

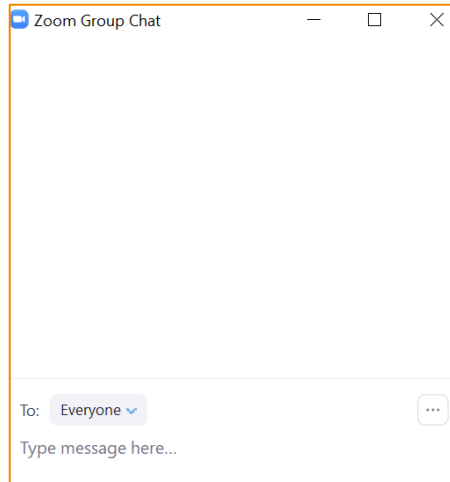
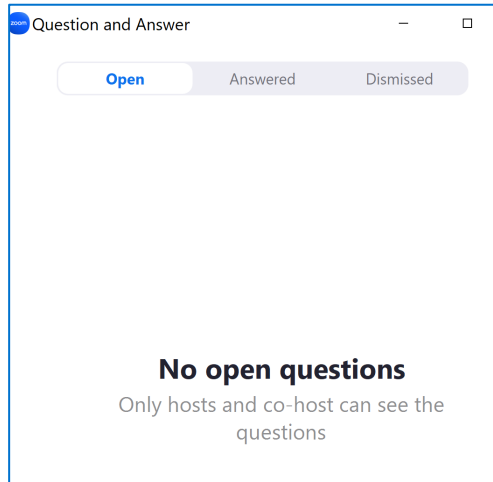


# Transfer Portal Impact Showcase

July 10, 2024



# Using Zoom



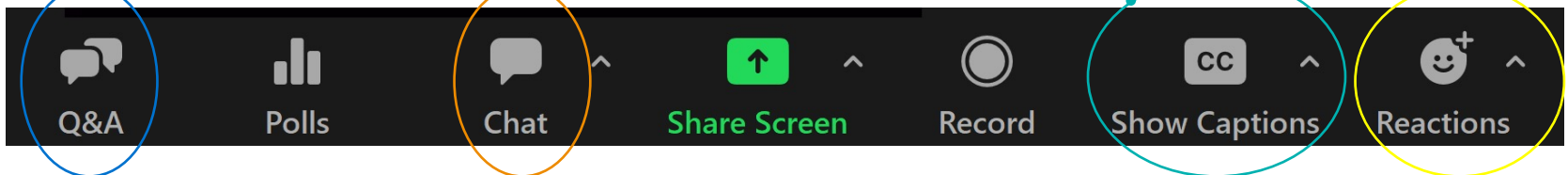
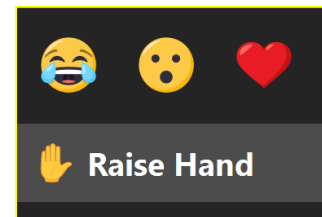
## Ask a Question

Use the **Q&A** to ask a question or view previous questions asked

## Join the Discussion

Use the **chat** to share your thoughts, experiences and resources

Enable Closed Captions and Show Subtitle or View Full Transcript



# Today's Presenters



**Gina Schorr**

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**Melissa Friddle**

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# New Transfer Impact Toolkit



4

[Download the Toolkit, Worksheets, and Templates Online](#)



## Dedicated EAB.com Page

The toolkit and its accompanying resources have their own eab.com page, which can be found on the [Transfer Resource Center](#).



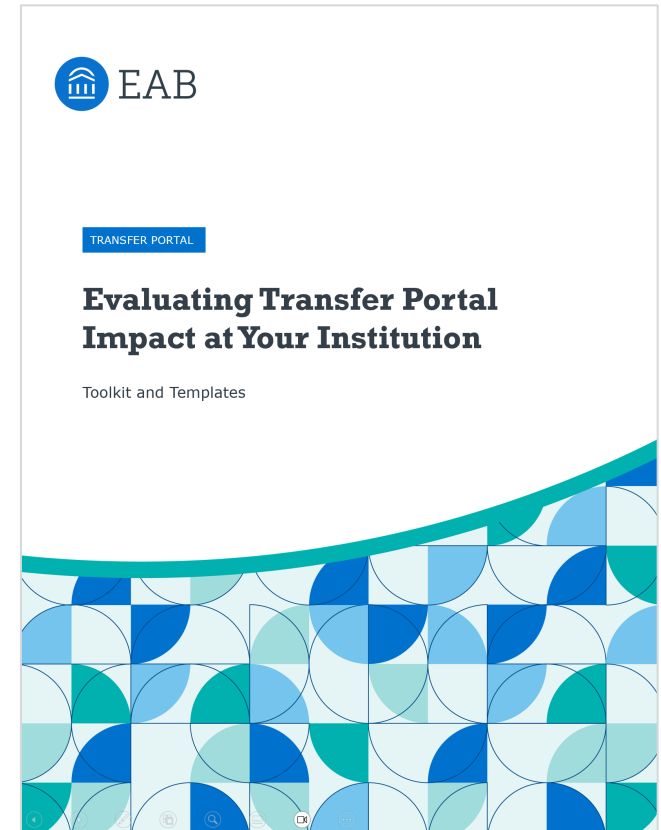
## Templates

Download Impact Templates, the Transfer Impact Report Template, and Impact Story Templates to gather data and share your work.



