

Building a Transfer Foundation

Transfer Portal Intensive Limited Series, Session II

Today's Facilitators



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Update Your Name

The screenshot shows a Zoom meeting window with the title bar "Zoom Meeting ID: 841-573-482". The main content area displays a presentation slide with the EAB logo and the text "EAB Virtual Meetings". On the right side, the "Participants (2)" panel is open, showing "Test Participant (Me)" and "Meeting Host (Host)". The "Rename" button next to "Test Participant (Me)" is highlighted with a yellow box. An orange line points from a text box above to this button. Below the Participants panel, the "Test Participant" video tile is also highlighted with a yellow box. An orange line points from a text box below to this tile. The bottom toolbar includes icons for Mute, Stop Video, Invite, Participants, Share, Chat, and Record. The "Leave Meeting" button is visible in red text. The "Rename" dialog box is open, showing the "Enter a new screen name:" field with the text "Jane Doe - Institution" and "OK" and "Cancel" buttons.

Update your name and add your institution

Open Participants menu

Mic, Chat, and Nonverbal Feedback

The screenshot shows a Zoom meeting window with a presentation slide titled "EAB Virtual Meetings". The interface includes a top bar with the meeting ID (841-573-482) and a status bar at the bottom with icons for Mute, Stop Video, Invite, Participants (2), Share, Chat, Record, and Leave Meeting. A "Participants" panel is open on the right, showing two participants: "Test Participant (Me)" and "Meeting Host (Host)". The "Test Participant (Me)" panel has icons for Raise Hand, yes, no, go slower, go faster, and more. The "Meeting Host (Host)" panel has icons for Unmute Me and Reclaim Host. The "Zoom Group Chat" section is also visible, showing a "To:" dropdown set to "Everyone" and a text input field for typing a message.

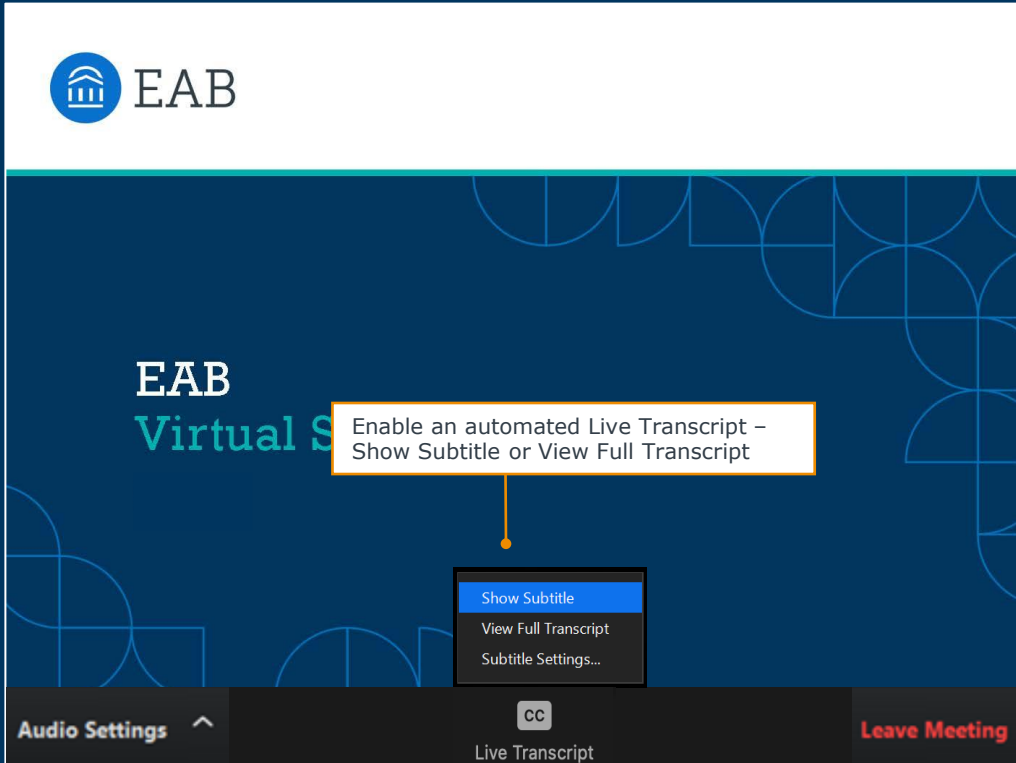
Use icons to communicate answers and signals to presenter

