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*Sponsored Session*

## **2324 - Leveraging Technology to Recruit Transfer Students**

Matriculation Trends and Issues, Partnerships and Collaboration

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

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*NISTS 2022*

*February 2, 2022*



# Allison Ray Akalonu

Director, Transfer  
EAB Enrollment Services



**We help schools support students from enrollment to graduation and beyond**

➤ Find and enroll your right-fit students

➤ Support and graduate more students



➤ **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**

➤ Prepare your institution for the future

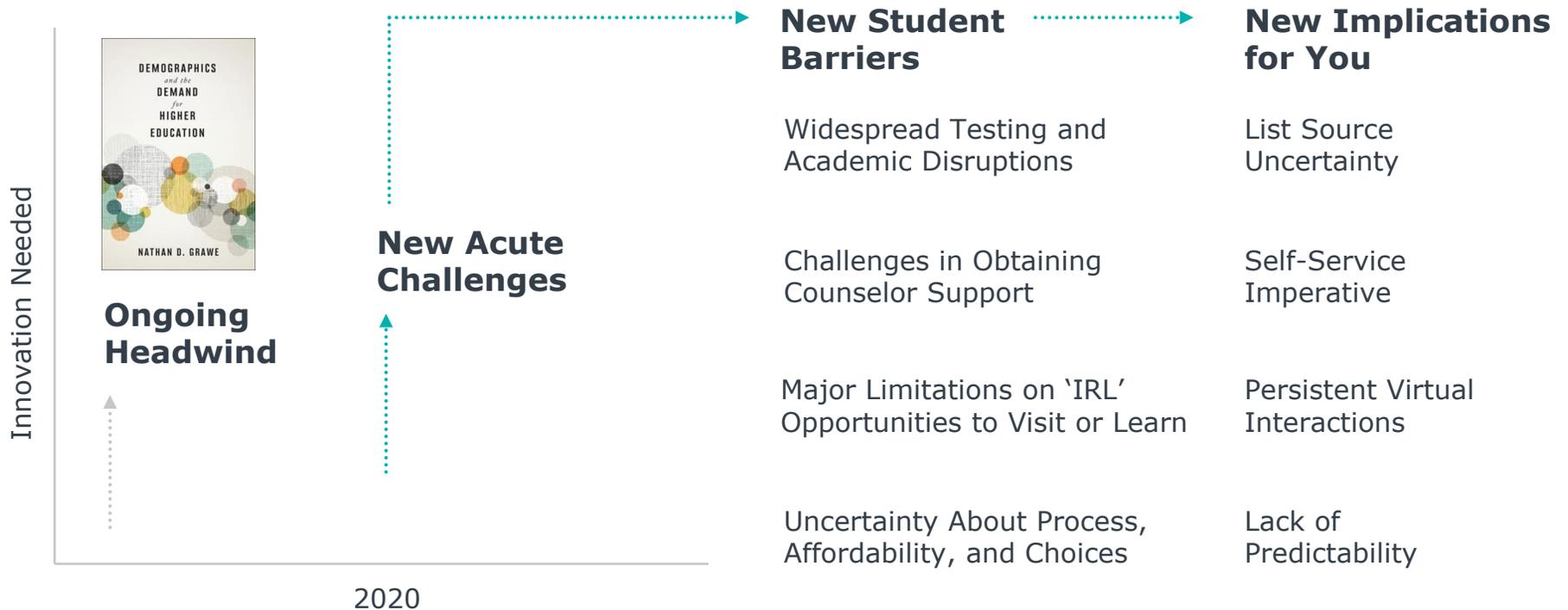
1 State of Transfer

2 Transfer Challenges

3 Getting Started

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# A Demography Challenge Exacerbated in the Years Ahead



# Transfer Landscape

Quick recap of 2020 – 2021 school year



**New schools  
focused on  
transfer**

**10%**

increase in transfer enrollment at highly selective institutions<sup>1</sup>



**Enhanced  
competition**

**23%**

of schools will consider recruiting students who have already committed to another institution<sup>2</sup>