## Worksheets

Download and complete worksheets, such as a worksheet to help you understand your data story's goals, audience, and such.



# AGENDA

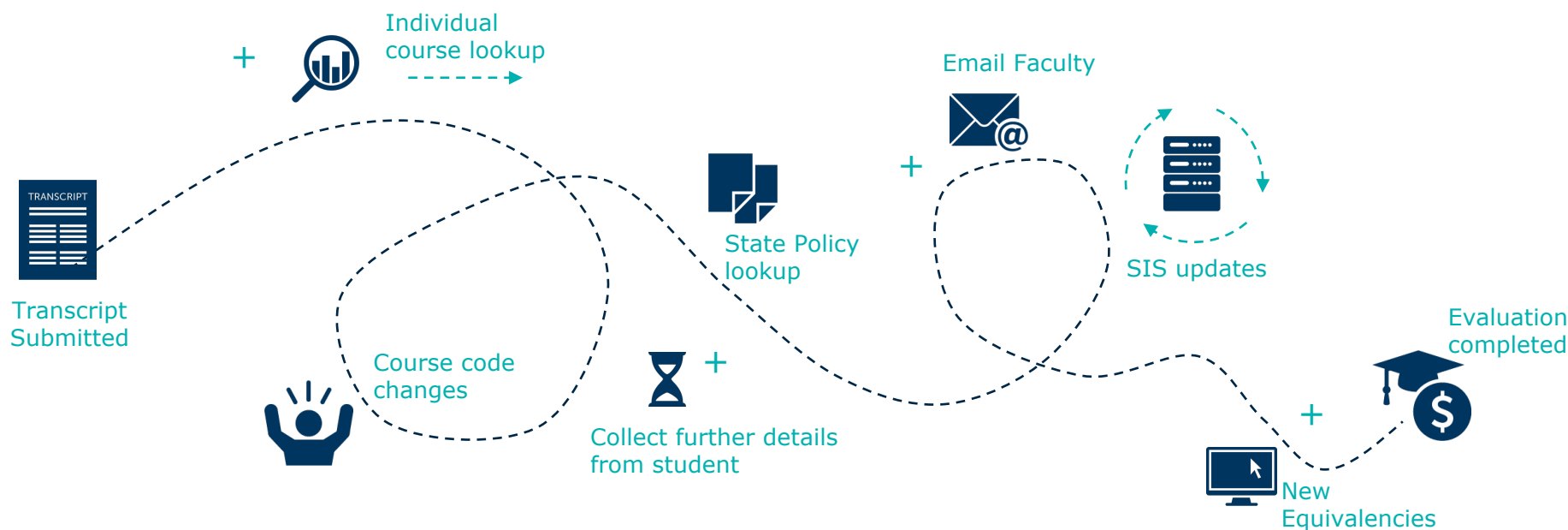
- 1 – Kent State University
- 2 – Mercy University
- 3 – Winthrop University
- 4 – University of Houston –  
Clear Lake
- 5 – Xavier University
- 6 – Inquiry Generation  
Impact

# Kent State University

# Reducing Turnaround Time Despite Process Complexities



Despite the complex and time-intensive diversions that come between the transcript submission to the full evaluation, Kent State University processes a high volume of transcripts in an impressive turnaround. Tributes to efforts verifying accuracy of statewide guidelines, correcting system typos, the Transfer Portal auto-resolve and pending course workflow, and part-time staff during surge periods.



**46+** Transcripts/evaluations per day

**918** Pending Courses Resolved

**13,978** Courses added

**2** Average days to Course Resolution

*Data from Jan 1 – Jul 1 2024*

# Measuring Quantitative Impact



Transfer Portal Data Jan 1, 2024 – July 1, 2024

## Course Evaluations

**13,978** Courses  
Added

**3,494 hrs**

Staff time saved

**\$87K**

Dollars saved

## Course Equivalencies

**818** Pending courses  
received credit

**1,100**

Average rules updated per  
week

**80,129**

Equivalency rules added in the  
last year

**789,000+**

Equivalency rules in the  
database and growing!



