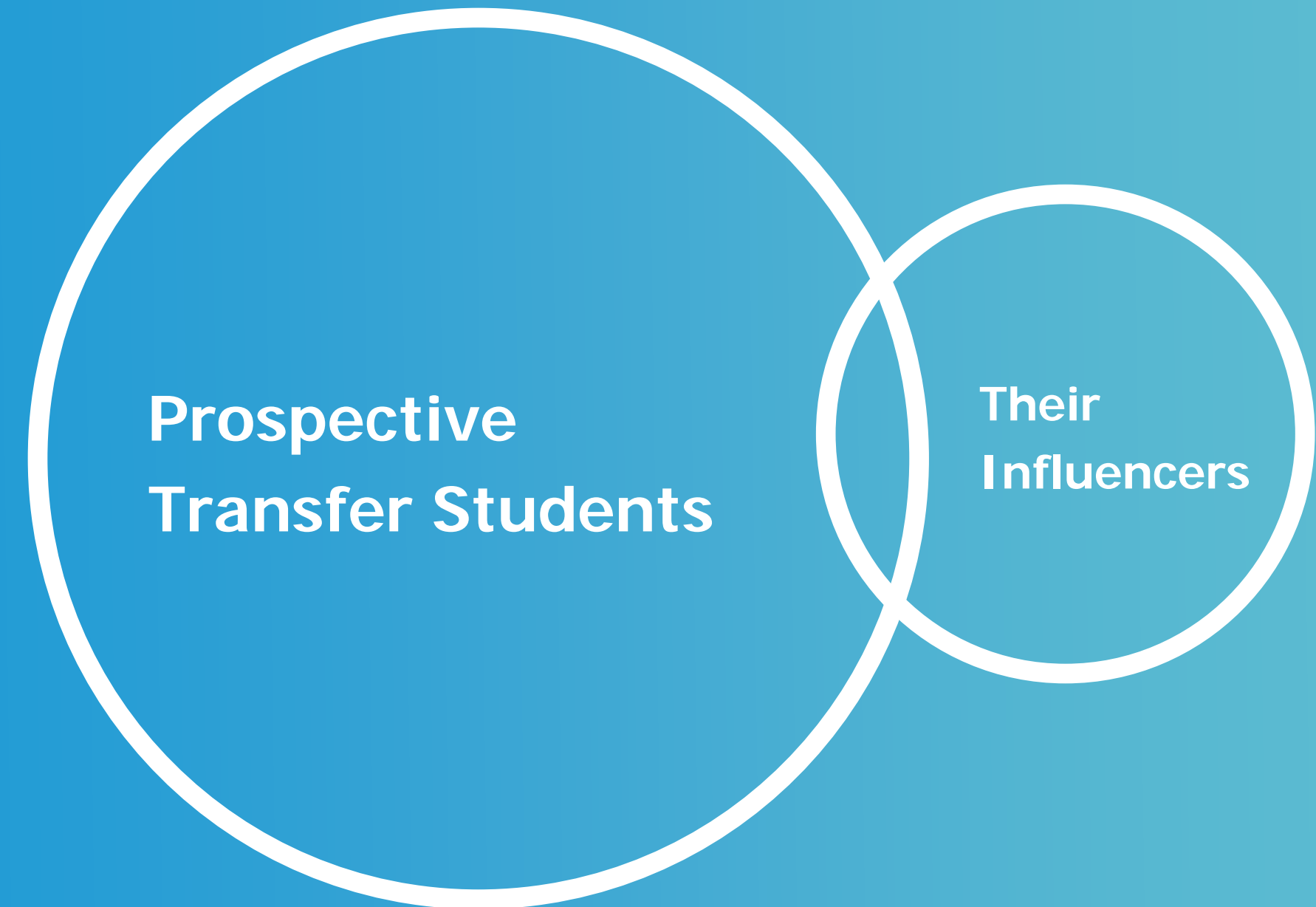
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# Focus on your transfer student audience first.

The goal of information architecture is threefold:

1. Make it easy and intuitive for site visitors to find the information they are looking for
2. Encourage exploration and immersion on the site
3. Complement your brand and identity, where applicable

We cannot overstate the importance of making the information on your transfer student site easy-to-find and navigate from the *student's* perspective. It should be as comprehensive as possible and seamlessly bring together information about transfer admissions, academic advising, credit equivalencies, financial aid, orientation, student life, and transfer-specific resources and opportunities.



### Transfer Student Influencers:

- Parents & Families
- High School Career Counselors
- Community College Academic Advisors
- Faculty & Staff Who Work with Transfer Students

# Goals for a Transfer Student Site

**“A system in which [transfer] information is not posted publicly, is inadequately detailed, or is incoherently presented puts a great deal of burden on students and undermines a primary goal of postsecondary institutions: to improve the outcomes of their student body.”**

*– Schudde, Bradley, & Absher<sup>9</sup>*

Your transfer site should empower students to be successful in their academic careers. A good site does this by:

1. Demystifying the process.
2. Encouraging students to begin thinking very early about their future plans, so they can make good decisions about their coursework.
3. Creating a place where audiences can easily find reliable and up-to-date information.
4. Connecting transfer students to the people they need to talk with.

5. Encouraging key conversions in the transfer student journey: speaking with academic advising, scheduling a visit, and applying.

Different institutions take different approaches to constructing a transfer student web presence. Some have a transfer-specific web presence, while others embed transfer-related information across multiple department webpages.

Our model assumes the creation of a centralized transfer-specific site. This transfer-friendly approach ensures that transfer students can access all the information they need in one place and diminishes feelings of being “bounced around” between departments.

Those talking a more decentralized approach can use our proposed information architecture to ensure that the proper content exists and is interlinked across a larger site.

**In either case, a web presence should take a user-centered philosophy – delivering information according to student needs and expectations rather than institutional boundary lines or office and department hierarchies.**

# Information Architecture

---

**We've developed four recommended sets of navigation for a transfer site that, when available together, provide more holistic support for the transfer experience:**

- 1. Topic navigation:** These links represent all of the major information needs for prospective transfer students.
- 2. Task navigation:** These prominent calls to action represent the main steps we'd like transfer students to take.
- 3. Journey navigation:** Some site visitors may identify by the current stage of their education journey rather than a specific topic or task. This navigation represents common transfer student scenarios.
- 4. Audience gateways:** Geared toward influencers, these pages aggregate information from across the transfer student site and provide additional, audience-specific resources (such as training for advisors).

The subsequent pages in this section contain a series of information architecture maps that are represented in a vertical hierarchy format. A few notes about the charts before you proceed:

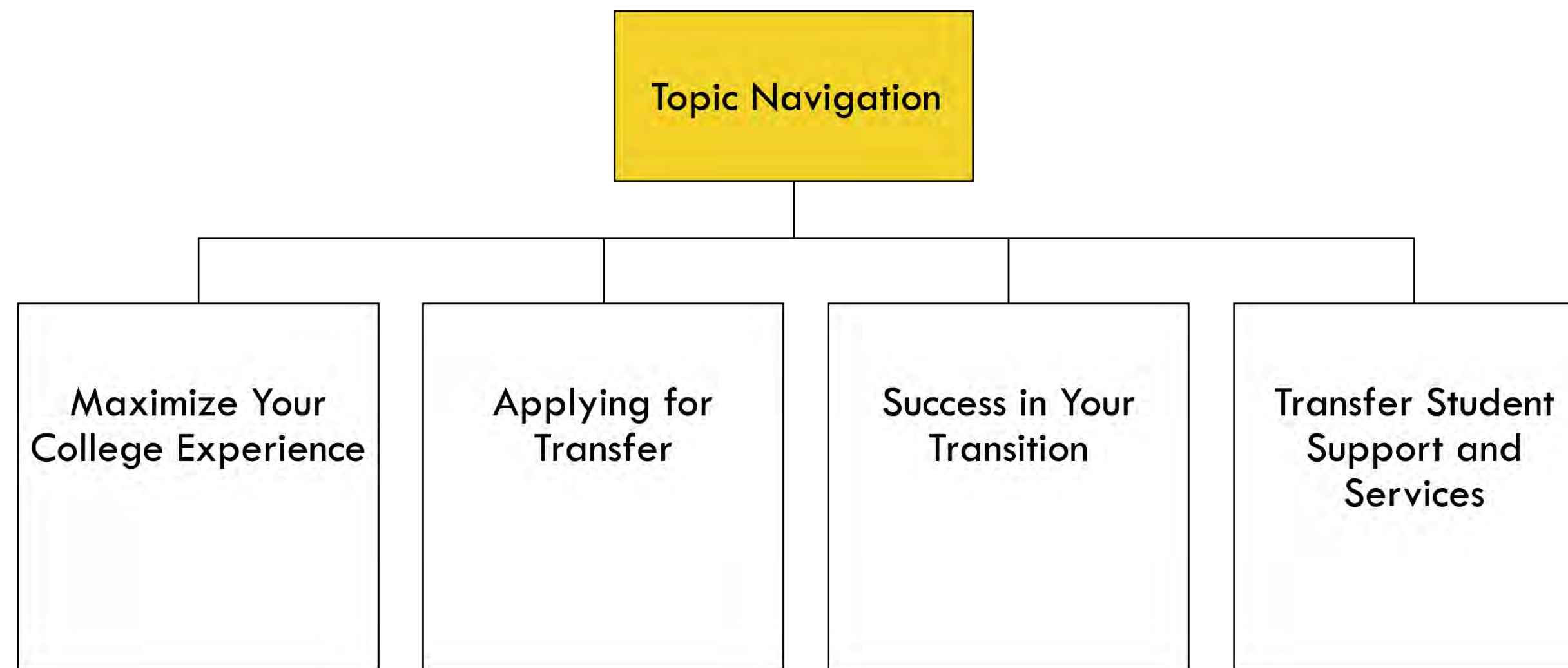
- Each box represents a page or, potentially, a set of pages.
- The boxes are intentionally organized to represent a narrative flow. For instance, the task navigation represents key steps in the process in the order that students are likely to take them.
- The language we've recommended is based on easily identified and commonly used labels in higher education.
- In certain cases, the information we've suggested may not be applicable to your specific institution. Likewise, you may need to add information that is unique to you or your state system.

These charts should serve as a framework and a starting point for you to create a website that serves your specific population of transfer students in a truly tailored way.

We make these recommendations with both community colleges and universities in mind, so students have access to resources at all stages of their transfer journey.

Please see [Section 6: Wireframes](#) for a visual representation of how this information architecture translates into webpage layout and design.

# Topic Navigation

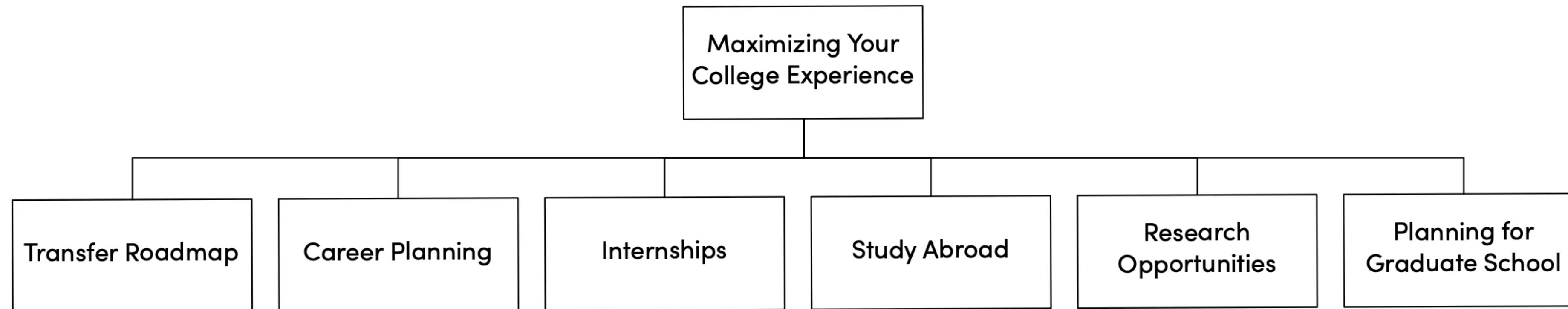


We've organized the primary navigation for the transfer site into a set of four clear, discrete topics that mirror the thoughts, feelings, and actions highlighted on our transfer student journey map:

1. Understand and Explore
2. Narrow Choices and Apply
3. Decide and Accept
4. Commit and Transition

These topics align to the different questions and tasks transfer students typically encounter while matriculating to your institution, including before application, during application, during enrollment, and throughout the transition to becoming a current student. The structure also supports the understanding that the sooner a transfer student begins to think about their academic career across institutions, the better equipped and more successful they're likely to be.

# Topic Navigation: Maximizing Your College Experience



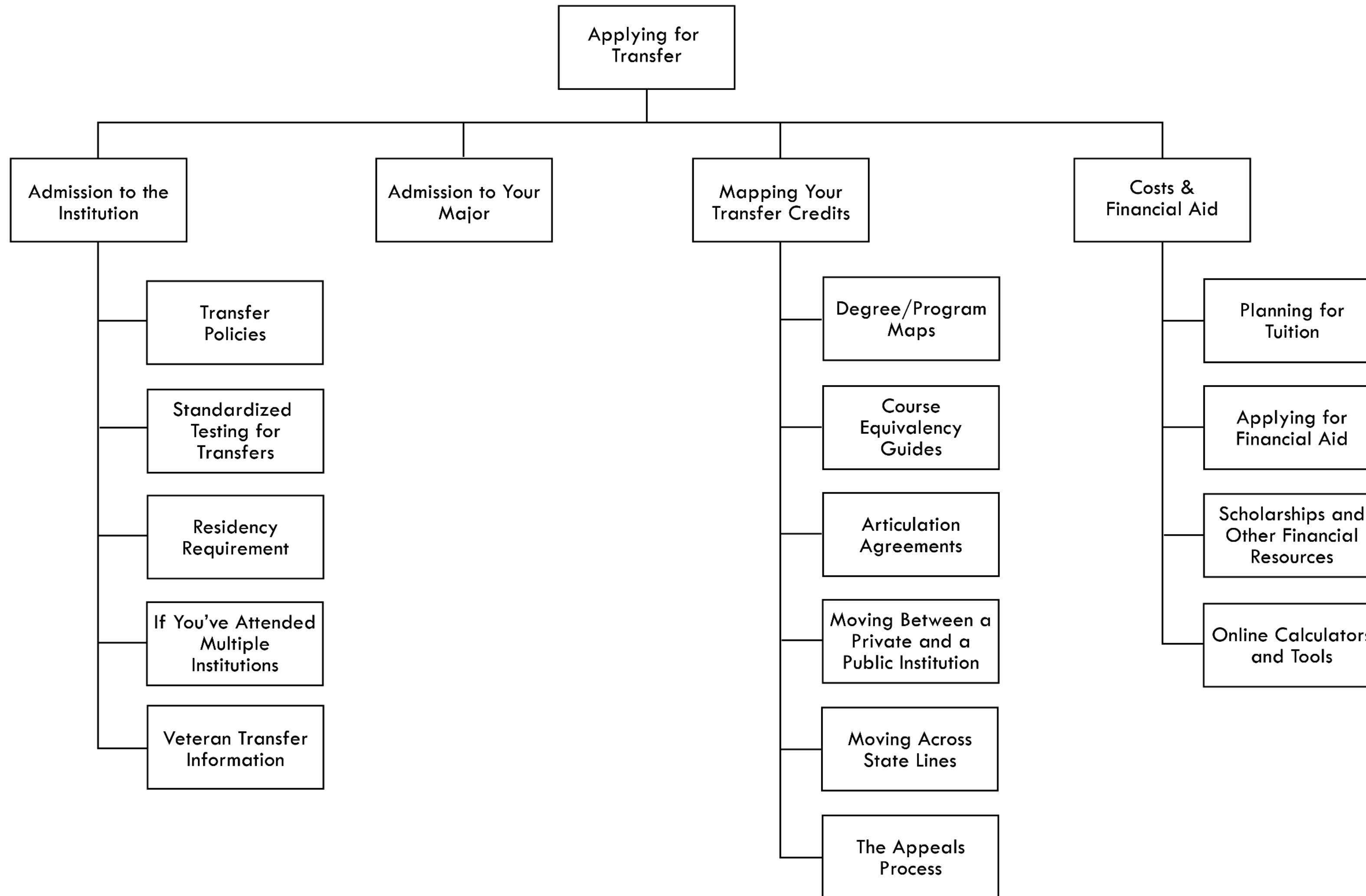
This section of the site is for students who are just beginning or in the midst of planning their transfer experience. Students who start early are more likely to experience success in planning their courses and making a transition from one institution to another.