Unmute to verbalize a comment

Open Participants and Chat

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

Turn on Captions



The screenshot shows a Zoom meeting interface. At the top, there is a white header with the EAB logo (a blue circle containing a stylized building icon) and the text "EAB". Below the header, the main background is dark blue with a pattern of light blue geometric shapes. In the center, the text "EAB Virtual S" is visible. A yellow callout box with a black border points to a menu. The callout box contains the text: "Enable an automated Live Transcript – Show Subtitle or View Full Transcript". The menu is a dark grey rectangle with three options: "Show Subtitle" (highlighted in blue), "View Full Transcript", and "Subtitle Settings...". At the bottom of the screen, there is a dark grey bar. On the left, it says "Audio Settings" with an upward arrow. In the center, there is a "CC" icon and the text "Live Transcript". On the right, there is a red button that says "Leave Meeting".

EAB

EAB Virtual S

Enable an automated Live Transcript – Show Subtitle or View Full Transcript

Show Subtitle

View Full Transcript

Subtitle Settings...

Audio Settings ^

CC

Live Transcript

Leave Meeting

What is your favorite
spring activity?



- 1 Transfer Maturity Curve
- 2 Best Practice 1: Prioritize Institutional Support for Transfer Students
- 3 Best Practice 2: Build Community College Partnerships and Transfer Pathways
- 4 Closing and Next Steps



Transfer Maturity Curve

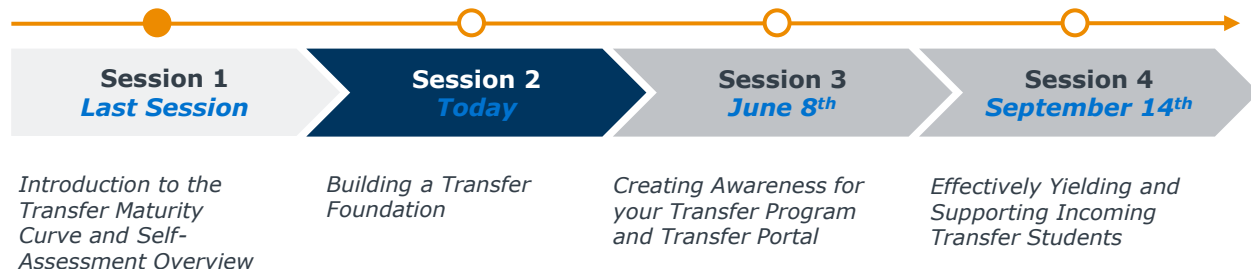
Brief Recap of Session I of the Intensive Series



Transfer Intensive Series

Register for Upcoming Sessions and Encourage Your Colleagues to Attend!

