



EAB

# Transfer Portal Support Office Hours

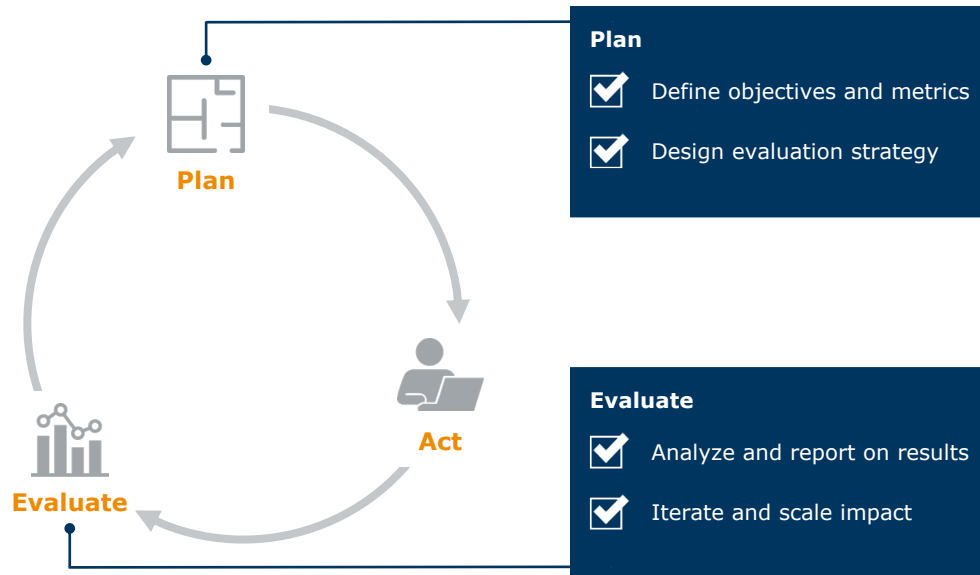
Wednesday, October 12

- 1 Why Analyze Impact?
- 2 Transfer Analytics Overview
- 3 Tracking Impact: CRM or EAB Excel Tracker
- 4 University of Maryland, Baltimore County Example

