



TRANSFER PORTAL

Evaluating Transfer Portal Impact at Your Institution

Toolkit and Templates

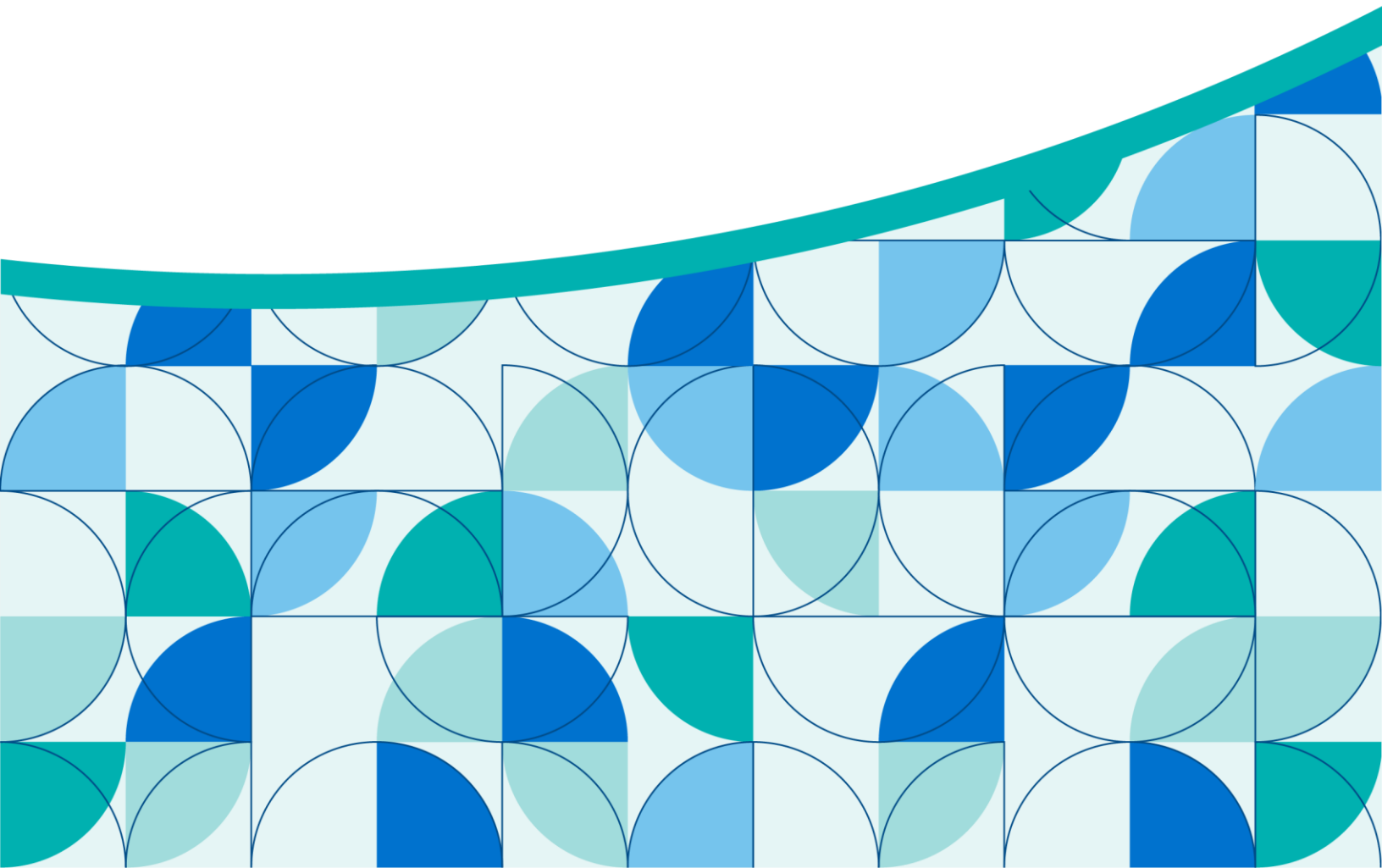


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Access the eab.com page

This toolkit and its accompanying resources, like templates, are available online on eab.com. Visit the page to access and download the resources: <https://eab.com/resources/tool/evaluating-transfer-portal-impact/>.



Introduction

SECTION

1

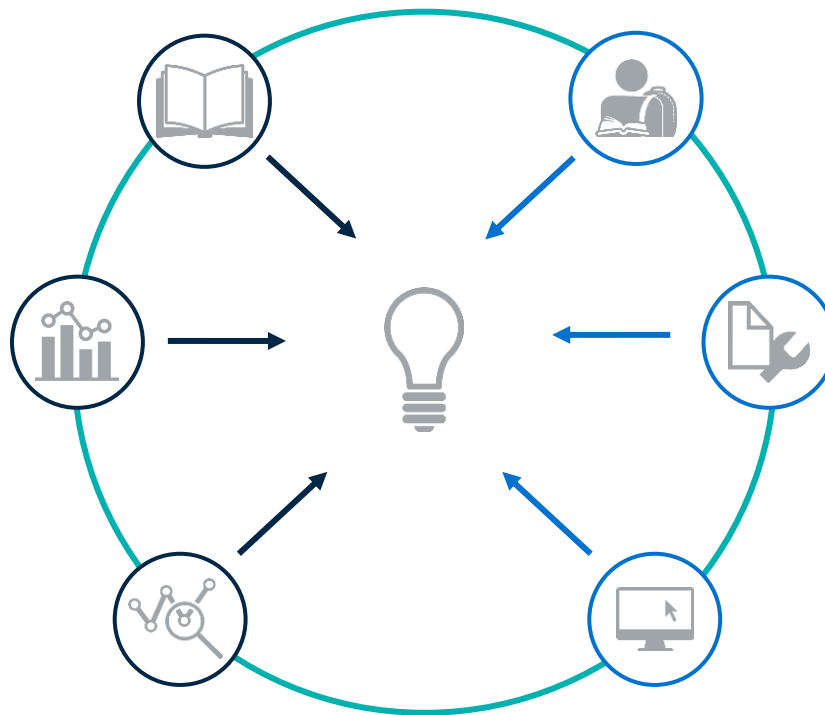
This section introduces the concept of documenting transfer impact in a Semiannual or Annual Transfer Impact Report, why it is beneficial for your institution to do so, and how this toolkit can be used to assist you.

Keep Up to Date with the Latest Transfer Data

Helpful Resources to Understand the Transfer Landscape

The Transfer Enrollment Landscape

The transfer enrollment landscape is continuously evolving. Increased competition in the transfer enrollment recruitment space provides students with more and more options to consider. It is important to understand what all of this means for your institution. We have included several resources below that we recommend you reference for the most up-to-date transfer research and data.



Research



[National Student Clearinghouse](#)



[Community College Research Center](#)



[The American Association of Collegiate Registrars and Admissions Officers \(AACRAO\)](#)

Other Content



[National Institute for the Study of Transfer Students \(NISTS\)](#)



[The Chronicle of Higher Education](#)



[Insider Higher Ed: Beyond Transfer](#)

Creating an Annual Report to Share Transfer Impact

Communicating Progress and Identifying Improvement Opportunities

Why Measuring Transfer Impact Is Valuable

It is critical to evaluate the impact of your transfer initiatives to ensure progress is being made against goals and expectations and to enhance visibility into transfer efforts at your institution. Without intentional evaluation, common challenges may arise that impede real progress and using experiences to inform future work.



Common Challenges

- Work does not align with institutional goals
- Potentially ineffective practices continue to be implemented at the institution
- Several initiatives occur simultaneously, with the impact of each being unknown
- Data is not collected to allow for effective evaluation
- Purpose is unclear, leading to “analysis paralysis”

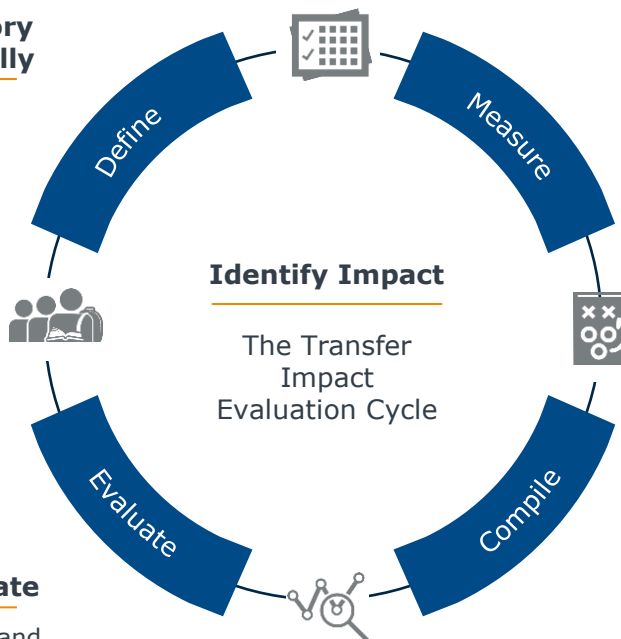
The Transfer Impact Evaluation Cycle

Every successful initiative involves the following four phases: Define, Measure, Compile, and Evaluate. Impact evaluation is a continuous cycle, since every initiative is iterative and there will always be improvement opportunities. Consider your process through the lens of this framework to ensure you are on track for success.