**Many institutions conflate transfer planning with transfer admissions and orientation policies and procedures.** This limited perspective often ignores the fundamentals of transfer that students need to know and may exacerbate confusion – and worse, might contribute to students’ excess credits and increased time to degree.

Thus, this section of the site intentionally supports a smoother transition by showing prospective students exactly what they should be thinking about and when, including what kinds of decisions they can make today to prepare them for success throughout their transfer journeys (i.e., checklists, calendars, and reflection guides).

This section also helps broaden students' imaginations to consider participating in high-value experiences and opportunities that can enhance their transfer experience but might not have been part of their initial thinking.

# Topic Navigation: Applying for Transfer



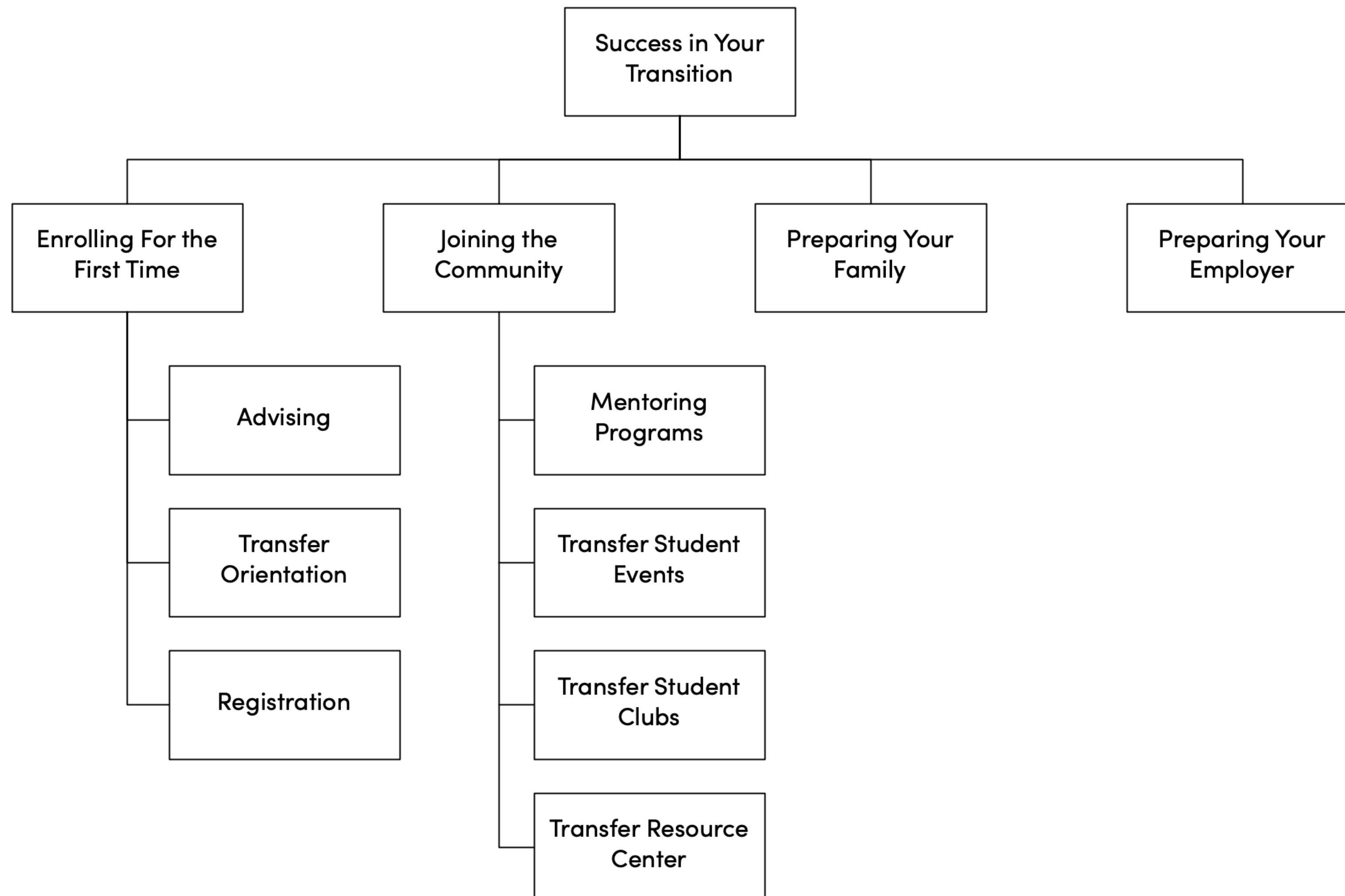
This section of the site is the most critical to a successful transfer transition. The goal is to make key application and enrollment processes as seamless and easy to understand as possible, all while giving prospective students a direct connection to individuals who can answer their specific questions.

Content in this section is particularly prone to academic jargon, so we recommend including clear step-by-step instructions written in plain language. Rely on easy-to-read checklists to help transfers send complete applications with all required documents and track their progress toward a degree.

Key content to emphasize in this section includes:

- Application requirements
- Program maps and credit applicability
- The total cost to obtain a degree and the financial resources available to help
- Deadlines
- Who to contact with questions

# Topic Navigation: Success in Your Transition



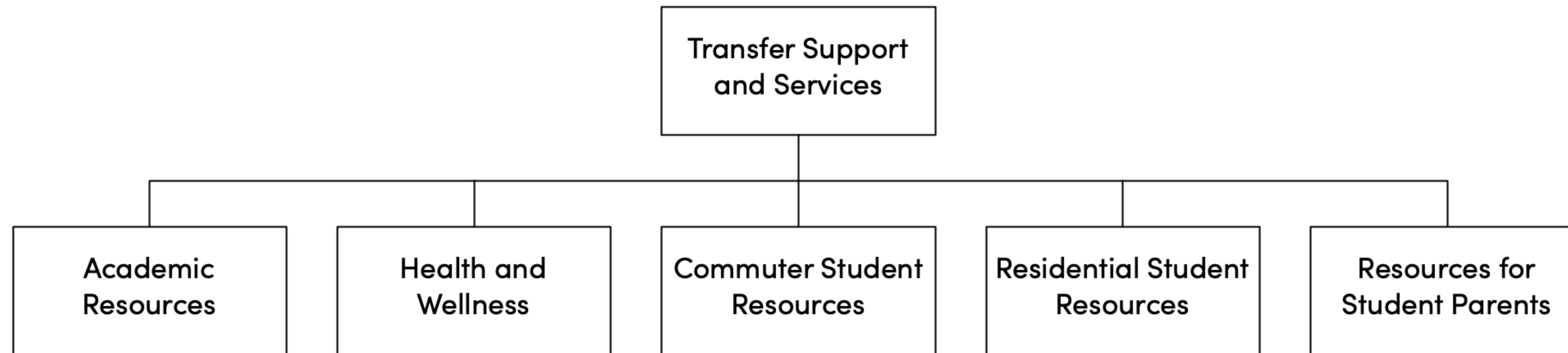
Once students are accepted to your institution, this section supports their transition from applicant to current student. The goal is to create welcoming and helpful content that makes it easier for admitted students to enroll, with an eye toward integrating these students into the broader campus community.

Because transfer students often feel out of place and report challenges in integrating into a new community, showcasing resources specifically for them is essential. This information is also useful to advisors at the sending institution, who may be providing guidance to students throughout their transition.

In addition, transfer students often have significant responsibilities to their families and employers. Providing information to help them navigate crucial conversations regarding their schedules, availability, and changing priorities as a student can increase their chances of academic success.



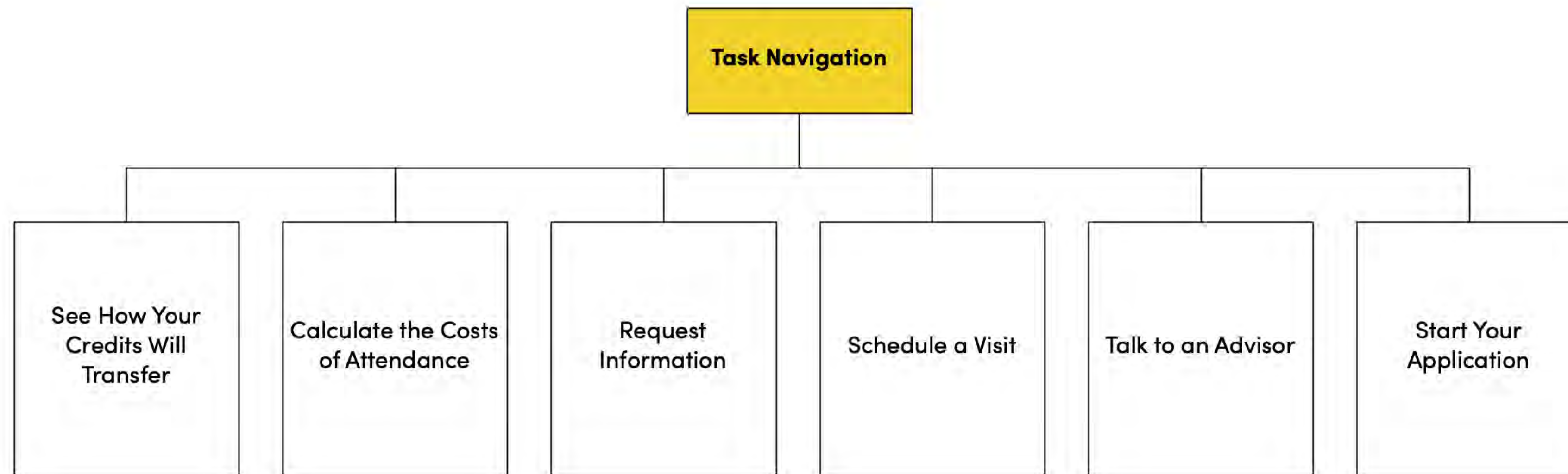
## Topic Navigation: Transfer Support and Services



Once admitted transfer students have made the transition to current transfer students, this section offers the support and resources they need to stay engaged and on track, both inside and outside the classroom. Considering what questions transfer students are likely to have throughout their first semester of enrollment can help you determine which services to highlight.

Because campus resources typically target all students, it's important to provide at least some transfer-focused messaging before linking out to individual department and office websites. Thoughtfully tailoring the landing page of each category of supports can normalize help-seeking behavior and combat the imposter-like feelings some new transfer students might have.

# Task Navigation



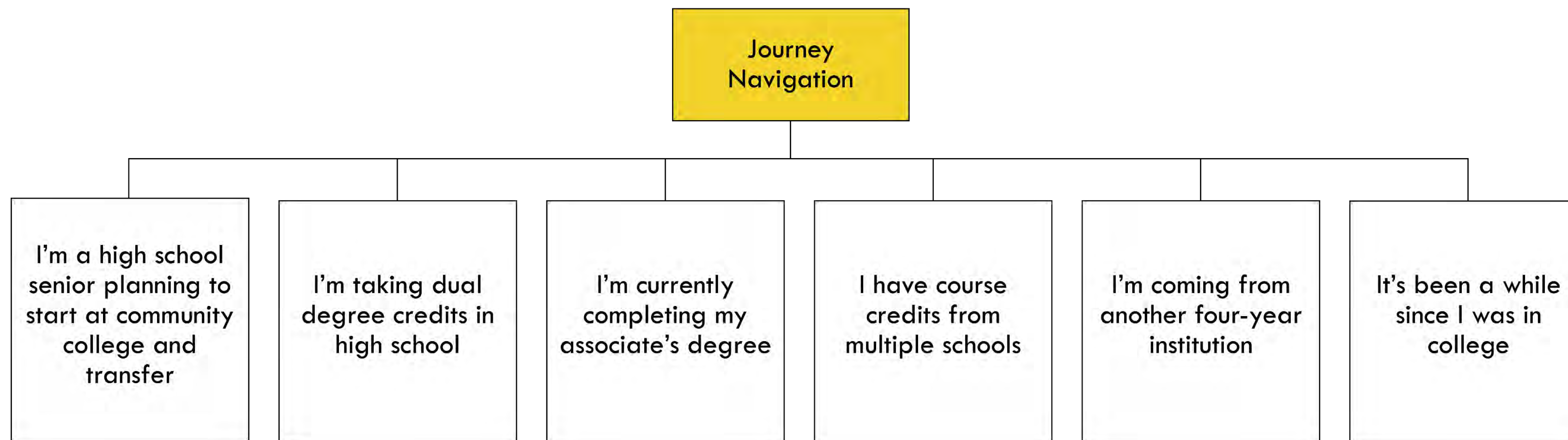
Task Navigation describes the primary set of actions visitors can take when they arrive at your transfer site. These links will be the main calls-to-action and should be prominently featured.

Talking to an advisor to determine credit applicability and applying are the two most critical early interactions prospective transfer students will have with your institution. We've also included links to request information and start an application in order to ease the admissions journey.

For all tasks, it should be quick and easy for students to make direct contact with knowledgeable transfer professionals when deciding whether to apply. Providing clear, consistent, and correct information across departments should be a top priority for all involved.

