

Thank you for joining!

We will begin at 2:03 pm Eastern Time

Before we get started, update your Zoom name with
Institution | Name | *Short Title*

The screenshot shows a Zoom meeting window. The main display area shows the EAB logo and 'EAB Virtual Meetings'. The bottom toolbar includes icons for Mute, Stop Video, Invite, Participants (with a '2' badge), Share, Chat, Record, and a 'Leave Meeting' button. The 'Participants' menu is open, showing a list of participants: 'Test Participant (Me)' and 'Meeting Host (Host)'. A 'Rename' dialog box is open over the 'Test Participant (Me)' entry, with the text 'Enter a new screen name:' and input fields. Annotations with numbered circles point to specific elements: 1 points to the 'Participants' button in the toolbar; 2 points to the 'Rename' button in the participants list; 3 points to the input field in the 'Rename' dialog box. A text box next to annotation 2 says 'Update your name. Add your institution and *short* title.' A text box next to annotation 3 provides an example: 'Woodley | Allison Akalonu | Dir. of Transfer Admission'.

1 Open Participants menu

2 Update your name. Add your institution and *short* title.

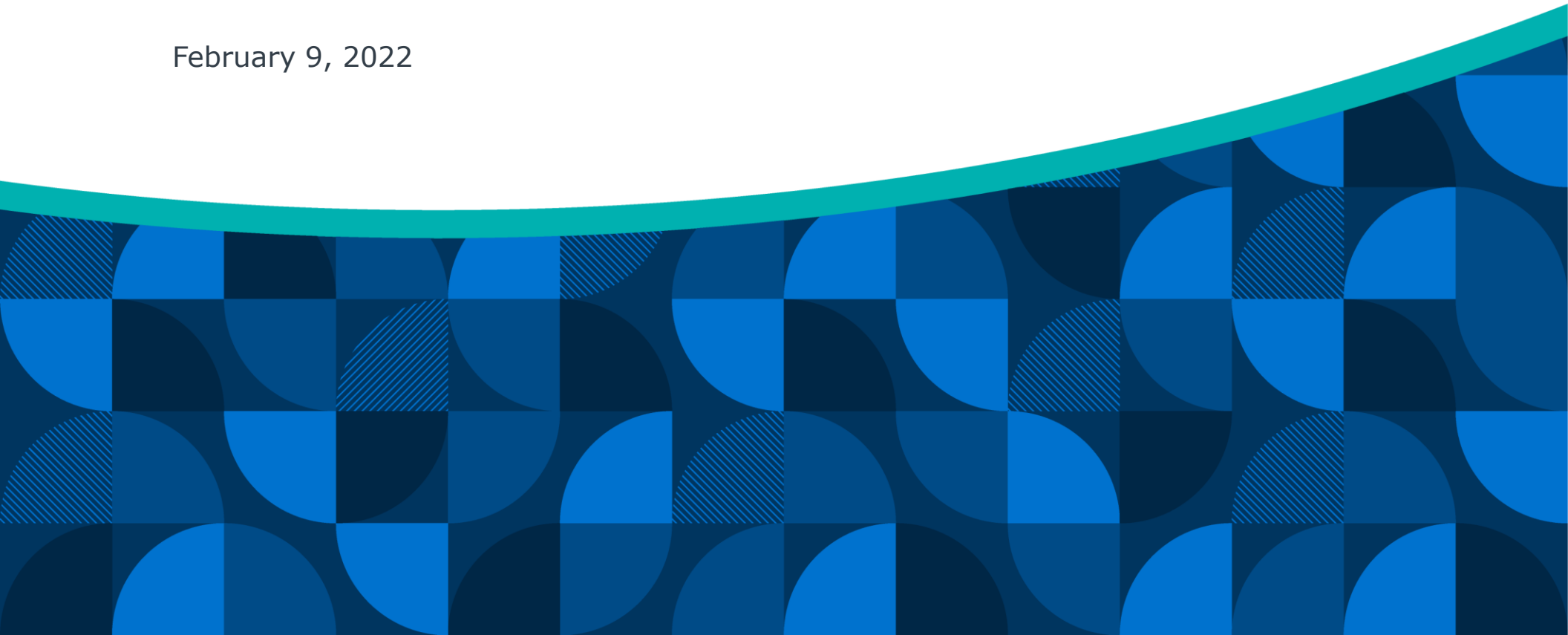
3 Example:
Woodley | Allison Akalonu | Dir. of Transfer Admission



TRANSFER INTENSIVE LIMITED SERIES, SESSION I

Introduction to the Transfer Maturity Curve and Self-Assessment Overview

February 9, 2022



Today's Facilitator



Allison Ray Akalonu

Director, Transfer

aakalonu@eab.com

Chat and Nonverbal Feedback

Use icons to communicate answers and signals to presenter

Select whether you want to chat with everyone or a specific person

Open Participants and Chat

The screenshot displays a Zoom meeting interface. The main window shows a presentation slide with the EAB logo and the text 'EAB Virtual Meetings'. On the right side, there is a 'Participants (2)' panel listing 'Test Participant (Me)' and 'Meeting Host (Host)'. Below the participants list, there are icons for 'Raise Hand', 'yes', 'no', 'go slower', 'go faster', and 'more'. The 'Zoom Group Chat' panel is also visible, showing a message from 'Test Participant'. At the bottom of the screen, there is a toolbar with icons for 'Mute', 'Stop Video', 'Invite', 'Participants' (highlighted with a box and a callout), 'Share', 'Chat' (highlighted with a box and a callout), 'Record', and 'Leave Meeting'.

Audio Mute/Unmute and Video Stop/Start

The screenshot shows a Zoom virtual session interface. At the top, the EAB logo is displayed. The main content area has a blue background with the text "EAB Virtual Session". At the bottom, there is a toolbar with various icons. A callout box on the left points to the "Unmute" button, which has a microphone icon with a red slash through it. A callout box on the right points to the "Start Video" button, which has a camera icon with a red slash through it. Both buttons have an upward-pointing arrow next to them. A third callout box at the bottom points to the "Mute" and "Stop Video" buttons, which also have upward-pointing arrows next to them. The "Leave Meeting" button is visible in the bottom right corner.

Red slashes mean your microphone is muted and your camera is off

Access audio and video options by clicking the up arrow next to the Mic and Camera icon

EAB

EAB Virtual Session

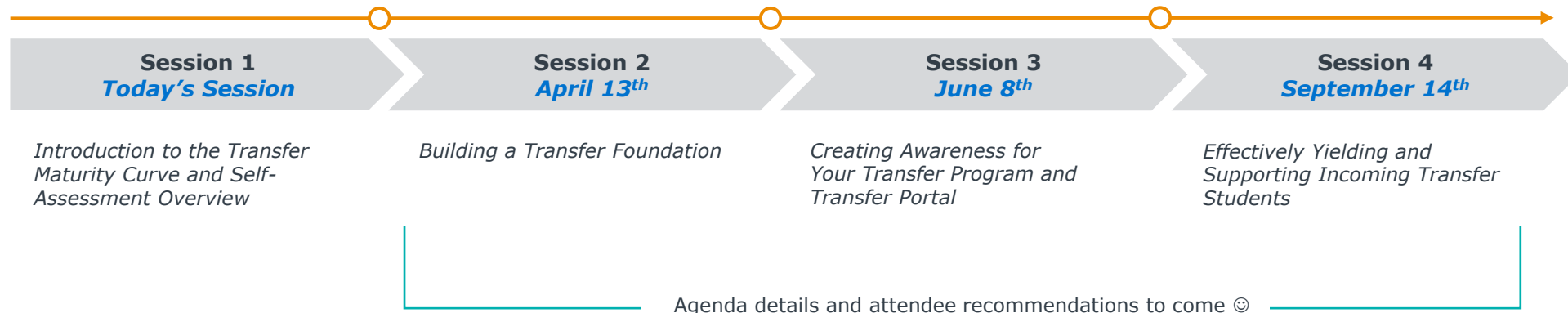
Unmute Start Video

Mute Stop Video Invite Participants Share Chat Record Leave Meeting

Transfer Intensive Series

Register for Upcoming Sessions and Encourage Your Colleagues to Attend!

Four-Part Series



Register for Sessions Today!



1. Visit the event registration page
2. Log into your eab.com account and select the date(s) of your choice
3. Click Register
4. Share the link with colleagues and encourage them to register, too

[Click Here to Visit the Registration Page](#)

Contact TransferPortal@eab.com for assistance.

- 1 **Transfer Challenges and Transformation in Practice**
- 2 Updated Transfer Maturity Curve Framework and Assessment Tool
- 3 Getting Started

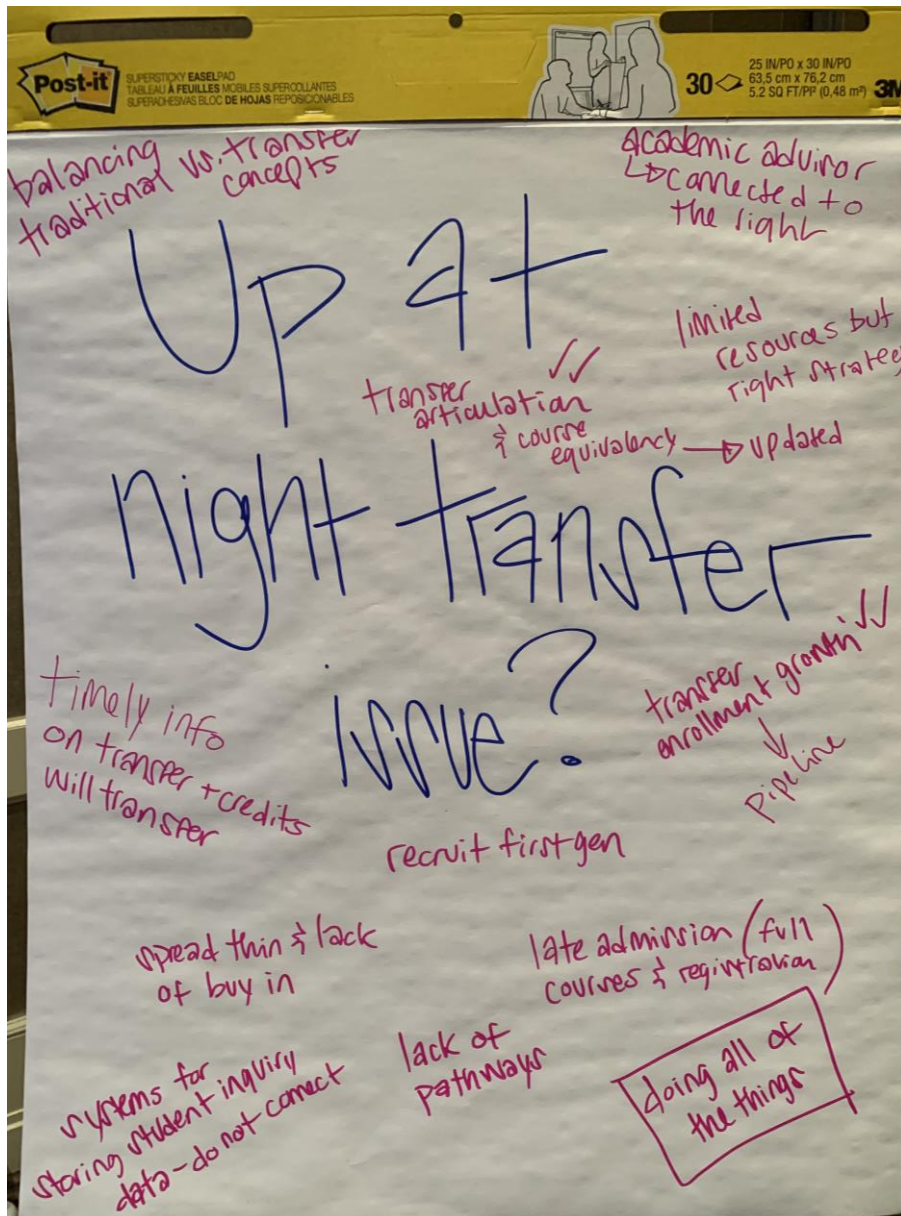


Use the Chat to Enter Your Response

What's your biggest “up at night”
transfer issue?