Four-Part Series

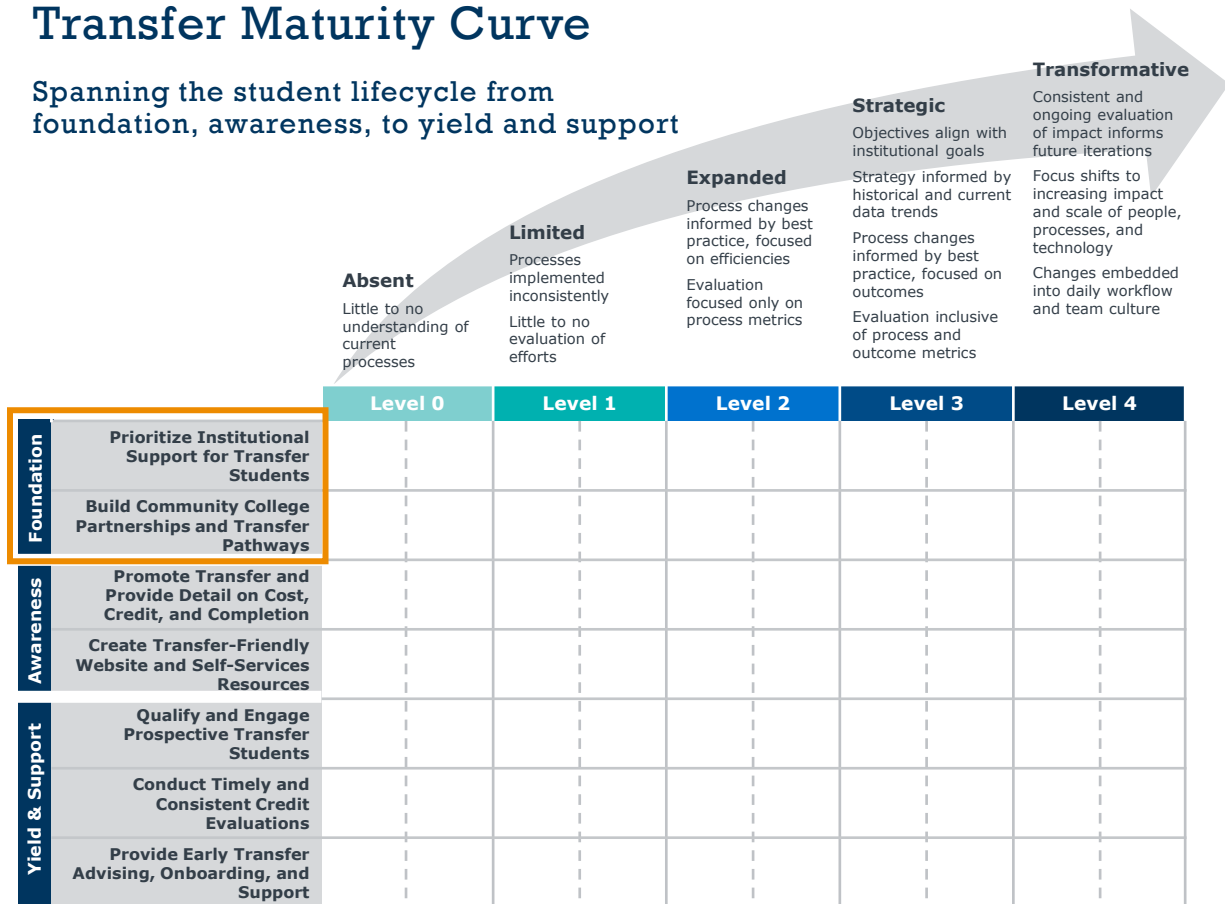


Register for sessions today and encourage your colleagues to do so, too!

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

Transfer Maturity Curve

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





Prioritize Institutional Support for Transfer Students

Maturity Curve - Foundation

BEST PRACTICE

1

Quick Poll

What percentage of students leave 2-year institutions and enter a 4-year institution?

- a) 30%
- b) 45%
- c) 55%
- d) 70%

Maturity Curve – Foundation, Best Practice 1

13

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>

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

3 Tracks to Prioritizing Transfer Support



1a

Goals and Planning

Transfer goals are defined, with a strategic enrollment or transfer recruitment plan in place to guide implementation of activities.

1b

Transfer Data

Data are used by unit leaders and community college partners to inform decisions and strategy.

1c

Transfer Team and Student Experience

Transfer is a defined area of focus for the Enrollment Management Committee (EMC) and/or a Student Success Committee.





Pre-Work Reflection & Share Out

What is your institution's level of Transfer Maturity?

Absent	Limited	Expanded	Strategic	Transformative
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- Poll:** Where is your institution on the maturity curve?
- What are your institution's top transfer-related goals?
- Do you have a formal strategic enrollment management plan and/or a transfer recruitment plan for achieving these transfer goals?
- What barriers currently exist (if any) that might inhibit your team from achieving these goals?

