



# Transfer Portal Office Hours

Analyzing Transfer Portal Impact (Part 1)



# Connecting to Audio



Refer to the meeting confirmation email you received in your inbox.

## Using Your Computer Speakers

If you select the “Computer Audio” option, please be sure that your speakers or headphones are connected.

## Using Your Telephone

If you select the “Phone Call” option, please dial in with the phone number and meeting ID provided.

Date Time: Mar 31, 2020 03:00 PM Eastern Time (US and Canada)

Join from PC, Mac, Linux, iOS or Android: [Click Here to Join](#)

Note: This link should not be shared with others; it is unique to you.

[Add to Calendar](#) [Add to Google Calendar](#) [Add to Yahoo Calendar](#)

Or iPhone one-tap

US: +16468769923,,511418667# or +13126266799,,511418667#

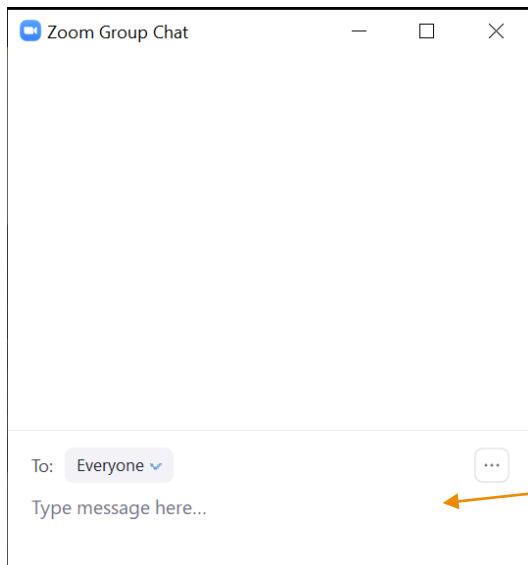
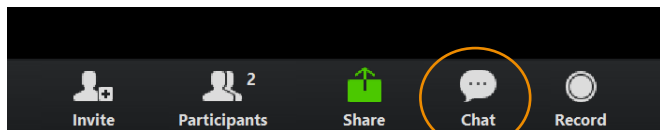
Or Telephone:

Dial(for higher quality, dial a number based on your current location):

US: +1 646 876 9923 or +1 312 626 6799 or +1 301 715 8592 or +1 346 248 7799 or +1 669 900 6833 or +1 253 215 8782

Meeting ID: 511 418 667

International numbers available: <https://eab.zoom.us/j/abLkP09Nci>



## Asking a Question

To ask a question, navigate to the chat button at the bottom of your screen and type it into the chat panel, or unmute yourself and ask your question verbally.

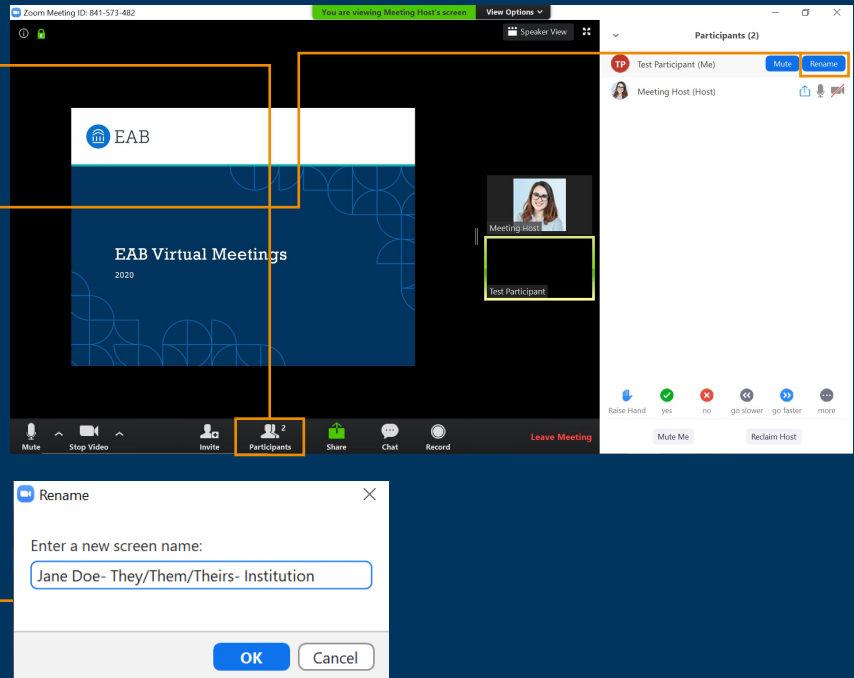
After the session, a member of our team will be in touch to follow-up on your questions individually if they were not answered during the session.