What We've Heard Across Various Engagements



► Enrollment Strategy & Transfer Market

- Creating the right strategy with limited resources
- Transfer enrollment growth and availability of pipeline
- Community college declines
- Increasing applications and improving overall funnel health
- Melt mitigation

► Admissions & Staff Capacity

- Campus visits
- Keeping students engaged across all stages (app-to-enrollment)
- Staff capacity and gaining institutional buy-in
- Doing "all of the things"
- Going virtual

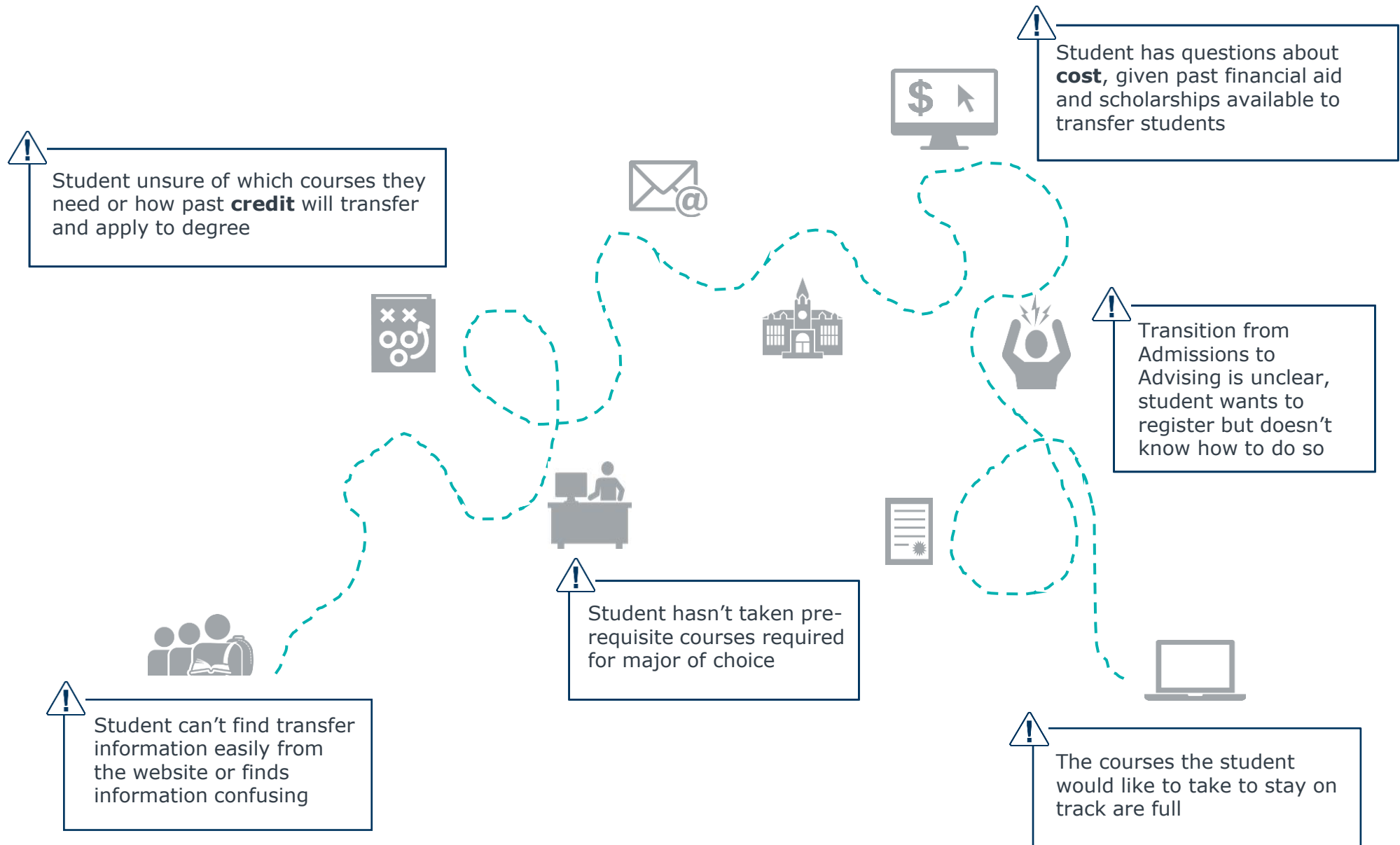
► Credit Evaluation, Data Management, Process

- Timely information on how credits will transfer
- Transfer articulation and course equivalency management
- Disconnected systems: System for storing student inquiry data do not connect
- Variable admissions process across academic departments

► Advising, Registration, Onboarding

- Creating academic/guided pathways
- Academic advising
- Late admission, full courses at registration
- Transfer orientation (online)
- Onboarding process

How This Translates to Students: Winding Road of Transfer



1

Transfer Challenges and Transformation in Practice

2

Updated Transfer Maturity Curve Framework and Assessment Tool

3

Getting Started

How Transfer-Friendly Is Your Institution?

Take a Holistic Approach to Transfer Readiness: From the Inside Out

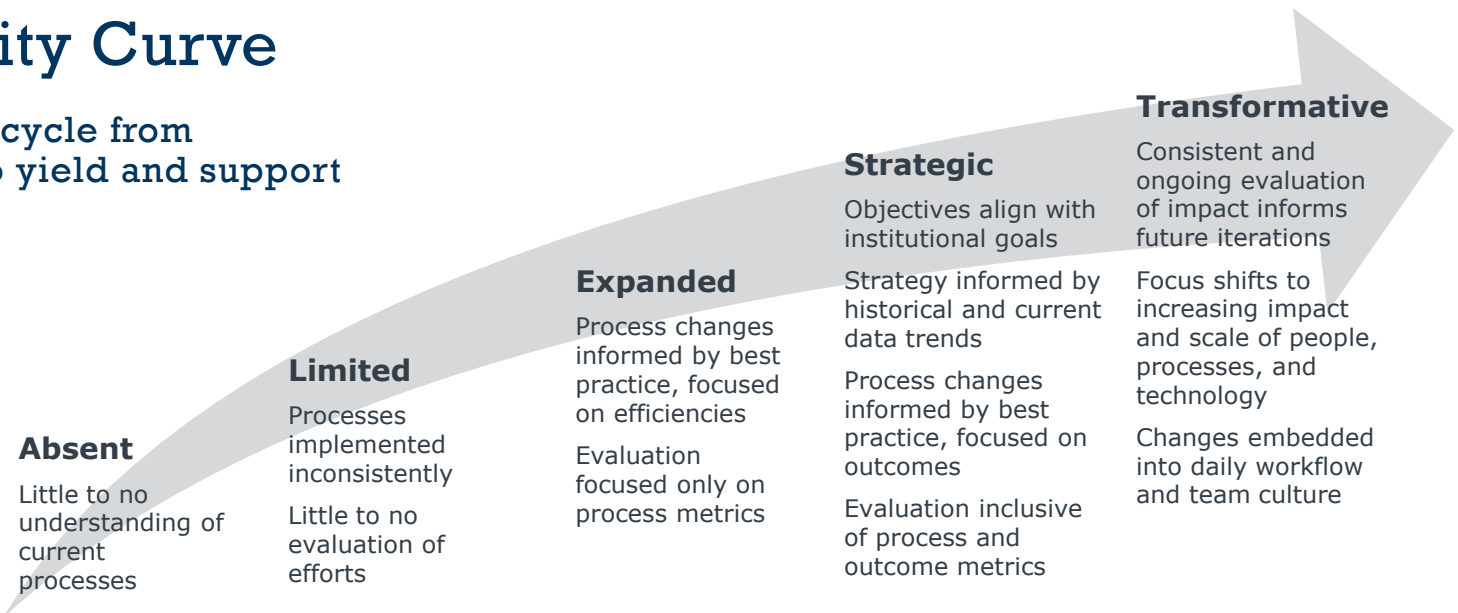


BEST PRACTICE AREAS

1. Prioritize Institutional Support for Transfer Students
2. Build Community College Partnerships and Transfer Pathways
3. Promote Transfer and Provide Detail on Cost, Credit, and Completion
4. Create Transfer-Friendly Website and Self-Services Resources
5. Qualify and Engage Prospective Transfer Students
6. Conduct Timely and Consistent Credit Evaluation
7. Provide Early Transfer Advising, Onboarding, and Support

Transfer Maturity Curve

Spanning the student lifecycle from foundation, awareness, to yield and support



		Level 0	Level 1	Level 2	Level 3	Level 4
Foundation	Prioritize Institutional Support for Transfer Students					
	Build Community College Partnerships and Transfer Pathways					
Awareness	Promote Transfer and Provide Detail on Cost, Credit, and Completion					
	Create Transfer-Friendly Website and Self-Services Resources					
Yield & Support	Qualify and Engage Prospective Transfer Students					
	Conduct Timely and Consistent Credit Evaluations					
	Provide Early Transfer Advising, Onboarding, and Support					

Use the Worksheet to Input Notes


EAB

Transfer Portal

Introduction to the Transfer Maturity Curve

Transfer Portal Intensive Series, Session I

Throughout today's [Transfer Portal Intensive Series](#) session, use this worksheet to record notes and responses. As a refresher, we recommend you refer to this worksheet before attending Session II (April 13, 2022) in the series.