Considerations for Transfer Enrollment Planning



Transfer Landscape and Your Regional Market

Economists expect traditional student pipelines to continue shifting and some regions will be more impacted.

- Factor these changes into your enrollment strategies and consider the future needs of your transfer student demographic.

Feeder Institutions and Transfer Pipeline

Examine your top feeder institutions to better understand which strategies need revisiting.

- Example: Compare yield and degree conferment rates, anticipated growth, and shifts to major offerings/core curricula at feeder institutions. Apply insights to shift recruitment strategy and transfer pathways.

Transfer Policies or State Initiatives

Increasingly, policymakers are creating guidelines for institutions to follow (e.g., transfer credit acceptance benchmarks, associate degree-to-bachelor degree requirements, etc.).

- These policies can have immense implications for transfer enrollment, awareness, and competitive landscape.

Transfer Competition

Identify your key competitors, their competitive threat, and risk to your market share.

- Consider their transfer-in rate (available on IPEDS) and key components of their transfer program.
- Craft responses to maintain or grow market share based on your analysis.



Pre-Work Reflection & Share Out

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1 Poll: Where is your institution on the maturity curve?

2 How are transfer enrollment and success data tracked and shared internally (e.g., faculty and staff) and externally (e.g., community college partners)?

Types of Data to Consider for Analysis

Understanding Your Transfer Student Population and Support Needs

Demographic Data

Assess how/if the transfer student population differs from your general student population.

Example data points:

- Age, Gender, Ethnicity/Race
- First-Generation Status
- Part Time vs. Full Time
- Academic College/Major



Transfer-Specific Data

Uncover support needs and resources for incoming students and those early in their career at your institution.

Example data points:

- Name and type of feeder institutions
- Number of transferred credits
- Incoming GPA
- GPA in first and second terms



Institutional Data

Analyze existing institutional data with a transfer lens to help justify transfer programming and support.

Example data points:

- Retention between terms and years
- Graduation rates
- Percentage of graduating class who transferred





Pre-Work Reflection & Share Out

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- 1 Poll:** Where is your institution on the maturity curve?
- Are there any existing taskforces, committees, or groups looking at transfer student enrollment or student success?
- Does this group assess possible transfer student barriers and gaps in the student experience?

Standing Up a Cross-Functional Transfer Team

Purpose and Responsibilities

- Understand transfer market and make recommendations regarding 1–3-year transfer enrollment forecasts
- Identify barriers that impact strategic transfer enrollment and student success goals
- Develop strategies and action plans that align with goals and address barriers
- Ensure that the institution moves forward with identified initiatives and accountability metrics are in place
- Continuously monitor and evaluate progress, provide opportunities for updates and discussion, iterate as needed

Recommended Committee Members

Co-chairs: VPEM and VPAA

Core Cross-Functional Team Members:

- Enrollment Management and Admissions
- Registrar
- Credit Evaluation/Degree Audit reps
- Academic Deans or Department Chairs
- Academic Advising
- Student Affairs (Orientation)
- Marketing and Website

As needed:

- Financial Aid
- Information Technology
- Institutional Research
- Finance and Business Office
- International Student Office

Download the Resources: (1) EMC Charge and Structure Outline
(2) Oregon State University – Transfer Advisory Council

(Transfer Portal Resource Hub > Strategic Resources > Prioritize Institutional Support)



Build Community College Partnerships and Transfer Pathways

Maturity Curve - Foundation

BEST PRACTICE

2

Quick Poll

What percentage of student credits do not transfer?

- a) 10-20%
- b) 20-30%
- c) 40-50%
- d) 50-60%

Maturity Curve – Foundation, Best Practice 2

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>

3 Tracks to Build Community College Partnerships and Transfer Pathways

2a

Community College Partner Development

Data are used to identify strong partners and strategic initiatives ensure students can easily transfer.

