

NISTS 2023

BE A CONNECTOR FOR TRANSFER STUDENT SUCCESS

Virtual • February 1-3 | Portland, OR • February 22-24

The following presentation was given at the 21st Annual Conference for the National Institute for the Study of Transfer Students. Please cite responsibly and direct questions to the original presenter(s).

Educational Session

2780 - Creating a Strategic Plan for the Transfer Student Experience

Leadership and Strategic Planning, Matriculation Trends and Issues

Creating a Transfer Student Experience Strategic Plan provides direction to your transfer professionals, advisory teams, and the University's larger Strategic Plan. That was the impetus behind our Transfer Services Team's work. We analyzed surveys, SWOT analysis, and direct experience to create a plan that identified gaps in services and new initiatives to ensure transfer students' persistence and success. During this session you'll learn how we did it and how you can replicate this process.

Kim Morton, *Director of Transfer Recruitment & Retention*
Appalachian State University

Creating a Strategic Plan for the Transfer Student Experience

Presented by:

Kim Morton, Director of Transfer Recruitment & Retention



Overview of Appalachian State University

- Located in Boone, NC
- Public, one of 17 institutions in UNC - over 20,000 total student enrollment
- Welcome approximately 1,500 new transfer students each fall and 500 in the spring (main campus & online; new campus in Hickory opening Fall 2023!)
- 1/4 of our population or over 4,700 total students began as a transfer
- 70% transfer from community colleges
- 45% are first generation students



WHY We Chose to Create a Strategic Plan

- The Transfer Services Team, an internal advisory board, had reached a point in their work where they needed more data and to identify gaps in services to guide them on future work
 - A team like this is a great way for solo or small offices to get campus buy-in/advocates!
- *Transfer* had not been part of or mentioned in the current or any past institution's Strategic Plans
- Transfer Admissions & Engagement was about to begin their Periodic Comprehensive Review



Transfer Services Team

Charged by the Provost to work collaboratively across campus, disciplines, and divisions to:

- Use current available data to identify transfer student needs - both academically and socially - and where Appalachian is meeting or not meeting those needs
- Identify units across campus that can provide transfer student-specific programs or integrate transfer students into existing programs, and assist in executing these programs,
- Raise awareness of transfer student issues among faculty & staff

Accomplishments include:

- Proposed & Created office dedicated to transfer students
- Creation of the Transfer Champion Award
- Enhanced support of Early College Students
- Include transfer students in the Common Reading Program
- Allow transfer students with AA/AS degrees to be advised by Colleges rather than UC Advising during orientation advising
- Research and proposals on topics including: Transfer Student Center, Transfer Seminar, transfer scholarships, off-campus housing market, “new student” notation on teaching & advising rosters



A little more...

- 24 members of the team, chaired by Director of Transfer Recruitment & Retention
- Faculty representative from each college and the library, staff representatives from many offices that support student success, and students when possible.
- Most of the faculty representatives are also Faculty Transfer Mentors
- Team meets monthly during the semester



University Strategic Plan

Strategic Plan 2014-2019: *The Appalachian Experience: Envisioning a just and sustainable future*

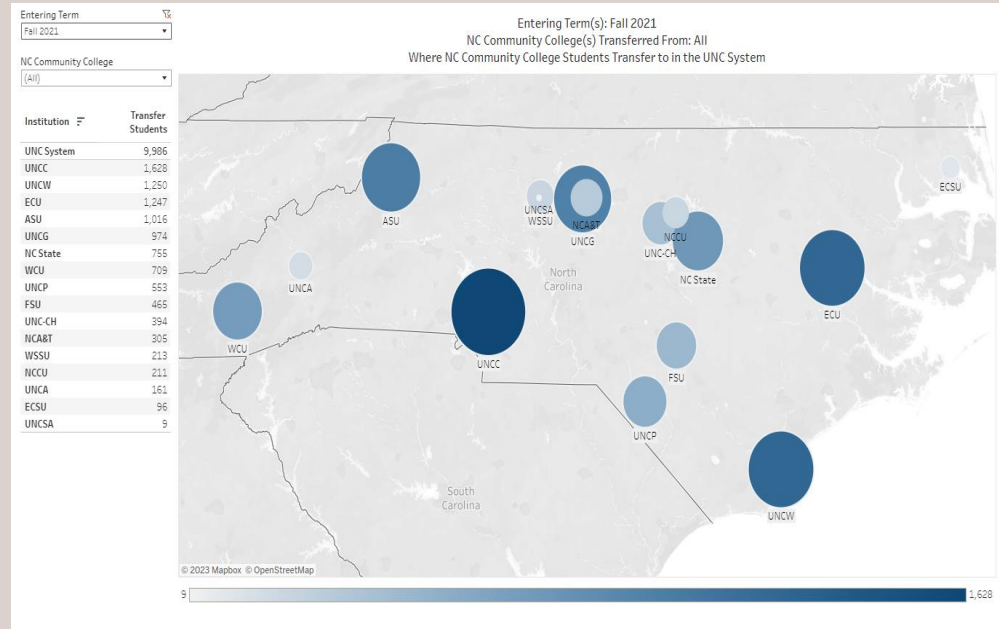
- Sustainable, global focus and diversity--but nothing on transfer students

When we started working on our plan, the University was in early planning for our next plan and we wanted to have some input into the language.