1 Use this space to record notes as we walk through slides 14-23 about Transfer Best Practice Areas.

Foundation

a) Prioritize Institutional Support for Transfer Students

b) Build Community College Partnerships and Transfer Pathways

Awareness

c) Promote Transfer and Provide Detail on Cost, Credit, and Completion

d) Create Transfer-Friendly Website and Self-Service Resources

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- 1** Download the worksheet in the Chat.
- 2** Use the Worksheet, Question 1 to record notes as we walk through the Transfer Best Practice Areas on slides 14-23.

Transfer Maturity Curve Best Practice Areas

A collection of strategies designed to assess progress towards seven transfer best practice areas and optimal adoption and strategic utilization of technology to support your institution's transfer goals.

Prioritize Institutional Support for Transfer Students

Goals and Planning

- Transfer enrollment goals defined and disaggregated
- Strategies fully operationalized and aligned to institutional priorities (e.g., SEM plan)
- Broadly communicated
- Budget has been allocated



Transfer Data

Transfer enrollment and success data reviewed by senior leadership:

- Used in real-time adjustments in business processes and strategy
- Data sharing agreements are in place with top community college partners

Transfer Team and Student Experience

Cross-functional EMC/SSC is in place:

- Deploys transfer services that are optimized to best support the student experience and address barriers
- Uses data to determine ideal offerings and ensure resources are allocated accordingly

Build Community College Partnerships and Transfer Pathways

Community College Partnership Development

- Community college partner identification is based on regional high-demand programs
- Strategic initiatives ensure community college students can readily transfer and earn bachelor's degrees (e.g., dual enrollment and dual admission programs)
- Cross-institutional executive planning happens regularly (at least annually) to ensure shared goals/activities support transfer students in regions



Admissions Activities

- Dedicated university transfer liaison in place for each community college focused on creating trusted relationships and addressing transfer issues
- Admissions staff have a dedicated office and/or visit regularly
- Student appointments and classroom visits encouraged.

Transfer Pathways and Articulation Agreements

- Faculty are highly engaged in transfer pathway development and meet with partners at least annually
 - Discuss changes to programs, course sequencing, and actively work to align lower-division course curriculum and programs of student/meta-majors
- Detail on course sequencing and major requirements is available in a student-friendly format that is up to date and available online

Discussion Questions

- 1 How do you prioritize transfer? Where are there gaps or opportunities? Consider the following:
 - Goals and planning
 - Transfer data
 - Transfer team and student experience

- 2 How do you build community college partnerships and pathways? Where are there gaps or opportunities? Consider the following:
 - Partner identification
 - Admission activities
 - Transfer pathways and articulation agreements

Create Transfer-Friendly Website and Self-Services Resources

Transfer Admissions Website

- Transfer content is easy to locate (1 click or less from institution home page)
- Includes dynamic linking that reduces number of clicks and eases navigation of information
- Website is mobile first design
- Analytics are collected and regularly reviewed by Marketing to optimize user experience



Transfer Guides

- Program-specific transfer guides are made available to community college students within their first semester at the institution
- Guides are routinely evaluated for effectiveness, incorporating student and advisor feedback

Self-Service Resources

- Admissions alerts and messages include clear next steps and tools to allow students to take immediate action
- Manual processes have been replaced by self-service tools in order to improve student utilization
- Staff time is assessed and reallocated regularly.

Promote Transfer and Provide Detail on Cost, Credit, and Completion

Transfer Marketing

- Wide variety of transfer marketing materials are in place
- Transfer program is well known
- Materials are optimized for audience
- University and community college partners collaborate on joint marketing and website integration promoting transfer program and resources



Digital Advertising

- Digital advertising, pay-per-click, and retargeting advertising are used to promote the transfer program
 - Regularly updated to reflect latest market trends in transfer
- SEO is in place and optimized for transfer pages

Transfer Admissions Information

Transfer admissions information is robust and as comprehensive as first-time, full-time student materials

- Effectively addresses key questions about cost, credit, completion
- Content is journey based, organized by transfer milestones (e.g., target enrollment term)
- Copy crafted with student in center, using relevant terminology, avoiding jargon, and providing easy to understand definitions

Discussion Questions

- 1 Do you have a transfer-friendly website and self-service resources? Where are there gaps or opportunities? Consider the following:
 - Transfer admissions website
 - Transfer guides
 - Self-service resources

- 2 How do you promote transfer and detail on cost, credit, and completion? Where are there gaps or opportunities? Consider the following:
 - Transfer marketing
 - Digital advertising
 - Transfer admission information

Qualify and Engage Prospective Transfer Students

Lead Management

- Lead source structure is in place to qualify and score prospects based on where they are in journey (e.g., target enrollment term, # of credits completed)
- Lead management metrics (e.g., speed to lead) routinely collected and used to inform marketing and recruiting



Student Communication

- Communication schedules and content are centralized, automated, and coordinated across units to reduce noise and maximize penetration
- Nudging principles utilized to encourage desired actions and inflect behaviors
- CRM drives all communication and is regularly evaluated to improve penetration

Transfer Application

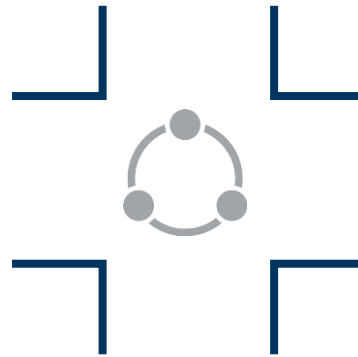
- A hosted application is personalized for transfer students' use
- Common barriers proactively addressed
- Nudges utilized to keep students on track
- 24/7 application support provided
- All requirements can be submitted online
- Mobile optimized.

Conduct Timely and Consistent Credit Evaluations

Course Equivalency Policy and Decision Making

Course equivalency and credit appeals policies are consistent across university with clearly defined steps and owners

- Easy for students to follow
- Regularly evaluated for effectiveness
- Equivalency issues are proactively managed, with formal method in place to analyze course equivalency gaps and identify curricular alignment or transfer pathways issues



Course Equivalency Data

- All course equivalency decisions are stored in the SIS
- Data governance structures are in place to ensure consistent input of data
- SIS rule-building happens with the course equivalency decision
- Technology deployed to automate and support more efficient rule building (e.g., transcript readers, SIS rule-builder applications)

Credit Evaluation

- Official credit evaluations are generated within 1-2 days, prior to application
- Unofficial credit evaluations are provided through a self-service, automated online tool
 - Provides detail on how courses transfer into majors and regularly shared with prospective students

Provide Early Transfer Advising, Onboarding, and Support

Staffing

- Single point of contact available for students to navigate complexities of the transfer process
- Load levels for are defined and trigger hiring decisions
- Technology in place to support transfer students through proactive interventions, coaching, remediation, and connecting to other transfer students

Transfer Onboarding and Student Feedback

- Flexible transfer student onboarding services are provided (e.g., non-traditional hours, online modules, community college campus appointments)
- Student support and resources are responsive to shifting transfer student needs and institutional goals
 - Informed by student focus groups and surveys



Transfer Advising

- Transfer advising provided as soon as student identifies transfer as a goal (e.g., first semester at community college)
 - Shared with transfer destination
- Academic planning and registration data are used to improve transfer pathways, prerequisites, policies, and optimize course seat availability for incoming transfer students

Financial Aid Planning

- Community college financial aid strategy in place and broadly promoted
- Counseling provided as soon as student identifies transfer as a goal (e.g., first semester at community college)
- Transfer financial aid yield data are routinely reviewed and optimized for effectiveness

Discussion Questions

- 1 How do you qualify and engagement transfer students? Where are there gaps or opportunities? Consider the following:
 - Lead management
 - Student communication
 - Transfer application
- 2 How do you conduct timely and consistent credit evaluations? Where are there gaps or opportunities? Consider the following:
 - Course equivalency policy and decision making
 - Course equivalency data
 - Credit evaluation
- 3 How do you provide early transfer advising, onboarding, and support? Where are there gaps or opportunities? Consider the following:
 - Staffing
 - Transfer advising
 - Transfer onboarding and student feedback
 - Financial aid planning

Poll: Select up to three responses

Based on your institutional goals, which of the seven Transfer Maturity Curve areas stand out as strategies to prioritize for improvement right now?

Prioritize Institutional Support for Transfer Students

Build Community College Partnerships and Transfer Pathways

Create Transfer-Friendly Website and Self-Services Resources

Promote Transfer and Provide Detail on Cost, Credit, and Completion

Qualify and Engage Prospective Transfer Students

Conduct Timely and Consistent Credit Evaluations

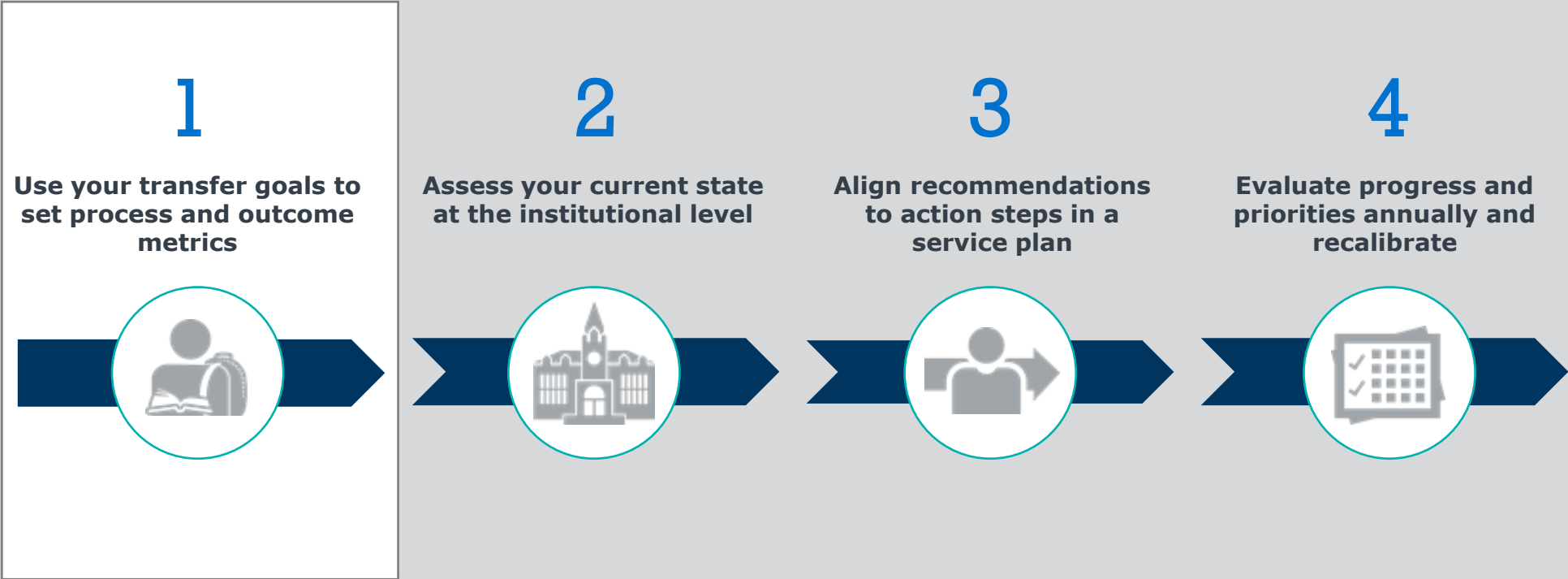
Provide Early Transfer Advising, Onboarding, and Support

Record your responses in
the worksheet, question 2.