2b

Admissions Activities and Relationship Building

Staff make regular visits, focusing on early lead identification, building trusted relationships, and connecting with advisors and faculty to promote the transfer program.

2c

Transfer Pathways and Curriculum Aligned

Faculty across institutions are engaged in transfer pathway development and curriculum alignment to best support students.





Pre-Work Reflection & Share Out

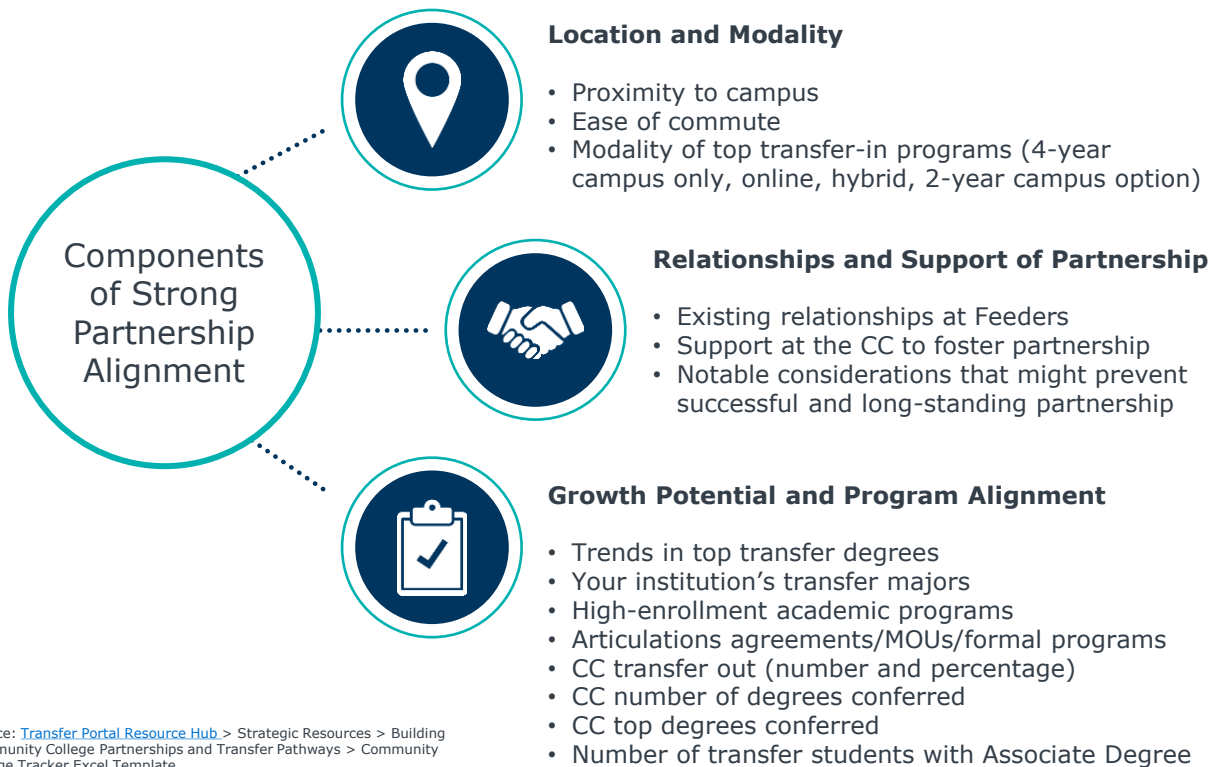
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- Poll:** Where is your institution on the maturity curve?
- How are community college partners identified?
- Which of your current feeders do you consider to be the strongest partners and why? Describe peer (staff, faculty, executive) relationships between institutions.
- How big of a priority is strengthening your community college partnerships?

Community College Identification

Analyze Transfer Data to Inform Partner Identification





Pre-Work Reflection & Share Out

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- 1 Poll:** Where is your institution on the maturity curve?
- What kind of admissions activities are in place with your community college partners?
- How frequently are admissions staff at community colleges and what do you expect from them when visiting? Do you have dedicated space on community college campuses?
- Are these visits coordinated across all departments? What other staff visit colleges (e.g., advisors, faculty)?