# A Useful Framework for Analyzing Impact

Focus on These Steps Annually to Hardwire Evaluation Into Your Approach

## Sustain Momentum Through Ongoing Evaluation



# 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



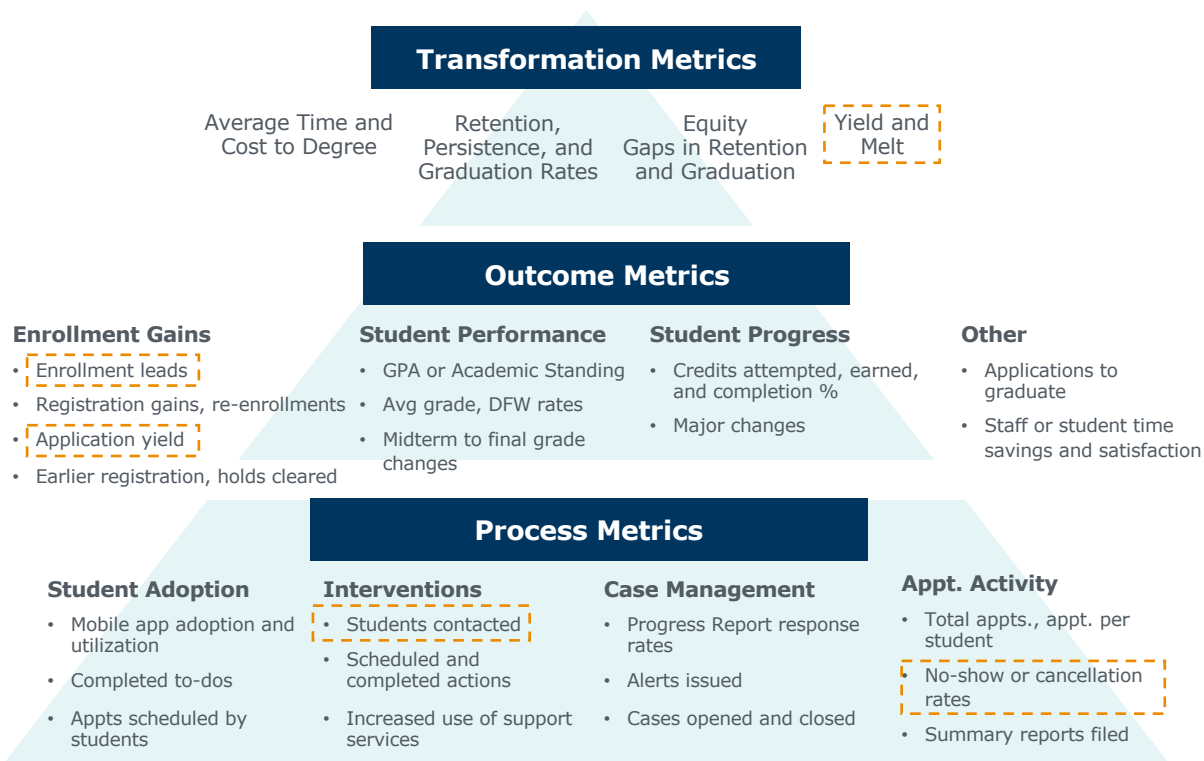
## For Us

- 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)**

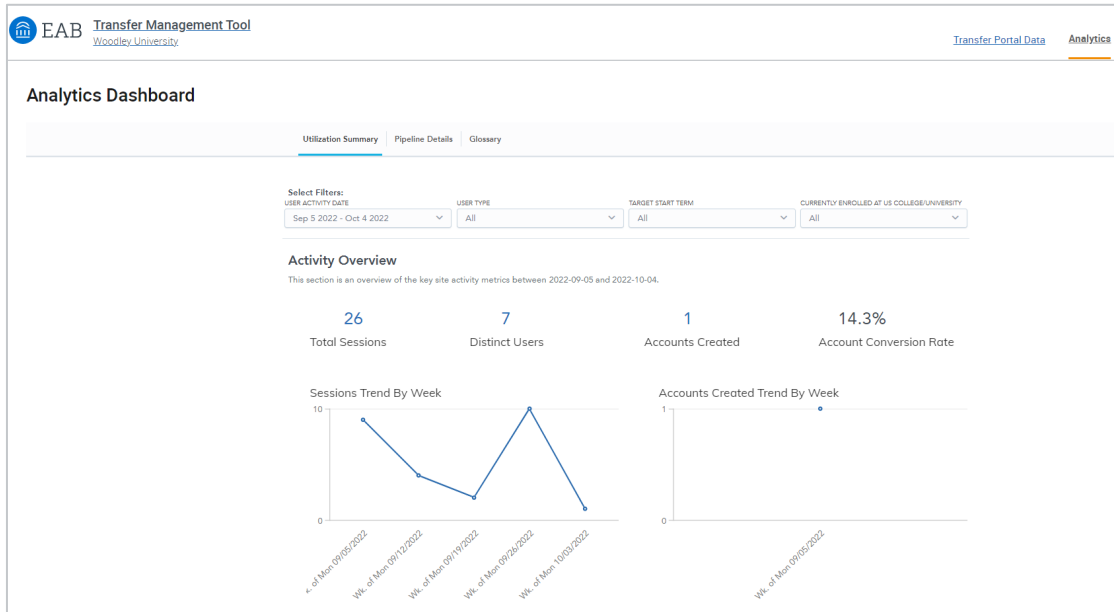
# Levels of Transfer Impact

Set goals across enrollment and student success



# Transfer Portal Analytics

## Walkthrough the Analytics available through the Portal



# Identifying Effectiveness from Transfer Analytics

## Analyze Combined Transfer Portal Exports with CRM Data

### Transfer Portal Exports

**Export History**

Export Type	Export Date	Exported By	Status	Download
REMOVED_PENDING_COURSES	07-29-2022 01:58:06 PM	Alison Akatsu	SUCCEEDED	[Download]
PENDING_COURSES	07-29-2022 01:55:59 PM	Alison Akatsu	SUCCEEDED	[Download]
OTHER_CREDITS	07-29-2022 01:55:56 PM	Alison Akatsu	SUCCEEDED	[Download]
MAJORS	07-29-2022 01:55:50 PM	Alison Akatsu	SUCCEEDED	[Download]