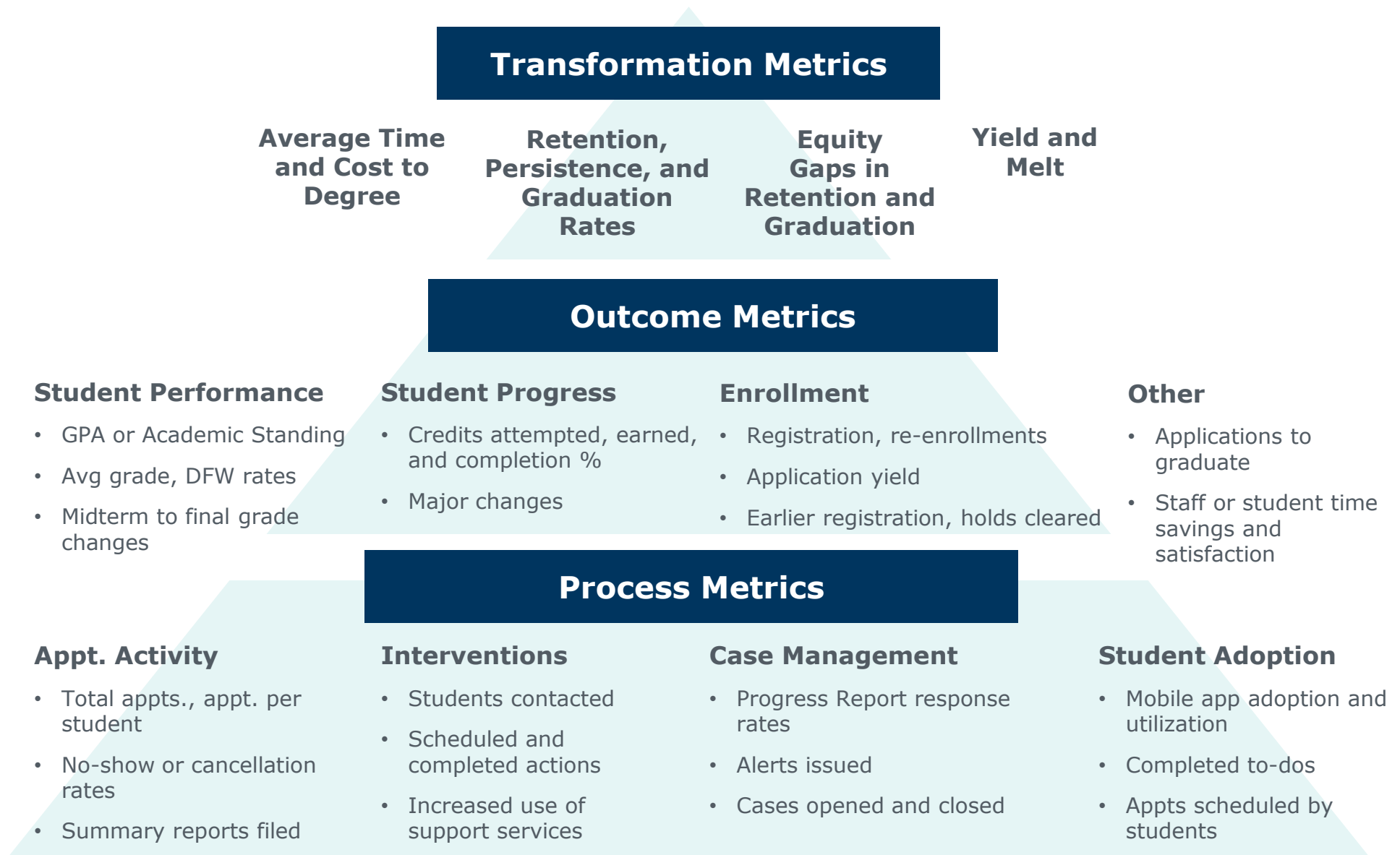
- 1 Transfer Challenges and Transformation in Practice
- 2 Updated Transfer Maturity Curve Framework and Assessment Tool
- 3 **Getting Started**

Getting the Most Out of the Maturity Curve



What Are Your Transfer Goals?

Ranging from Enrollment to Student Success



Use the Worksheet to Record Your Responses

Steps to Get the Most Out of the Maturity Curve

- 1 Use your transfer goals to set process and outcome metrics
- 2 Assess your current state at the institutional level
- 3 Align recommendations to action steps in a service plan
- 4 Evaluate progress and priorities annually and recalibrate

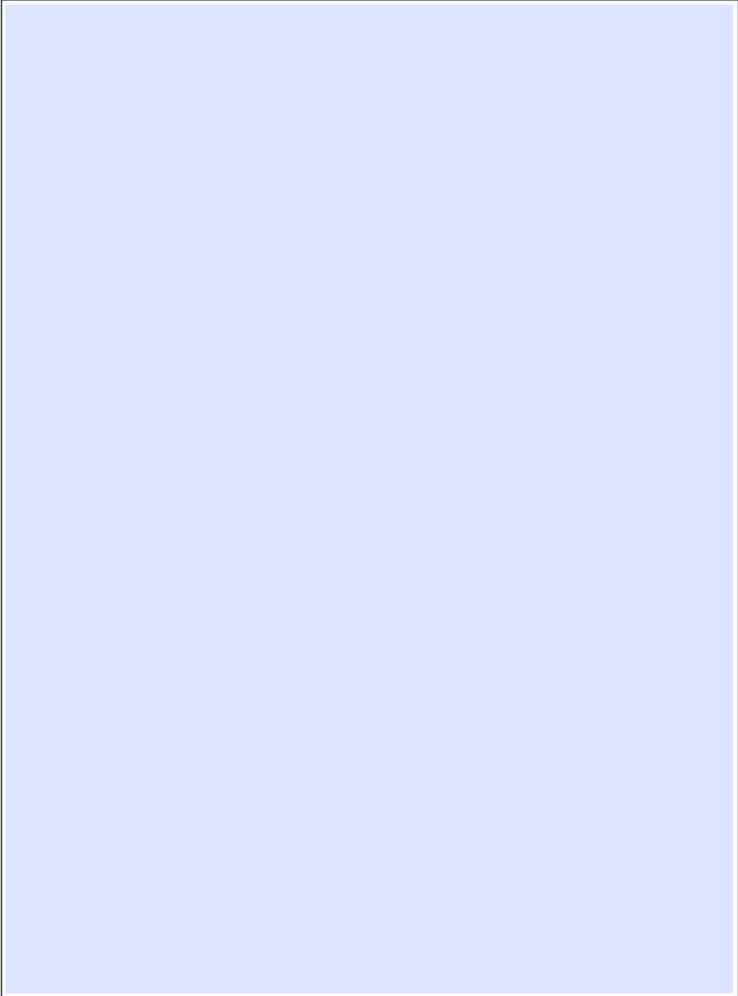
3 What are your transfer goals? Check the applicable boxes in the pyramid.

Transformation Metrics			
☐ Average Time and Cost to Degree	☐ Retention, Persistence, and Graduation Rates		
☐ Equity Gaps in Retention and Graduation	☐ Yield and Melt		
Outcome Metrics			
Student Performance ☐ GPA or Academic Standing ☐ Avg grade, DFW rates ☐ Midterm to final grade changes	Student Progress ☐ Credits attempted, earned, and completion % ☐ Major changes	Enrollment ☐ Registration, re-enrollments ☐ Application yield ☐ Earlier registration, holds cleared	Other ☐ Applications to graduate ☐ Staff or student time savings and satisfaction
Process Metrics			
Appt. Activity ☐ Total appointments, appointment(s) per student ☐ No-show or cancellation rates ☐ Summary reports filed	Interventions ☐ Students contacted ☐ Scheduled and completed actions ☐ Increased use of support services	Case Management ☐ Progress Report response rates ☐ Alerts issued ☐ Cases opened and closed	Student Adoption ☐ Mobile app adoption and utilization ☐ Completed to-dos ☐ Appts scheduled by students

Check the applicable boxes in question 3.

Use the Worksheet to Record Notes

4 Use this space to record notes throughout the rest of today's session.



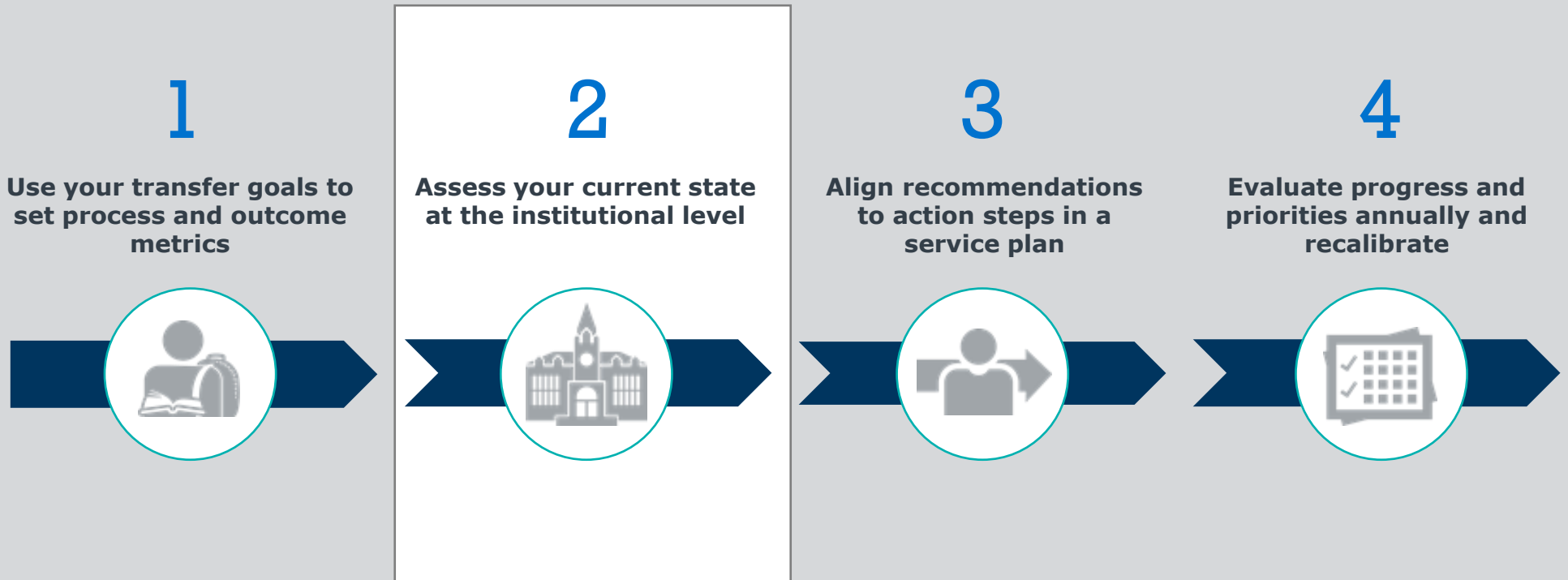
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Use the space in question 4 to record notes throughout the rest of today's session.