1

Define Your Data Story and Think Strategically

Consider your audience, what they care about, and what you want them to take away after reading your report.



2

Select Metrics for Evaluation

Use your transfer goals to identify the process and outcome metrics you will use to measure impact.

3

Gather and Document Data

Create an annual or semiannual Transfer Impact Report to capture your selected metrics.

4

Evaluate Transfer Impact and Recalibrate

Use the report to understand the impact on your transfer goals and inform next steps and future decision-making.

How Transfer Impact Data Can Be Used

Transfer impact data can inform a variety of decisions and opportunities at an institution. The data enhances insight into how the institution is performing regarding transfer goals, uncovers opportunities to better invest resources in offices that support transfer efforts, and puts the spotlight on high-achieving offices and staff.



Grant Requests or Reports

Include impact data in grant requests or reports to demonstrate the value of your institution's services on transfer student success goals and to support specific projects.



Resource Allocation

Understand which offices deliver an outsized impact on transfer student success and may benefit from additional resources (e.g., staff, funds).



Staff Recognition

Compare impact data with your institution's expectations (e.g., Are staff spending a proportionate amount of time on tasks? Are staff exceeding expectations?).

Additionally, transfer impact data promotes buy-in among key collaborators. Through grant requests and reporting, resource allocation decisions, and staff recognition, key collaborators will better understand the value that offices that support transfer efforts provide to students and staff.

Benefits of Creating a Transfer Impact Report

This toolkit provides resources to create a semiannual or annual Transfer Impact Report. By creating a report once or twice every year, your institution establishes a formal cadence to evaluate and document transfer impact and increases visibility into the student success contributions made by offices that support transfer.

- ✔ Establishes a formal cadence to evaluate and document transfer impact
- ✔ Provides senior leadership with visibility into how the offices and staff contribute to transfer success strategy and the overall return on investment, helping to generate buy-in among this group
- ✔ Informs resource allocation decisions, staff capacity, and transfer student engagement opportunities
- ✔ Lifts the curtain that offices that support transfer efforts may live behind, putting their work front and center
- ✔ Allows transfer leaders to surface areas for improvement and recognition
- ✔ Enables leaders to understand how staff and student Portal utilization is trending to inform future training and promotional opportunities

How to Use This Toolkit



What Content Will Readers Find in This Toolkit?

This toolkit provides resources for semiannual or annual reporting for offices that support transfer efforts leveraging the Transfer Portal technology. There are several templates that can be used together and alone any time during the year to measure the impact of your work.



How Is The Toolkit Organized?

The toolkit is organized by different stages of the [Transfer Impact Evaluation Cycle, which is described on page five](#). Depending on where your institution is in the process, it may be most beneficial to start with the resources relevant to your institution's "stage" in the impact evaluation process.



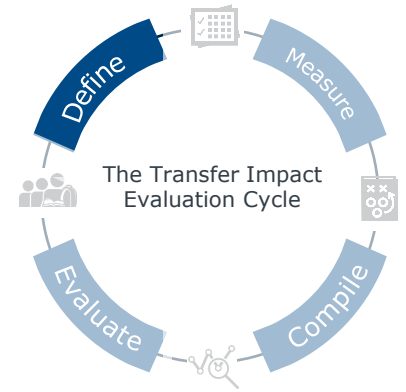
Who Is the Intended Audience?

This toolkit is designed to be used by the individuals leading your institution's transfer initiatives and efforts. It is recommended that the completed reports be shared with senior administration.



When Should This Toolkit Be Used?

We recommend using the tools to create your semiannual report after each fall and spring term or your annual report at the conclusion of an academic year. The cadence depends on your institution's preferences.



Define Your Data Story and Think Strategically

SECTION

2

This section provides information about data storytelling, including core considerations for crafting a compelling story.

Use Data to Tell a Cohesive and Compelling Story

Like every story, your data story needs a beginning, middle, and end. Without details, you tell an incomplete story and do not provide your audience with the full narrative. They may misinterpret the information, hindering them from reaching your desired intentions.

1

Background

Contextual information about transfer work at your institution.

- What is happening with offices that support transfer efforts?
- What details do the audience need to know to understand what's happening? (e.g., participants, goals, past and future initiatives, etc.)

2

Challenge

Transfer enrollment, onboarding, and other challenges that the office helped to resolve.

- With what issues do offices that support transfer efforts seek to help?
- When and why do students experience these challenges?

3

Solution

The initiative(s), project(s), and responsibilities that were carried out by the office.

- What kinds marketing and communications projects were implemented?
- What outreach to enrolled students was performed?
- What support services were offered by the office and used by students?
- Who was impacted by this work and how?

4

Results and Next Steps

Data, data, data!

- What data show the office's work and demonstrate impact on transfer goals?
- What resources, if any, would support the office's work moving forward?
- Are there qualitative anecdotes or feedback that support your story?
- How can the office's work be scaled and continue to return greater impact?



Worksheet: Prepare Your Data Story

Answer the following questions for your institution's offices that support transfer efforts. [You may download this worksheet individually as a fillable PDF online under the "Worksheets" section.](#)

What is the story you are aiming to tell using the data?

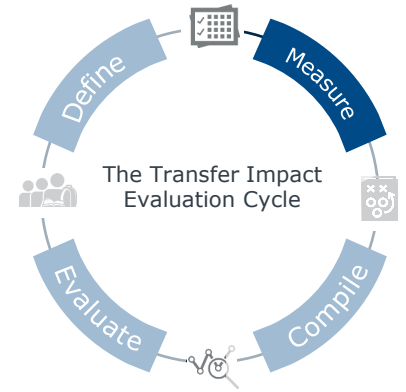
▶ Who are the individuals who will hear your story?

▶ What do they care about most?

▶ What do you want them to take away from your story? What are your desired outcomes?

▶ How do you anticipate they will respond?

▶ How will you use the data to mitigate their pushback?



Select Metrics for Evaluation

SECTION

3

This section provides information about the Transfer Maturity Curve. Learn about the different types of metrics you can use to evaluate transfer impact based on EAB's Transfer Maturity Curve best practices.

Assessing Your Progress Towards Optimal Adoption

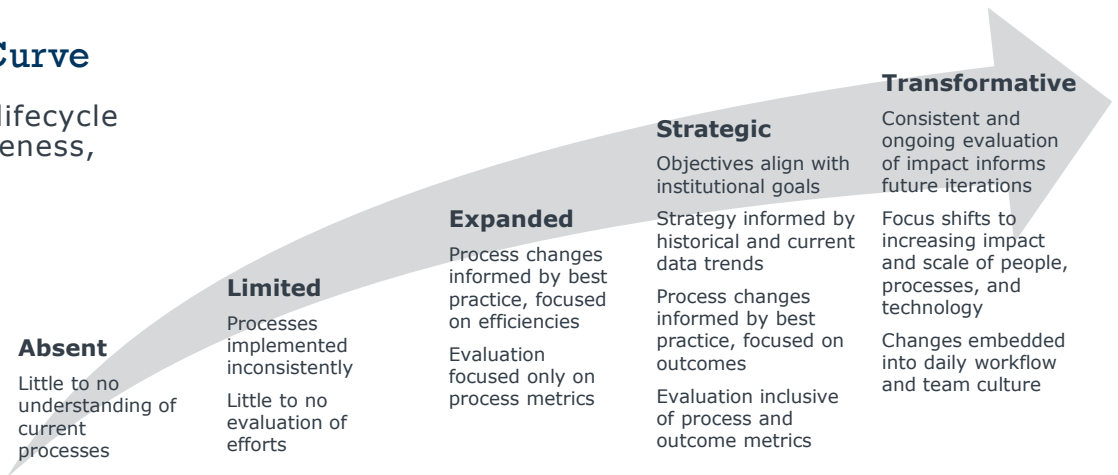
EAB's Transfer Maturity Curve

The Transfer Maturity Curve is powered by seven best practices which span the student's life cycle starting with foundation, moving to awareness, and ending with yielding and supporting transfer students. This tool is designed for partners to assess progress towards optimal adoption and strategic utilization of Transfer Portal and prioritization of transfer best practices over time. [Download the Maturity Curve Self-Assessment and strategic resources online!](#)

The templates in the [Gather and Document Data section of this toolkit](#) align with each best practice to help you guide and measure the impact of your institution's work.

Transfer Maturity Curve

Spanning the student lifecycle from foundation, awareness, to yield and support



		Level 0	Level 1	Level 2	Level 3	Level 4
Foundation	Prioritize Institutional Support for Transfer Students					
	Build Community College Partnerships and Transfer Pathways					
Awareness	Promote Transfer and Provide Detail on Cost, Credit, and Completion					
	Create Transfer-Friendly Website and Self-Services Resources					
Yield & Support	Qualify and Engage Prospective Transfer Students					
	Conduct Timely and Consistent Credit Evaluations					
	Provide Early Transfer Advising, Onboarding, and Support					

Impact Is Everywhere

Driving Towards Meaningful Transfer Outcomes

Impact falls into two different categories:




- 1 Process Metric:** The baseline numerical value for a value connected to impact, oftentimes aligned with your strategies (e.g., strategy to launch a marketing campaign)
 - E.g., Number of Portal accounts created, automatic course evaluations, etc.
- 2 Outcome Metric:** The result of the strategy or action, oftentimes aligned with your objectives.
 - E.g., Portal user yield, enrollment revenue, etc.