**While many institutions don't allow prospective transfer advising prior to admission, such conversations are often a crucial step for students. If at all possible, institutions should support this vital connection.**

# Journey Navigation

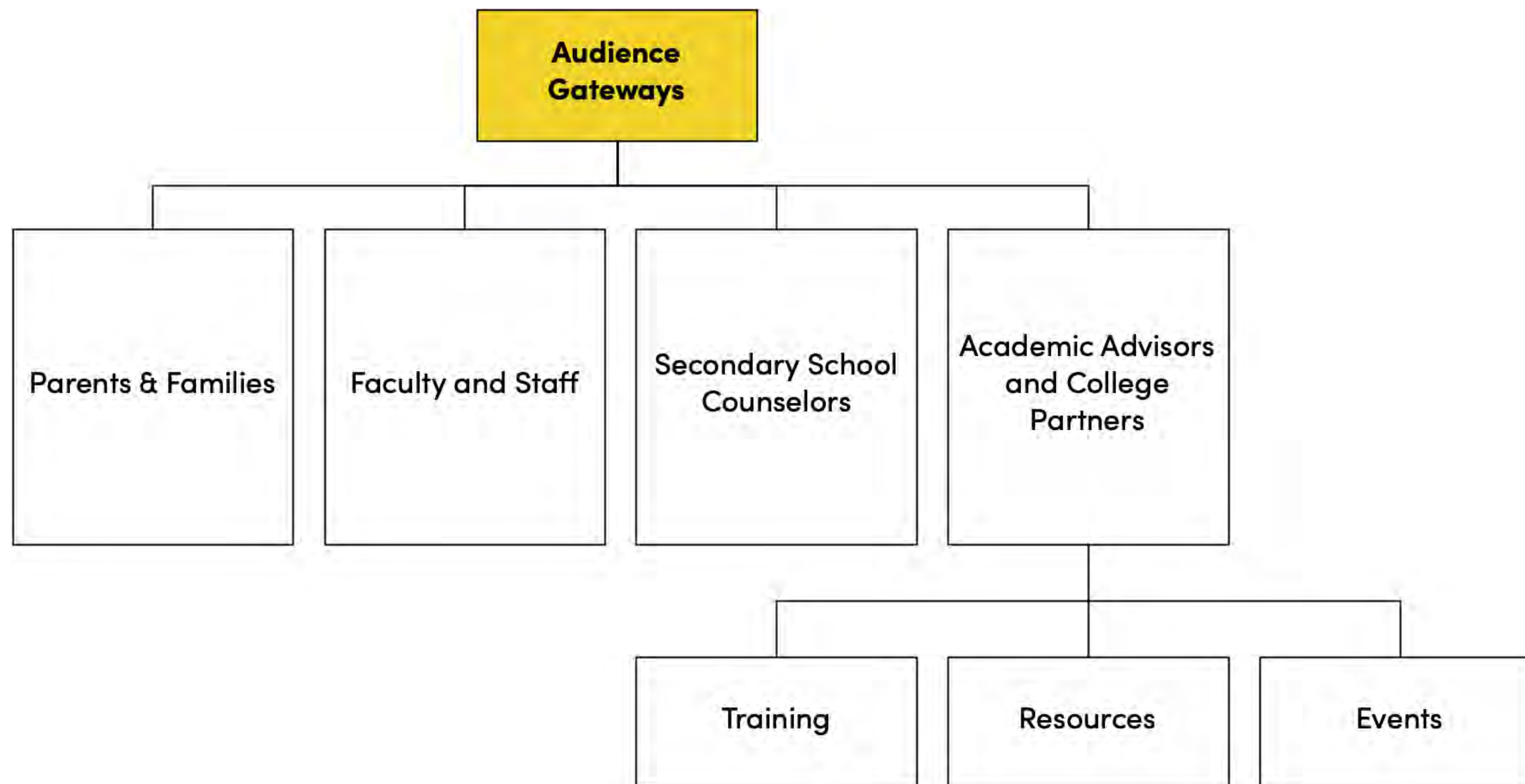


Clear navigation and robust transfer-specific content will go a long way to ease the transfer student journey. However, as we learned in the personas, transfer students may be coming to an institution from many different paths.

These pages should include very specific checklists and step-by-step information as appropriate to each segment. These pages should also make clear any information, opportunities, and limitations that are relevant to each specific audience.

Our recommended journey navigation serves up information highly tailored to where students are in their education career. This navigation can help students identify whether or not they are considered a transfer student (and therefore help redirect any prospective students who may have arrived here in error), and it can help more specific segments of transfer students get to the information they need quickly and easily.

# Audience Navigation: Gateways



To keep the primary topic navigation streamlined and focused on meeting transfer student needs, create Audience Gateways for other key audiences such as those featured here. Each gateway should house information that's top-of-mind for that specific audience. Further, they should be organized according to the mental models and expectations of each individual audience for the best user experience.

An Audience Gateway page can house everything that audience needs in one page, or it can be its own section of the site with deeper level pages. For example, parents and families might want information about cost and financial aid. But instead of keeping a set of Cost & Financial Aid pages in this section of the transfer site, you can link to those existing pages elsewhere.

By contrast, academic advisors and college partners will need a more robust set of resources to support their work with transfer-intending students. Similarly, faculty and staff may need additional guidance on understanding transfer student needs and what resources are available to support them. The example subpages listed here are intentionally broad but can be easily tailored to fit your institution. As with student-facing content, be sure to include specific points of contact for more information.

6.

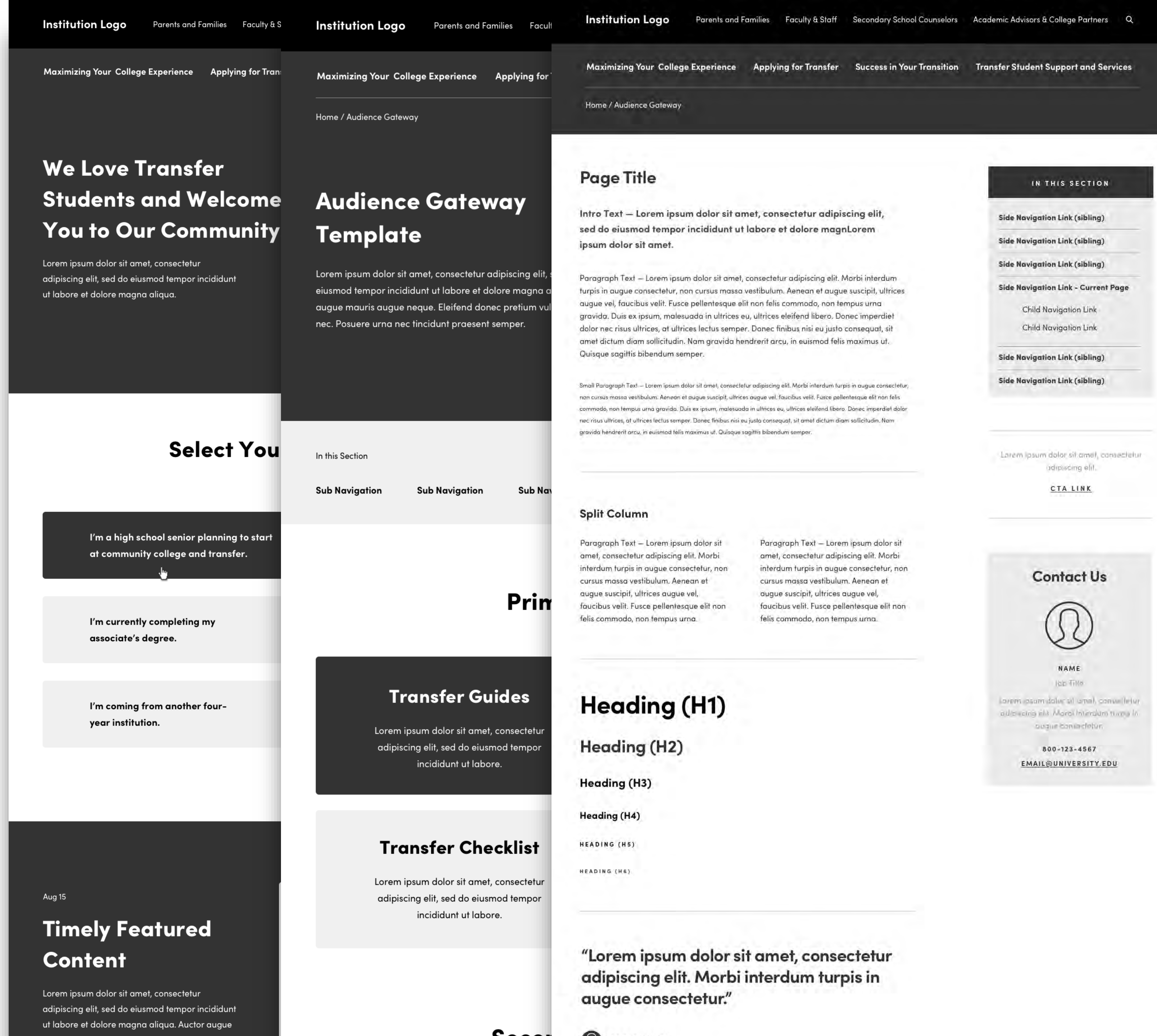
# Wireframes

# An Introduction to Wireframes

Wireframes have multiple applications in web design. Some are high-fidelity, detailing finer points of design that will eventually be “skinned” with colors and fonts.

For the purposes of our collaboration, however, the wireframes we’ve created are “low-fidelity.” They are not intended to dictate visual design in a prescriptive way.

Instead, these wireframes, particularly the homepage and gateway page wireframes, illustrate and build on the ideas expressed in the content strategy and information architecture, showing specific components and layouts available in the design system.



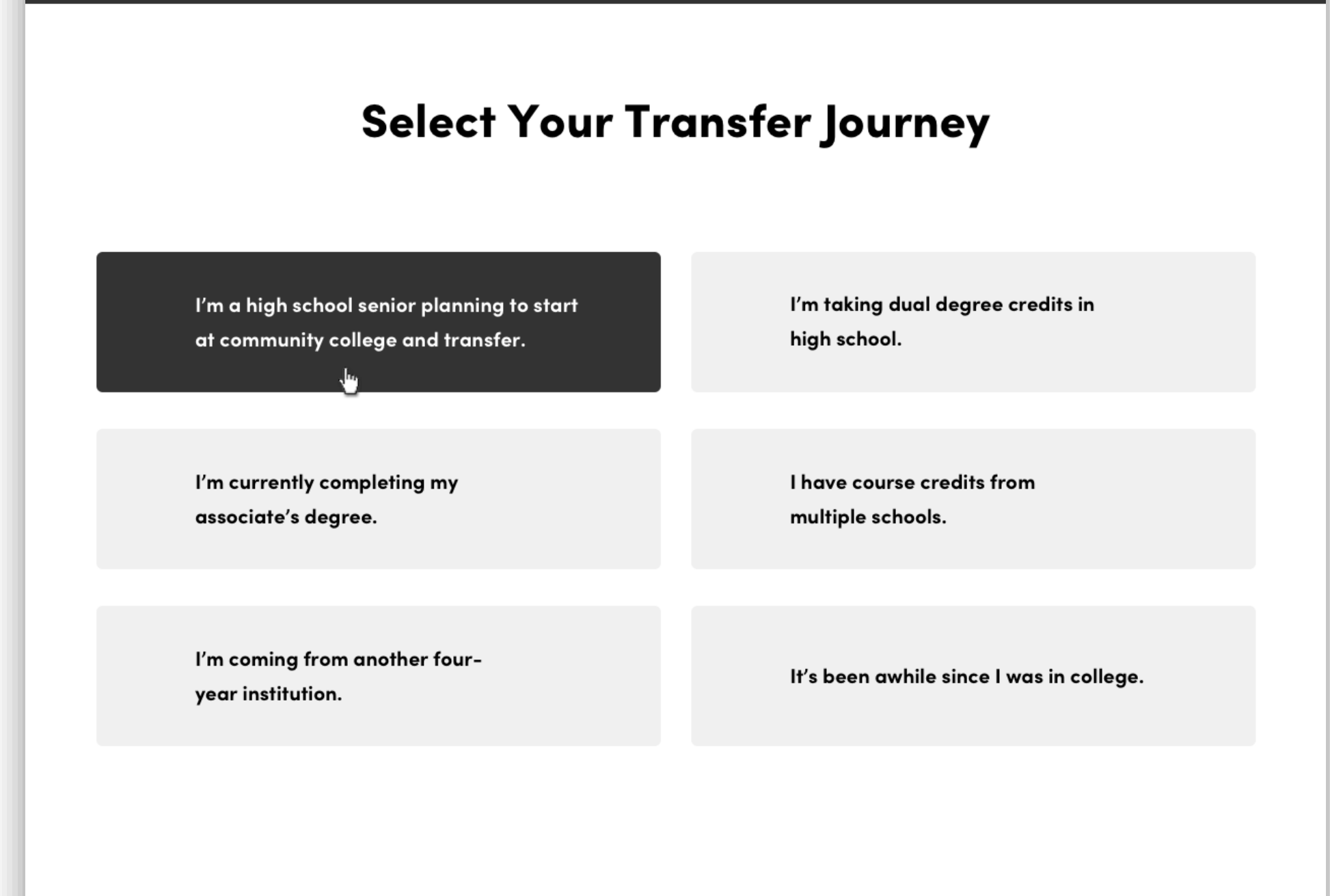
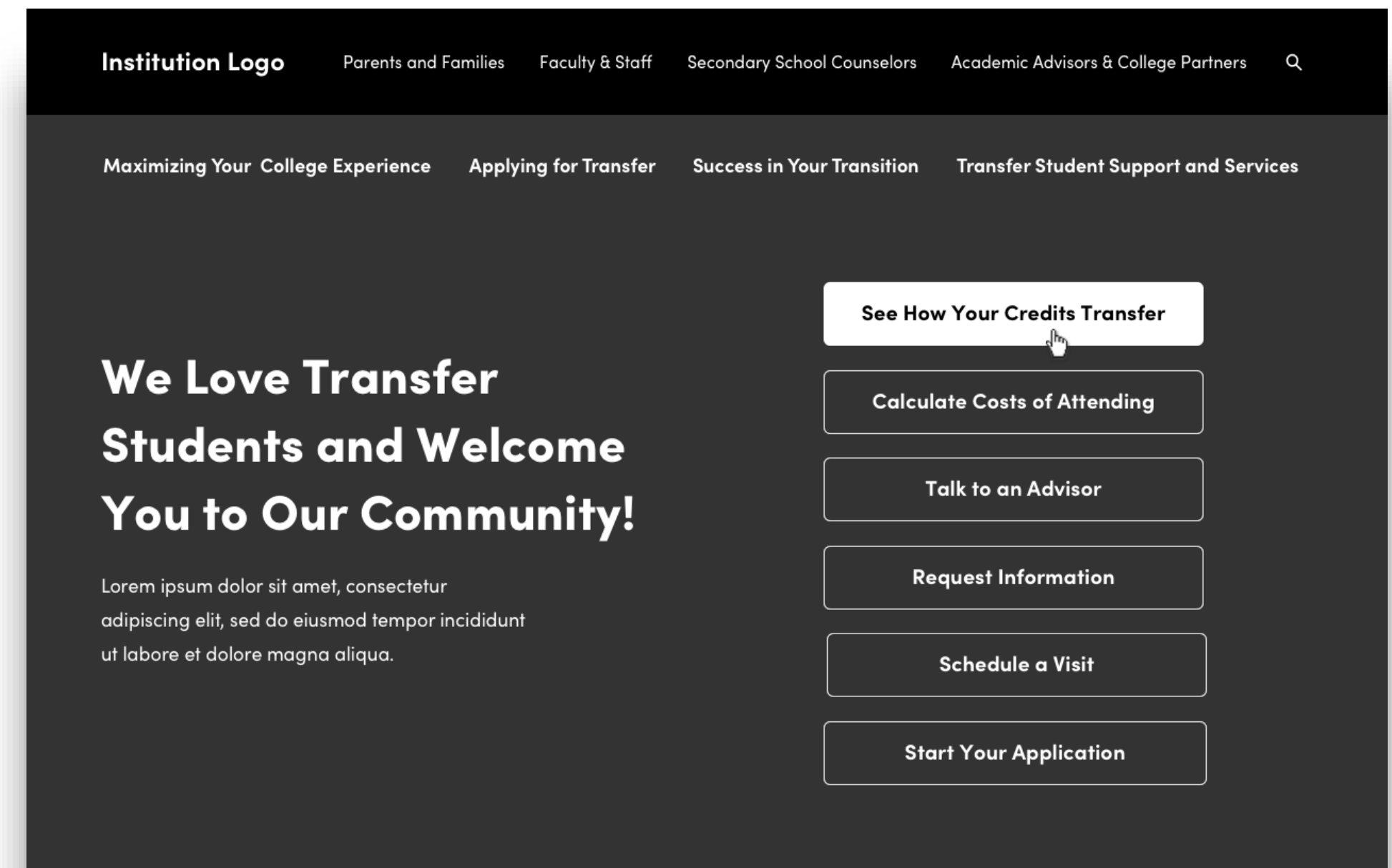
# Homepage Wireframe