Discussion Questions

- 1 What are your transfer top-level transformation metrics?
- 2 What outcome and process metrics do you use to evaluate progress?

Getting the Most Out of the Maturity Curve



Prioritize Institutional Support for Transfer Students

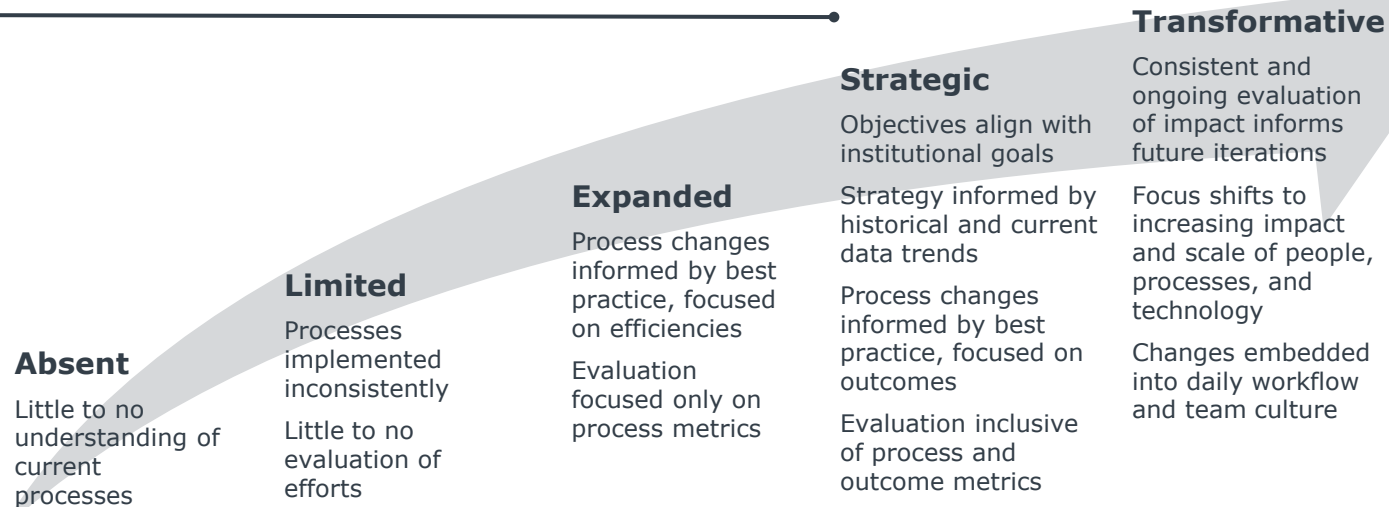
Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Transfer enrollment goals are not defined.	Transfer enrollment goals are defined but there is no supporting documentation (e.g., strategic enrollment management plan) or strategy to achieve them.	Transfer enrollment goals defined with supporting SEM or transfer recruitment plan in place; strategies in early implementation.	Transfer enrollment goals defined, prominent within SEM plan, and disaggregated (e.g., student type, 2-year/4-year mix, and location), with supporting strategies in place.	Transfer enrollment goals defined and disaggregated with supporting strategies fully operationalized, aligned to institutional priorities, broadly communicated; budget and resources have been allocated.
Transfer enrollment and success data are not available.	Transfer enrollment and success data are available and shared with unit leadership on an ad-hoc basis.	Transfer enrollment and success data are available and regularly reviewed by unit leadership.	Transfer enrollment and success data regularly reviewed by senior leadership and community college partners; data are used to inform decisions.	Transfer enrollment and success data are reviewed by senior leadership and are used in real-time adjustments in business processes and strategy; data sharing agreements are in place with top community college partners.
Enrollment management committee (EMC) and/or a Student Success Committee are not in place; transfer student barriers unknown.	EMC/SSC is in place, but transfer is not an area of focus and essential participants are not consistently included (e.g., Admissions, Registrar, Faculty); transfer student barriers anecdotally known.	Cross-functional EMC/SSC is in place, with transfer-specific charge; common transfer student barriers have been identified and supporting interventions in development.	Cross-functional EMC/SSC is in place, with clear transfer-specific charge; regular checks in place to assess transfer student barriers and student experience (e.g., student survey and focus groups); interventions deployed.	EMC/SSC deploys transfer services that are optimized to best support the student experience and address barriers; use data to determine ideal offerings and ensure resources are allocated accordingly.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Strategies by level, specific to each track

Suggestions for process and outcome metrics to track progress, specific to each track

Maturity levels from
Absent (0) to
Transformative (4)

Transfer Best
Practice Areas



Level 0

Level 1

Level 2

Level 3

Level 4

Foundation

Prioritize Institutional Support for Transfer Students

Build Community College Partnerships and Transfer Pathways

Awareness

Promote Transfer and Provide Detail on Cost, Credit, and Completion

Create Transfer-Friendly Website and Self-Services Resources

Yield & Support

Qualify and Engage Prospective Transfer Students

Conduct Timely and Consistent Credit Evaluations

Provide Early Transfer Advising, Onboarding, and Support

Each track filled in as your institution assesses your current state and levels-up

Transfer Maturity Curve

Spanning the student lifecycle from foundation, awareness, to yield and support

Absent

Little to no understanding of current processes

Limited

Processes implemented inconsistently
Little to no evaluation of efforts

Expanded

Process changes informed by best practice, focused on efficiencies
Evaluation focused only on process metrics

Strategic

Objectives align with institutional goals
Strategy informed by historical and current data trends
Process changes informed by best practice, focused on outcomes
Evaluation inclusive of process and outcome metrics

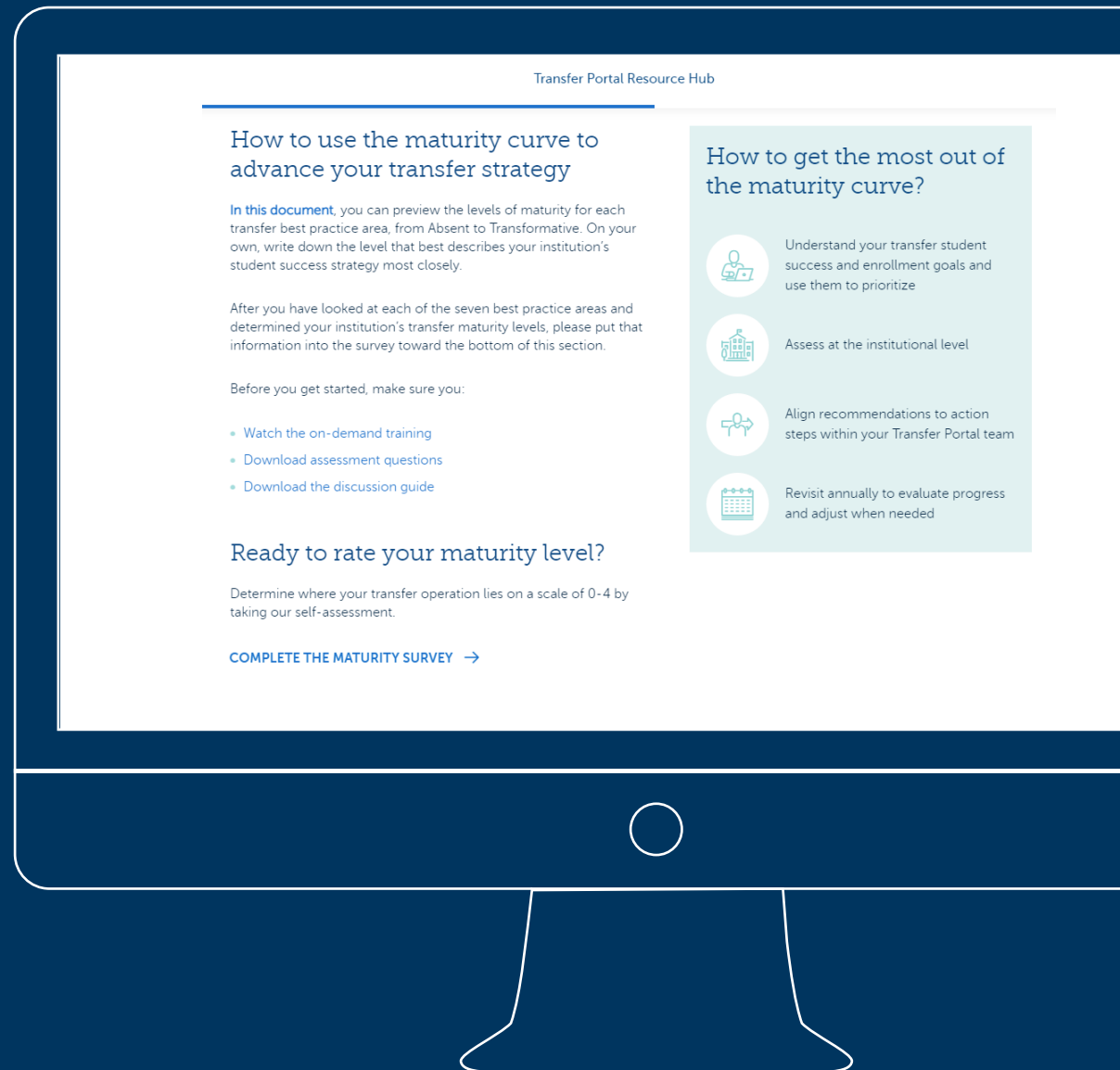
Transformative

Consistent and ongoing evaluation of impact informs future iterations
Focus shifts to increasing impact and scale of people, processes, and technology
Changes embedded into daily workflow and team culture