Optimal Admission Resource Allocation and Activities ²⁸

**Recruiting and
Student Outreach**

Relationship Building

Strategic Engagement

EAB estimated time share

70%

Activities to Consider

- Funnel stage goal setting with 2-year college partners
- **Weekly 2-year college admissions visits**
- **Early prospect identification via identification of prospective transfer student influencers and encouraging them to refer students to the portal**
- Coordination with internal staff to resolve admissions process gaps
- **Transfer-specific events at your institution**
- Internal performance reviews to build bench strength

Suggested Tools

- Counselor activity reports
- **Transfer-specific admissions materials (e.g., guides)**
- 2-year college events calendar to support recruitment opportunities
- 2-year college website to ensure timely and efficient recruitment communication
- Event survey feedback to inform future events
- Mystery shopping to strengthen recruitment and admission processes

Optimal Admission Resource Allocation and Activities ²⁹

**Recruiting and
Student Outreach**

Relationship Building

Strategic Engagement

EAB estimated time share

20%

Activities to Consider

- **Information and data sharing meetings with 2-year college advising staff**
- **Transfer events at 2-year college with Registrar, Admissions, Staff and Faculty (e.g., workshops, networking events, transfer portal “demo day”)**
- **Transfer student focus groups**
- **2-year advisor training to ensure portal and transfer program awareness**

Suggested Tools

- **Transfer enrollment reports**
- **2-year college faculty and staff introductions and sustained outreach**
- **Structured peer relationship development sessions on the 2-year college and your college campuses**
- **Use of portal data to foster understanding of transfer benefits and build Faculty/Staff confidence in advocating for transfer**

Optimal Admission Resource Allocation and Activities ³⁰

**Recruiting and
Student Outreach**

Relationship Building

Strategic Engagement

EAB estimated time share

10%

Activities to Consider

- Research on program redesign and development
- Leadership (President/senior staff, articulation, financial aid, admissions, IR, student affairs) joint roundtables
- **Co-marketing/sponsorships**
- Sponsored joint professional development events
- **Constituent portal and partnership awareness via social media, PR, and campus updates**

Suggested Tools

- 2-year college strategic plans to understand priorities and identify collaboration opportunities
- **2-year college publications and electronic communications**
- 2-year college social media channels
- Google alerts to track activity and identify opportunities for collaboration
- Sponsor and present at 2-year college Faculty/Staff development sessions

Use Transfer Portal to Build Stronger Collaboration



WICHITA STATE UNIVERSITY



Transfer Portal Advisor Resource



“Transfer students are a vital and large portion of our student community at Wichita State. Providing them a more fluid process to onboard into Shocker Nation will not only facilitate their academic endeavors, but help them plug into student life, internships and more.”

Bobby Gandu, Director of Admissions

Intuitive Transfer Gateway Answers Key Transfer Questions in Real Time

Every year, more than a 1000 students transfer to Wichita State University.

These students are a vital part of the campus community, enriching the student body while creating their own unique Shocker experience.

The transfer process, however, is not always easy.

WSU's Transfer Gateway is a new technology designed to engage students early, keep them on track to enroll, and answer their key transfer questions in the search process:

- How will credits transfer?
- How long will it take to graduate?
- How much will it cost?

The Gateway will enable better support for transfer students and help us more closely align with you, our two-year transfer partner!

WSU's Transfer Gateway: Student-Facing Web Tool To Support Students Through Enrollment



Search

Is transferring worth it?

Major and Career Exploration

Compare majors and associated career paths, including salary and job demand



Application

How will my credits transfer?

Self-Service Credit Estimation

Check how prior coursework will transfer and view progress across programs



Enrollment

What do I need to do to apply?