Audience Gateway

Topic Navigation

Task Navigation

Journey Navigation



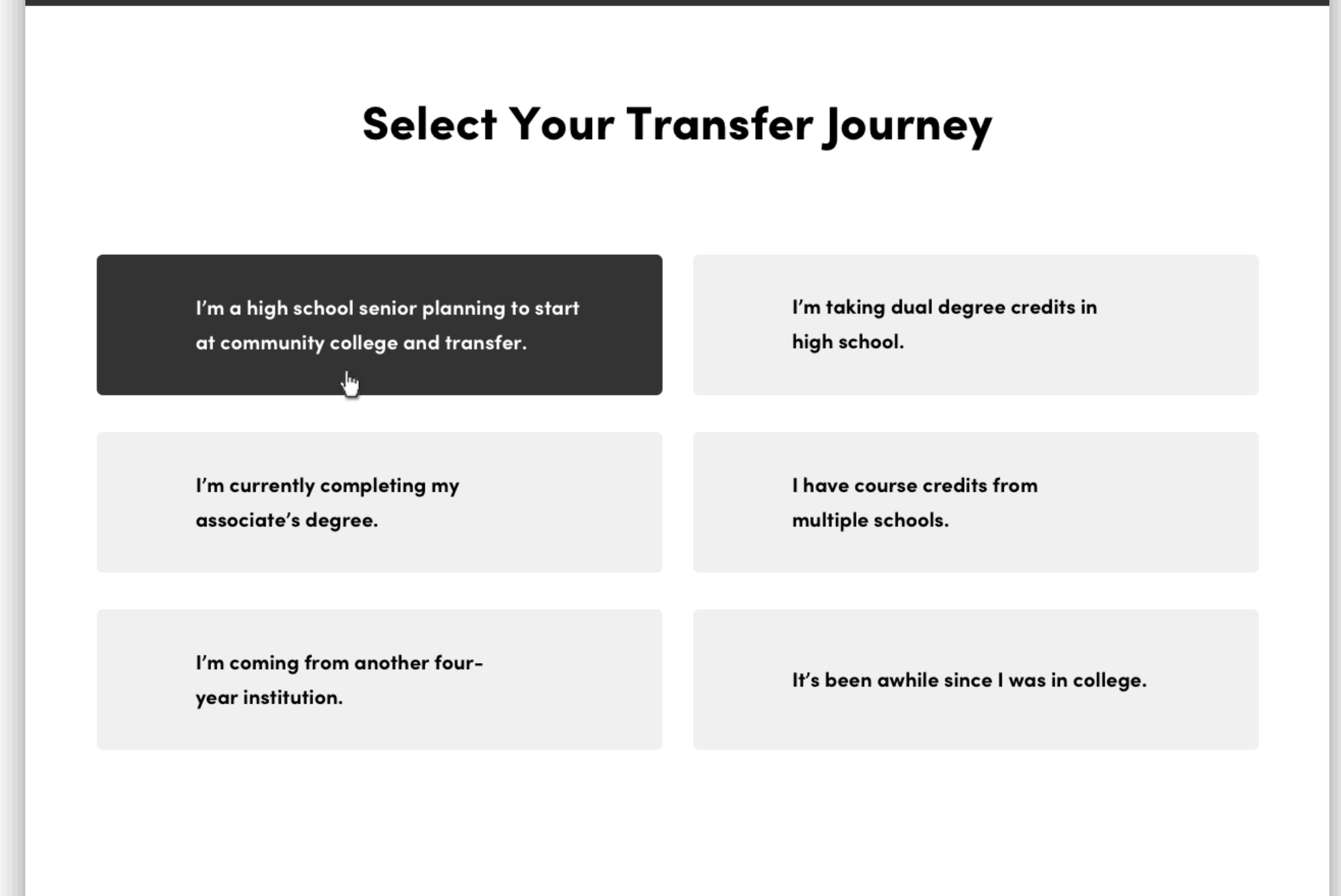
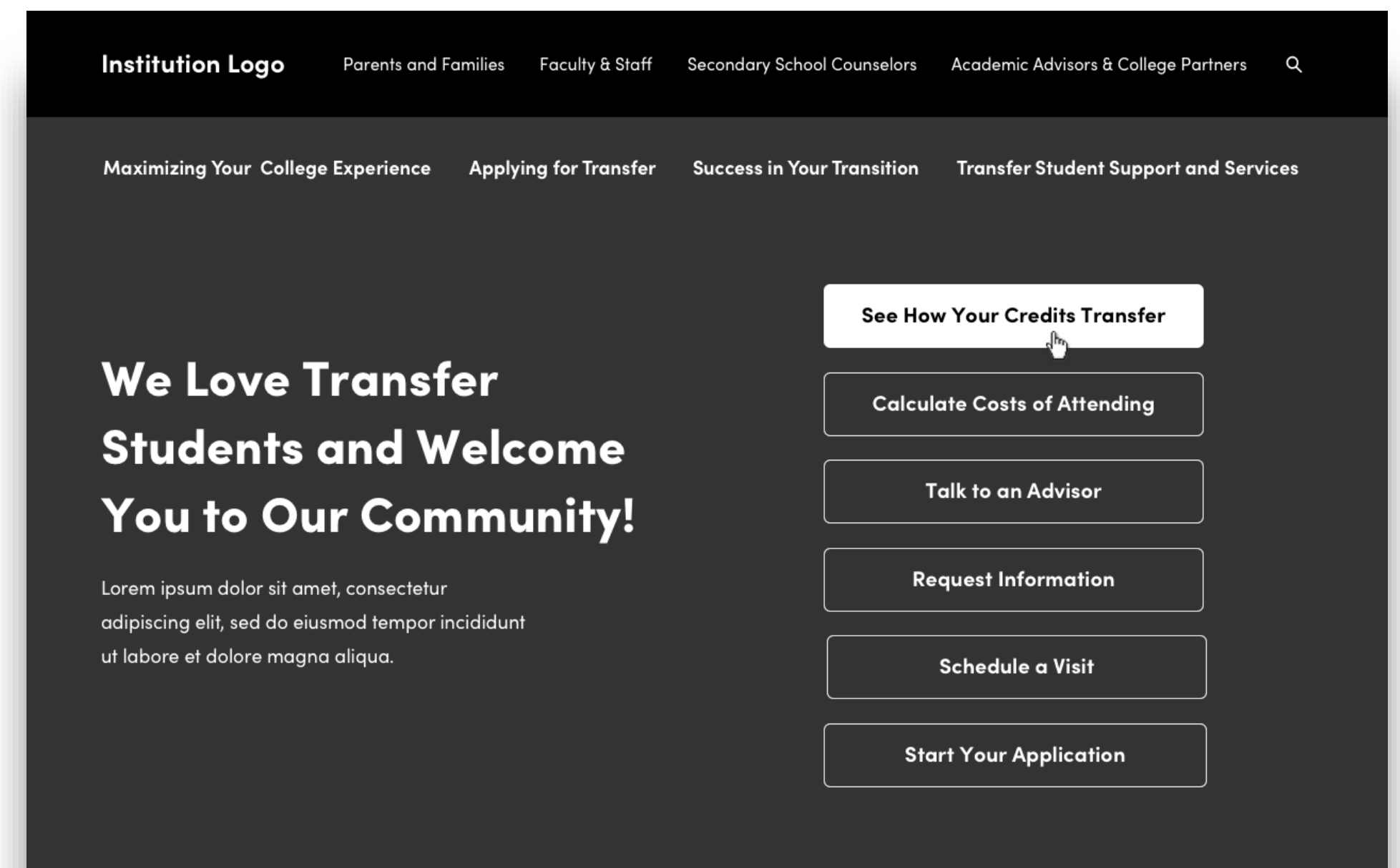
# Homepage Wireframe

## Hero

The opening real estate contains all of the recommended navigation sets, as well as a place for high-quality photography that helps create a sense of place for transfer students.

## Journey Navigation

For students who think in terms of where they are in their academic career, journey navigation facilitates the process of finding information and understanding opportunities available, based on a student's current path.





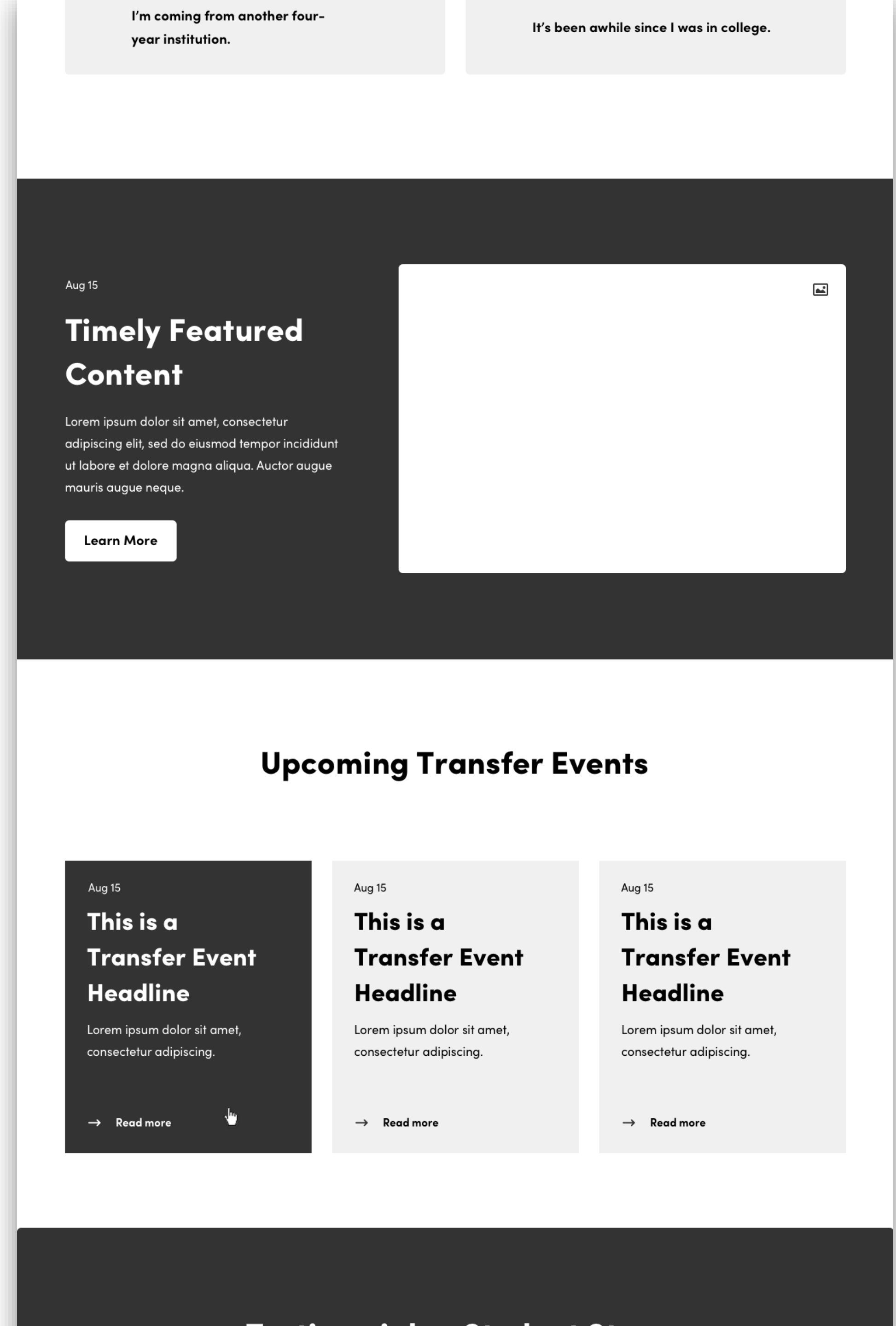
# Homepage Wireframe

## Timely Content Feature

Further down the page, we recommend highlighting one or two items that would be of high interest to transfer students. An editorial calendar is useful in planning content for this section. See pages 38-39 for suggestions on essential and timely content.