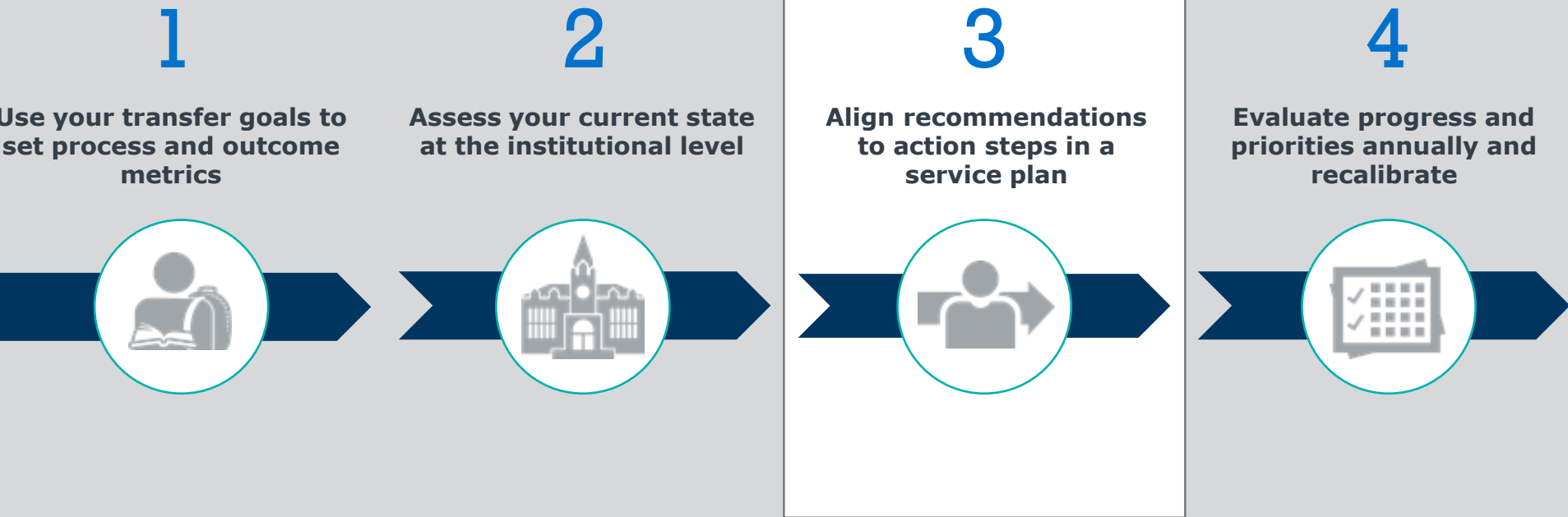
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Foundation	Prioritize Institutional Support for Transfer Students					
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	Create Transfer-Friendly Website and Self-Services Resources					
Yield & Support	Qualify and Engage Prospective Transfer Students					
	Conduct Timely and Consistent Credit Evaluations					
	Provide Early Transfer Advising, Onboarding, and Support					

Take the Online Assessment

- ▶ Rate your maturity level across the seven best practice areas through a brief online survey.
- ▶ While taking the survey, complete the companion discussion guide available on the [eab.com Resource Hub](https://eab.com/technology/resource-center/enrollment/transfer-portal-resource-hub/).
- ▶ Your EAB support team will follow up with your results and incorporate recommended actions to take and resources to support your work.

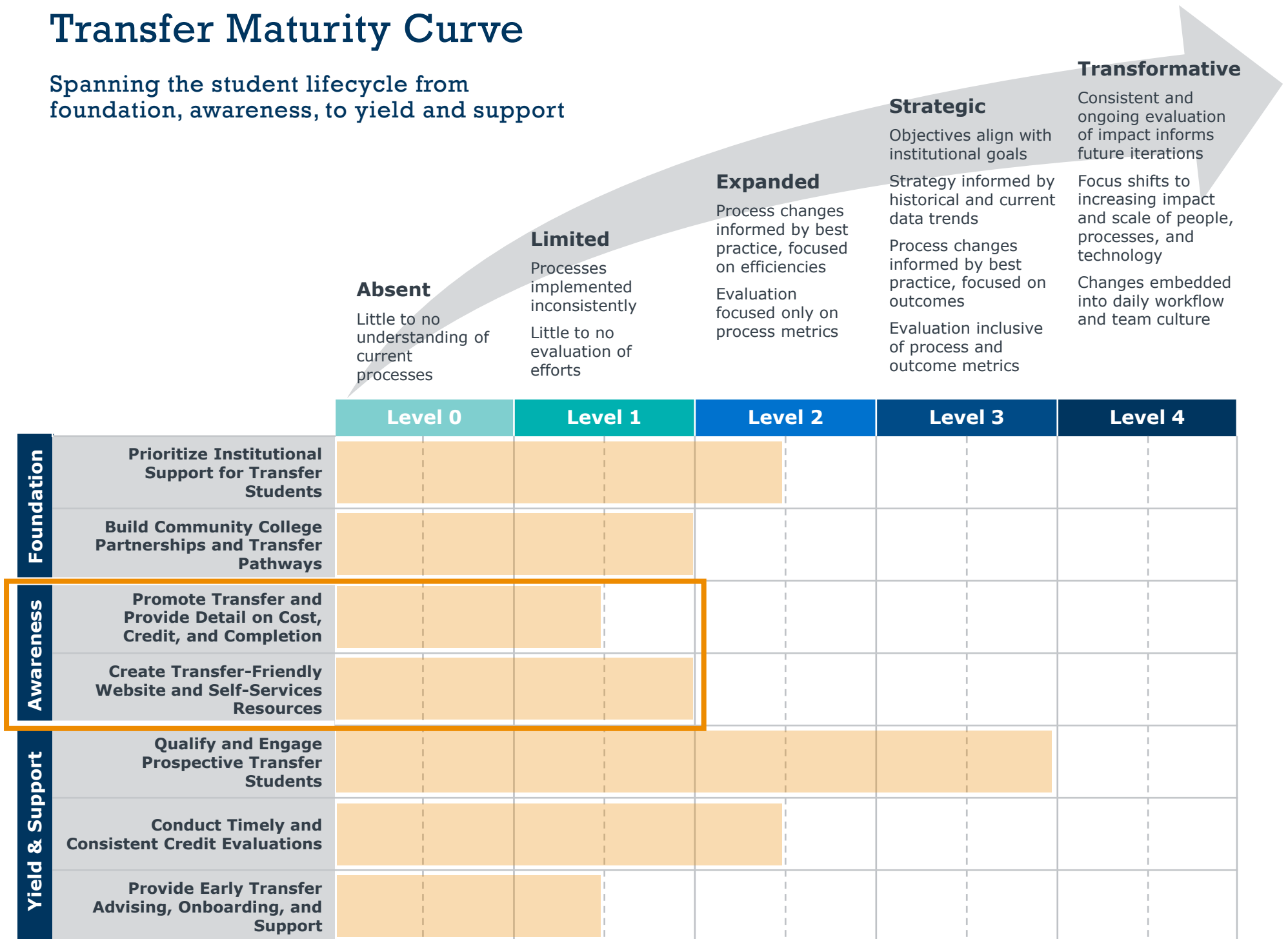


Getting the Most Out of the Maturity Curve



Transfer Maturity Curve

Spanning the student lifecycle from foundation, awareness, to yield and support



Create Transfer-Friendly Website and Self-Services Resources

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Website navigation is challenging; website is desktop first design and unresponsive to various screen sizes (e.g., mobile, tablet); analytics are not embedded.	Transfer content is fragmented across multiple pages and requires extensive navigation to locate (5+ clicks from institution home page); website is desktop first design and somewhat responsive to various screen sizes; analytics are embedded but not used.	Transfer content is available on a dedicated transfer section and can be found with relative ease (3 clicks from institution home page); website is desktop first design and responsive to various screen sizes; analytics are embedded and reviewed on an ad hoc basis.	Transfer content is prominently displayed on a dedicated transfer section of the admissions website and is easy to locate (2 clicks from institution home page); website is mobile first design; analytics are embedded and regularly reviewed by some but not all key stakeholders.	Transfer content is easy to locate (1 click or less from institution home page) with dynamic linking that reduces number of clicks and eases navigation of information; website is mobile first design; analytics are collected and regularly reviewed by Marketing to optimize the user experience.
Transfer guides do not exist.	Transfer guides at the institution-level exist but are not always updated and may not be publicly available.	Transfer guides at the institution-level and some programmatic-level exist, with efforts to ensure accuracy and availability online and on the community college website.	Transfer guides at both the institution-level and programmatic-level exist; all guides are up to date, centralized, and available online and on the community college website.	Program-specific transfer guides are made available to community college students within their first semester at the college; guides are routinely evaluated for effectiveness, incorporating student and advisor feedback.
Little to no self-service tools available during admissions process; staff are required to inform students of most information and complete almost all actions.	Institutions have multiple admission apps, websites, or tools for students to access information, but resources lack clarity and/or detail on transfer; students rely on staff for basic transactions.	Institutions have centralized repository of transfer resources with clear value propositions and comprehensive FAQ; students can resolve most common problems on their own.	Admissions alerts and messages include clear next steps and tools to allow students to take immediate action; self-service strategy is managed by key transfer cross-functional departments (e.g., Admissions, Registrar, Financial Aid).	Manual processes have been replaced by self-service tools in order to improve student utilization; staff time is assessed and reallocated regularly.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Research and Data Collection Opportunities



Institutional Survey

- Gather cross-functional responses through survey
- Provides insights into incoming transfer student process, past performance, and opportunities for improvement



Website & Materials Audit

- Review of transfer website and application against national best practices
- Detail steps necessary to improve website utilization and application completion
- Determine current promotional and marketing activities and identify areas to improve or expand those activities



Process Mapping

- Attempt to lay out all of the steps for a student to transfer to your institution and then explore where they could encounter barriers



Institutional Data Scan

- Review transfer feeder, program-level, and student outcomes data over past three years



Student Survey & Focus Group

- Invite transfer students or students considering transfer to participate in a survey or focus group to explore their experience with articulation, advising, and institutional selection



Meet with Regional Partners & Advisors

- Come together to discuss program requirements and desired outcomes across the region, also considering the student experience



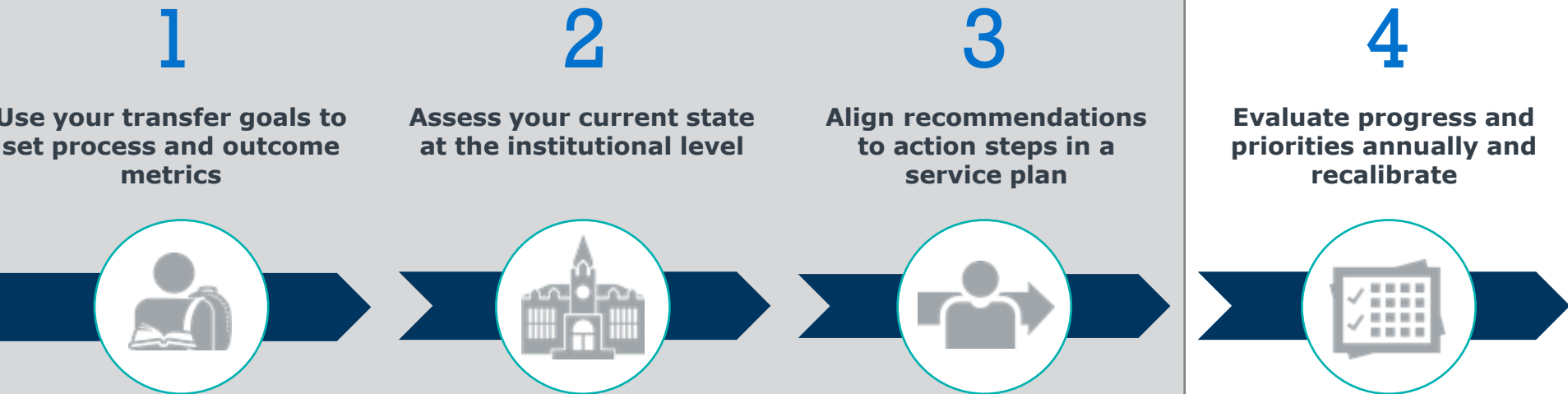
Review Transfer Application Process

- Review historical data to identify specific barriers to application completion. Employ surveys and focus groups to explore findings

Discussion Questions

- 1 What research and data collection opportunities seem the most interesting to you?
- 2 Any opportunities that you would want to pursue immediately?