Be SMART – Specific, Measurable, Actionable, Relevant, Timely

Metrics You Can Track for Each Best Practice on the Transfer Maturity Curve


Foundation

- | | | |
|--|---|--|
|  Prioritize Institutional Support for Transfer Students |  | <ul style="list-style-type: none">• Portal account activity• Courses added, resolved, and unresolved |
|  Build Community College Partnerships and Transfer Pathways | | <ul style="list-style-type: none">• Users' schools (in- and out-of-state)• Majors submitted• Staff Portal activity• Year-over-year session and account trends |

Awareness

- | | | |
|---|---|---|
|  Promote Transfer and Provide Detail on Cost, Credit, and Completion |  | <ul style="list-style-type: none">• Programs explored• Time and dollars saved per program review |
|  Create Transfer-Friendly Website and Self-Service Resources | | <ul style="list-style-type: none">• Student feedback on the Portal, general transfer process• Net Promoter Survey feedback |

Yield & Support

- | | | |
|--|---|--|
|  Qualify and Engage Prospective Transfer Students |  | <ul style="list-style-type: none">• Portal user yield• Portal enrollment revenue |
|  Conduct Timely and Consistent Credit Evaluations | | <ul style="list-style-type: none">• Automatic course evaluations• Time and dollars saved per course review• Pending course requests resolved |
|  Provide Early Transfer Advising, Onboarding, and Support | | <ul style="list-style-type: none">• Course equivalencies built through Portal requests• Programs explored• Time and dollars saved per program review |

Three Core Components in a Transfer Impact Report

An Example from a Partner Institution

1

Insights – *What Did You Learn From the Data?*

Example Data: Portal User Yield

Through assessing the impact of students who used Transfer Portal compared to those who did not, **they learned that students were more likely to enroll if they received information about how their credits will transfer earlier in the process.**

2

Recommendations – *What Are Your Next Steps Based on the Data?*

Example Action: Transfer Campaign

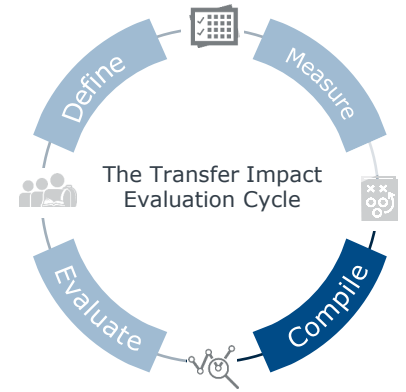
In addition to providing data in their annual report, **they also used the data to create a CRM campaign that provided different calls to action for prospective students based on where they were in their journey (e.g., Portal User vs. Non-Portal, Location in Enrollment Funnel).**

3

Value – *What Impact Does the Office Provide?*

Example Value: Tuition Revenue

Moving beyond the insights and recommendations, they were able to **showcase the value of their efforts and more specifically how they are paying for themselves and the Transfer Portal through the number of students who enrolled and also engaged with Transfer Portal.**



Gather and Document Data

SECTION

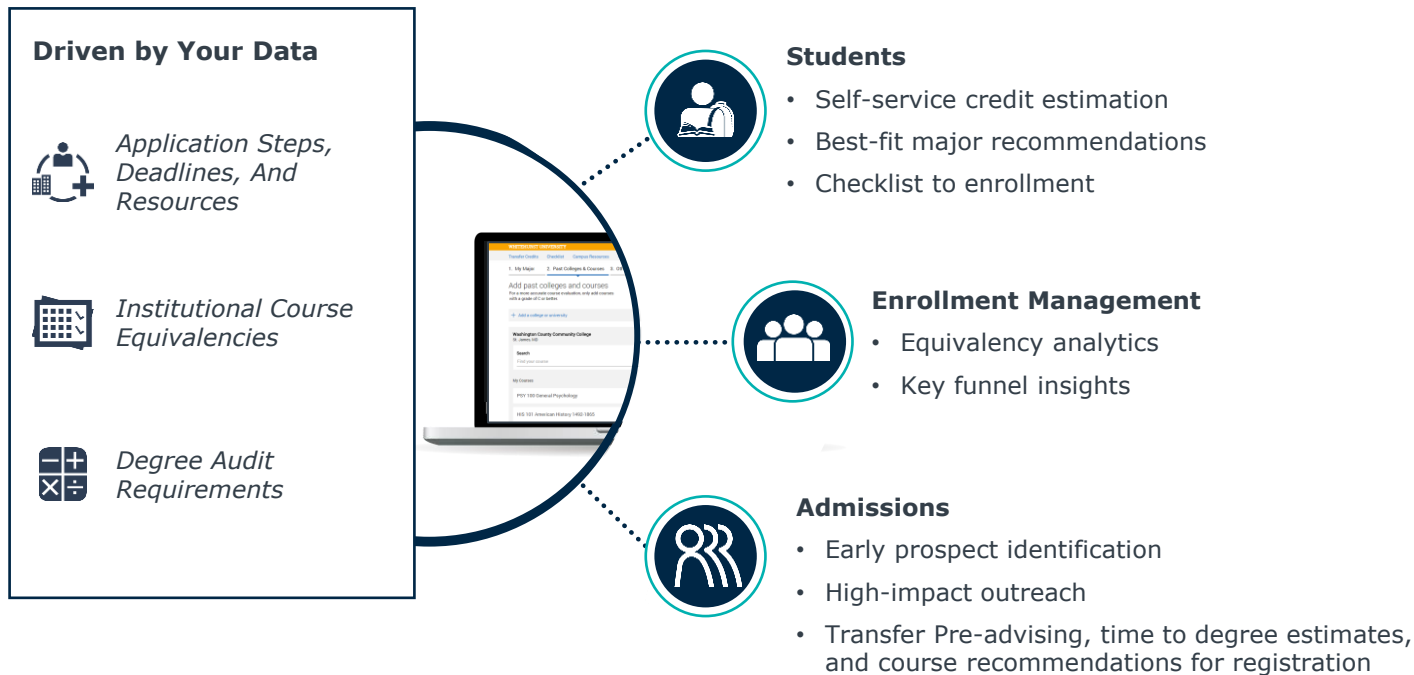
4

This section includes several templates to help you populate your Semiannual or Annual Transfer Impact Report. Download the Transfer Impact Report Template online and customize it for your institution. Use the templates in this section that are most relevant to your institution. [The Impact Templates are downloadable as individual PDF files, and the Impact Report is downloadable as a Microsoft Word document online.](#)

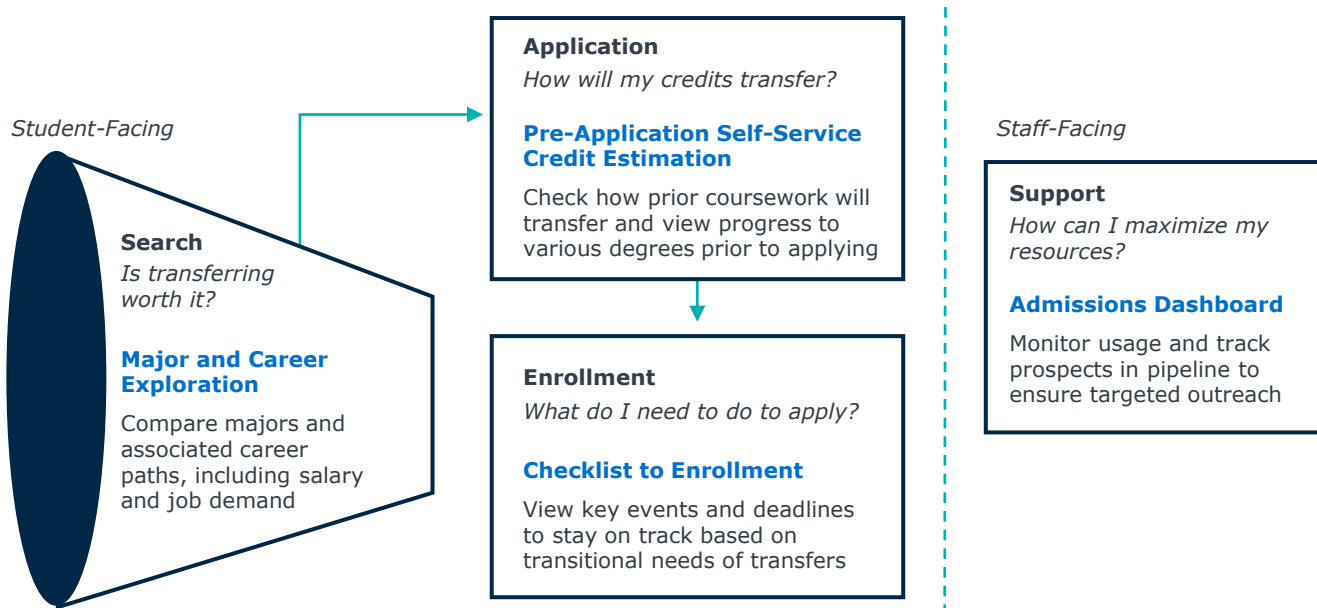
How the Transfer Portal Benefits Both Staff and Students

Helping Drive Transfer Enrollments

Transfer Portal Provides Across-the-Board Impact with Key Collaborators...