## Transfer Events

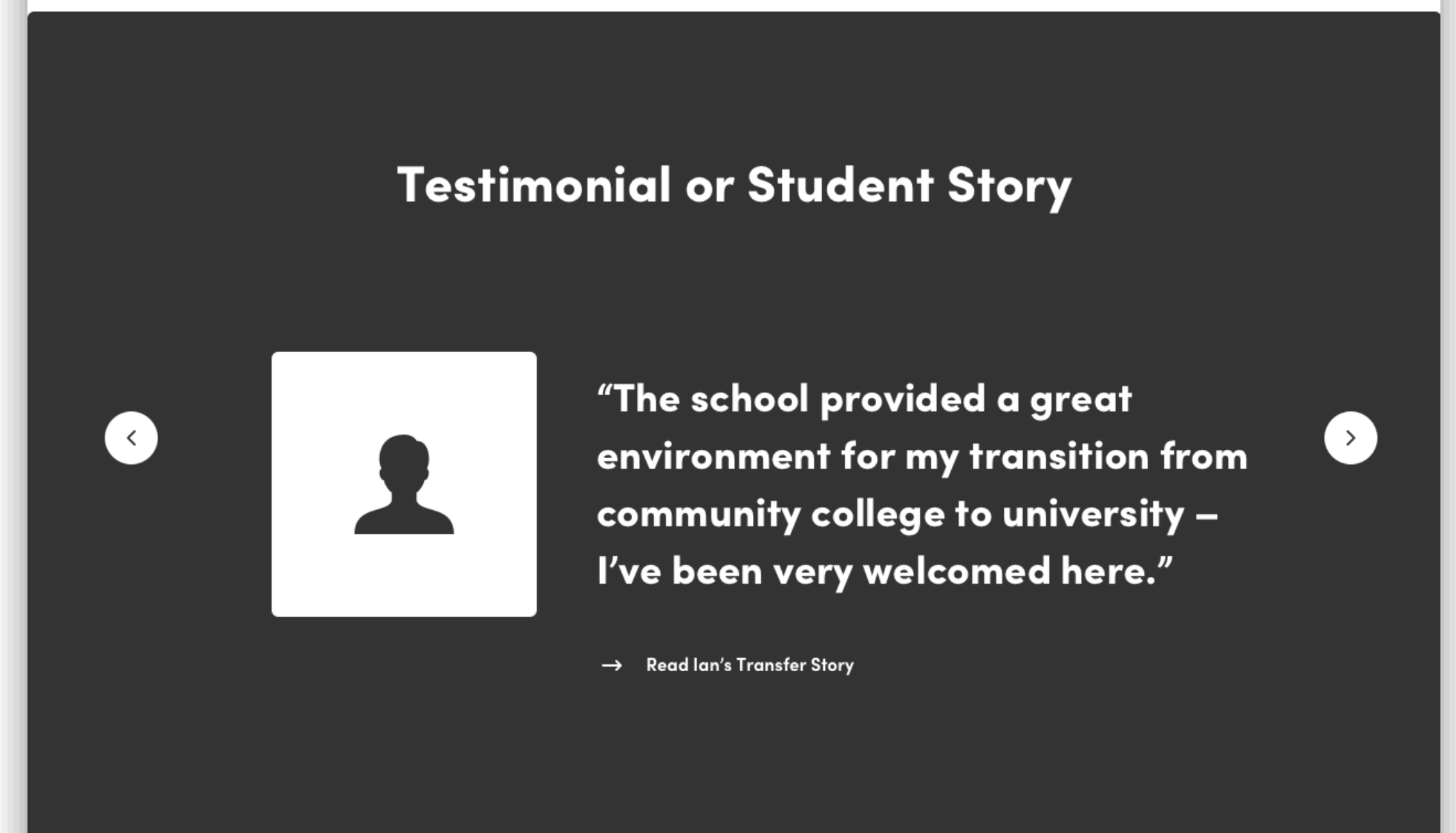
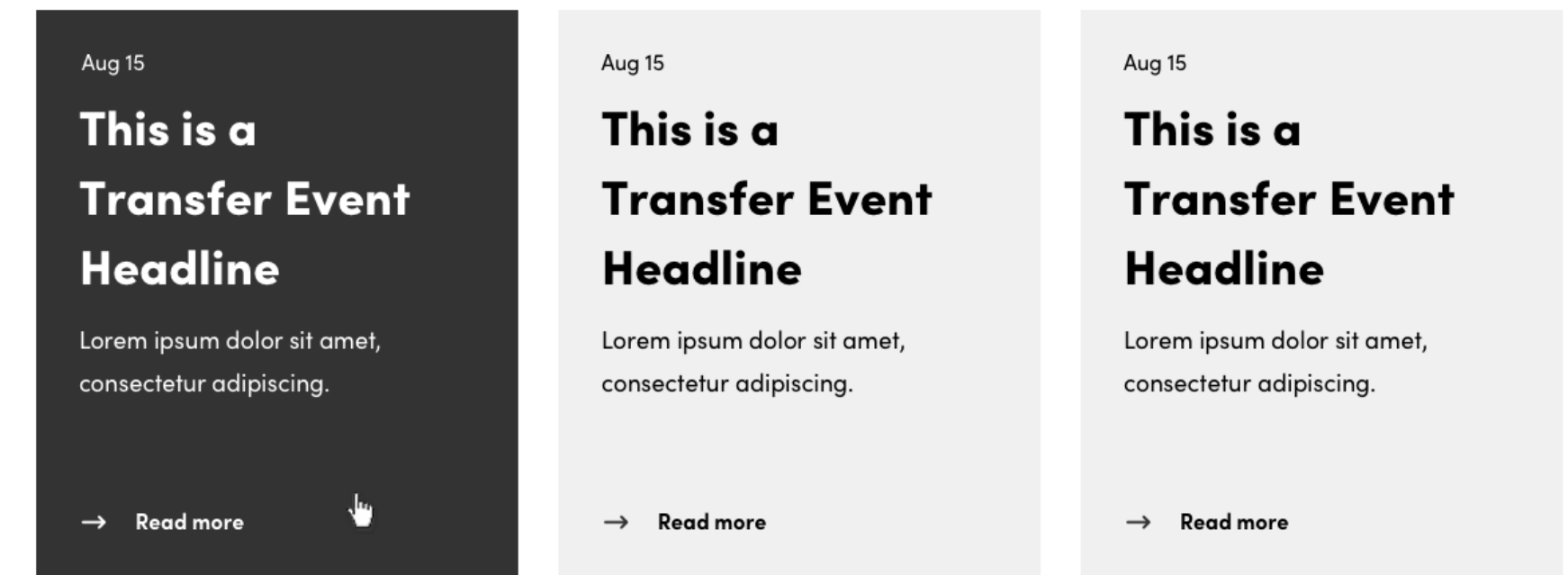
Featuring specific transfer events educates prospectives on resources available to them and also helps to communicate that transfer students are valued and appreciated in the larger community.



# Homepage Wireframe

## Testimonials

While transfer students focus first on pragmatic information (will my credits transfer?), they also want to see evidence of success and to connect with people. Reading about the experiences of other transfer students can inspire prospective transfers to continue on their journey.



## Life at Our Institution

Student Life

This is a  
Student Life



# Homepage Wireframe

## Student Life and Academics Highlight

Featuring academic resources serves an educational function — showing prospective students what's available to them to help ensure their academic success.

## Life at Our Institution

Student Life

### This is a Student Life Feature

Lorem ipsum dolor sit amet,  
consectetur adipiscing elit, sed  
do eiusmod tempor incididunt  
ut labore et dolore.



Academics

### This is an Academics Feature

Lorem ipsum dolor sit amet,  
consectetur adipiscing elit, sed  
do eiusmod tempor incididunt  
ut labore et dolore.



## Next Steps

Transfer Admissions

Cost & Financial Aid

# Gateway Wireframe

## Welcome Message

Each gateway should feature a key message tailored for each specific audience.

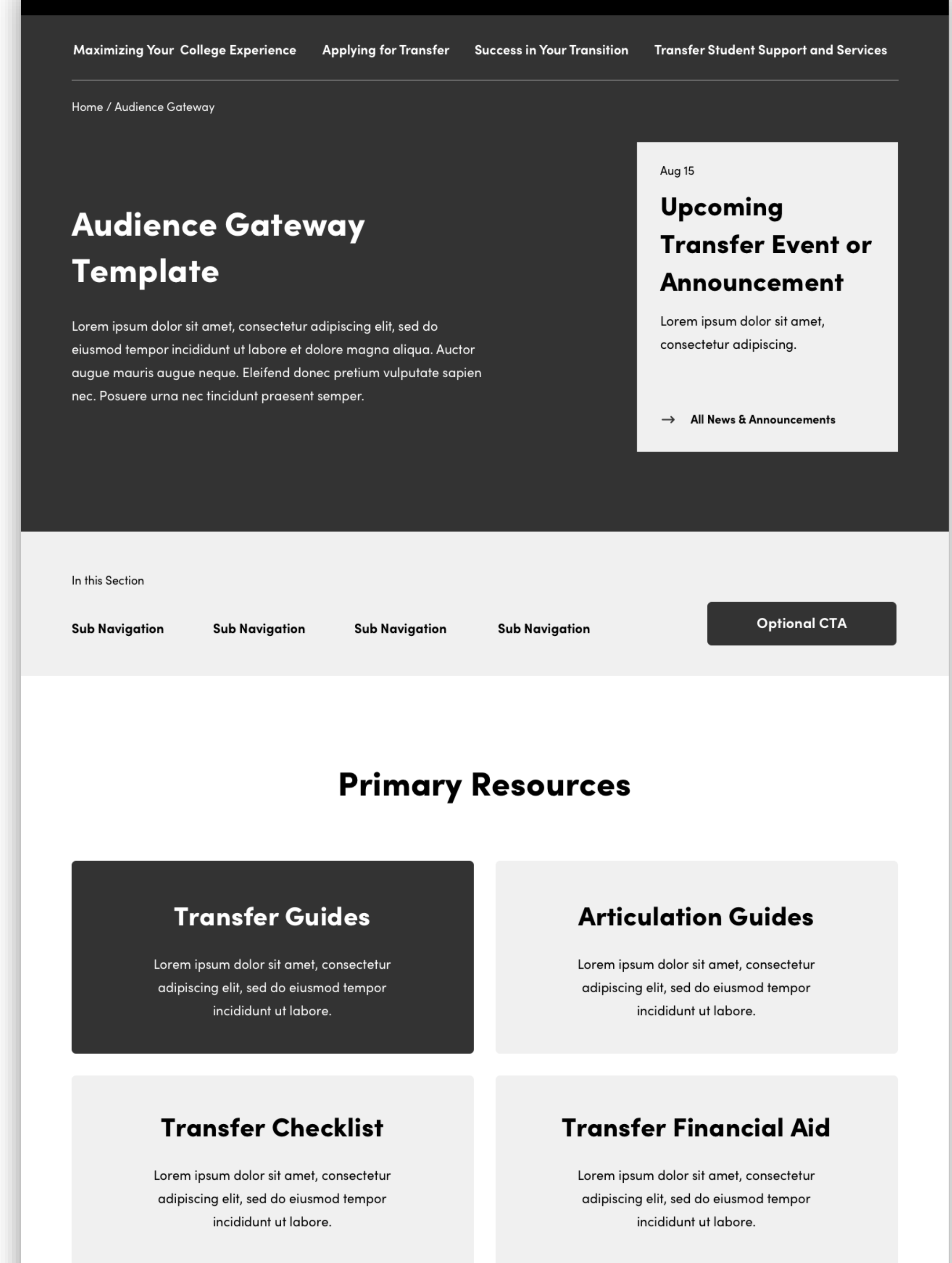
## Featured Event or Announcement

Audience-specific upcoming events, deadlines, and announcements have a prominent place.

## “In This Section” Navigation

Introducing groups of information allows site editors to tailor information to the needs and mental models of each audience. Each section of primary and secondary resources should represent a logical grouping of resource **customized for each particular audience.**

See, for instance, the different approaches that the University of North Dakota takes for [current students](#), [faculty and staff](#), and [families](#).



# Gateway Wireframe

## Primary Resources

Creating a hierarchy of groups allows site editors to feature the most important information first, and secondary information further down the page.

## Secondary Resources

### Primary Resources

#### Transfer Guides

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore.

#### Articulation Guides

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore.

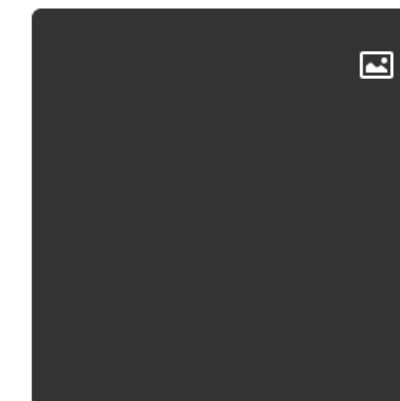
#### Transfer Checklist

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore.

#### Transfer Financial Aid

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore.

### Secondary Resources



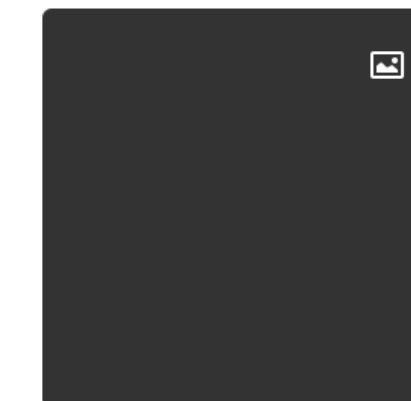
#### Category

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)



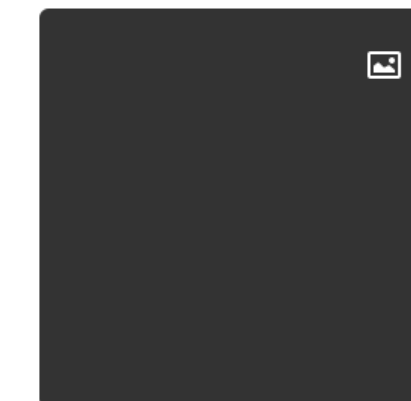
#### Category

[Resource List Item](#)

[Resource List Item](#)

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[Resource List Item](#)



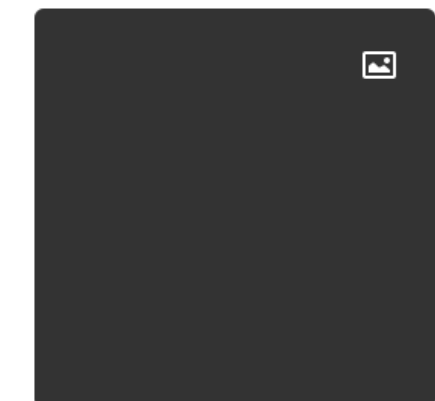
#### Category

[Resource List Item](#)

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[Resource List Item](#)



#### Category

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

# Gateway Wireframe

## Ask the Experts

Connecting audiences with different areas (admissions, academic affairs, and financial aid) helps to facilitate high-touch/high value interactions.

## Transfer Events & Announcements

Additional events and announcements can be featured lower down the gateway page.