*Type your question here*

# Update your name (and include your institution)

## Update Your Name

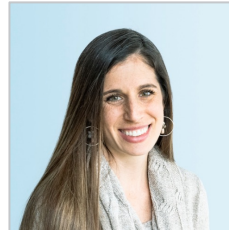
- Click **Participants** in your menu bar.
- On the right side of the screen, hover over your name, click more, and then click **Rename**.
- Add a dash and your institution name. You may also add your pronouns if you wish (example: they/them/theirs)



# Today's Presenters



**Kate Manning**  
*Transfer Portal*



**Gina Schorr**  
*Partner Support*

# Celebrating National Transfer Student Week!



**FULL STEAM  
AHEAD**

**NATIONAL  
TRANSFER  
STUDENT WEEK**  
OCTOBER 16-20, 2023

NISTS  
National Institute for the Study of  
TRANSFER STUDENTS

#TRANSFERSTUDENTWEEK  
WWW.NISTS.ORG/NTSW



# Ways to Celebrate National Transfer Student Week

This Year's Theme: Full Steam Ahead!

## Ideas & Resources

- [Ideas for Educating](#) - Help others understand the complexity of transfer mobility by sharing student stories and data
- [Ideas for Programming](#)- Host events and activities that celebrate the diversity of the transfer student experience on your campus.
- [Ideas for Giveaways](#) -Free swag is a great way to instill transfer pride and build connections with your college and university.
- [Free Marketing Kit](#) includes flyers, calendars, champion student spotlights, posters, social media squares, and sticker buttons!



## **EAB Podcast!**

Available Oct 17<sup>th</sup>

Join EAB's Kate Manning and Matt Sheldon's conversation with Chad Steinkamp from Wichita State University on supporting prospective and enrolled transfer student transition smoothly and adapt to campus life.

# Transfer Portal Ideas for National Transfer Week



## Encourage a Sense of Belonging

### ▶ Checklist Items

Encourage connections!

- Email your advisor and introduce yourself. Share one fun fact and ask one question in your email.
- Connect to campus Transfer student groups on social media

### ▶ Resources

- Virtual community building for distance Transfer learners
- Transfer specific faculty-student mentoring programs or events that foster connections with faculty.
- Transition specific resources for mental health and wellbeing

### ▶ Custom Messages

Consider welcoming phrases on student facing screens using the Custom Messages editor.

- **Colleges and Courses:** Welcome! We love that you're considering to join the Woodley family! Add your courses with a grade of C or better to evaluate your program progress..."
- **Other Credits:** "We know there could be more to your story, share your other accomplishments..."
- **Summary:** "We are so happy you found us; this is going to be a great fit! You've completed your credit review. Check out the Checklist to see..."

### ▶ Header & Footer

- Transfer specific logos or group names
- Mascot or slogan references



# Response to Release Feedback

## Committed to Communication

### Transfer Portal Releases

*Portal changes in functionality, user experience or processes*



#### Communication Plan

- 1-2 weeks prior to production release
- Live release walkthrough during Office Hours or separately scheduled webinar
- Email with Release Notes
- In-Portal dialogue box sharing release date and link to release notes in the Help Center

### Transfer Help Center

### Release Hotfixes or Minor Updates

*Issue resolutions, behind the scenes upgrades, or specific to few partners*



#### Communication Plan

- In-Portal dialogue box sharing hotfix or minor release date and link to release notes in the Help Center
- Release notes published in Help Center
- 1-2 days prior or day of depending on lead time

[Transfer Help Center Link](#)





# Why Analyze Impact?

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# Why is Identifying Impact So Important?