...and End-to-End Prospect Support to Improve Transfer Enrollment and Graduation



✓ Drive application volume and increases in application completion rates

✓ Enable admissions to engage with prospects early and have greater visibility into the pipeline

✓ Transform the prospective student experience to be easier and stress-free

Transfer Portal Metrics to Evaluate

Use the templates below to connect impact to the [Transfer Maturity Curve](#). Templates are tied to progression areas of **Foundation**, **Awareness**, and **Yield & Support**. [You may also download each template individually online under the "Impact templates" section of the page.](#)

1

Transfer Portal Utilization

Access data in the Transfer Portal Analytics dashboard, which includes session activity and pipeline details, to understand how and who is using the Portal. These reports should be used as a baseline in Portal health analysis.

- ▶ **Prioritize Institutional Support for Transfer Students:** Access and share transfer and success data to inform your work.
- ▶ **Build Community College Partnerships and Transfer Pathways:** Identify from which institutions students are transferring to pinpoint partnership opportunities.

2

Transfer Pre-Advising

Students can obtain instant degree completion estimates for various academic programs through the Portal, streamlining the process and reducing the need for staff to generate these estimates. Understand how the Portal has saved staff time in this area.

- ▶ **Promote Transfer and Provide Detail on Cost, Credit, and Completion:** Leverage quick and early credit evaluation and pre-advising to assist prospective students in earlier decisions.

3

Student Feedback

The Portal serves as an engagement and yield tool for prospective students. Understand from your students if the Portal was helpful in their decision-making process.

- ▶ **Create Transfer-Friendly Website and Self-Services Resources:** Use Student feedback to enhance website experience and self-service resources.
- ▶ **Provide Early Transfer Advising, Onboarding, and Support:** Use Student feedback to improve transfer advising, onboarding and support services.

4

Course Evaluations and Course Equivalencies

The Portal streamlines course equivalency discovery, automating evaluations for time-saving benefits to students and staff. Understand the impact of having requests funneled through the Portal to enable faster credit evaluations and improve the database for future students.

- ▶ **Create Transfer-Friendly Website and Self-Services Resources:** Deep link to the Portal on your website to direct students to automated course evaluations and equivalencies.
- ▶ **Conduct Timely and Consistent Credit Evaluations:** Utilize auto-resolvable course evaluations to empower prospective students with information instantaneously.

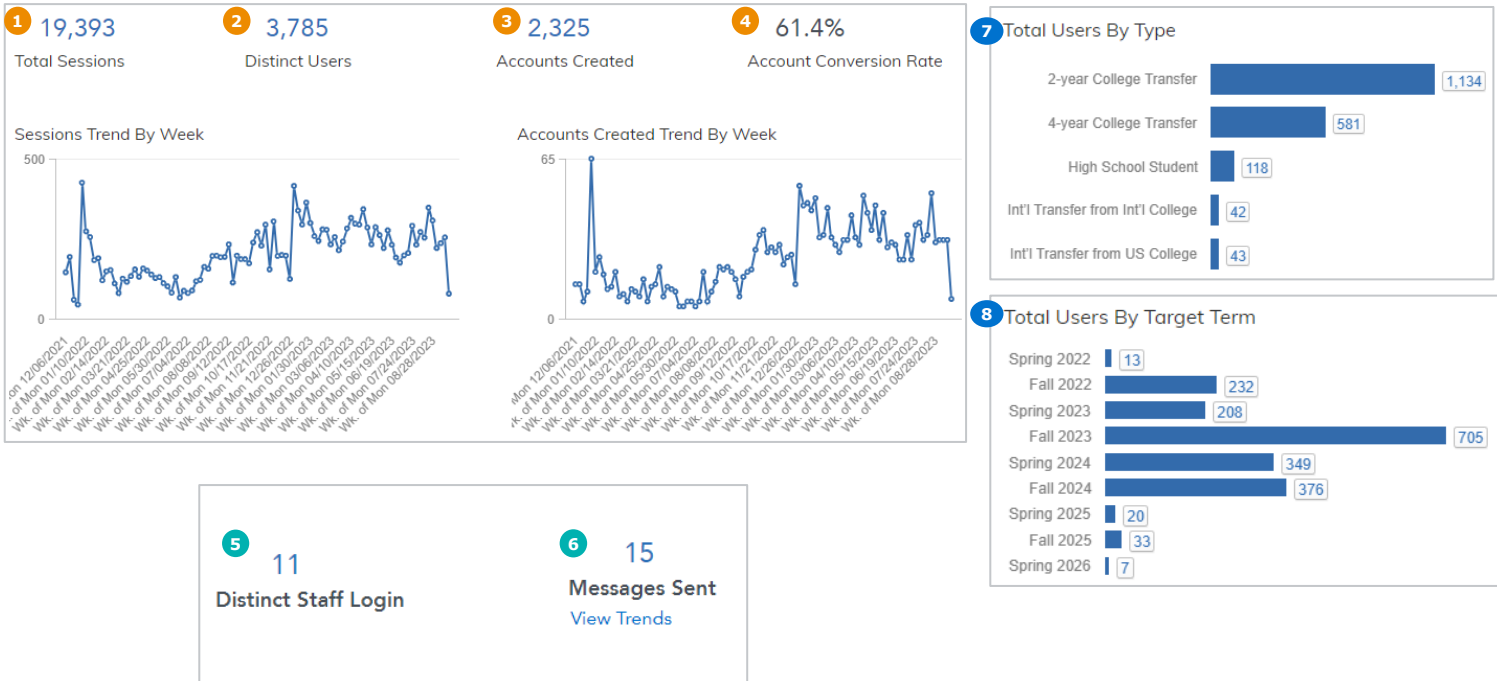
5

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. Calculate inquiry generation savings and tuition revenue that can be attributed to these students.

- ▶ **Qualify and Engage Prospective Transfer Students:** Effectively engage prospective transfer students to increase yield.

Transfer Portal Utilization: Activity Overview



Data Point and Definition	Why It's Important
1. Total Sessions: Total number of unique sessions by any user	Provides insight into overall site traffic, marketing performance, and student engagement
2. Distinct Users: Total number of user sessions who added at least 3+ course or have an account created	Indicates an elevated level of user engagement; can be considered your "superusers." Students receive an automated course evaluation leading to time savings for both students and staff. This data also aids in understanding utilization patterns
3. Accounts Created: Total number of users who have created an account	These students should be considered new inquiries, as they completed a significant step by saving their work and providing their information. The calculation of money saved can be tied to these student inquiries
4. Account Conversion Rate: Conversion rate based on % of estimated distinct users who created an account	Shows level of student interest by their follow through to create an account
5. Distinct Staff Login: The number of distinct individuals logged in to the staff URL in the selected date range.	Provides insight into Transfer team engagement with Transfer Portal.
6. Messages Sent: Total number of messages sent, includes anonymous users	Provides timing of messaging to lead to further analysis of question types, and signifies a high-level user engagement
7. Total Users by Type: Total number of users by type, self-selected as a part of account creation	Provides insight into population and demographic breakdown, data can be used to qualify and customize outreach campaigns to prospects
8. Total Users by Term: Total number of users by term, self-selected as a part of account creation	Provides insight into when students are interested in enrolling and can be used by staff to gauge future enrollment projections, view trends, and conduct customized outreach

Transfer Portal Utilization: Pipeline Details

1 17.4%
Users With More than One School

2 47 67%
Users With In-State Schools

3 23 33%
Users With Out-of-State Schools

4 Top 10 Feeder Schools (By Most Estimated Distinct Users)

Transfer College	Total Users Per College	Courses Added Per College	% Courses Added Per College
Washington County Community College	46	156	53.2%
Hutchinson Community College	9	41	14.0%
Hudson County Community College	7	7	2.4%
Samford University	4	19	6.5%
Ball State University	3	10	3.4%
Penn State University	2	6	2.0%
American University	1	3	1.0%
Baruch College-CUNY	1	5	1.7%
Cisco College	1	1	0.3%
College of DuPage	1	7	2.4%
Dallas County Com Col Dist	1	8	2.7%
Indiana University - Bloomington	1	5	1.7%

5 Top 10 States for Transfer Schools (By Most Estimated Distinct Users)

Transfer State	Total Users Per State	Courses Added Per State	% Courses Added Per State
DC	47	159	54.3%
KS	9	41	14.0%
NJ	7	7	2.4%
AL	4	24	8.2%
IN	4	23	7.8%
PA	3	7	2.4%
NY	2	8	2.7%
TX	2	9	3.1%
CA	1	4	1.4%
IL	1	7	2.4%
MD	1	1	0.3%