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

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[Resource List Item](#)

[Resource List Item](#)

[Resource List Item](#)

## Ask the Experts



**Naomi**  
Transfer Counselor  
[transfer@institution.edu](mailto:transfer@institution.edu)



**Simone**  
Transfer Counselor  
[transfer@institution.edu](mailto:transfer@institution.edu)



**Ian**  
Transfer Counselor  
[transfer@institution.edu](mailto:transfer@institution.edu)

## Events & Announcements

Aug 15

### Transfer Event or Announcement

Lorem ipsum dolor sit amet, consectetur adipiscing.

→ [Read more](#)

Aug 15

### Transfer Event or Announcement

Lorem ipsum dolor sit amet, consectetur adipiscing.

→ [Read more](#)

Aug 15

### Transfer Event or Announcement

Lorem ipsum dolor sit amet, consectetur adipiscing.

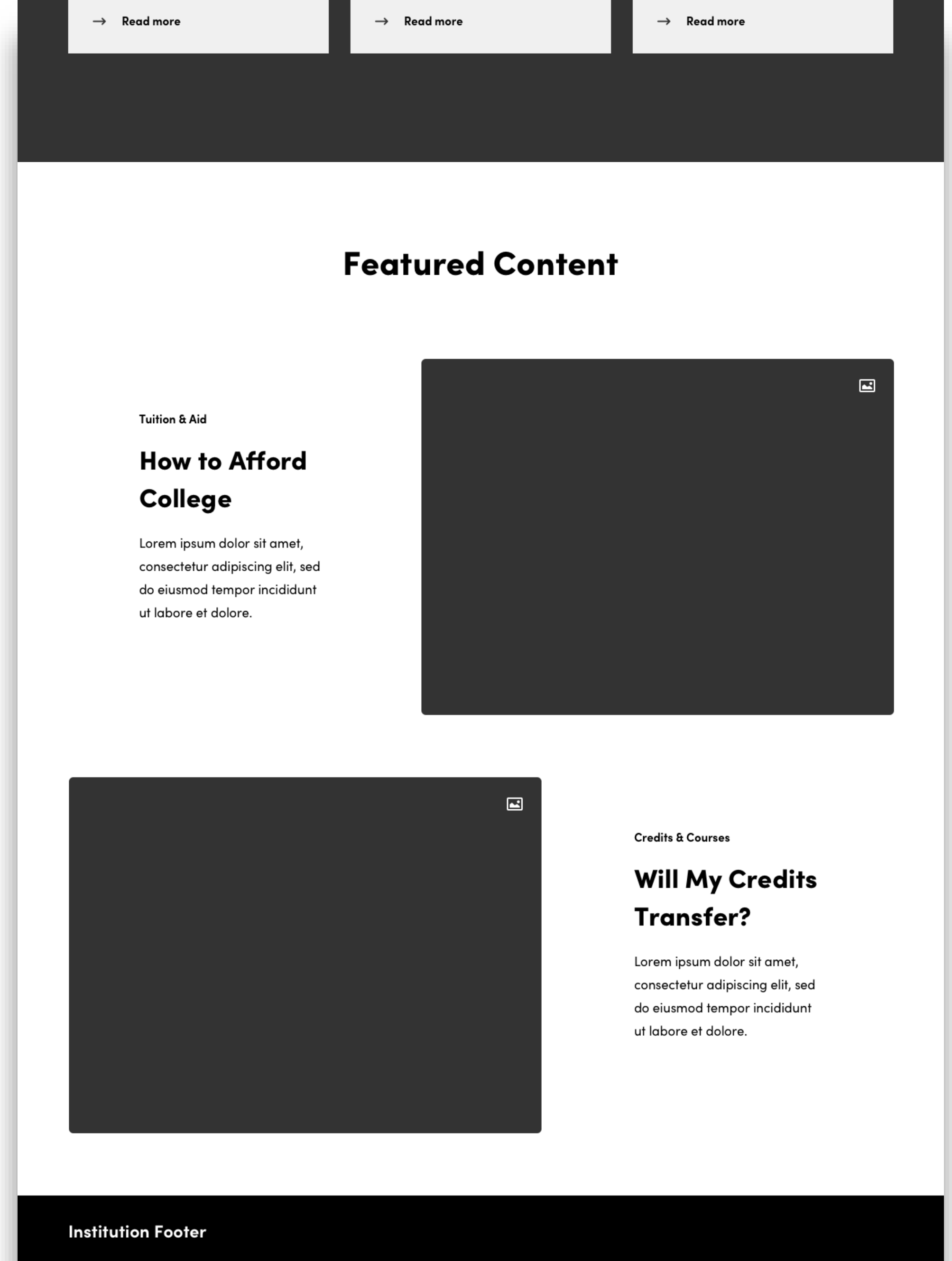
→ [Read more](#)

## Featured Content

# Gateway Wireframe

## Featured Content

Highlight crucial topics and connect students to important advice that helps drive their decision-making. Search engine marketing-oriented content around key topics can simultaneously drive traffic to a site, provide valuable content, and build a preference for an institution in audience's minds.



# Universal Page Wireframe

## A Robust Design System

Establishing consistent navigation, visual and typographic hierarchy, and a robust set of modules for the site also enriches the user experience and instills confidence in the institution.

Maximizing Your College Experience   Applying for Transfer

Home / Audience Gateway

### Page Title

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#### Heading (H3)

#### Heading (H4)

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EDDIE HAZEL

## Heading (H1)

### Heading (H2)

#### Heading (H3)

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HEADING (H5)

HEADING (H6)

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EDDIE HAZEL

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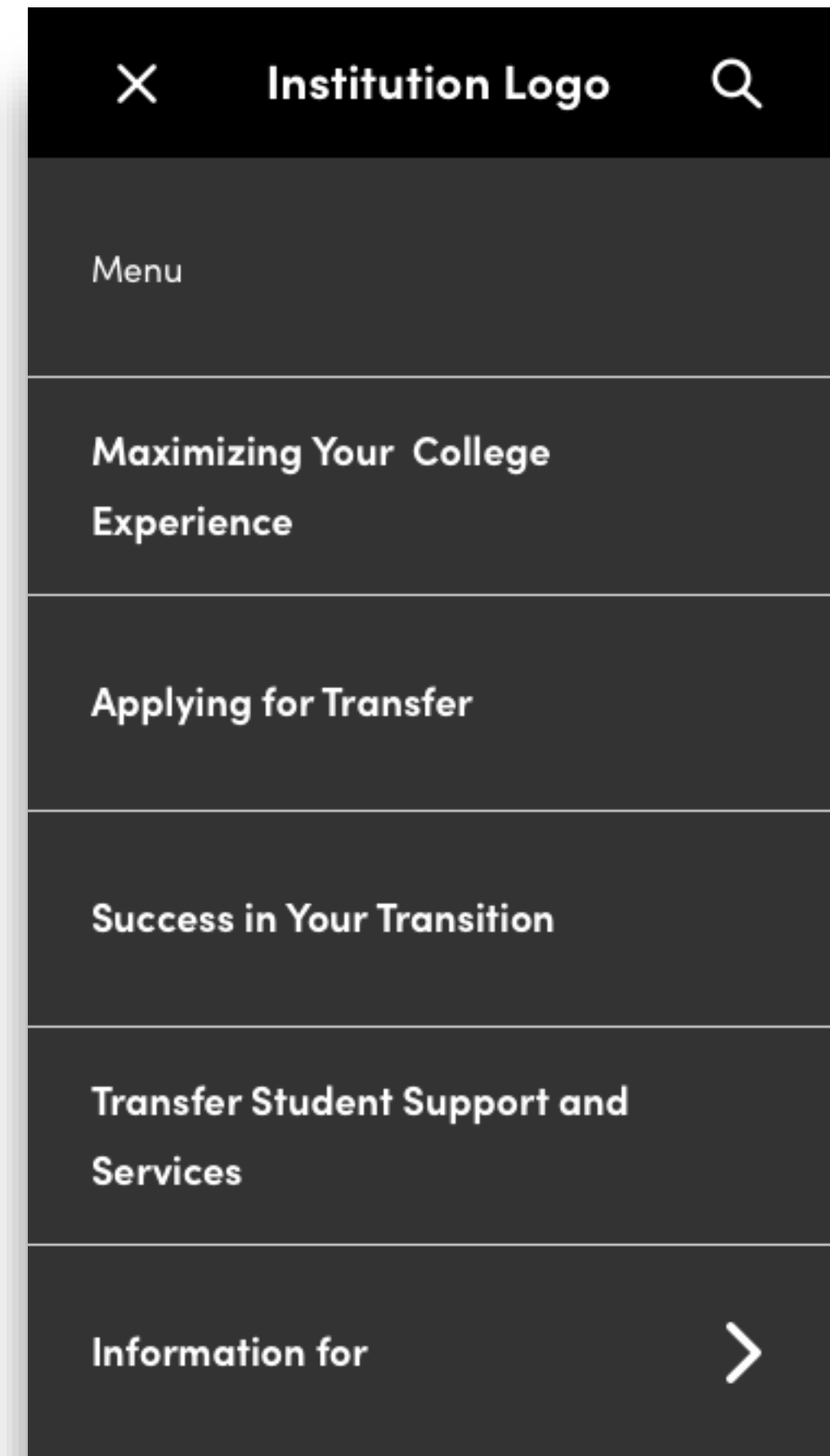
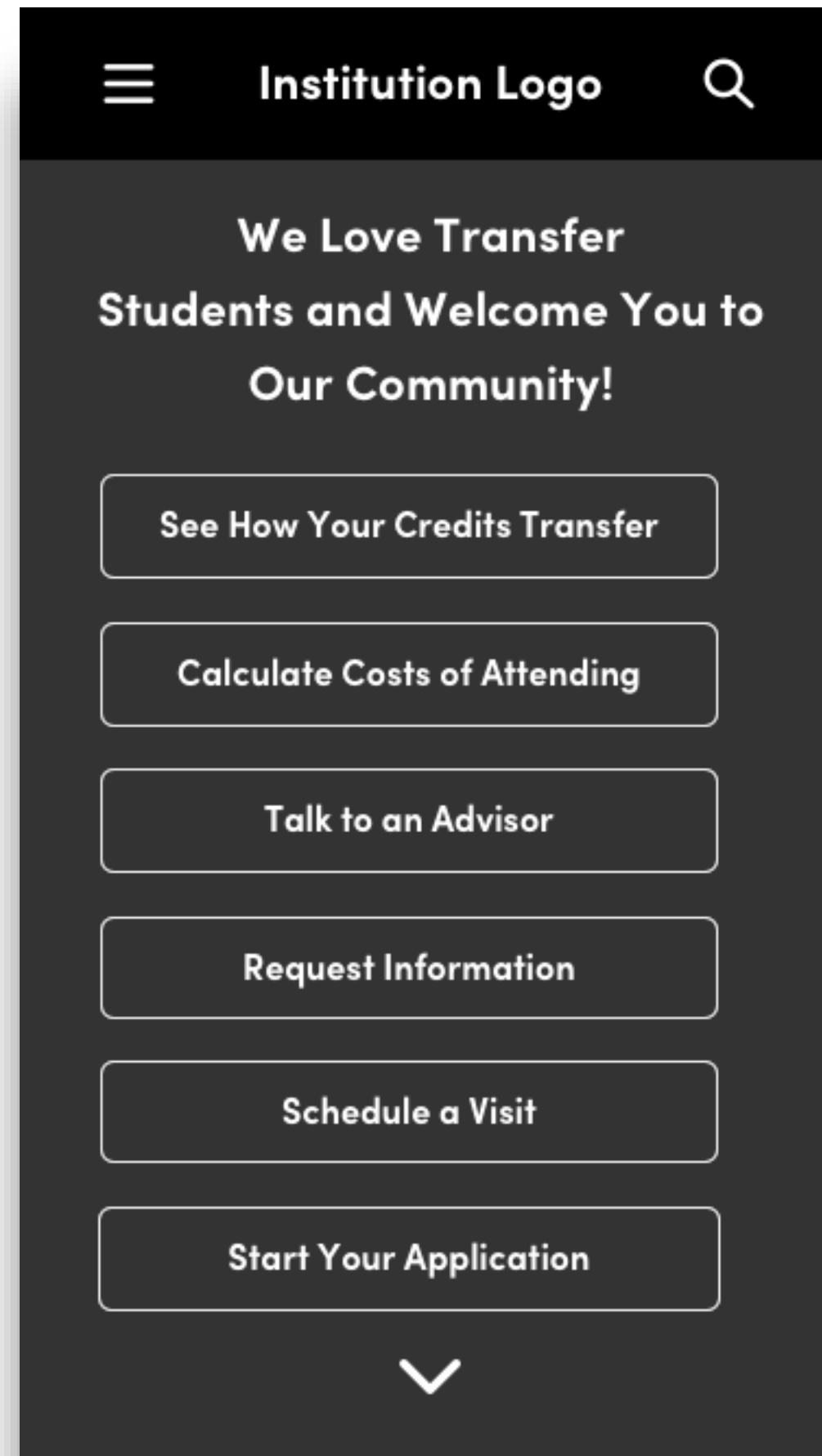
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# Mobile Menu Wireframe