To Name a Few Reasons...



## For Our Partners

- Make the case for resources, whether continuing or additional
- Support change management
- Self-assess to understand what is working and what is not
- Deploy your resources where they will be most effective
- Celebrate your successes more broadly
- Share your story to help other institutions



## For Us

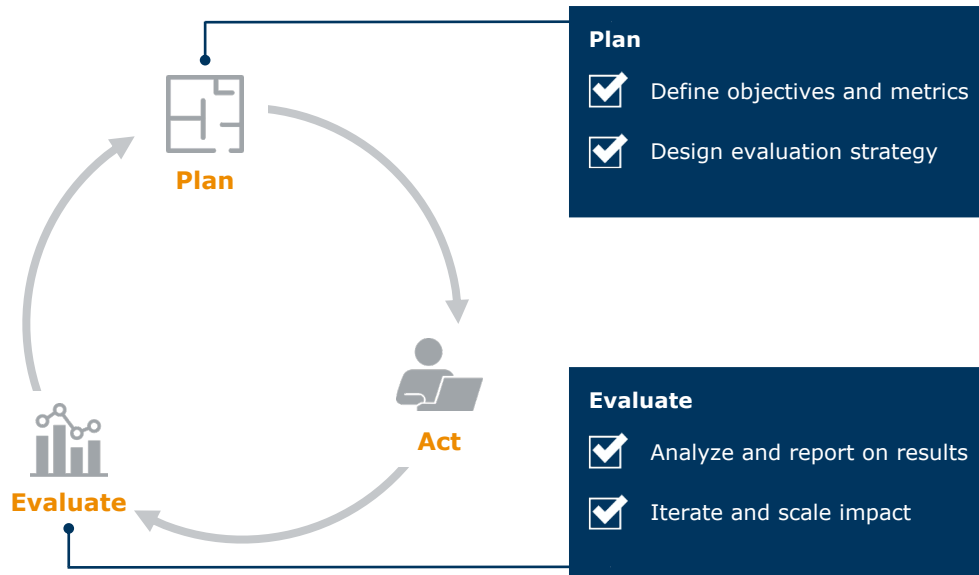
- Better understand the impact of our recommended practices
- Share greater diversity of stories broadly to help our partnership
- Prove the need for expanded capabilities in highly impactful areas
- Inform our staff of where you need different types of support
- Continue expanding our offerings and partnership