6 64.0%
Submitted More Than One Major

7 Top 10 Majors Selected By Estimated Distinct Users

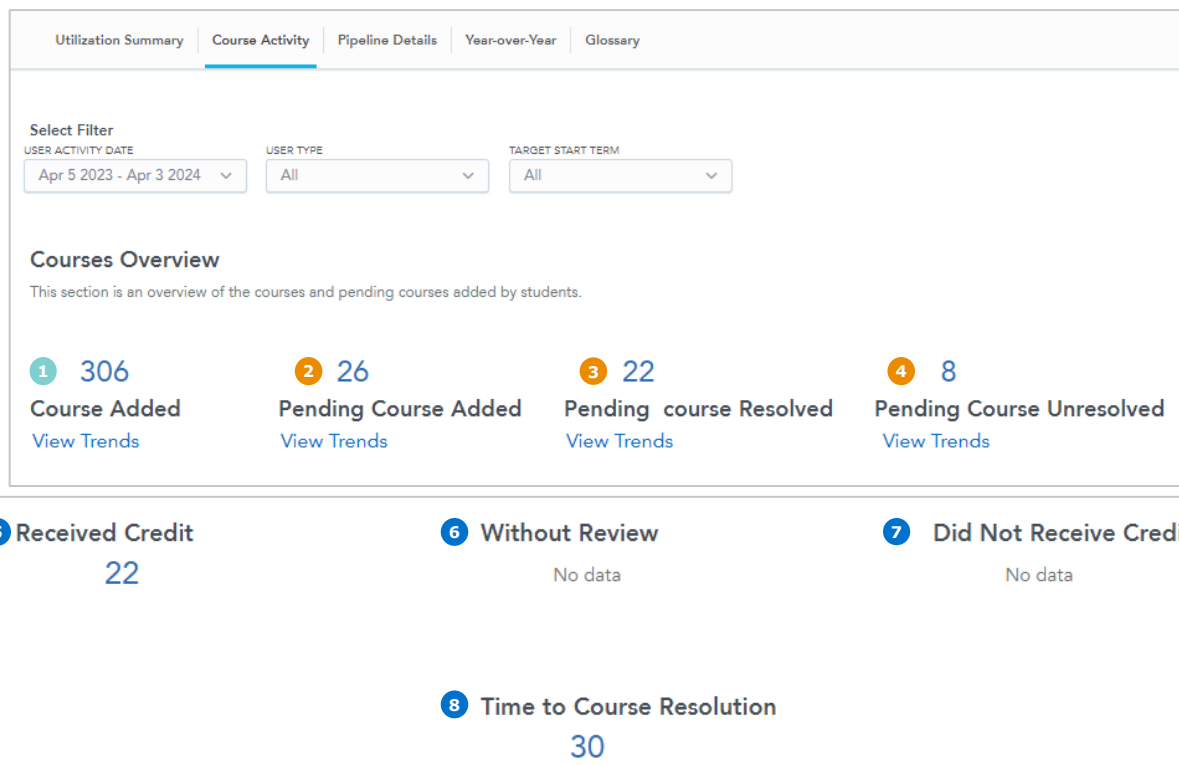
Intended Major	Total Users Per Major
Accounting	13
General Business	11
International Business	7
Biological Sciences BA	6
Biological Sciences BS	4
Communication-Journalism	1
Economics	1
Elementary Education	1

8 Pending Courses by Transfer College

Transfer College	Pending Courses	Pending Courses Resolved	Pending Courses Unresolved
Washington County Community College	17	13	5
College of DuPage	4	1	3
Hudson County Community College	2	2	
Hutchinson Community College	2	2	
Indiana University - Bloomington	1		1
Penn State University	1	1	
Samford University	1	1	
Sul Ross State University	1		1
University of Notre Dame	1		1
Cisco College		1	

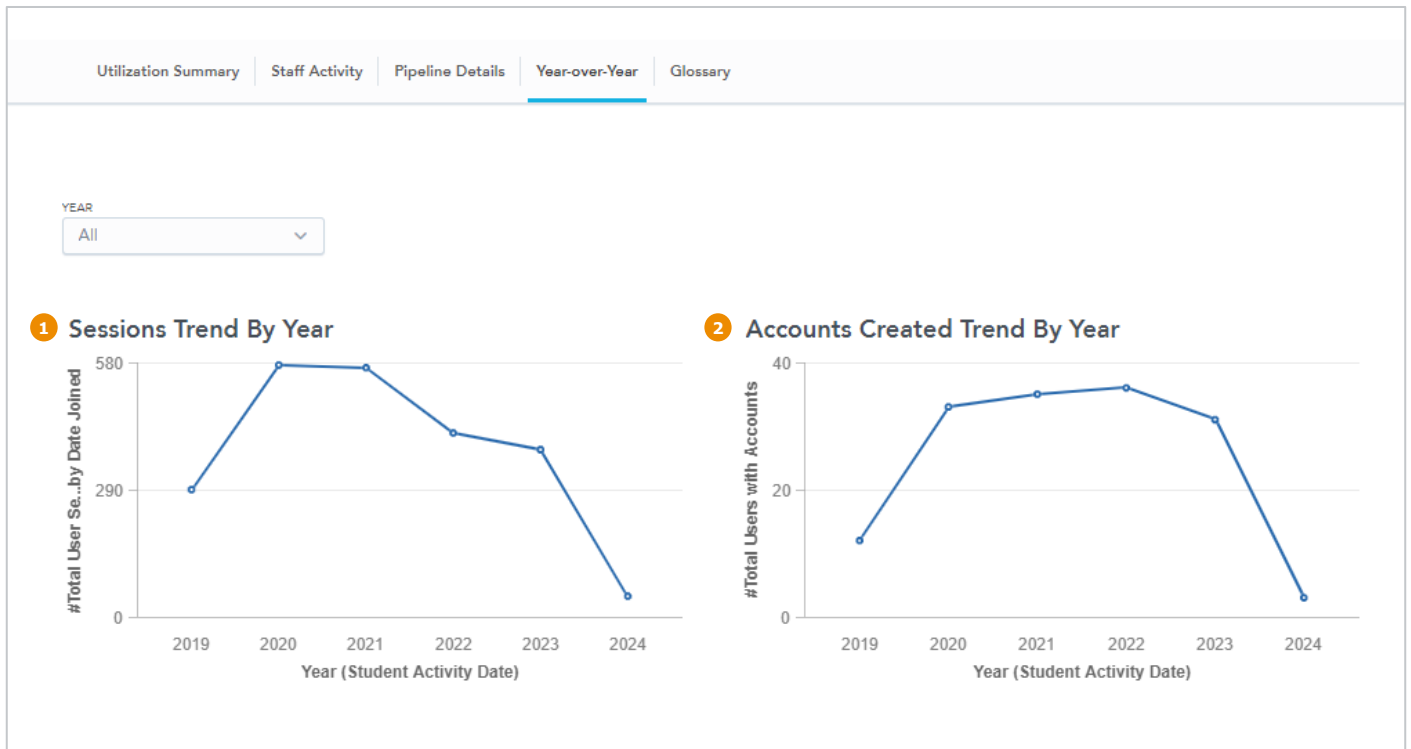
Data Point and Definition	Why It's Important
1. Users with more than one school: % of estimated distinct users who submitted courses from more than one transfer school	These users have attended more than one institution, possibly transferring multiple times; provides insight into student behavior
2. Users with in-state schools: Total number of estimated distinct users who have added at least one course from an in-state institution	Provides insight into in-state and out-of-state mix and growth opportunities
3. Users with out-of-state schools: Number of estimated distinct users who have not added at least one course from an in-state institution	Provides insight into in-state and out-of-state mix and growth opportunities
4. Top 10 feeder schools: Top ten institutions with the most estimated distinct users and the total number of courses they have added	Provides insight into community college/top feeder relationships and activity, identifies new potential partnerships, and highlights what four-year universities where majority of lateral transfer occurs
5. Top 10 states for transfer schools: Top ten states with the most estimated distinct users and the total number of courses they have added from institutions in these states	Provides insight into in-state and out-of-state mix and growth opportunities
6. Submitted more than one major: % of estimated distinct users who submitted 2 or 3 intended majors	Provides insight into student behavior and exploration patterns
7. Top 10 majors selected by estimated distinct users: Top ten intended majors selected by estimated distinct users	Shows majors with the most interest and student exploration, provides insight into where major-of-interest gaps or growth opportunities (e.g., CC partnership or articulation agreement strategy)
8. Pending courses by transfer college: List of all institutions where pending course was submitted	Students have transfer coursework from these institutions, but were unable to find a course equivalency; provides insight into course equivalency gaps and eab.com partnership growth opportunities

Transfer Portal Utilization: Course Activity



Data Point and Definition	Why It's Important
1. Courses Added: Total number of courses submitted that have existing equivalencies	Considered a proxy for automated 1:1 course evaluation requests which saves student and staff time
2. Pending Courses Added: Total number of pending courses (no prior equivalency) submitted for review	Provides insight into course equivalency database health, where gaps exists, guides staff capacity considerations, and shows funnel trends and growth opportunities
3. Pending Courses Resolved: Total number of pending courses resolved, regardless of when they were added	Provides insight into staff capacity and turnaround time
4. Pending Courses Unresolved: Total number of pending courses still unresolved from those added	Provides insight into staff capacity and turnaround time
5. Received Credit: These are the total number of pending courses resolved as "Course receives credit" in the selected date range.	The count of courses as received credit represents new course equivalency rules built in the SIS. These additions will be auto-matched for future course entries.
6. Without Review: These are the total number of pending courses resolved as "Course will not be reviewed" in the selected date range.	For various reasons, these courses are not reviewed and course equivalencies are not built. This provides an opportunity to reevaluate why the courses were not received and adjust internal processes accordingly.
7. Did Not Receive Credit: These are the total number of pending courses resolved as "Course does not received credit (Note required)" in the selected date range.	These courses are not transferable for various reasons, and course equivalencies are not built. This offers an opportunity to reassess why the courses are not receiving credit and make internal process adjustments accordingly.
8. Time To Course Resolution: This is the average number of dates between the date pending courses are submitted and the resolution date.	This number represents the average waiting period for a student to receive a response regarding their pending course request. The data serves to guide the internal credit evaluation process and can prompt adjustments if necessary.