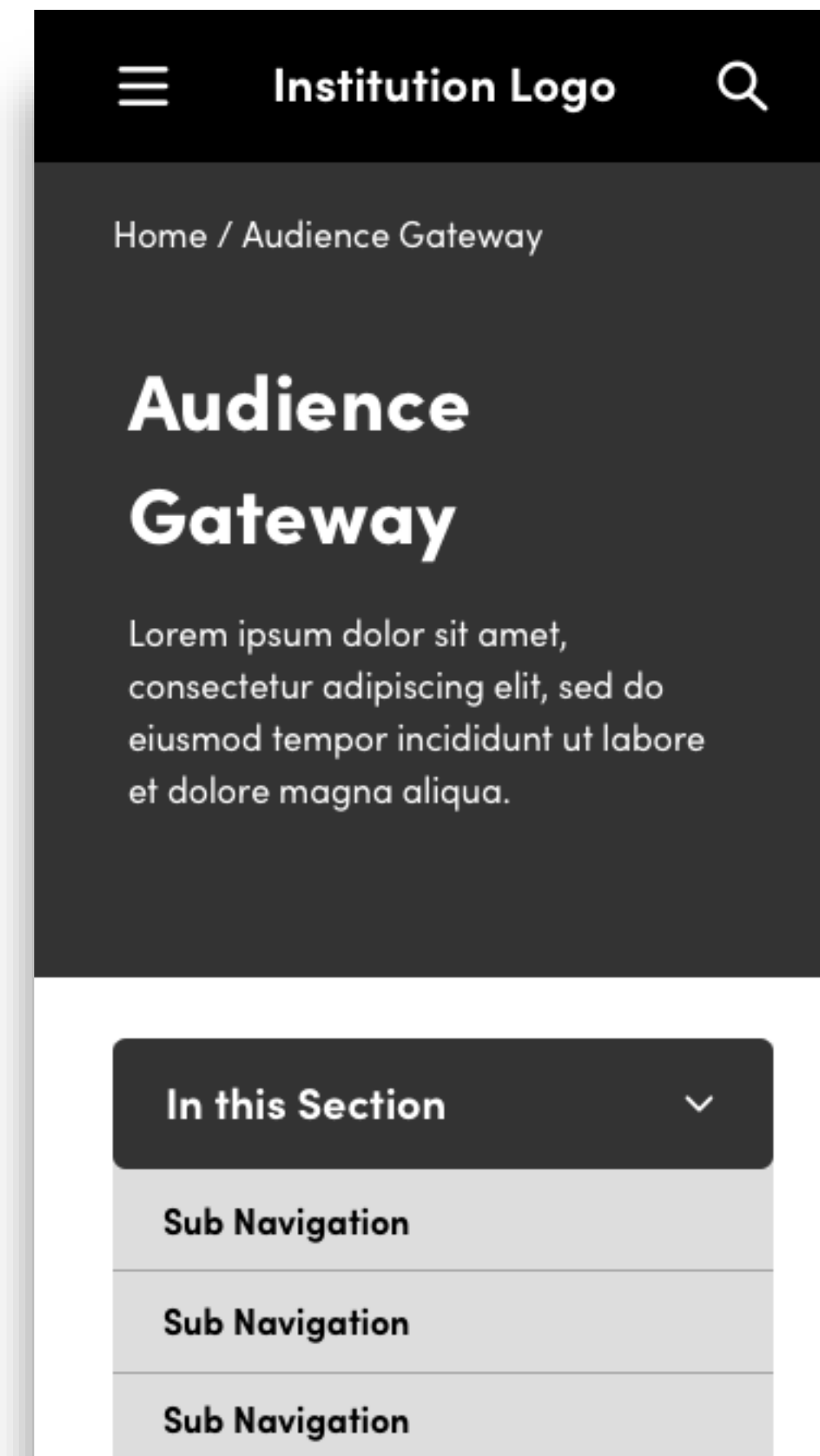
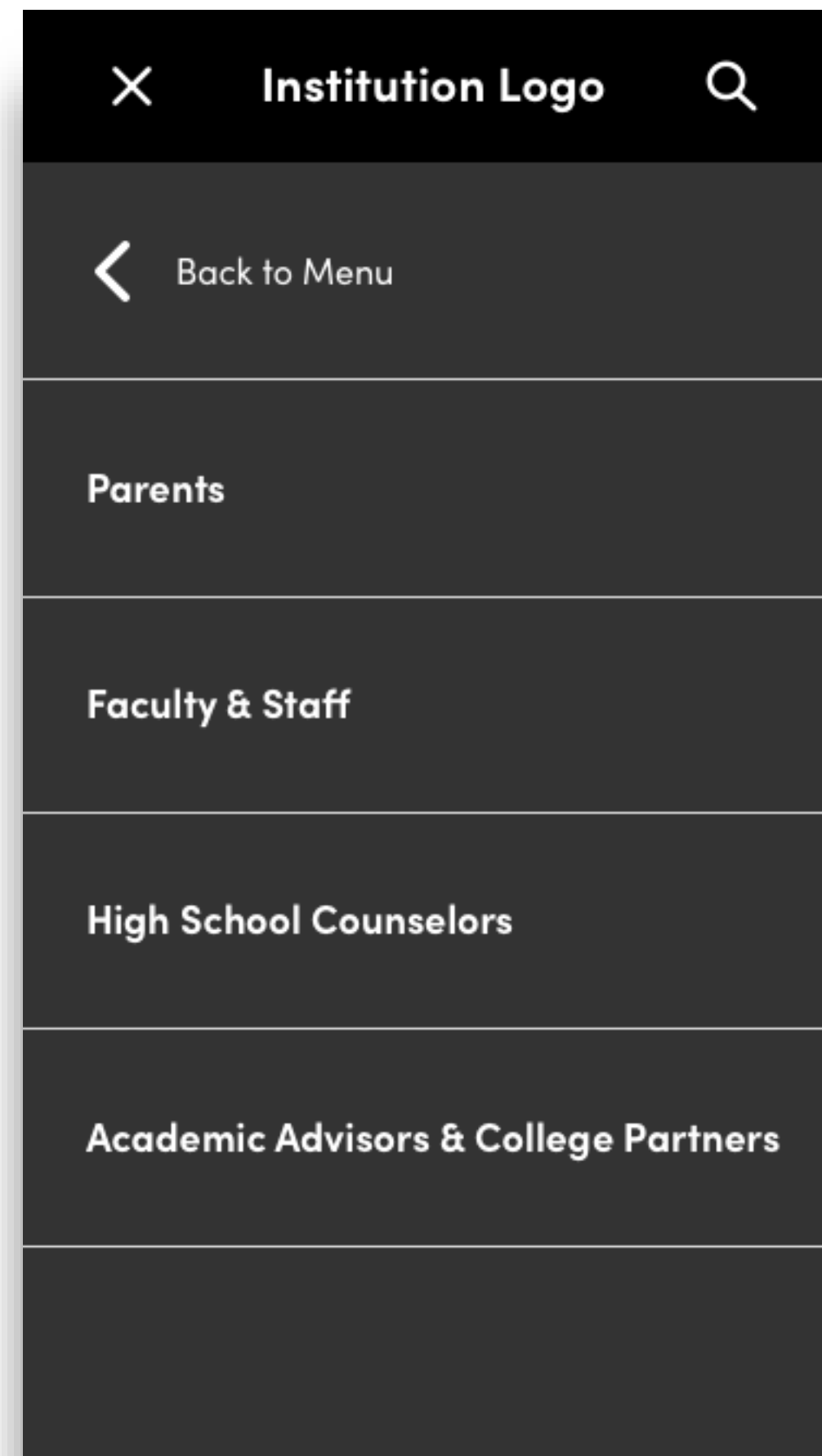
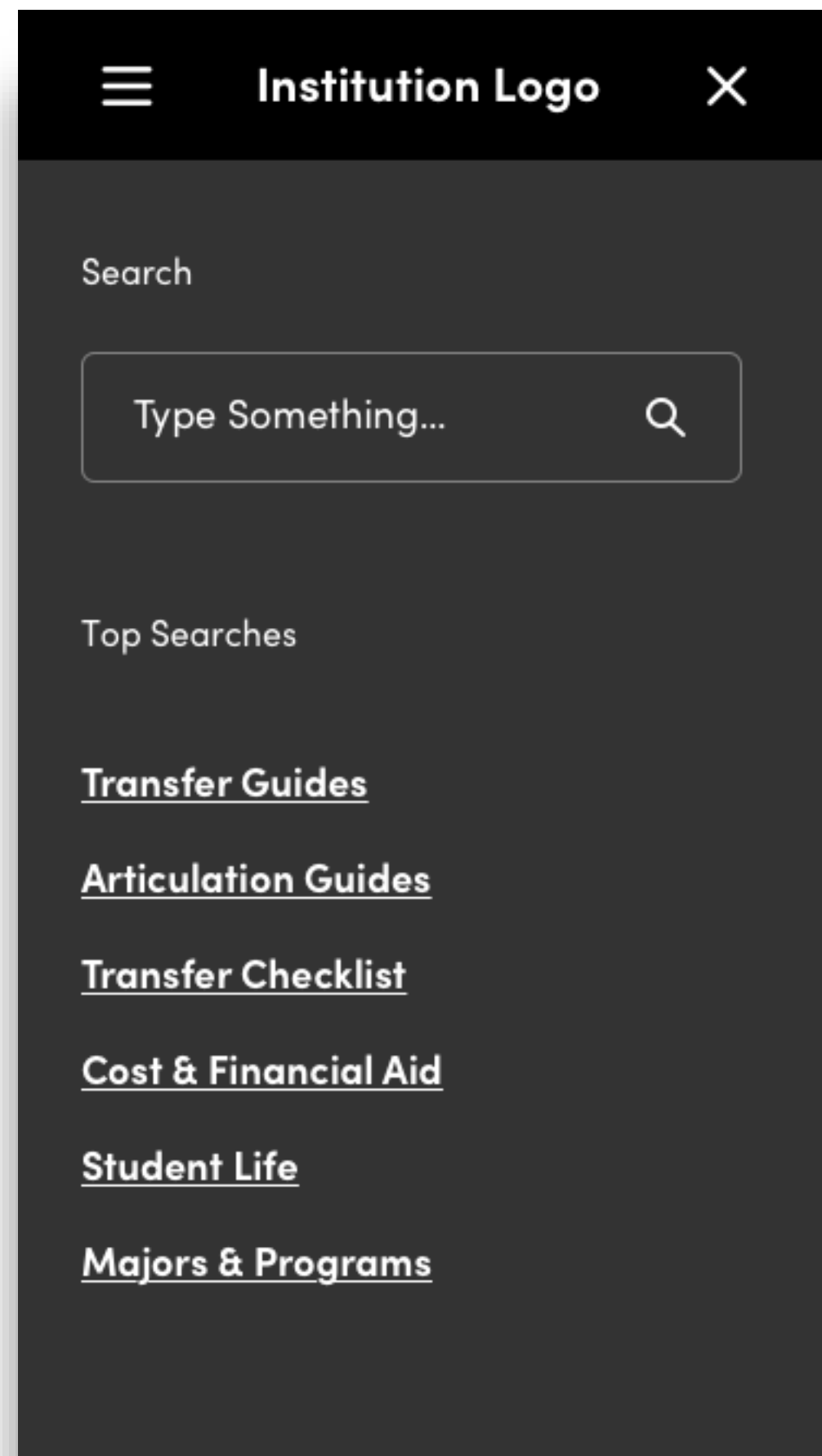


## Mobile-First and Accessibility Compliant

A good transfer student site must be optimized for mobile use and must also be fully compliant with WCAG guidelines.

Learn more about [accessibility standards](#).

# Mobile Menu Sub Navigation



7.



# Governance

# Governance Challenges for Transfer Sites

**“Digital governance is a framework for establishing accountability, roles, and decision-making authority for an organization’s digital presence, which includes its websites, social channels, and any other Internet and web-enabled products and services.”**

– Lisa Welchman<sup>10</sup>

More simply put, governance is about “deciding who gets to decide.”

Higher ed institutions typically wrestle with siloization; offices tend to work on their own, disconnected from other areas that naturally overlap in serving students.

This issue becomes even more pronounced when dealing with transfer students. Because so many areas need to come together to increase the chance of transfer student success ([see Section 3: Preparing Your Institution](#)), being clear about the day-to-day and long-term ownership model for your transfer site is essential.

Governance-related questions that need to be answered at the beginning of your website design project include:

- Who is responsible for creating, updating, and publishing the transfer site web pages?
- Who are the subject matter experts for key information, particularly around transfer policies and guides?
- How are curriculum changes communicated among stakeholders—both within and between institutions?
- How do we ensure that changes made to articulation agreements or the institution’s catalog get reflected on the transfer site?
- What are the agreed-upon standards in terms of updating content that has changed?
- What standards for brand and visual identity should the site follow?

- What editorial tone should the site employ? What target reading level should the site aim for? What prevailing editorial style guide (for example, Associated Press) should writers and editors use?
- What standards for accessibility compliance — particularly for PDFs, videos, images, and other document types — should we enforce? Who is responsible for ensuring online resources are compliant?
- How does the institution enforce these governance policies consistently and fairly?

The answers for these questions will differ at least slightly from institution to institution; having clear alignment from the beginning will help establish a strong foundation for a vibrant transfer site.

# Moving From Project to Process

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In addition to policy, ownership, and accountability issues, site planners should address the issue of sustainability and resources.

One issue that institutions and organizations struggle with is the allocation of ongoing resources to sustain and enhance their transfer site.

In some cases, funding is grant-based; once the grant has expired, resources for updating the web presence dissipate.

In other cases, responsibility for the transfer site is spread across multiple areas. Changes in staffing and budget cuts in any area could easily lead to parts of a transfer site falling into disrepair or becoming out-of-date.

Early planning conversations should include a discussion about the institution's commitment to a post-launch and ongoing minimum staffing resource level. Ideally, the institution will switch

from a project mentality — in which a site is relaunched every three to five years — to a process mentality.

In a process mentality, dedicated digital communications professionals are continually reviewing site analytics, conducting A/B and multivariate experiments on site elements (for example, the placement, visual styling, and language for key calls to action). Reviewing these metrics allows enhancements to the site based on usability testing and feedback from the multiple stakeholders across institutions that serve transfer students.

Additionally, site editors should also continually check the transfer site to ensure ongoing compliance with WCAG guidelines.

8.



**Next Steps**

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# Key Takeaways

## 1. Your site should directly address the complete transfer transition.

Although all transfer students have some prior college experience, not everyone has had access to sufficient transfer assistance. The resources on your website play a critical role in filling information gaps and should be organized so that those who are unfamiliar with the process can get up to speed quickly on the whole transfer journey—from planning through degree completion.

## 2. Prioritize essential transfer content, especially planning guides and degree/program maps.

Transfer students want to know if they're "on track" to graduate in a timely manner. They need a planning guide to help them chart the transfer process and a degree/program map that clearly illustrates which courses to take and in what order. Missteps caused by a lack of clear guidance can impact the overall price tag of their degree, so links to key transfer content should be easy to find and use.

## 3. Make asking questions and getting personalized support as easy as possible.

Each transfer experience is unique, so providing direct access to the professionals who can answer students' individual questions will help them feel welcomed, valued, and supported. You can also boost their academic momentum by taking every opportunity to validate their aspirations and reassure them that you're committed to helping them meet their goals.

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# Key Takeaways

## **4. Involve a broad group of stakeholders in planning, designing, and testing your transfer site.**

Transfer students interact with a variety of departments and individuals at both their sending and receiving institutions. When combined, input from these distinct points of contact can create a comprehensive picture of the transfer transition, both what's going well and what's not. Incorporating insights from these multiple perspectives builds alignment around transfer success and ensures students have access to robust online supports and resources.

## **5. Budget appropriate time, staff, and resources to long-term site monitoring and maintenance.**

If the information on your transfer website is insufficient, out-of-date, or lackluster, prospective transfer students could pay the price literally (in tuition dollars) and figuratively (in time and frustration). And, they may move on to another institution. Policies and programs can change regularly, so you should proactively commit to an ongoing schedule of website review, testing, and updates to maintain accuracy and demonstrate that transfer student needs matter.



# Getting Started

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As you consider how to implement the strategies explained throughout this guide, follow these steps to quick action:

- 1. Determine the transfer landscape at your institution.** Leverage existing interest in transfer success to find allies who might support your ideas.
- 2. Evaluate the state of your current web content for transfer students.** Use our Transfer Website Snapshot tool to guide your exploration and assessment.
- 3. Identify one to three “quick wins” you can implement on your website right away.** You’ll help prospective transfer students now while building momentum for an improved site.
- 4. Build awareness and alignment with leadership and key departments.** Share what you’ve learned to create buy-in for your website redesign project.
- 5. Build your transfer site dream team.** Use the 360 Stakeholder Map to ensure multiple perspectives and varied areas of expertise are represented.
- 6. Use this guide as a blueprint for planning your project.** From developing empathy to drafting a governance plan, you have the insights you need to confidently transform your transfer site.

