How often have you heard the question, “how will my credits transfer”? EAB has partnered with universities across the country to deploy the Transfer Portal technology to answer this critical question while building the transfer pipeline and deploying best practices strategies that reduce transfer barriers. Attendees will learn how EAB members have strengthened their market position, connected with stealth shoppers, and improved the transfer experience with focused and research-informed, high-impact admissions team activity.

**Allison Akalonu, Director, Transfer**

**Matthew Sheldon, Associate Director for Client Development, Transfer**

EAB
Leveraging Technology to Improve Transfer Recruitment

NISTS 2022

February 2, 2022
Allison Ray Akalonu
Director, Transfer
EAB Enrollment Services
We help schools support students from enrollment to graduation and beyond

ROOTED IN RESEARCH
- 7,500+ Peer-tested best practices
- 500+ Enrollment innovations tested annually

ADVANTAGE OF SCALE
- 1,500+ Institutions served
- 4 M+ Students supported by our SSMS

WE DELIVER RESULTS
- 95% Of our partners continue with us year after year, reflecting the goals we achieve together

Find and enroll your right-fit students
Support and graduate more students
Prepare your institution for the future
1. State of Transfer

2. Transfer Challenges

3. Getting Started
### A Demography Challenge Exacerbated in the Years Ahead

#### 2020

**Ongoing Headwind**

**New Acute Challenges**

<table>
<thead>
<tr>
<th>New Student Barriers</th>
<th>New Implications for You</th>
</tr>
</thead>
<tbody>
<tr>
<td>Widespread Testing and Academic Disruptions</td>
<td>List Source Uncertainty</td>
</tr>
<tr>
<td>Challenges in Obtaining Counselor Support</td>
<td>Self-Service Imperative</td>
</tr>
<tr>
<td>Major Limitations on ‘IRL’ Opportunities to Visit or Learn</td>
<td>Persistent Virtual Interactions</td>
</tr>
<tr>
<td>Uncertainty About Process, Affordability, and Choices</td>
<td>Lack of Predictability</td>
</tr>
</tbody>
</table>
Transfer Landscape

Quick recap of 2020 – 2021 school year

New schools focused on transfer

10%

increase in transfer enrollment at highly selective institutions¹

Enhanced competition

23%

of schools will consider recruiting students who have already committed to another institution²

Community College decline

9.1%

national decline in Community College enrollment³

Transfer decline

9%

national decline in transfer enrollment⁴

¹) National Student Clearinghouse data; (2021, June)
²) “What We Know About Transfer” Community College Research Center
³) National Student Clearinghouse data; (2021, April)
⁴) National Student Clearinghouse data; (2021, June)

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Transfer Landscape
Where we are today

- Transfer enrollment stays flat
  - 1% national decline in transfer enrollment

- Highly selective transfer
  - 4% increase in transfer to highly selective schools

- Community College decline
  - 5.7% national decline in Community College Enrollment

- Lateral transfer increase
  - 9% national increase in students transferring between 4 year schools

1) National Student Clearinghouse press release (2022, January)
2) National Student Clearinghouse press release (2022, January)
3) National Student Clearinghouse press release (2021, November)
4) National Student Clearinghouse press release (2022, January)
A Closer Look at Community College Students

Intention to Transfer Is High Among Community College Students

81% of community college students express a desire to earn a bachelor's degree.

25% of community college students end up transferring to a 4-year school.

"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
1. The State of Transfer

2. Transfer Challenges

3. Getting Started
What are your most pressing transfer issues, questions, or challenges?

- **Enrollment Strategy & Transfer Market**
  - Creating the right strategy with limited resources
  - Transfer enrollment growth and availability of pipeline
  - Increasing applications and improving overall funnel health
  - Ability to pivot quickly with COVID
  - Melt mitigation
  - Non-traditional population

- **Admissions & Staff Capacity**
  - Community college engagement and/or visits
  - Keeping students engaged across all stages of funnel
  - Staff capacity and gaining institutional buy-in
  - Doing “all of the things”
  - Ability to support and engage virtually
  - Website experience and/or clear transfer materials

- **Credit Evaluation, Data Management, Process**
  - Timely information on how credits will transfer
  - Transfer articulation and course equivalency management
  - Disconnected systems: System for storing student inquiry data do not connect
  - Variable admissions process across academic departments