**And Ultimately to Provide **Students** a Return on Education (ROE)**

# A Useful Framework for Analyzing Impact

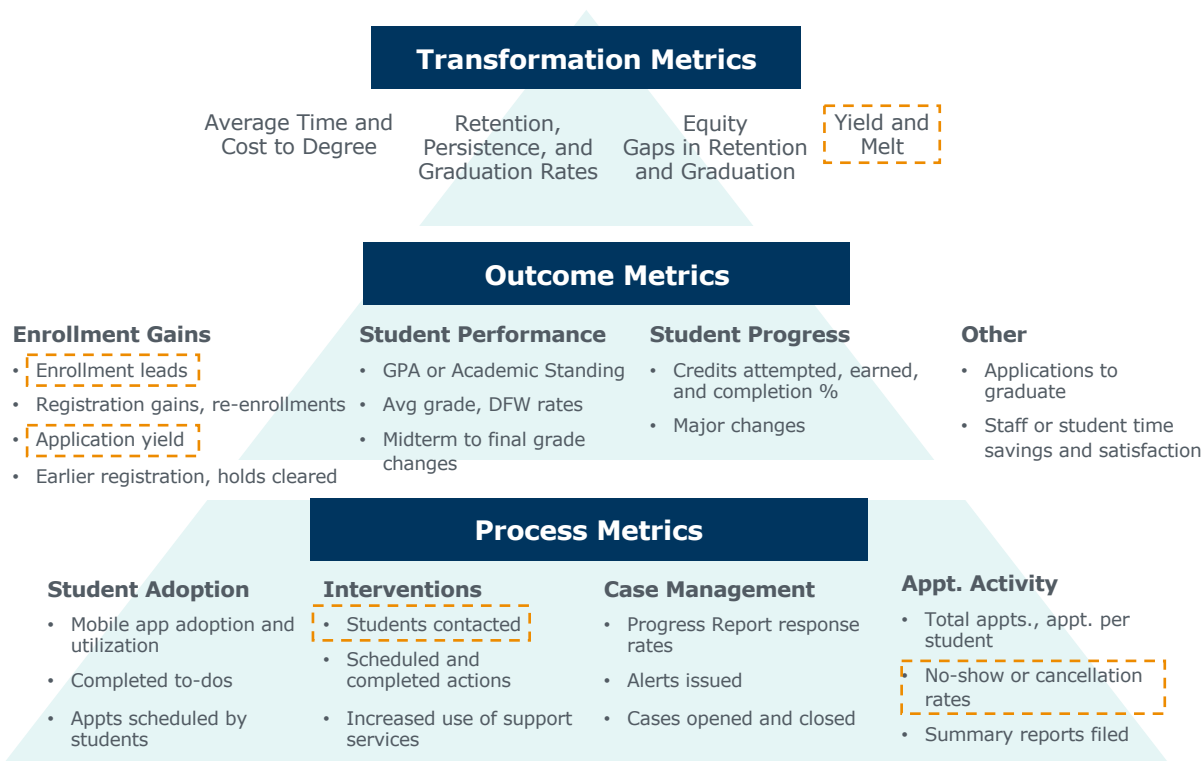
Focus on These Steps Annually to Hardwire Evaluation Into Your Approach

## Sustain Momentum Through Ongoing Evaluation



# Levels of Transfer Impact

Set goals across enrollment and student success





# Crafting your Impact Narrative

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# Fewer Students Are Transferring

While Intent to Earn a Bachelor's Degree Is High, Few Students Transfer



Only

**85%**

of community college students  
 express a desire to  
 earn a bachelor's degree

“The primary challenge for the two-year sector in the next fifteen years is clear: dramatically reduced enrollments. Indeed, the **expected rate of contraction in two-year enrollments is almost 20% faster than for college enrollments in general.**”

Nathan Grawe, *Demographics and the Demand for Higher Education*, 2018

# Declining Transfer Enrollment Is a National Trend

## The Transfer Landscape

### Community College to Four-Year Transfer

14.5%

Decline in transfer enrollment since Fall 2019<sup>1</sup>

### Lack of Staff Investment

75%

Of schools surveyed have 4 or fewer employees dedicated to transfer<sup>3</sup>

### Online Only Institutions

40%

Of students returning to school after stopping out are attending online only institutions<sup>2</sup>

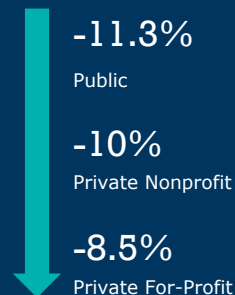
### Enhanced Competition

77%

of Directors of Admissions indicated that recruiting transfer would be a priority next year<sup>4</sup>

### And No Institution Is Immune...

Enrollment Declines by  
Institution Type  
*Fall 2020-Fall 2022*



1) National Student Clearinghouse (March, 2023)