9.



# Appendices

Appendix 9.1



# Project Details

# Methodology

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**Due to the exploratory nature of this project, we gathered data from several sources, including interviews with experts in the field, relevant research and prior projects, and an examination of exemplary websites.**

## Expert Interviews

NISTS staff utilized our existing professional network, as well as knowledge of current research and practice in the field, to identify interviewees from several functional areas. Candidates were selected based on their professional reputations and experience with transfer student needs and transfer websites.

We conducted one-hour, semi-structured interviews with fifteen higher education professionals from across the United States.

Because transfer students rely heavily on websites prior to matriculation, we purposefully sought input from professionals in admissions, academic advising, orientation, and transfer services, as well as faculty members who have been involved in transfer reform efforts.

The final interview pool included coordinators, assistant directors, directors, and academic administrators from large, public four-year universities and community colleges in the East, South, Midwest, and West. A university webmaster, administrators from a state system office, and higher education researchers also participated in the study.

Staff at mStoner conducted all interviews via Zoom. The interview protocol included a range of questions that targeted participants' firsthand experiences in helping transfer students navigate the transfer process. When applicable, questions

also referenced common challenges and perceived best practices for disseminating transfer information via institutional websites.

We used Zoom to record the interviews and Rev to transcribe the resulting audio files. The qualitative data we collected was not sensitive, but we nevertheless removed identifying information from the transcripts and coded the data accordingly.

Members of the research team reviewed the transcripts for accuracy, made corrections as needed, and analyzed them to identify common insights. The findings were then synthesized into the broad themes reflected in this report.

## Methodology (continued)

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### Prior Projects & Existing Research

This project leveraged recent research that emphasized the usability of transfer websites<sup>9</sup> and seeks to extend that work by offering concrete guidance for creating a transfer-focused website. A key part of this toolkit is the detailed understanding of common transfer student personas. Several other projects informed this approach, including a research study by NISTS<sup>11</sup>, several recent and in-process web redesign projects conducted by mStoner (including Park University and Central Michigan University), and a design challenge by the Education Design Lab.<sup>7</sup>

These three sources for information and data — expert interviews, transfer site reviews, and prior research — formed the personas and resulting strategies that we recommend for serving transfer students.

### Exemplary Websites

NISTS staff identified a variety of transfer websites that fit into three broad categories: exemplary, common/standard approach, and insufficient. After conducting a preliminary, limited review of these sites, the research team selected three for in-depth analysis, comparison, and evaluation.

Selected websites were viewed on both laptop and mobile devices and assessed according to the following criteria: general ease of use, information presentation, quality of content, clarity and dissemination of key transfer information, mobile friendliness, and accessibility compliance.

*NISTS funded this study and directed its design and implementation. mStoner conducted the interviews, coded the data, and designed the toolkit framework. Both parties contributed to the final document. This study was approved through the University of North Georgia Institutional Review Board.*

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Appendix 9.2



# Best-of-Class Sites

# Transfer Websites & Resources

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## Community Colleges

- [Waubonsee Community College](#)
- [Austin Community College](#)
- [Foothill College](#)

## University Sites

- [University of Washington](#)
- [Marymount University](#)
- [University of North Carolina Charlotte](#)
- [University of Maryland](#)
- [UCLA Transfer Center](#)

## Interactive Tools

- Credit transfer wizard: [University of Maryland Baltimore County](#)
- Time donut: [STEM Transfer Student Success Initiative](#)
- Program mapper: [Bakersfield College](#)

## State-level or Audience-Specific Guidance

- [Arizona Transfer](#)
- [Michigan Transfer Network](#)
- [Illinois Transfer Portal](#)
- [Old Dominion University](#)
- [STEM Transfer Student Success Initiative](#)

*(While this site is no longer updated, it provides some great information and an example of collaborative efforts across multiple offices and institutions.)*

## Checklists, Worksheets, and Roadmaps

- [Marymount University](#)
- [University of Washington](#)
- [University of Wisconsin System](#)
- [University of Vermont](#)
- [Bakersfield College](#)



Appendix 9.3

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# Seven Best Practices in Writing for the Web

## Best Practice #1:

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# Plan your content.

### Consider these questions about your audience:

1. What is my user doing?
2. When is she doing these things?
3. What does my user expect?
4. What is she thinking?
5. What is she feeling?
6. Who/what does she trust for information?
7. How can I make her journey easier?
8. How can I surprise and delight?
9. What else can enrich her user experience?

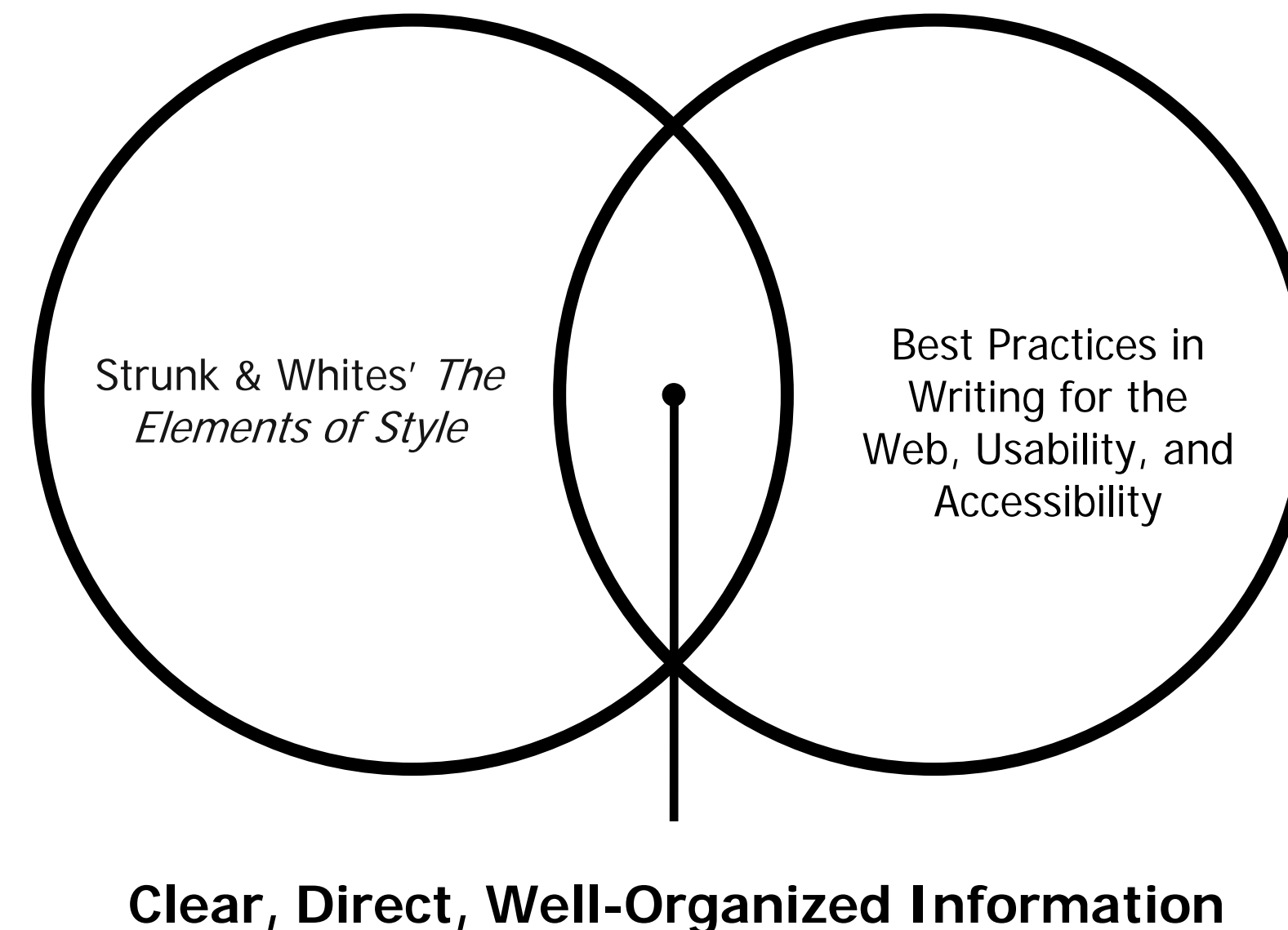
### Consider these questions about your content:

1. What's your business goal?
2. Have you framed your idea to relate to your audience(s)?
3. Do you have credible data sources and examples?
4. What structure are you using (lists, how-to, narrative)?
5. Are you writing to one person? Who?
6. What do you want that person to know or do as a result of your content?
7. What's your call to action that ends the piece?
8. Have you chosen an image and or video to support your great content?
9. Have you written an accompanying tweet? Hashtags?

## Best Practice #2:

# Write at an appropriate reading level for your audiences.

Aim for an eighth-grade level, and use tools like the Flesch-Kincaid reading level score (available within Microsoft Word) to assess the level of your writing.



## Best Practice #2 (continued):

---

### Four Writing Tips:

- 1. Use direct address.** Direct address is more engaging than content written in third-person.
- 2. Use active voice.** Active voice is clearer and more engaging than passive voice. Combined with direct address, active voice draws the user into the conversation. Active voice also allows you prompt the user to action more naturally. Finally, Active voice allows you to say more with fewer words.
- 3. Keep sentences simple.** Try to limit page titles to four to eight words. Try to limit sentences to 20 words or fewer. Try to limit paragraphs to two to four sentences. Each sentence should focus on one idea.
- 4. Use lists and subheads to help audiences scan.** Bulleted lists allow people to see discreet items. Numbered lists help people to understand scope and scale — for example, the number of steps in a process. Subheads provide focus for a particular section within a page.

## Best Practice #3:

---

# Encourage exploration and action.

### Two Writing Tips:

1. **Make sure you include a call to action or logical next steps.** Every page on your site should have a call to action or prompt to explore.
2. **Hyperlink phrases instead of single words.** Phrases are easier to see when people are scanning pages.

## Best Practice #4:

---

# Write with a tone and style that reflect the heart of your institution.

The friendlier and more approachable your tone, the likelier your site visitor will be to form positive impressions about your community.

## Best Practice #5:

---

# Use your institution's style guide.

Use your institution's editorial style guide. If one doesn't exist, then follow the [Associate Press' Stylebook](#).

## Best Practice #6:

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# Get feedback on your writing.

### 1. From experienced writers and editors you respect:

- Tone and style
- Substance
- Grammar and punctuation

### 2. Use digital tools to assess your work:

- [grammarly.com](https://www.grammarly.com)
- [hemingwayapp.com](https://www.hemingwayapp.com)
- [readable.io](https://readable.io)

### 3. Consider collaboration tools that enforce workflow and enable collaboration:

- [gathercontent.com](https://gathercontent.com)



## Best Practice #7:

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# Maintain your content.

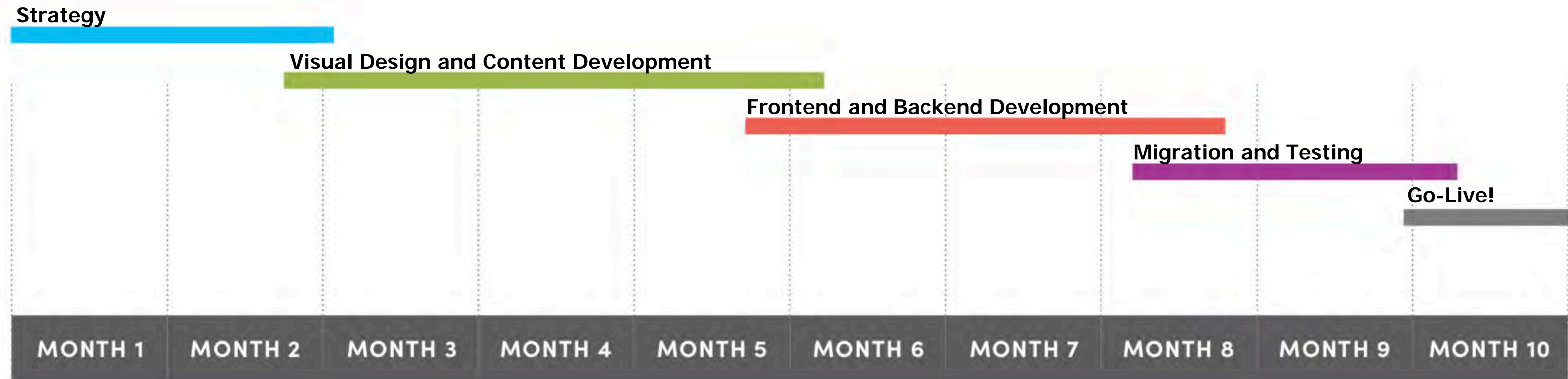
1. Set a calendar for content review.
2. When time-sensitive content is created, plan early to update or archive.
3. Review analytics and site search logs.
4. For more insight, consider A/B testing, usability testing, and heat maps to refine your content.

Appendix 9.4



# Sample Timeline

# A Typical Website Timeline



A typical website project takes eight to 10 months from planning to launch, and the most labor-intensive work is developing good content. We recommend that people plan to spend five to eight hours per page of content — first draft, reviews and edits, through to final copyediting and proofing before becoming migration-ready.

Before launching your comprehensive transfer site, be sure to conduct user tests with a variety of constituents. You should watch a diverse group of prospective transfer students use the site, as well as their key influencers. Practitioners and faculty members from within your institution and at partnering schools should also have a chance to offer feedback.

Appendix 9.5



# Additional Reading

## Additional Reading

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For more broader transfer-focused recommendations, please visit the [NISTS website](#).

Through education, research, and advocacy, the National Institute for the Study of Transfer Students (NISTS) brings together practitioners, faculty, administrators, researchers, and policy-makers to explore the pressing issues and obstacles related to transfer student success. We equip professionals—no matter their role or institution type—with the knowledge and skills needed to actively advocate for transfer students, challenge the status quo, and reach beyond specific roles to develop holistic, inclusive, and seamless transfer student experiences.

Visit the [NISTS website](#) to learn more about our work, including our [annual national conference](#) and [National Transfer Student Week](#).

[mStoner, Inc.](#) is a creative agency that builds elegant, creative, and effective solutions to your greatest digital challenges. We craft powerful, tailored, human-centric experiences to illuminate your brand and allow you to tell the story only you can tell. We connect you with the right audience at the right time so you can form right-fit relationships. We position your team for improved productivity, sustainable growth, internal alignment, and proof-positive success. And we aim to make your job fun again and help you create inspired work that you are proud to show off. Since 2001, we've worked with more than 350 colleges, universities, and professional schools in the U.S. and abroad.



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