Checklist to Enrollment

View a customized list of key events and deadlines to stay on track for application, deposit and enrollment

Access the Transfer Gateway online: wichita.transfer.degree



WICHITA STATE UNIVERSITY



Portal Makes The Transfer Process Seamless



Portal Helps Students Stay On Track For Transfer To WSU, Saving Time and Money

Benefits for Students:

- Major and Career Exploration** Students compare majors and associated career paths to determine best fit
- Self-service Credit Estimation** Students enter prior coursework and receive unofficial credit and progress-to-degree estimates across programs
- Checklist to Enrollment** Students receive a customized checklist of key events and deadlines to stay on track to apply and enroll

Portal Helps 2-Year Advisors Better Support Students Seeking Transfer To WSU

Benefits for 2-Year Advisors:

- Easy Access To Credit Estimates** Show students how their credit will transfer without needing to keep track of course equivalencies
- Stronger Programmatic Alignment** The Portal helps ensure that course equivalencies are up-to-date, allowing us to identify and proactively close gaps
- WSU Commitment To Transfer** An admissions-facing dashboard provides visibility into transfer roadblocks and enables deeper support for transfer students

Key Student Questions:

- How do I access the Transfer Gateway?** The Transfer Gateway can be accessed from wichita.transfer.degree or from the transfer admissions page on the WSU website.
- If I use the Portal, do I still need to send transcripts?** Yes, the Portal provides an unofficial estimation of credit. Official transcripts are required as part of the application process and to determine final evaluations.
- Can my 2-year advisor help me with the Portal?** Sure! WSU has a transfer partnership with your 2-year College. Advisors have been trained on the Portal and can offer assistance.
- How do I contact at WSU if I have questions on the Portal results?** Neal Hoelting is your primary point of contact. He can be reached at Neal.Hoelting@wichita.edu.

Access the Transfer Gateway online: wichita.transfer.degree

Pre-Work Reflection & Share Out

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- 1 Poll:** Where is your institution on the maturity curve?
- Describe any transfer pathways efforts and level of faculty participation.
- Do you have program-level articulation agreements in place? How is the process managed and coordinated across your institution?
- Is curriculum alignment considered in the development process and are faculty involved in the transfer pathways process?



Best Practices for Creating Transfer Pathways

1

Conduct Data Discovery

- Identify the barriers to transferring credits
- Establish the trends in top transfer degrees and high academic programs

2

Involve the Right People

- Get the right people involved to determine how, what, and why the pathway is important (staff, faculty, etc.)
- Designate accountability

3

Prioritize Pathways

- Prioritize the most important transfer pathways and majors to focus on
 - Pathways should benefit both institutions and their students

4

Develop a Plan

- Identify key components
- Establish a firm process (review, development, promotion, signatures, implementation, and evaluation process)

5

Execute the Plan

- Develop pathways
- Schedule regular meetings to share curriculum updates, finalize content & track pathways
- Notify your campus community once a pathway is developed (faculty, advisors, student, etc.)