### Partner CRM Data

Summary of Portal Users		Total	
Portal Accounts Created		#	
# of Matched Portal Users*		#	
# of Non-matched Portal Users		#	
% of Matched Portal Users who applied		#%	

\*Matched users = Email, LN/DOB or FN/LN Match

	Term	Submitted	Complete	Admit	Deposit	Enroll	App Complete %	Admit %	Yield %
Transfer EC	Total All Time								
	Non-Portal								
Portal	Total All Time								
	% of EC (Portal)	#%	#%	#%	#%	#%			

	Term	Submitted	Complete	Admit	Deposit	Enroll	App Complete %	Admit %	Yield %
Transfer EC	Spring 2019								
	Spring 2019								
Non-Portal	Spring 2019								
	Spring 2019								
% of EC (Portal)	Spring 2019	100%	100%	100%	100%	100%			
	Spring 2019								
Transfer EC	Summer 2019								
	Summer 2019								
Non-Portal	Summer 2019								
	Summer 2019								
Portal	Summer 2019								
	Summer 2019								
% of EC (Portal)	Summer 2019	#%	#%	#%	#%	#%			
	Summer 2019								

\*Excel linked on [Transfer Resource Hub](#)

Yield % of those using  
Transfer Portal vs. Not

# Example: University of Maryland, Baltimore County

## Data Collection and Analysis Process



### Year 1

- UMBC provided EAB data in format
- Back and forth clean up to align with spec
- Finalized numbers
- Put into an executive update



### Year 2

- UMBC updated excel tracker directly
- Some support by EAB to provide guidance on use of tracker
- Put into an executive update

### ▶ Leadership Team Update (Bi-Annual)

**Key Objectives:** Utilization and impact review, recent progress towards goals, focus for year ahead, risk identification and mitigation, feedback



# Example: University of Maryland, Baltimore County

## Key Metrics of Success

1

### Lead Generation and Engagement

- Opening stealth population and sourcing high-intent inquiries

2

### Funnel Insight: Portal User Progression in each funnel stage

- Define funnel stages (submitted application, admitted confirmed/deposited, etc.)
- Yield % compared to Transfer entering class (in entirety) and non-portal users

3

### Automated Evaluations

- Staff time savings

4

### Spreading Evaluation

- Outside peak times

5

### Process and Change Management

- Established a new University wide Transfer Committee

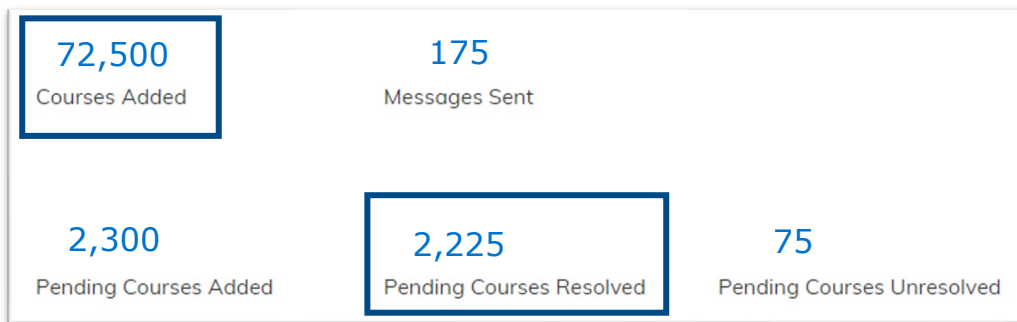
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### Student Engagement and Feedback

- EAB's Net Promoter Survey Responses
- Focus Groups

# Staff Time and \$ Saved, New Course Evaluations

## Key Value Metrics



### Staff Time and \$ Savings

- Est. 3 min per course review
- Courses Added: 72,500
- Staff Time Saved: 217,500 mins. / 3,625 hrs.
- Money Saved: \$100K+

### Key Assumptions:

- Estimated time per course evaluation
- Hourly salary for credit evaluator

### New Course Evaluations

- Pending Courses Resolved: 2,225
- Resolved as "Receives Credit": 2,100
- New Course Evaluation Generated: ~2,100

### Key Assumptions:

- When course is resolved as "receives credit", this is because it has found a matching course equivalency in the SIS that wasn't there before **or** because student did not input data correctly