Transfer Portal Utilization: Year-Over-Year



Data Point and Definition	Why It's Important
<p>1. Sessions Trend By Year: This is the trend report showing the total number of unique session be any user, with or without an account based on the years selected from the drop-down.</p>	<p>Provides insight into all user activity with your Transfer Portal across the years. Trends will hopefully follow various transfer initiatives over time.</p>
<p>2. Accounts Created Trend By Year: This is the trend report showing the total number of accounts created through the platform based on the years selected from the drop-down.</p>	<p>This insight is specifically for prospective students who created accounts within your Transfer Portal. The trends here should help evaluate effectiveness of different deep linking or profile creation campaigns.</p>

Transfer Pre-Advising: Programs Explored

Unofficial Credit Evaluations

- 1 Admission Time:** Admission and advising staff time savings with less one-on-one meetings with students to discuss program progress.
- 2 Staff Expertise:** Many times, the admissions office needs to involve advisors or the registrar's office to obtain information, increasing the time and staff required for these evaluations.

Portal: Analytics, Pipeline Details

Selected Majors are programs explored by Distinct Users.

Intended Major Overview

This section provides an overview of the intended majors estimated distinct users review.

61.6%

Submitted More Than One Major

Top 10 Majors Selected By Estimated Distinct Users

Intended Major	Total Users Per Major
Accounting	12
General Business	10
International Business	6
Biological Sciences BA	5
Biological Sciences BS	4
Economics	1
Elementary Education	1
Sum	39

View Full List of Estimated Distinct Users and Majors

Full List of Estimated Distinct Users and Majors » Drill In

Intended Major	Estimated Distinct Users Per Major
Accounting	23
General Business	20
Biological Sciences BS	17
Biological Sciences BA	14
Elementary Education	12
Communication-Journalism	7
International Business	6
Economics	4
Field Major Biol Sci/Biochem	4
Engl Language and Literature	3
History	3
Chemistry (ACS)	2
Commun Sciences and Disorders	2
Engineering Technology	2
Entrepreneurship	2
Management	2
Art - Studio Art	1
Art Education Emphasis PK-12	1
Sum	600

Staff Time Savings: Calculations and Estimates

600	×	30 mins	=	300 hrs
Total Majors		Estimated staff time per program review		Staff Time Saved
300 hrs	×	\$50/hr	=	\$15,000
Staff Time Saved		Estimated hourly rate		Dollars Saved

Assumptions

- A student would want each program evaluated
- Distinct Users = Total number of user sessions who added at least three or more courses in the selected date range or have an account created
- Estimated staff time per program review = 30 min
- Hourly rate for admissions/advisor/credit evaluation = \$50/hour

Areas of Impact

600	300+	\$15K+
Programs explored	Hours saved	Salary savings

Student Feedback

Qualitative Input from Students Through Surveys or Focus Groups

1 Transfer Portal Specific Feedback

Target Audience: Recently enrolled transfer students at your institution (ideally, within first semester or year)

*What was your experience using this platform?
How easy was it to use the Transfer Portal?
Did using the Transfer Portal directly answer questions for you?
Did using the Transfer Portal aid in your decision to transfer to this institution?*

2 General Transfer Process Feedback

Target Audience: Recently enrolled transfer students at your institution (ideally, within first semester or year)

*What portions of your transfer process were the easiest?
What portions of your transfer process were the most difficult? Why?
At any point during the Transfer process did you reconsider transferring here? If so, when and why?
Example survey and feedback group questions found on [Transfer Resource Hub](#)*

3 EAB Net Promoter Score Survey

Target Audience: In application survey option while student is using Transfer Portal

Submit a request to your EAB Strategic Leader to pull this information for your institution

*“This was so easy”
“It is useful to know what credits I can use”
“I could not find the courses I was looking for”*

Next Steps

- Strategically position Portal or adjust configuration based on areas of opportunities surfaced
- Highlight positive feedback to leadership team
- Consider follow up resources or points of connection for Transfer cohorts

Automated Course Evaluations and New Course Equivalencies

Calculations and Estimates

45,000 Courses Added	× 5 mins Estimated staff time per course review	= 3,750 hrs Staff Time Saved
3,750 hrs Staff Time Saved	× \$50/hr Estimated hourly rate	= \$187,500 Dollars Saved

- Automatic Course Evaluations = Courses Added
- Estimated staff time per course review = 5 minutes
- Hourly rate for admissions/advisor/credit evaluation = \$50/hour

Portal: Analytics, Utilization Summary

The screenshot shows a dashboard with the following data points:

- 45,000** Courses Added (with a 'View Trends' link)
- 25** Messages Sent (with a 'View Trends' link)
- 976** Pending Courses Added (with a 'View Trends' link)
- 812** Pending Courses Resolved (with a 'View Trends' link)
- 164** Pending Courses Unresolved (with a 'View Trends' link)

Summary Highlights

Automated Course Evaluations: Staff Time and Dollars Saved

Use of the Transfer Portal has eliminated the need for ad-hoc and unofficial credit evaluations by the Admissions Team, allowing the team to reallocate their time to more strategic work.

45,000

Automatic course evaluations generated

5 minutes

Estimated staff time per course review

3,750+ hours

Saved to date

\$187,500+

Saved to date

Automated Course Evaluations and New Course Equivalencies

Assumptions

- Pending course requests resolved = pending courses resolved in the utilization timeframe
- New course equivalencies built = courses resolved as "Resolved (receives credit)". There may be deviation since not all courses will have articulation rules built (e.g., student error, development coursework)

Portal: Analytics, Utilization Summary

Analytics | Site Setup | User Management

Utilization Summary | Pipeline Details | Glossary

Select Filters:
 USER ACTIVITY DATE: Oct 25 2022 - Oct 24 2023
 USER TYPE: All

Activity Overview
 This section is an overview of the key site activity metrics between 2022-10-25 and 2023-10-24.

45,000 Courses Added View Trends	25 Messages Sent View Trends	
976 Pending Courses Added View Trends	812 Pending Courses Resolved View Trends	164 Pending Courses Unresolved View Trends

New Course Equivalencies

Analytics | Site Setup | User Management

Utilization Summary | **Staff Activity** | Pipeline Details | Year-over-Year | Glossary

Select Filter:
 USER ACTIVITY DATE: Feb 17 2023 - Feb 16 ...
 USER TYPE: All
 TARGET START TERM: All

Received Credit 725	Without Review 36	Did Not Receive Credit 51
Staff Login Rate 12	Time To Course Resolution 4.5	

Summary Highlights

New Course Equivalencies

The Credit Evaluation Team prioritized building rules to enable faster official credit evaluations, staff time savings during peak periods, and an improved searchable database for future prospective students.

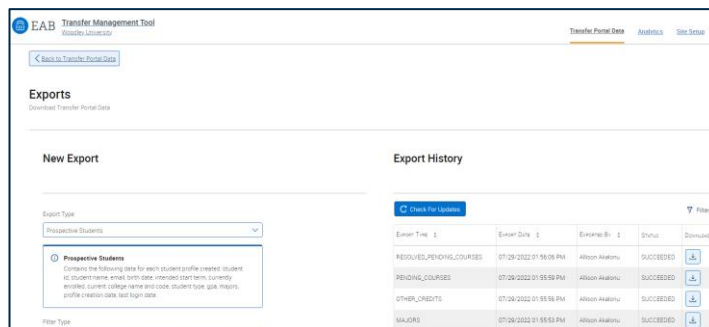
812 Pending course requests resolved

725 New course equivalencies built through portal requests

Transfer Enrollment and Revenue

Option 1: Partner managed CRM report and tracking

- 1 Transfer Portal data must be regularly exported (automatically or manual) and imported into CRM
- 2 Portal data should be de-duplicated
- 3 Portal data should include indicators in the CRM for (1) new lead source and (2) activity for existing lead
- 4 There is risk with accuracy based on how leads are imported and managed



Option 2: Semi-manual analysis, using Transfer Portal exports, partner's entering class file, and EAB Transfer Data Analysis workbook