Bridge Strategic Plan 2021-2022

- reaction to COVID 19

Strategic Plan 2022-2027: Empowering Human Potential through the Appalachian Experience



Transfer Admissions & Engagement:

- Office of 22 dedicated to transfer students at Appalachian
- We help students from when they are first thinking about App through to staying involved as alumni!
 - Admissions Counselors, Pre-Transfer Advising
 - Application Processing, Credit Articulation
 - Transitional assistance & Integration
 - TrACE Grant program
 - Engagement events & programming, transfer residence hall, Retention efforts
 - Transfer Alumni Network
- Periodic Comprehensive Review (PCR) is completed every 7 years by all offices on campus for program review & planning



Process of our Strategic Plan

1. Strategic Plan Primer from IRAP

- Provided an overview to team of what it takes to complete a strategic plan



Process of our Strategic Plan

2. Data collection

- **SWOT analysis**
 - **Strengths** are defined as things we are doing well, qualities that distinguish us from other institutions, or dedicated resources. What are some of the strengths of Appalachian's transfer student experience?
 - **Weaknesses** are defined as things we are lacking, qualities that other institutions have that we do not, or resource limitations. What are some of the weaknesses of Appalachian's transfer student experience?
 - **Opportunities** are defined as external emerging issues that could positively impact Appalachian's transfer student experience. What are some emerging opportunities facing Appalachian's transfer student experience?
 - **Threats** are defined as external emerging issues that could negatively impact Appalachian's transfer student experience. What are some emerging threats facing Appalachian's transfer student experience?
- **Student Surveys**
 - **Transfer Student Surveys & New Mountaineer Surveys**
- **Transfer Student Mentor input**

Process of our Strategic Plan

3. TST identified themes and we grouped them into larger goals

- Through the surveys and SWOT analysis we identified six larger goals



Process of our Strategic Plan

4. Split team into 6 smaller groups to identify initiatives from data

- Teams reviewed data to identify initiatives
- Initiatives needed to be achievable but impactful
- Not all initiatives would be led by the TST or Transfer Admissions & Engagement. Some will be recommendations to other areas like scholarships or parking



Process of our Strategic Plan

5. Team gave feedback, edits to other groups

- We ensured that all team members had input and a voice in each goal and initiative



Example....



Advocacy: Dissemination of transfer-specific information

- Increase communication and visibility around transfer student success, challenges, and opportunities.
- Increase transfer inclusive language (versus first-year centric language) in campus events and communications.

Advocacy: Scholarships

- Increase the number and dollar amount of scholarships and identify potential donors for transfer-specific scholarships.
- Create more pathways for transfer students in already established campus scholarship programs.

**A copy of our Strategic Plan is available at
<https://transfer.appstate.edu/node/626>**

What is the “So What?”



- An active collaboration between departments and colleges
- A holistic review of the unique academic and social needs of transfer students
- Creates buy in & help -- great for those solo transfer practitioners!
- Gives us a road map of future work to ensure transfer students persist & succeed!

What's happened since?

- We provided our Transfer Student Experience Strategic Plan to the University Strategic Planning group working on the next University Strategic Plan. Unfortunately they still did not specifically mention transfer and adult students or our partners in community colleges.
- Plan was also given to the Enrollment Planning Council for their review & consideration.
- Transfer Admissions & Engagement used this for both goal planning and their Periodic Comprehensive Review.

What's happened since?

- The Transfer Services Team has used this to direct their work the last two years
 - Prioritized the initiatives by ranking their preferences as a group
 - Team is split into 2 groups each year; groups investigate the initiative, research the issue, and make recommendations and/or implement change when possible
 - Year 1
 - Advocacy: Scholarships
 - Diversity & Inclusion: Increase training of faculty, staff, and students
 - Year 2
 - Continue work from Year 1 Initiatives
 - Communication: Pre-Transfer Arrival Communication

Questions?

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To learn more:

Morton, K. & McCallister, K. (2022, July).
Creating a strategic plan for the transfer
student experience. Strategic Enrollment
Management Quarterly, 10 (2), p. 41-47.