Getting the Most Out of the Maturity Curve



Discussion Questions

- 1 Reflecting on today's session, did any other ongoing conversations happening across campus come to your mind?
- 2 Do you have the right people involved to work toward your transfer goals? Who might be missing?
- 3 ***What kind of help from EAB would be most useful?***

Next Steps

Let Us Know What You Thought About Today's Session!

- Complete the Zoom poll
- You will receive a follow-up email later today that will include the survey and a link to today's session materials

THANK YOU IN ADVANCE!

Register for Upcoming Sessions in the Series!



1. Visit the event registration page
2. Log into your eab.com account and select the date(s) of your choice
3. Click Register
4. Share the link with colleagues and encourage them to register, too

Contact TransferPortal@eab.com for assistance.

[Click Here to Visit the Registration Page](#)

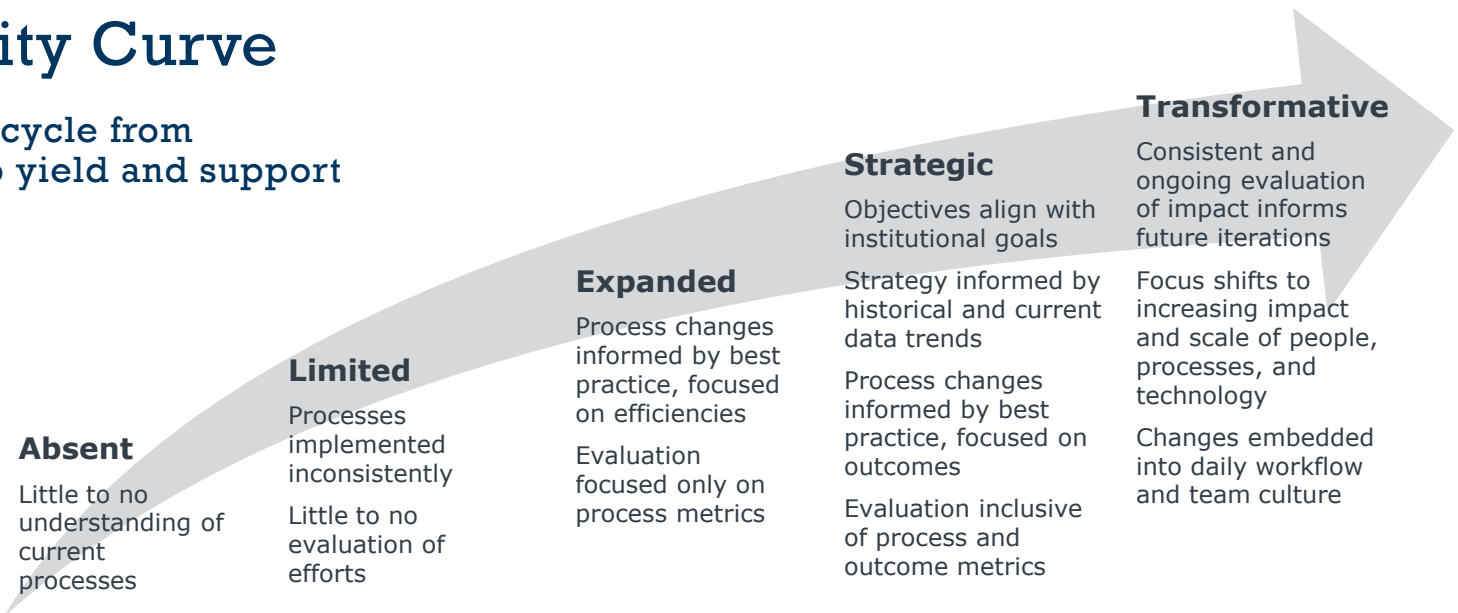


Appendix: Transfer Best Practices

Full descriptions of the seven transfer best practice strategies and descriptive levels that make up EAB's Transfer Maturity Curve

Transfer Maturity Curve

Spanning the student lifecycle from foundation, awareness, to yield and support



		Level 0	Level 1	Level 2	Level 3	Level 4
Foundation	Prioritize Institutional Support for Transfer Students					
	Build Community College Partnerships and Transfer Pathways					
Awareness	Promote Transfer and Provide Detail on Cost, Credit, and Completion					
	Create Transfer-Friendly Website and Self-Services Resources					
Yield & Support	Qualify and Engage Prospective Transfer Students					
	Conduct Timely and Consistent Credit Evaluations					
	Provide Early Transfer Advising, Onboarding, and Support					

FOUNDATION

AWARENESS

YIELD & SUPPORT



Prioritize Institutional Support for Transfer Students

Transfer student enrollment and success goals are defined with data sharing mechanisms in place, student barriers addressed with dedicated resources and strategies deployed by cross-functional teams.



Create Transfer-Friendly Website and Self-Services Resources

Transfer website is student-centered, mobile-responsive, and easy to navigate, enabling resolution of most transactional questions through self-service resources, reducing staff demand.



Qualify and Engage Prospective Transfer Students

Prospective students qualified based on key transfer student criteria and communications are coordinated, automated, and evaluated to reduce noise and optimize penetration, application designed for transfer student with on-demand support and resources to aid in completion.



Build Community College Partnerships and Transfer Pathways

Community college partnerships developed based on shared mission and academic pathway alignment with strong staff, faculty, and executive relationships focused on addressing transfer issues and building academic pathways.



Promote Transfer and Provide Detail on Cost, Credit, and Completion

Transfer admissions information is robust and answers key questions about how much it will cost, how credits will transfer, and progress-to-degree, avoiding jargon and designed to increase student engagement.



Conduct Timely and Consistent Credit Evaluations

Course equivalency policies are student-friendly, consistent across institution, and broadly communicated with supporting data governance processes and technology that support on-demand unofficial evaluations and official evaluations in 1-2 days.



Provide Early Transfer Advising, Onboarding, and Support

Dedicated staff in place to support transfer onboarding services, early academic advising, financial aid counseling and transfer scholarships, routine evaluation informs shifts to interventions, strategies, and resources allocation.

Prioritize Institutional Support for Transfer Students

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Transfer enrollment goals are not defined.	Transfer enrollment goals are defined but there is no supporting documentation (e.g., strategic enrollment management plan) or strategy to achieve them.	Transfer enrollment goals defined with supporting SEM or transfer recruitment plan in place; strategies in early implementation.	Transfer enrollment goals defined, prominent within SEM plan, and disaggregated (e.g., student type, 2-year/4-year mix, and location), with supporting strategies in place.	Transfer enrollment goals defined and disaggregated with supporting strategies fully operationalized, aligned to institutional priorities, broadly communicated; budget and resources have been allocated.
Transfer enrollment and success data are not available.	Transfer enrollment and success data are available and shared with unit leadership on an ad-hoc basis.	Transfer enrollment and success data are available and regularly reviewed by unit leadership.	Transfer enrollment and success data regularly reviewed by senior leadership and community college partners; data are used to inform decisions.	Transfer enrollment and success data are reviewed by senior leadership and are used in real-time adjustments in business processes and strategy; data sharing agreements are in place with top community college partners.
Enrollment management committee (EMC) and/or a Student Success Committee are not in place; transfer student barriers unknown.	EMC/SSC is in place, but transfer is not an area of focus and essential participants are not consistently included (e.g., Admissions, Registrar, Faculty); transfer student barriers anecdotally known.	Cross-functional EMC/SSC is in place, with transfer-specific charge; common transfer student barriers have been identified and supporting interventions in development.	Cross-functional EMC/SSC is in place, with clear transfer-specific charge; regular checks in place to assess transfer student barriers and student experience (e.g., student survey and focus groups); interventions deployed.	EMC/SSC deploys transfer services that are optimized to best support the student experience and address barriers; use data to determine ideal offerings and ensure resources are allocated accordingly.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Build Community College Partnerships and Transfer Pathways

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Institution may have top feeders based on historical enrollment patterns, but strategic community college partnerships have not been identified; peer (recruiter, faculty) relationships do not exist.	Some transfer enrollment and graduation data from community colleges are available and partnership identification is in early stages; some peer relationship exist but activities are not coordinated.	Transfer enrollment and graduation data from community colleges are analyzed to inform partner identification; peer relationships exist, and activities are coordinated.	Community college partner identification is based on regional high-demand programs; strong faculty, staff, and senior leadership relationships exist with community colleges, activities are highly coordinated with a strong communication and engagement plan in place.	Strategic initiatives in place to ensure community college students can readily transfer and earn bachelor's degrees (e.g., dual enrollment and dual admission programs); cross-institutional executive planning happens regularly (at least annually) to ensure shared goals and activities are in place to support transfer students in regions.
Admissions staff do not visit community college partners.	Admissions staff visit community colleges infrequently (1-2 times a semester).	Admissions staff visit community colleges monthly, efforts are focused on tabling and high-level advisor contact.	Admissions staff visit community colleges weekly, efforts are focused on early lead identification and connecting with advisors to ensure awareness of transfer program.	Dedicated university transfer liaison in place for each community college focused on creating trusted relationships and addressing transfer issues; admissions staff have a dedicated office; student appointments and classroom visits encouraged.
Articulation agreements are not in place and/or transfer pathways have not been developed.	Institution-level articulation agreements are in development but effectiveness as a transfer pathway from community college are not addressed (e.g., overlapping credit, course sequencing issues).	Program-level articulation agreements are in place, with varying levels effectiveness as a transfer pathway from community colleges, faculty are not engaged in development process.	Faculty are highly engaged in transfer pathway development and are active participants in credit gap analysis; program-level articulation agreements in place support transfer pathways.	Faculty across institutions within region meet at least annually to discuss changes to programs, course sequencing, and actively work to align lower-division course curriculum and programs of student/meta-majors; detail on course sequencing and major requirements is available in a student-friendly format that is up to date and available online.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Create Transfer-Friendly Website and Self-Services Resources

