Transfer Impact Report

**Time Period:** Click or tap here to enter text.  **Contributors:** Click or tap here to enter text.

**Executive Summary:** Click or tap here to enter text.

**Transfer Portal Utilization**

**Activity Overview**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Total Sessions** | **Distinct Users** | **Accounts Created** | **Account Conversion Rate** | **Courses Added** | **Messages Sent** |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Pending Courses Added** | **Pending Courses Resolved** | **Pending Courses Unresolved** | **Total Users by Type** | **Total Users by Term** |  |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

**Year-Over-Year Change:**

* Change in total user sessions from last year: Click or tap here to enter text.
* Change in total accounts created from last year: Click or tap here to enter text.

**Pipeline Details**

|  |  |  |  |
| --- | --- | --- | --- |
| **Users with more than one school** | **Users with in-state schools** | **Users with out-of-state schools** | **Top 10 feeder schools** |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Top 10 states for transfer schools** | **Submitted more than one major** | **Top 10 majors selected by estimated distinct users** | **Pending courses by transfer college** |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

**Transfer Pre-Advising: Programs Explored**

* Number of programs explored: Click or tap here to enter text.
* Hours saved: Click or tap here to enter text.
* Salary savings: Click or tap here to enter text.

**Student Feedback Collected Through Surveys and Focus Groups**

* Summary of Transfer Portal feedback: Click or tap here to enter text.
* Summary of transfer process feedback: Click or tap here to enter text.
* EAB Net Promoter Survey feedback: Click or tap here to enter text.

**Automated Course Evaluations and New Course Equivalencies**

* Automatic course evaluations generated: Click or tap here to enter text.
* Estimated staff time per course review: Click or tap here to enter text.
* Hours saved to date: Click or tap here to enter text.
* Dollars saved to date: Click or tap here to enter text.
* Pending courses requests resolved: Click or tap here to enter text.
* New course equivalences built through Portal requests: Click or tap here to enter text.

**Transfer Enrollment and Revenue**

* Number of Transfer Portal accounts created: Click or tap here to enter text.
* Dollars saved from not having to purchase inquiries: Click or tap here to enter text.

**Portal vs. Non-Portal**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Term** | **Complete** | **Admit** | **Deposit** | **Enroll** | **Admit %** | **Yield %** |
| **Transfer EC** | *Total All Time* | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Non-Portal** | *Total All Time* | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Portal** | *Total All Time* | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **% of EC (Portal)** | *Total All Time* | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Term** | **Complete** | **Admit** | **Deposit** | **Enroll** | **Admit %** | **Yield %** |
| **Transfer EC** | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Non-Portal** | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **Portal** | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| **% of EC (Portal)** | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

**Account Activity**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Accounts Created** | **Completed Applications** | **Admitted** | **Deposited** | **Enrolled** | **Portal User Yield** |
| Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

|  |  |
| --- | --- |
| **Transfer Portal Revenue (In-State):** | Click or tap here to enter text. |
| **Transfer Portal Revenue (Out-of-State):** | Click or tap here to enter text. |

**Accolades and Recognitions**

Accolades, Awards, and Recognitions: Click or tap here to enter text.

**Other Transfer Initiatives**

Initiatives Completed or In Progress: Click or tap here to enter text.

**Conclusion**

|  |  |
| --- | --- |
| **Summary and Observations:** | Click or tap here to enter text. |
| **Recommendations for Next Term or Academic Year:** | Click or tap here to enter text. |