# Transfer Funnel Impact

	Term	Complete	Admit	Deposit	Enroll	Admit %	Yield %
Transfer EC	Total	8000	6500	4000	3200	81%	49%
Non-Portal	Total	3000	1700	1350	900	57%	53%
Portal	Total	2250	1800	1500	1250	80%	69%
% of EC (Portal)	Total	28%	28%	38%	39%		

	Term	Complete	Admit	Deposit	Enroll	Admit %	Yield %
Transfer EC	Fall 2021	5000	4000	3000	2500	80%	63%
Non-Portal	Fall 2021	2000	1000	800	500	50%	50%
Portal	Fall 2021	1500	1100	900	750	73%	68%
% of EC (Portal)	Fall 2021	30%	28%	30%	30%		

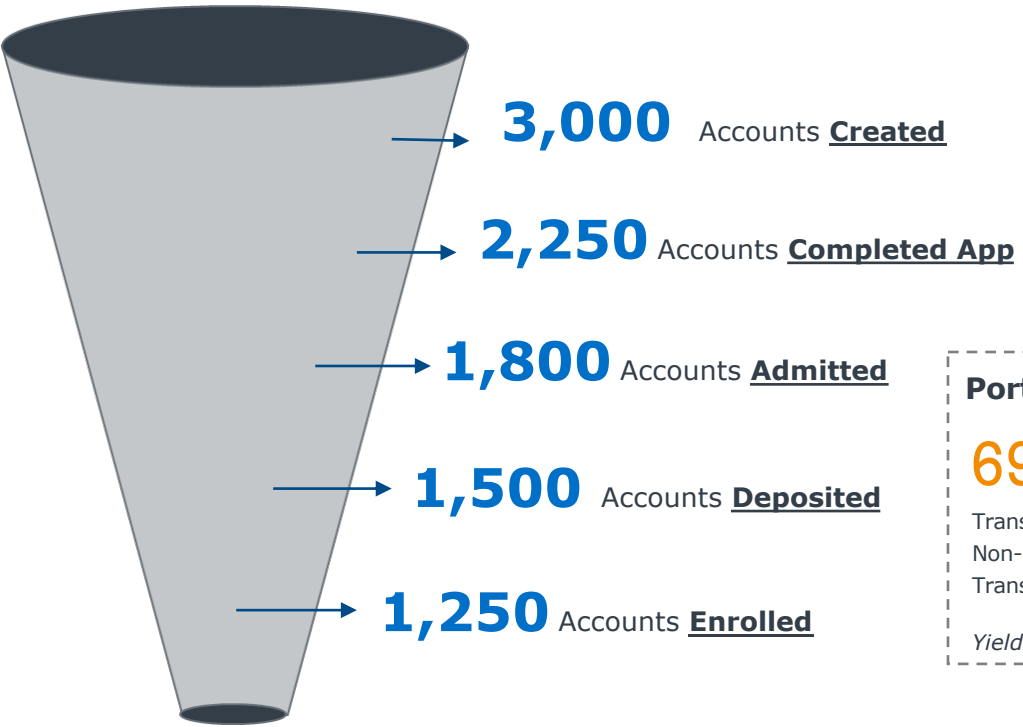
Transfer EC	Spring 2022	3000	2500	1000	700	83%	28%
Non-Portal	Spring 2022	1000	700	550	400	70%	57%
Portal	Spring 2022	750	700	600	500	93%	71%
% of EC (Portal)	Spring 2022	25%	28%	60%	71%		

Summary of Portal Users	Total
Portal Accounts Created	3,000
# of Matched Portal Users*	1,500
# of Non-matched Portal Users	1,500
% of Matched Portal Users who applied	66%

\*Matched users = Email, LN/DOB or FN/LN Match

# Transfer Funnel Impact

Enrollment Cycle: Fall 2021, Spring 2022



**Portal User Yield:**

**69%**

Transfer EC = 49% yield  
Non-Portal = 53% yield  
Transfer Portal = 69% yield

*Yield = Enrolled / Admitted*

\* Dummy data used in this example  
Matched users = Email, LN/DOB or FN/LN Match

# Polls

- 1 How was today's session?
- 2 Do you want to be registered for the Nov 2<sup>nd</sup> Office Hours session?