# Mercy University

# Leveraging Transfer Portal's Pending Course Workflow



## Bulk Upload of Course Equivalencies Improves Staff and Student Efficiencies



### Significant Time Spent of Pending Course Review

- High volume of pending course review was consuming time for staff review
- Focus on feeder schools with majority of courses submitted
- Several coming in with associates degree or general education courses



### Course Equivalency Bulk Upload

- Worked with IT to achieve the bulk uploads
- Focused English, History, and upper-level courses such as Calc 1 to College Algebra
- Mercy can now replicate this process with additional bulk uploads



### Efficiencies Gained

▶ **1000+**

Courses uploaded in bulk!

▶ **“This is much easier now!”**

Improved experience for staff and students

▶ **Time Saved**

Students have less wait time with fewer pending courses.

Staff can focus time on more complex course reviews.

# Winthrop University

# Building Efficiencies for Course Equivalencies



## Challenge

The course equivalencies review process was incredibly delayed when this work began. There were 40 pages of unreviewed courses in the queue, sitting in excess of 6 months before they were reviewed. Potential transfer students were lost due to this delay.



## Process Change

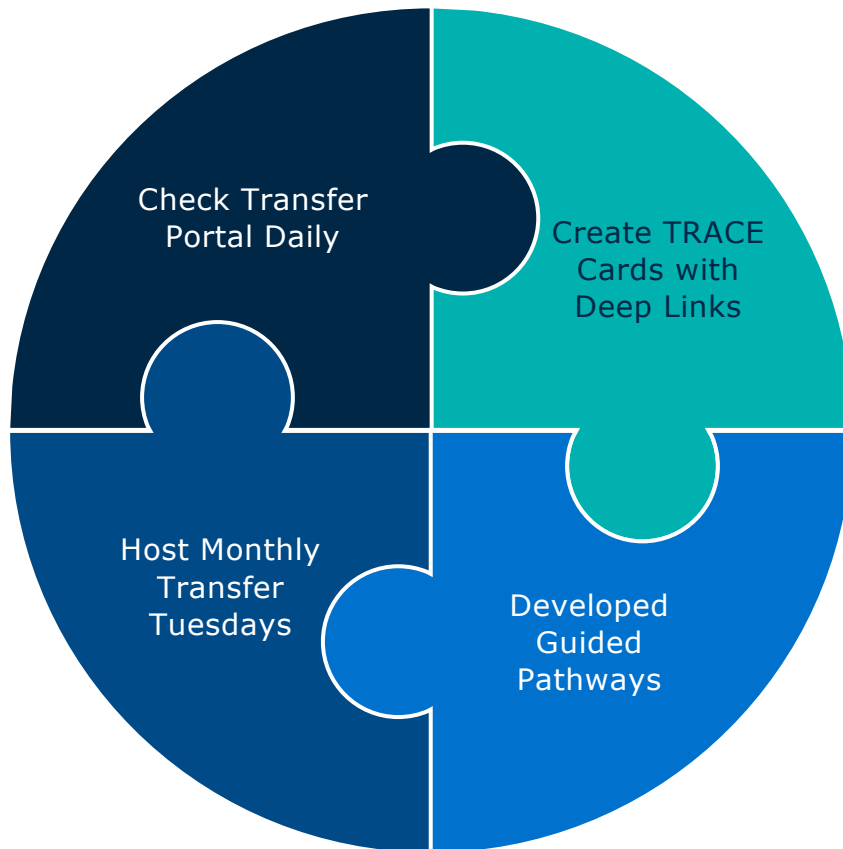
A part-time position was created and dedicated to working 100% with the Transfer Portal. Winthrop established a group of Academic Transfer Experts to network across colleges and agree on course equivalencies. They simplified the course review process and added in daily checks to Transfer Portal to proactively look for new potential students.



## Impact

Transfer equivalencies are down to a 48-hour turnaround time! This, in conjunction with other University efforts, **increased the transfer student enrollment by 17%!**

# Increasing Transfer Student Enrollment by 17%



## ● **Check Transfer Portal Daily**

Proactive communication and outreach with potential transfer students by responding to pending queries quickly.

## ● **Create TRACE Cards with Deep Links**

Sharing these post cards allows potential transfer students to scan a QR card and create a profile in Transfer Portal.

## ● **Developed Guided Pathways**

Began with major feeder school and developed multiple guided pathways for students to visualize their academic path and all the courses they are going to take.

## ● **Host Monthly Virtual Transfer Tuesdays**

Presenting directly to new and interested transfer students allows for enhanced engagement and interest.



EAB

# University of Houston – Clear Lake

# Refining the Transfer Portal for a Better Experience

15

## *Configuring the Transfer Portal to Provide Efficient Information*



### **Challenges with Institutional Data**

- Students were submitting international credits that couldn't be processed through Transfer Portal due to the complexities of processing international credits at UH-Clear Lake.
- Certain institution names are incorrect in the Transfer Portal creating uncertainty for end users.