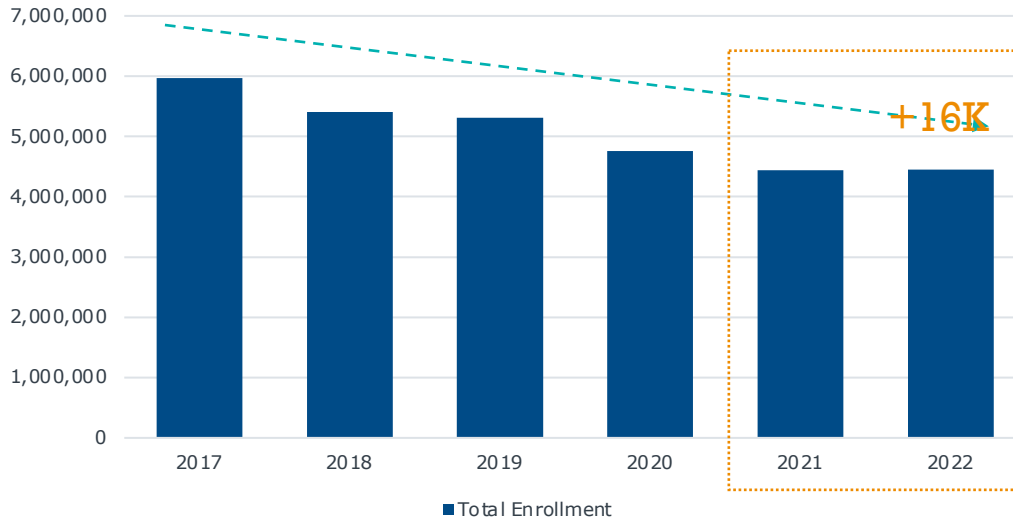
# But There Are Reasons to Be Hopeful



## Community College Enrollment Is Steady

### Total Community College Enrollment in the U.S.<sup>1</sup>

Fall 2017 through Fall 2022



1) National Student Clearinghouse Research Center, "Current Term Enrollment Estimates: Fall 2022 Expanded Edition; <https://nscresearchcenter.org/current-term-enrollment-estimates/>

# How Should You Think About Your Transfer Enrollment?

When Declines Are the Trend, Stability Is Good

**1** Growing Enrollment

Enrollment growth is ideal, but *unrealistic* in this landscape.

**Decline in Enrollment  
Compared to the  
National Average** **2**

Compare your enrollment decline to the national average. A decline less than or equal to the average is *good*.

**3** Stable Enrollment

If there is no change in your enrollment, enrollment is stable which is the *next best thing* to enrollment growth.



# Metrics to Evaluate

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# Measuring Impact with Transfer Portal



Templates linked for each in [Transfer Help Center](#)

1

## **Transfer Portal Utilization**

Foundational data available through Transfer Portal Analytics dashboard, which includes session activity and pipeline details. These reports should be used as a baseline in portal health analysis.

2

## **Automated Course Evaluations and New Course Equivalencies**

The Transfer Portal streamlines course equivalency discovery, automating evaluations for time-saving benefits to students and staff. New course evaluation requests are funneled through Portal enabling faster credit evaluations and improves the database for future students.

3

## **Transfer Pre-Advising**

The Transfer Portal provides prospective students the convenience of obtaining instant degree completion estimates for various academic programs, streamlining the process and reducing the need for staff to generate these estimates.

4

## **Student Feedback**

Transfer Portal should be utilized as an engagement and yield tool for prospective students. Understand from your students if the portal was helpful in their decision-making process.

5

## **Transfer Enrollment and Revenue**

In combination with your transfer enrollment data, use the Transfer Portal data to understand how these students progressed through your funnel and tuition that can be attributed to these students.

6

## **Other**

- Process and Change Management
- Transfer Maturity Curve

# Poll #1 Analyzing Portal Impact

- 1 How would you rate the ease of use of the template format?
- 2 What changes would you suggest for the templates?
- 3 What impact metrics are you interested in learning more about?



## Poll #2 De-Duplication Tools

- 1 Do you use a de-duplication tool for CRM ingestion?
- 2 If yes, which tool and would you recommend it? If no, any tips or tricks in your de-duplication process?



# Poll #3 Session Feedback

- 1 How was today's session?
- 2 Do you want to be registered for the Nov 1<sup>st</sup> continued Analytics Office Hours session?
- 3 Do you want to be registered for the Oct 17<sup>th</sup> Portal Onboarding session?



# EAB Experiences – Transfer Portal



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

## Product Training and Support

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### 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

## Strategies and Best Practices

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### 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 Hub

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

[Transfer Resource Hub link](#)

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



# Questions?



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