- **Advising, Registration, Onboarding**
  - Self-service resources
  - Creating academic/guided pathways
  - Dedicated transfer academic advising
  - Late admission process, full courses at registration
  - Transfer orientation (online)
  - Onboarding process

Source: EAB survey, focus groups, and interviews
How this Translates to Students: Winding Road of Transfer

- Student unsure of which courses they need or how past **credit** will transfer and apply to degree
- Student hasn’t taken pre-requisite courses required for major of choice
- Student can’t find transfer information easily from the website or finds information confusing
- Student has questions about **cost**, given past financial aid and scholarships available to transfer students
- Transition from Admissions to Advising is unclear, student wants to register but doesn’t know how
- The courses the student would like to take to stay on track are full

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1. The State of Transfer
2. Transfer Challenges
3. Getting Started
Students Must Be at the Center of Every Enrollment Decision

They are doing self-directed research on your website

79% of students ranked the college website as a top information source

They are ignoring inauthentic college communications

50% higher response rate when student-centered copy is used

They are using virtual tours to evaluate your campus

3X increase in virtual tour traffic in 2020

They are extremely concerned about the cost of college

62% of students say their top concern is fear of drowning in debt

They are concerned with transfer of credit

43% of academic credits are lost in transfer
How Transfer-Friendly are you?

Take a Holistic Approach to Transfer Readiness: From the Inside Out

<table>
<thead>
<tr>
<th>FOUNDATION</th>
<th>AWARENESS</th>
<th>YIELD &amp; SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Prioritize Institutional Support for Transfer Students</td>
<td>3. Promote Transfer and Provide Detail on Cost, Credit, and Completion</td>
<td>5. Qualify and Engage Prospective Transfer Students</td>
</tr>
<tr>
<td>2. Build Community College Partnerships and Transfer Pathways</td>
<td>4. Create Transfer-Friendly Website and Self-Services Resources</td>
<td>6. Conduct Timely and Consistent Credit Evaluation</td>
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<td></td>
<td></td>
<td>7. Provide Early Transfer Advising, Onboarding, and Support</td>
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“Our conversations with EAB made us realize we need to take a strategic approach to community college partnership development and to focus our attention on where it matters most.”

– Vice President of Enrollment Management, Regional Public University
## Transfer Maturity Curve

### Ensuring Readiness for Technology and Planning Optimization Path for Growth

<table>
<thead>
<tr>
<th>Level 0</th>
<th>Level 1</th>
<th>Level 2</th>
<th>Level 3</th>
<th>Level 4</th>
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</table>

### Absent
- Little to no understanding of current processes
- Little to no evaluation of efforts

### Limited
- Processes implemented inconsistently
- Evaluation focused only on process metrics

### Expanded
- Process changes informed by best practice, focused on efficiencies
- Evaluation focused only on process metrics

### Strategic
- Objectives align with institutional goals
- Strategy informed by historical and current data trends
- Process changes informed by best practice, focused on outcomes
- Evaluation inclusive of process and outcome metrics

### Transformative
- Consistent and ongoing evaluation of impact informs future iterations
- Focus shifts to increasing impact and scale of people, processes, and technology
- Changes embedded into daily workflow and team culture
Transfer Portal Recap & Questions

**Student-Facing:** Provide a one-stop-shop for prospective transfers to learn about the transfer process

- Easy **self-service credit estimation**, including real-time, automated progress-to-degree
- Unparalleled **major and career exploration**
- Customizable, **personalized checklist** to keep prospects on track to enroll
- Consolidated list of **key institutional resources**
- High student **engagement and yield**

**Staff-Facing:** Gain insight into the transfer stealth population and inform transfer recruitment strategy

- Pipeline **tracking and analysis** and **full-funnel metrics** and gap-to-goal
- Data used to inform **targeted outreach strategy** and prioritize recruitment efforts
- Identifies **credit equivalency gaps**
- Spreads out requests for equivalency reviews, helping **avoid overwhelming staff and faculty** at peak application periods
- Easy maintenance of site with **integrated, automated data updates** of SIS and degree audit data

“I’ve spent a lot of time looking for information on different college websites and this [EAB Portal] was 10-times easier. Having all the information in one place makes the whole process seem way less intimidating.”