### **Updating Portal so Students Receive Quicker Responses**

- UH-Clear Lake collaborated with Transfer Tech Support to "turn off" International Institutions in the Transfer Portal.
- Add a disclaimer to appear on the website that guides students to submit international credits to the Office of International Admissions.



### **Impact & Next Steps**

- Students and staff are now spending their time in the right place, sooner.
- Next area of focus is to review institutions with incorrect names starting with institutions in states with the most submitted transfer credits.

# Xavier University



# Time Saved for Prospective Students and Staff

Transfer Portal replacing manual unofficial credit evaluation efforts

Xavier University's official credit evaluation comes once a student is deposited, however much of the Transfer staff's time was spent reviewing unofficial credit evaluations for admission counselors or parents to aid in a students' transfer decision. The Transfer Portal now provides this review instantly!

## Course Evaluations



### Automatic Course Evaluations

*Jan 1, 2024 – July 1, 2024*

- Students receive more immediate course evaluation answers
- Staff can focus on more complex articulation questions

**944** Courses added by students

**236+** Staff hours saved

## Program Pre-Advising



### Intended Majors Explored

*Jan 1, 2024 – July 1, 2024*

- Student self-service of intended majors they are interested in pursuing
- Transfer staff or department staff time saved for complex discussions

**144** Intended Majors Explored

**72+** Staff hours saved

# Inquiry Generation Impact

# Inquiry Generation Savings with the Portal

## Outcomes Example



### Complex Inquiry Generation Process

- Leads are students who may or may not have indicated interest in the institution
- Inquiries are students who have indicated direct interest in our institution
  - Inquiries were not easily identifiable, and the process was manually managed by the Transfer Admissions Team
  - Average price for an inquiry is \$50



### Using the Transfer Portal to Enhance Our Outcomes

- Each Portal account created represents a transfer inquiry
- Inquiries are exported into our CRM for easier inquiry management



### Impact of Using the Transfer Portal

▶ **3,000**  
Accounts Created

▶ **\$150K**  
Saved in one year<sup>1</sup>

1)  $3,000 \times \$50 = \$150,000$

# Closing Poll Questions



- 1 How was today's session?**
- 2 Do you want help from EAB to create an impact story?**

*Thank you for joining us today!*

# EAB Experiences – Transfer Portal



Maximize your Partnership through EAB's Experiences led by Product and industry experts.

## Product Training and Support



### Onboarding

Learn about the responsibilities of a Transfer Portal Administrator and the systems and resources available to you.

[Click here to register.](#)

**Audience:** New Application Administrators



### Office Hours

Chat live with EAB Support Analysts and peers during drop-in Office Hours - come with questions!

[Click here to register.](#)

**Audience:** All Application Administrators



### Help Center

Articles and resources to learn how to use each of the features within the Transfer Portal.

[Help Center link](#)

**Audience:** All Portal users

## Strategies and Best Practices



### Strategy Spotlights

Discussion-based webinar series with an in-depth look into the seven best practice areas that make up EAB's Transfer Maturity Curve as well as examples from Transfer Portal peer institutions.

[Click here to register.](#)

**Audience:** Program Owners, Application Administrators, Functional Leaders



### Transfer Resource Center

Strategic resources and events for Transfer Portal partners to help successfully deploy and optimize the Transfer Portal technology.

[Transfer Resource Center link](#)

**Audience:** Program Sponsor, Program Owners, Application Administrators, Functional Leaders



### Newsletter

Quarterly email newsletter featuring upcoming and past events, partner highlights, transfer opportunities.

Email delivery

**Audience:** Program Sponsor, Program Owners, Application Administrators, Functional Leaders

# 2024 Strategy Spotlight Series

[Register for Sessions and Encourage Colleagues to Attend!](#)

Join our series to hear directly from and on behalf of partner institutions to learn about successful practices. Sessions will align with the Transfer Maturity Curve, which focuses on three categories: foundation, awareness, and yield and support.

## **Building a Strong Foundation for Transfer Student Success**

*Featuring University of Texas Permian Basin*

Learn about UTPB's wraparound advising infrastructure, including having a dual position with a community college.

**February 14<sup>th</sup>**

## **Promoting the Transfer Portal and Other Transfer Student Services**

*Featuring University of Alaska Fairbanks*

Learn about UAF's strategies to promote transfer resources, like creating a Portal promo plan.

**June 20<sup>th</sup>**

## **Improving the Transfer Student Experience**

Learn how partners have improved the transfer student experience and streamlined internal processes to support students.

**October 16<sup>th</sup>**

[\*\*Register Online Using This Link!\*\*](#)

# Questions?



**We are here! Let us know if  
you have joined with a  
question!**