



TRANSFER PORTAL

Transfer Maturity Curve

Assessment and Discussion Guide

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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.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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. ☐

1 What are your institution's top transfer-related goals?

2 Do you have a formal strategic enrollment management plan and/or a transfer recruitment plan for achieving these transfer goals?

3 What barriers currently exist (if any) that might inhibit your team from achieving these goals?

Check the box in the column that best corresponds to your institution and enter your response to the question below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

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

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

1 Are there any existing taskforces, committees, or groups looking at transfer student enrollment or student success?

2 Does this group assess possible transfer student barriers and gaps in the student experience?



Build Community College Partnerships and Transfer Pathways

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

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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. ☐

1 How are community college partners identified?

2 Which of your current feeder institutions do you consider to be the strongest partners and why? Describe peer (staff, faculty, executive) relationships between institutions.

3 How big of a priority is strengthening your community college partnerships?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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.
☐	☐	☐	☐	☐

1 What kind of admissions activities are in place with your community college partners?

2 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?

3 Are these visits coordinated across all departments? What other staff visit colleges (e.g., advisors, faculty)?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

1 Describe any transfer pathways efforts and level of faculty participation.

2 Do you have program-level articulation agreements in place? How is the process managed and coordinated across your institution?

3 Is curriculum alignment considered in the development process and are faculty involved in the transfer pathways process?



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.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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. ☐

1 When was your last Admissions website refresh? Are there any significant changes to the website coming soon?

2 How easy is it to make changes to the website and who owns making these changes?

3 How frequently are web analytics pulled and evaluated? Are they used to inform recruitment strategy and resource allocation?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

1 Do you currently have community college transfer guides or similar equivalency tools? Are they up to date and on your website?

2 How are these resources/tools used with prospective students?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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.
☐	☐	☐	☐	☐

1 What transfer-specific preparation materials or resources are in place for prospective transfer students?

2 Who owns creating/updating these resources?



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.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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. ☐

- 1 Do you currently have a recruitment marketing plan that includes transfer-specific strategies? Elaborate on any transfer-specific promotional materials currently in place and who owns making updates.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

1 Are digital ads used to promote transfer program?

2 Is Search Engine Optimization (SEO) used to improve search results for stealth transfer prospects?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

1 Do your online and print transfer admissions content comprehensively address cost, credit, and completion student questions?

2 What are common questions you hear from prospective transfer students?



Qualify and Engage Prospective Transfer Students

Prospective students are 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.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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.
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1 Describe your lead qualification and management process for transfer and any supporting technologies you may use (e.g., CRM).

2 Clarify how transfer territories are assigned and what data are used in the qualification process (e.g., incoming term, GPA, current institution, etc.).

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

- 1 Describe the communication plan in place to known transfer leads and how much/little CRM is used to automate transfer campaigns. Who manages this process?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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.

1 What time of the year do your transfer prospects apply? Are there any known issues with the application process?



Conduct Timely and Consistent Credit Evaluation

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.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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.
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1 Are course equivalencies ever conditional (e.g., based on a student's major, best fit)?

2 Is there a policy for review or expiration of course equivalencies?

3 When and how can students appeal a decision?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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).
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- 1 Are institutional course equivalency rules (at catalog level) built in the SIS when student transcripts are first processed, if not when? Do any "shadow" systems exist (e.g., maintenance of equivalencies in multiple locations or duplicative effort when building)?

- 2 Are all equivalencies centralized in a single place? Where?

- 3 Any known issues with equivalency data quality?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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.
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1 Do you provide unofficial credit evaluations to prospective students? If so, at what point are unofficial evaluation provided and who owns this process?

2 Describe the end-to-end credit evaluation process, including when/how the evaluation is triggered, owners at each step, turnaround time, and known student or staff barriers.

3 Do you leverage the degree audit system to produce either unofficial or official credit evaluations? Any known issues with degree audit data quality?



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.

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

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.
☐	☐	☐	☐	☐

1

Describe your staffing model for prospective transfer student recruitment, advising, onboarding, and registration (e.g., dedicated transfer resources or mixed allocation). What are their roles and levels of involvement?

2

Are you planning any changes to this model (e.g., hiring new staff)?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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. ☐

1 At what stage do academic advisors engage with prospective transfer students regarding transfer credit evaluation?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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.
☐	☐	☐	☐	☐

- 1 Describe the transfer onboarding process and related resources made available to incoming transfer students (e.g., transfer orientation, guides, one-stop-shop). What modalities are used to deliver these services (e.g., online, in-person, on-demand).

- 2 Do you survey or conduct focus groups with transfer students to gather feedback about their admission and onboarding experience?

- 3 What are the most common questions or challenges that you hear from incoming transfer students?

Check the box in the column that best corresponds to your institution and enter your responses to the questions below.

Absent	Limited	Expanded	Strategic	Transformative
Level 0	Level 1	Level 2	Level 3	Level 4
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). ☐

1 What kind of transfer-specific financial aid planning and preparation counseling or resources are available for prospective students?



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