*Transfer Portal Student User*

“The portal provides insight into what the student is thinking and what is important to them, allowing us to adjust marketing and course offerings accordingly.”

*Chief Data Officer*
Impact for Transfer Portal Partners

Expanding Beyond Core Markets

1 in 3
Portal users come from out of state

Building the Future Pipeline

40+% Share of Portal users who intend to transfer in 2019 or 2020

Driving Application Velocity

30+% Increase in application completion percentage among Portal users

Improving Yield

24% Higher yield among Portal users
Next Steps

Matt
Associate Director, Transfer
EAB Enrollment Services
Email: msheldon@eab.com

Allison
Director, Transfer
EAB Enrollment Services
Email: aakalonu@eab.com

Rate today’s session by completing the evaluation at the end of the session.

Email us to discuss your institution’s transfer program and to learn more about the Transfer Portal implementation process.
## Comprehensive Approach to Technology Delivery

<table>
<thead>
<tr>
<th>Human Capital to Support Launch</th>
<th>Years of Expertise to Guide the Way</th>
<th>Strategies to Ensure Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic Leader and Launch Team</strong>&lt;br&gt;Dedicated staff work directly with your institution to facilitate implementation, identify opportunities for impact, and advise on systemic challenges</td>
<td><strong>Change Management and Workflow</strong>&lt;br&gt;Customized support and strategies to launch the project, followed by ongoing monitoring of utilization and effectiveness</td>
<td><strong>Promotion, Communication, Transfer Strategy</strong>&lt;br&gt;Strategic resources and toolkits with clear directions for all stakeholders and a variety of resources to successfully launch the platform</td>
</tr>
<tr>
<td><strong>Streamlined Data Extracts</strong>&lt;br&gt;EAB specialists pull files directly from your institution’s SIS twice a day, validating data to ensure quality</td>
<td><strong>Implementation Best Practices</strong>&lt;br&gt;Prepared documents, templates, and configurations, to help you launch without starting from scratch</td>
<td><strong>Training and Coaching</strong>&lt;br&gt;Virtual and onsite orientation, guided training on functionality and features, and ongoing support sharing best practices and super-user tips to optimize value</td>
</tr>
</tbody>
</table>

“...Enrollment Management had no real insight into the Registrar’s Office and it was difficult to collaborate. We have been able to leverage the Transfer Portal as an internal ‘lever’ for process change. If we get nothing else out of this project, this alone has been worth the investment.” - Private Selective, Dean of Enrollment Management
Implementation Timeline
Upfront Support Combined with EAB’s Transfer Expertise Ensure Smooth Rollout

Readiness and Optimization Accelerator
EAB and cross-functional implementation teams assess transfer program to create customized launch plan

Market Launch
Launch Transfer Portal with press releases, website links, and marketing collateral

Months 1-2
Build and Testing
Complete Transfer Portal build, including customization of checklist and list of key resources; pilot in soft launch with transfer team

Months 2-4

Months 4-8

Months +
Expansion
Extend Transfer Portal marketing and use portal to deepen existing partnerships and add new ones

"Out of my entire career, spanning 30+ implementations, you are the only vendor and technical implementation where we have hit go-live and that's saying something."

- Associate Vice Chancellor of Enrollment Services, Large Public University
Partner Testimonials

"One of the only implementations that has concluded on-budget and before projected deadline."

- Vice President of Enrollment Management, Private Selective University

"The implementation process has gone very smoothly and the EAB team has been very organized. The cadence and structure have worked well for us. Our partnership with EAB has helped us formalize an intentional effort to develop partnerships in a better way."

- Vice President of Enrollment Management, Regional Public University

“I recently met with a prospective student that is considering transferring and changing their major from Business to Environmental Science. Through the Transfer Portal, I noticed this student had several Business courses and thought they might instead want to major in Environmental Management. I walked them through selecting both programs in Transfer Portal and putting in their transfer credit. We were able to see that they are about halfway complete with the Environmental Management degree, compared to the initial degree of interest (Environmental Science). The Transfer Portal helped me facilitate a conversation about the differences between the two programs. The visual of how their transfer credit would apply to each degree was very helpful."

- Transfer Advisor, Large Public University