6

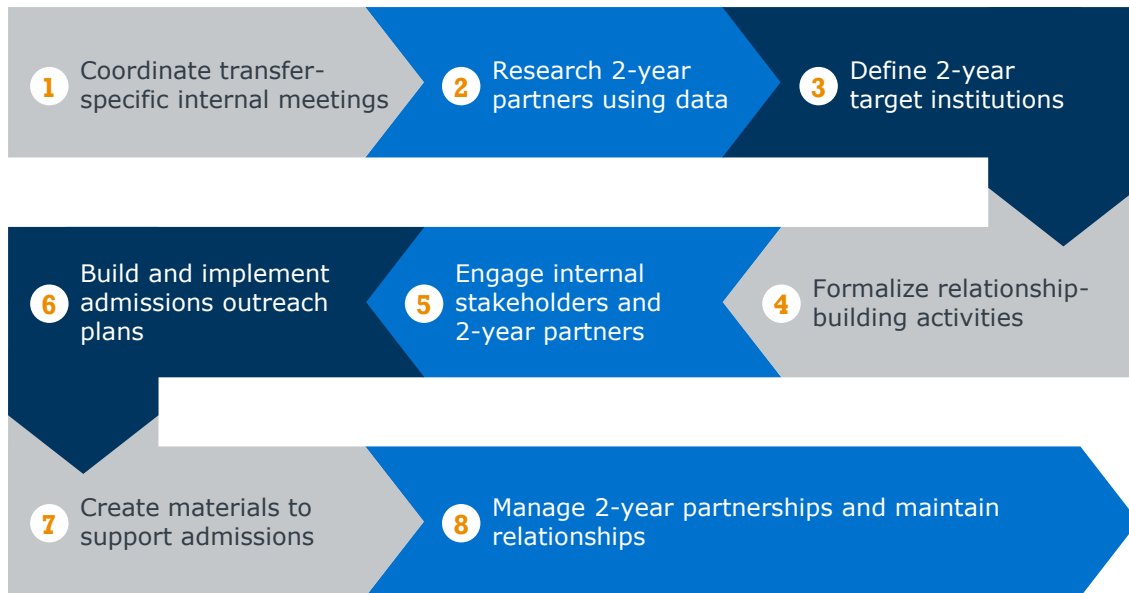
Integrate Continuous Improvement

- Determine a process to evaluate and update the process
- Use data to provide feedback on the success of the pathway

Blueprint for Getting Started

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Research and Identification, Activation, Partnership Management



Transfer Portal Resource Center

35

Download Resources [Online](#)! You Must Be Logged Into eab.com

Transfer Portal
Transfer Portal Resource Hub

Table of Contents ▾

1. Getting Started
2. Events
3. Transfer Maturity Curve
4. Strategic Resources
5. Quick Reads

Getting Started

EAB provides strategic resources and events for Transfer Portal partners to help them succeed.

Ways to get the most out of your EAB partnership:

- Register for an event to get the latest
- Take EAB's Transfer Maturity

Strategic Resources

Click on each topic below to explore toolkits, templates, and more.

- Prioritize institutional support for transfer students
 - NISTS Guide for Gathering Transfer Data
 - Enrollment Management Committee Charge and Structure Example
 - Transfer Portal Overview (Internal)
 - Training Session Sample Agenda
 - Training Presentation Template
 - Transfer Portal FAQ Template
 - Transfer Portal Demo Script Template
 - Oregon State University: Transfer Advisory Council - How to Amplify your Voice
 - Northern Arizona University - Data Sharing Agreement Example
- Build community college partnerships and transfer pathways
 - 2-Year Partnership Development Toolkit
 - 30 Key Activities to Build Enduring 2-Year Partnerships
 - Community College Interview Guide Template
 - Community College Tracker Excel Template
 - Aligning Transfer Portal With 2-Year College Priorities
 - Transfer Portal 2-Year Advisor Overview Template
 - Sample Agenda: 2-Year Partner Executive Meeting Template
 - AACRAO Guide to Articulation Agreement Best Practice
 - Example: Portland State Articulation Agreements Guidelines Manual
 - Engaging Faculty in the Transfer Process: 6 Steps for Success
 - Hunt Institute: Attainment for All-Postsecondary Pathways - Reverse Transfer
 - Indiana Commission for Higher Education: Reverse Transfer-Context and Policy Guidance
 - Harper College - Data Sharing Agreement Example

1 On the [Transfer Portal Resource Hub](#), click on "Strategic Resources" in the Table of Contents.

2 In the Strategic Resources section, click on each topic to view relevant resources.

3 Click on a resource to download it.



Closing and Next Steps



Poll: Would you like to be registered for an upcoming Transfer Intensive session? (multi-select)

- a) June 8: Creating Awareness for Your Transfer Program and Transfer Portal
- b) September 14: Effectively Yielding and Supporting Incoming Transfer Students

We Value Your Feedback!

Please take a few minutes to answer the final poll question to provide your feedback on today's experience.

We will also share a link to a short online evaluation in the Chat.



Washington DC | Richmond | Birmingham | Minneapolis

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