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Website navigation is challenging; website is desktop first design and unresponsive to various screen sizes (e.g., mobile, tablet); analytics are not embedded.	Transfer content is fragmented across multiple pages and requires extensive navigation to locate (5+ clicks from institution home page); website is desktop first design and somewhat responsive to various screen sizes; analytics are embedded but not used.	Transfer content is available on a dedicated transfer section and can be found with relative ease (3 clicks from institution home page); website is desktop first design and responsive to various screen sizes; analytics are embedded and reviewed on an ad hoc basis.	Transfer content is prominently displayed on a dedicated transfer section of the admissions website and is easy to locate (2 clicks from institution home page); website is mobile first design; analytics are embedded and regularly reviewed by some but not all key stakeholders.	Transfer content is easy to locate (1 click or less from institution home page) with dynamic linking that reduces number of clicks and eases navigation of information; website is mobile first design; analytics are collected and regularly reviewed by Marketing to optimize the user experience.
Transfer guides do not exist.	Transfer guides at the institution-level exist but are not always updated and may not be publicly available.	Transfer guides at the institution-level and some programmatic-level exist, with efforts to ensure accuracy and availability online and on the community college website.	Transfer guides at both the institution-level and programmatic-level exist; all guides are up to date, centralized, and available online and on the community college website.	Program-specific transfer guides are made available to community college students within their first semester at the college; guides are routinely evaluated for effectiveness, incorporating student and advisor feedback.
Little to no self-service tools available during admissions process; staff are required to inform students of most information and complete almost all actions.	Institutions have multiple admission apps, websites, or tools for students to access information, but resources lack clarity and/or detail on transfer; students rely on staff for basic transactions.	Institutions have centralized repository of transfer resources with clear value propositions and comprehensive FAQ; students can resolve most common problems on their own.	Admissions alerts and messages include clear next steps and tools to allow students to take immediate action; self-service strategy is managed by key transfer cross-functional departments (e.g., Admissions, Registrar, Financial Aid).	Manual processes have been replaced by self-service tools in order to improve student utilization; staff time is assessed and reallocated regularly.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Learn more about EAB's self-service credit estimation tool, the Transfer Portal: <https://eab.com/products/transfer-portal/>

Promote Transfer and Provide Detail on Cost, Credit, and Completion

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Transfer marketing materials (print and online) are not available.	Some transfer marketing materials are in place, but key components of transfer program are not well known.	Transfer marketing materials are in place and opportunities for co-branding with community colleges have been identified but not executed.	Wide variety of transfer marketing materials are in place, transfer program is well known, and community college partners are recognized online with active referral links to-and-from websites; materials are consistently co-branded.	Transfer marketing materials are optimized for audience, university and community college partners collaborate on joint marketing materials promoting transfer program and resources.
Digital advertising (ads) are not used.	Digital ads are used to promote the university but do not include transfer content.	Digital ads are used to promote the transfer program but pay-per-click and retargeting are not used; integration with other communication channels is not a priority.	Digital advertising, pay-per-click, and retargeting advertising are used to promote the transfer program; integration with other communication channels is in place.	All digital advertising are updated to reflect latest market trends in transfer; SEO is in place and optimized for transfer pages.
Transfer admissions information (print and online) is available but does not accurately address cost, credit, or completion.	Transfer admissions information about cost, credit, and completion are limited or outdated, often leading to follow up questions.	Transfer admissions information is available and partially addresses key decision factors around cost, credit, completion; opportunity to enhance descriptions or clarity in language.	Transfer admissions information is robust and as comprehensive as first-time, full-time student materials; effectively addressing key questions about cost, credit, completion; deploys best practices to avoid jargon and increase student engagement.	Transfer content is journey based, organized by transfer milestones like past/current colleges, target enrollment term, number of credits; copy crafted with student in center, using relevant terminology and providing easy to understand definitions, as appropriate.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Qualify and Engage Prospective Transfer Students

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Lead source is often unknown, and all prospects are considered equal; CRM not in place.	Lead source is often known, and CRM may be leveraged for qualification, but all transfer prospects are considered equal.	Lead source structure is in place and source is consistently known; CRM is leveraged for qualification, but some features may be underutilized, all transfer prospects are considered equal.	Lead source structure is in place and used to prioritize prospects based on key transfer student criteria (e.g., feeder institution, major of interest, GPA); CRM features fully utilized.	Lead source structure is in place to qualify and score prospects based on where they are in journey (e.g., target enrollment term, # of credits completed); lead management metrics (e.g., speed to lead) routinely collected and used to inform marketing and recruiting.
Transfer prospects receive ad hoc communications from institution.	Transfer prospects receive communications through multiple channels and is not coordinated to control for content, repetition, formatting, or sequencing; CRM not consistently used to drive communication.	Transfer prospects receive communications through multiple channels, and coordination sometimes occurs; students receive complementary messages; messages deploy best practices and avoid jargon to increase student engagement; most communication driven through CRM.	Communication schedules and content are centralized, automated, and coordinated across units to reduce noise and maximize penetration; nudging principles utilized to encourage desired actions and inflect behaviors; CRM drives all communication.	Communication content, channels, and delivery systems are continuously evaluated and improved using data from open and click rates to maximize penetration.
A transfer application is not available.	A basic transfer application, powered by the SIS, is available; key application requirements are unclear; resources to support completion unavailable.	An application has been developed but is not personalized for the transfer student experience; key requirements and processes are available but sometimes unclear; online resources to support completion available; not mobile responsive.	A hosted application personalized for transfer students used; requirements and process are clearly defined; online resources and staff application support available by phone and email during regular business hours; mobile responsive.	A hosted application is personalized for transfer students used; common barriers proactively addressed; nudges utilized to keep students on track; 24/7 application support provided; all requirements can be submitted online; mobile optimized.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Conduct Timely and Consistent Credit Evaluations

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Course equivalency policy (e.g., how credit is awarded) and credit appeals policy (e.g., how students can self-advocate for a different decision) are not defined.	Course equivalency and credit appeals policies are in place but may vary by department or major; decisions are inconsistently managed, difficult for students to understand, and not publicly available.	Course equivalency and credit appeals policies are in place and consistent across university; decisions centrally managed, available online, there may be opportunities to improve clarity and student-friendliness.	Course equivalency and credit appeals policies are consistent across university with clearly defined steps and owners, easy for students to follow, and broadly communicated; designed with minimal transfer student effort (e.g., staff lookup course descriptions).	Course equivalency and credit appeals policies are regularly evaluated for effectiveness, equivalency issues are proactively managed, with formal method in place to analyze matriculated and non-matriculated student course equivalency gaps and identify curricular alignment or transfer pathways issues.
Course equivalency decisions (i.e., articulation rules) are not centrally stored.	Course equivalency decisions are tracked on a shared spreadsheet.	Majority of course equivalency decisions are stored in the SIS, but "shadow" systems or data quality issues may exist (e.g., data in multiple locations), SIS rule-building occurs sporadically vs. with the course equivalency decision, requiring duplicative effort.	All course equivalency decisions are stored in the SIS, data governance structures are in place to ensure consistent input of data, SIS rule-building happens with the course equivalency decision.	Technology deployed to automate and support more efficient rule building (e.g., transcript readers, SIS rule-builder applications).
Official credit evaluations are provided post-enrollment; unofficial evaluations are not supported.	Official credit evaluations are provided 15+ business days after the admissions decision, turnaround time delayed due to staff capacity or demand; unofficial evaluations are provided ad hoc, but not promoted; evaluations completed manually without support degree audit system.	Official credit evaluations are provided within 5-10 business days of admissions decision, turnaround time variable; unofficial evaluations are not consistently provided prior to an enrollment commitment and triggered at student's request; possible gaps in degree audit data or capabilities not fully leveraged.	Official credit evaluations are provided with or before admission decision and turnaround time expectations are standardized; unofficial evaluations are provided prior to application, incorporated into recruitment process, and promoted; degree audit system regularly updated and fully leveraged to automate evaluations.	Official credit evaluations are generated within 1-2 days, prior to application; unofficial credit evaluations are provided through a self-service, automated online tool that provides detail on how courses transfer into major and regularly shared with prospective students.
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>

Provide Early Transfer Advising, Onboarding, and Support

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
Transfer student-facing positions to support high quality enrollment and onboarding experience are unavailable or unfilled.	Transfer admissions and advising responsibilities are shared across staff or departments.	Dedicated transfer admissions and transfer advising staff positions are available and filled.	Staff and advising technology in place to support transfer students through proactive interventions, coaching, remediation, and connecting to other transfer students.	Single point of contact available for students to navigate complexities of the transfer process; load levels for are defined and trigger hiring decisions.
Transfer advising is unavailable; students plan classes without proactive intervention or academic guidance.	Limited transfer advising available at point of registration and is transactional in nature; advising challenges may exist in the summer/winter due to availability; course seat availability for incoming transfers is a known issue.	Transfer advising is provided pre-application; strong follow up and support provided through first semester; institution holds seats for incoming transfer students.	Transfer advising is provided 1-2 semesters before start of target enrollment term; holistic, individual advising model used through student's first year; transfer students are guaranteed seats in courses that will put them on path to graduate on time.	Transfer advising provided as soon as student identifies transfer as a goal (e.g., first semester at community college) and shared with transfer destination; academic planning and registration data are used to improve transfer pathways, prerequisites, and policies.
Transfer onboarding information and resources (e.g., orientation, guides) are not available and/or not coordinated across institution.	Transfer onboarding checklist may be available with dates and steps for a successful start; transfer session provided as a part of first-time full-time student orientation; some promotion of resources in place.	All key dates, term-specific actions, and transfer resources are defined and promoted consistently and comprehensively; distinct transfer orientation available; quick polls and/or onboarding surveys used to identify transfer student needs.	Flexible transfer student onboarding services are provided (e.g., non-traditional hours in evenings and weekends, online modules, community college campus appointments); key transfer milestones prioritized and regularly promoted.	Student support and resources are responsive to shifting transfer student needs and institutional goals and are informed by student focus groups and surveys.
Financial aid or specialized counseling are not available for transfer students.	Transfer students are eligible for merit-based financial aid, but deadlines and counseling services may be off-cycle and disadvantageous.	Dedicated, merit-based financial aid are available for transfer students but may not be broadly known; additional scholarships are available for high-performing students (e.g., PTK); financial counseling provided ad hoc.	Community college financial aid strategy in place and broadly promoted; financial aid counseling provided early.	Transfer financial aid yield data are routinely reviewed and optimized for effectiveness; counseling provided as soon as student identifies transfer as a goal (e.g., first semester at community college).
 Evaluation Metrics	<i>Little to no evaluation of efforts.</i>	<i>Evaluation focused only on process metrics.</i>	<i>Evaluation inclusive of process and outcome metrics.</i>	<i>Consistent and ongoing evaluation of impact informs future iterations.</i>



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ABOUT EAB

At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.