- 1 Partner-generated enrollment entering class (EC) file must match EAB's data spec
- 2 EC data and latest Portal data loaded into an Excel workbook
- 3 Match all portal leads to EC file
- 4 Workbook pivot and some data fields need to be updated for accuracy

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	Total All Time							
Portal	Total All Time							
% of EC (Portal)	Total All Time	#%	#%	#%	#%	#%		

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

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

Excel linked on [Transfer Maturity Curve and Strategic Resources](#)

Sample Output

	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%		

	Term	Complete	Admit	Deposit	Enroll	Admit %	Yield %
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%		

* Dummy data used in this example

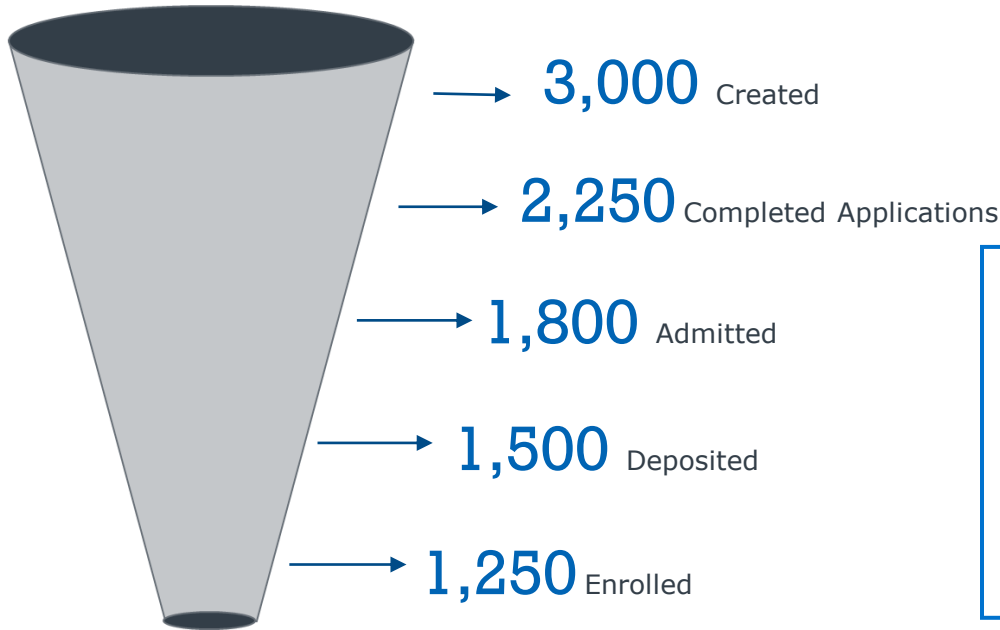
Summary of Portal Users		Total
Portal Accounts Created		3,000
# of Matched Portal Users*		1,500
# of Non-matched Portal Users		1,500
% of Matched Portal Users who applied		66%

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

Transfer Enrollment and Revenue

Enrollment cycle: Fall 2021, Spring 2022

Account Activity



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

Inquiry Generation

The accounts generated in the Transfer Portal serve as transfer inquiries, which are then exported into your CRM, resulting in cost savings by eliminating the need to purchase inquiries from transfer students.

3,000	×	\$50	=	\$150,000
Accounts Created		Estimated price per inquiry		Saved in one year

Estimated Cost and Revenue

2022-2023	In-State Per Year	Out-of-State Per Year
Tuition/Fees	\$14,500	\$32,000
Housing & Meals	\$16,200	\$16,200
Books	\$1,850	\$1,850
Transportation	\$2,900	\$2,900
Other	\$2,050	\$2,050
Direct Loan Fee	\$100	\$100
PLUS Loan Fee	\$820	\$820
Total:	\$38,420	\$55,920

In-State:

\$14,500 tuition/fees
 × 1,250 Transfer Portal users enrolled
 = \$18,125,000.00

Transfer Portal Revenue:
\$18,125,000.00*

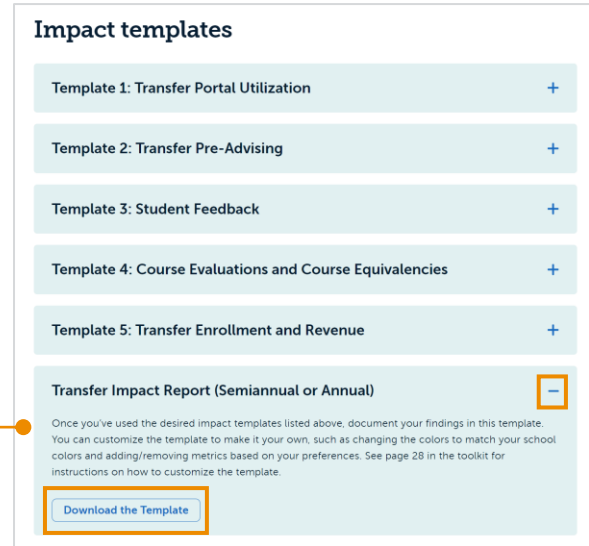
*Considerations: Some transfer students are out-of-state; transfer discount rate

Download Transfer Impact Report Template Online

The [Annual or Semiannual Transfer Impact Report Template](#) is available online as an [editable Microsoft Word document](#). Input the metrics you calculate and identify using Impact Templates 1-5 from this toolkit into the report.

Access the Report Template Online

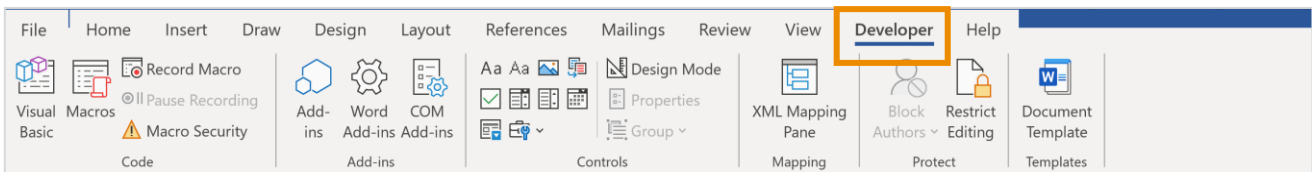
- 1 Visit the toolkit's page online: <https://eab.com/resources/tool/evaluating-transfer-portal-impact/>.
- 2 Scroll to the **Impact templates** section.
- 3 Click the **plus sign (+)** next to **"Transfer Impact Report (Semiannual or Annual)"**.
- 4 Click **"Download the Template"** at the bottom left of the box.



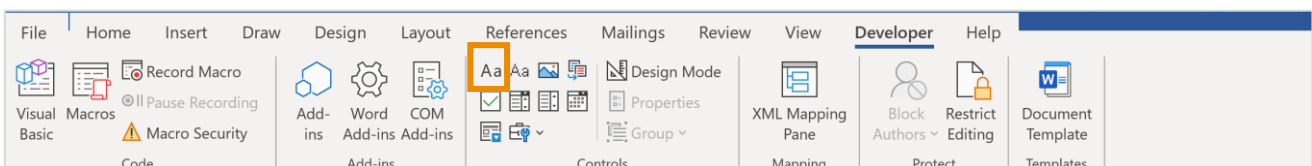
How to Customize the Template in Microsoft Word

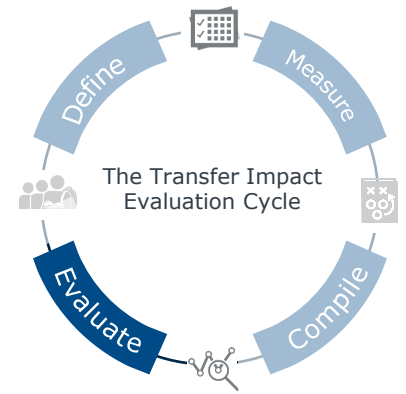
You may wish to edit the template based on your institutional preferences, like metrics to include, font type, table and font colors, the inclusion of your institution logo, etc.

- 1 [Download the template online.](#)
- 2 In the open document, you may want to rearrange, add, or remove text. You can rearrange sections and bullet points by copy and pasting within the document. Delete or add text as you would in any document.
- 3 To add a new text box, click on the **Developer tab** on your Microsoft Word ribbon.



- 4 Click the place in the document where you would like to add the text box.
- 5 On the Developer tab, click the **Aa icon**.





Evaluate Transfer Impact and Recalibrate

SECTION

5

This section includes tools to assess your transfer work and process based on findings and observations in the Semiannual or Annual Transfer Impact Report you have created. Every initiative is iterative and there is always room for improvement to best support transfer student success.

Think Strategically When Reviewing the Data

After you have compiled your [Transfer Portal Impact Report](#), you should look beyond the numbers in the context of your institution and priorities.

Questions for Consideration

To make informed decisions, it is crucial to pair data with qualitative context to help decision-makers make more accurate and impactful decisions.

- 1** Who are the individuals who have institutional and cultural context to accurately interpret the report?
- 2** How does the impact compare to previous year baselines? For example, have the number of Transfer Portal student accounts held steady? If so, why and is there room to grow in this area?
- 3** Are there any major institutional initiatives or external events (e.g., global pandemic) outside of the Transfer Admissions Office control that could be influencing the results? For example, did the institution receive a grant that funded a transfer partnership program for one year?
- 4** What are some process metrics or “smaller” wins (e.g., increase in the number of course articulations, use of system automations to reduce evaluation time) that are not directly tied to outcome metrics (e.g., increase in transfer admission rates) but contribute to overall transfer student goals?
- 5** Have there been any adjustments to transfer staff for initiatives? Did the institution make this work more or less of someone’s role? How did that impact the time toward these goals?
- 6** Have there been any new partnerships with feeder institutions that could have had impact on certain data points? If so, did they trend more positively?

Worksheet: Insights, Recommendations, and Value

After completing your Transfer Impact Report, record your findings below to ensure your data story includes the three critical components. [You may download this worksheet individually as a fillable PDF online under the “Worksheets” section.](#)

1

Insights—*What Did You Learn From the Data?*

2

Recommendations—*What Are Your Next Steps Based on the Data?*

3

Value—*What Impact Does the Office Provide?*

Worksheet: Reflect on the Process and Iterate

After completing your Transfer Impact Report, reflect on the process. [You may download this worksheet individually as a fillable PDF online under the "Worksheets" section.](#)

Process Improvements

- 1 What changes can you make to the transfer impact evaluation process to improve scale and ease of data collection and report creation?

- 2 Are there additional individuals you'd like to involve in the process? If so, who and when in the process?

- 3 What did you like and dislike about the process? In what ways can you improve the less favorable parts?

Impact Metrics and Documentation

- 5 What changes will you make to your Transfer Impact Report document? For example, are there additional metrics or qualitative information you want to include?

- 6 In what ways will the Transfer Impact Report be shared with the broader campus?



Celebrate Your Work in an Impact Story

SECTION

6

This section outlines the process for creating an Impact Story to celebrate your wins inside and outside of your institution.

Visualizing Your Impact Story

Creating a Visual to Share Inside and Outside Your Institution

Your Transfer Impact Report will serve as a valuable document to share the many ways in which your offices that support transfer efforts are progressing on transfer goals, helping transfer students, and more. It can be additionally beneficial to use that report to create an **Impact Story**. This allows you to visualize your impact story in a different way for easier storytelling, allowing you to bring greater attention to specific parts of your story.

Impact Story Creation Process

1

Identify Your Impact Story



Use your [Semiannual or Annual Transfer Impact Report](#) to pinpoint the specific impact story (big or small!) that you'd like to tell.

2

Visualize Your Story Using the Templates



Using the [PowerPoint impact story templates provided by EAB \(more information on page 37 in the toolkit\)](#), create a visual. Use the slides to update your leadership team on a semiannual or annual basis about the impactful work your office is doing.

3

Share Your Impact Story (Optional)



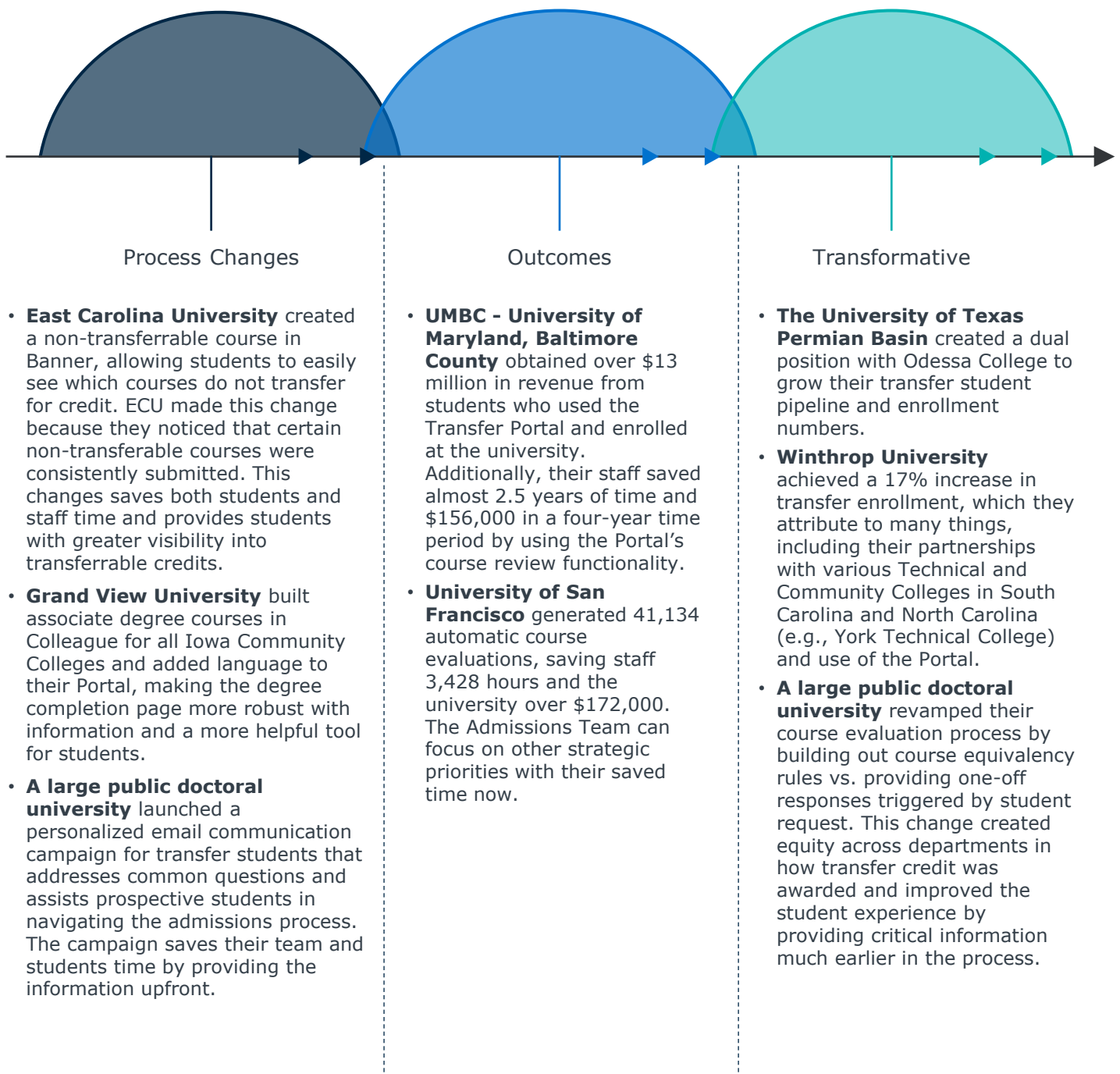
Celebrate your wins! Share your Impact Story with colleagues at your institution, Transfer Portal peers, and other higher education institutions via Quarterly Newsletter features, webinars, podcast episodes, blog posts, and more.

Impact Is a Spectrum – Nothing Is Too “Small”

Partner Impact Examples

A Spectrum of Impact Stories: Three Categories

Transfer impact is a spectrum ranging from “smaller” to “larger” wins. But a win is a win regardless, and everything should be celebrated! Below is a visual representation of this spectrum and a few partner examples.



Create Your Own Impact Story Using Our Templates

[PowerPoint Templates Available for Download Online](#)

Make a Value Story Slide

To assist you in creating a visual for your Impact Story, we have provided [slide templates](#) for you to use. [Scroll to the "PowerPoint slide templates" section of the page. Download the slides and use the slide that fits best with your story.](#) For inspiration, we have included a few partner example slides for your reference.

Five PowerPoint Templates Available

- 1 Download the Impact Story Templates online.
- 2 Pick the slide template that best communicates your story.
- 3 Use the guidance in the green shaded boxes located beside or below the slide to populate the slide with your information.

Example Slide Template

The image shows a slide template with a dark blue header containing the word "Title" and a small icon of a building. Below the header are three rows, each with a dark blue icon box on the left and a light blue text box on the right. The first row has a magnifying glass icon and a text box with the word "Header" and placeholder text. The second row has a person at a laptop icon and a similar text box. The third row has a document icon and a similar text box. To the right of the slide, there are three green shaded boxes with text: "Add information about the WHY. For example, the challenge you sought to solve or the process before changes were made, etc.", "Add information about the WHAT. For example, the Initiative you implemented, changes you made, new process you set up, etc. to address the challenges described in the first text box above.", and "Add information about the IMPACT. For example, the impact of the new Initiative or process, etc. (qualitative or quantitative)". A dark blue box with white text "Guidance on what kind of information to place on the slide" has lines pointing to the green boxes. At the bottom left of the slide, there is a small copyright notice: "©2024 by EAB. All Rights Reserved. eab.com".

Templatized slide design with placeholder text boxes



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At EAB, our mission is to make education smarter and our communities stronger. We work with thousands of institutions to drive transformative change through data-driven insights and best-in-class capabilities. From kindergarten to college to career, EAB partners with leaders and practitioners to accelerate progress and drive results across five major areas: enrollment, student success, institutional strategy, data analytics, and diversity, equity, and inclusion (DEI). We work with each partner differently, tailoring our portfolio of research, technology, and marketing and enrollment solutions to meet the unique needs of every leadership team, as well as the students and employees they serve. Learn more at eab.com.