**Community  
College decline**

**9.1%**

national decline in Community College enrollment<sup>3</sup>



**Transfer  
decline**

**9%**

national decline in transfer enrollment<sup>4</sup>

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

# Transfer Landscape

Where we are today



**Transfer enrollment stays flat**

1%

national decline in transfer enrollment<sup>1</sup>



**Highly selective transfer**

4%

increase in transfer to highly selective schools<sup>2</sup>



**Community College decline**

5.7%

national decline in Community College Enrollment<sup>3</sup>



**Lateral transfer increase**

9%

national increase in students transferring between 4 year schools<sup>4</sup>

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



Only

85%

of community college students expect to be enrolling in a 4-year institution to earn a bachelor's degree

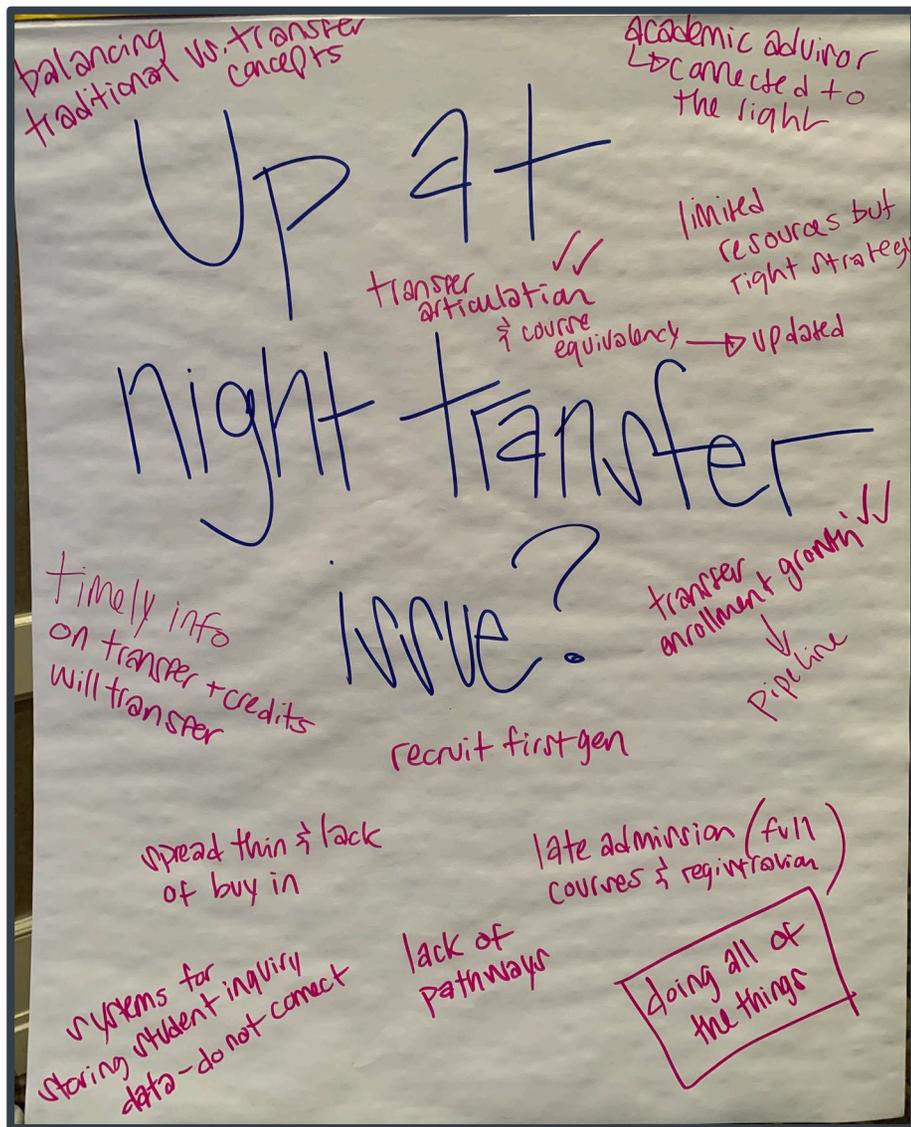


“The primary challenge for the two-year sector in the next fifteen years is clear: dramatically reduced enrollments. Indeed, the **expected rate of contraction in two-year enrollments is almost 20% faster than for college enrollments in general.**”

Nathan Grawe, *Demographics and the Demand for Higher Education*, 2018

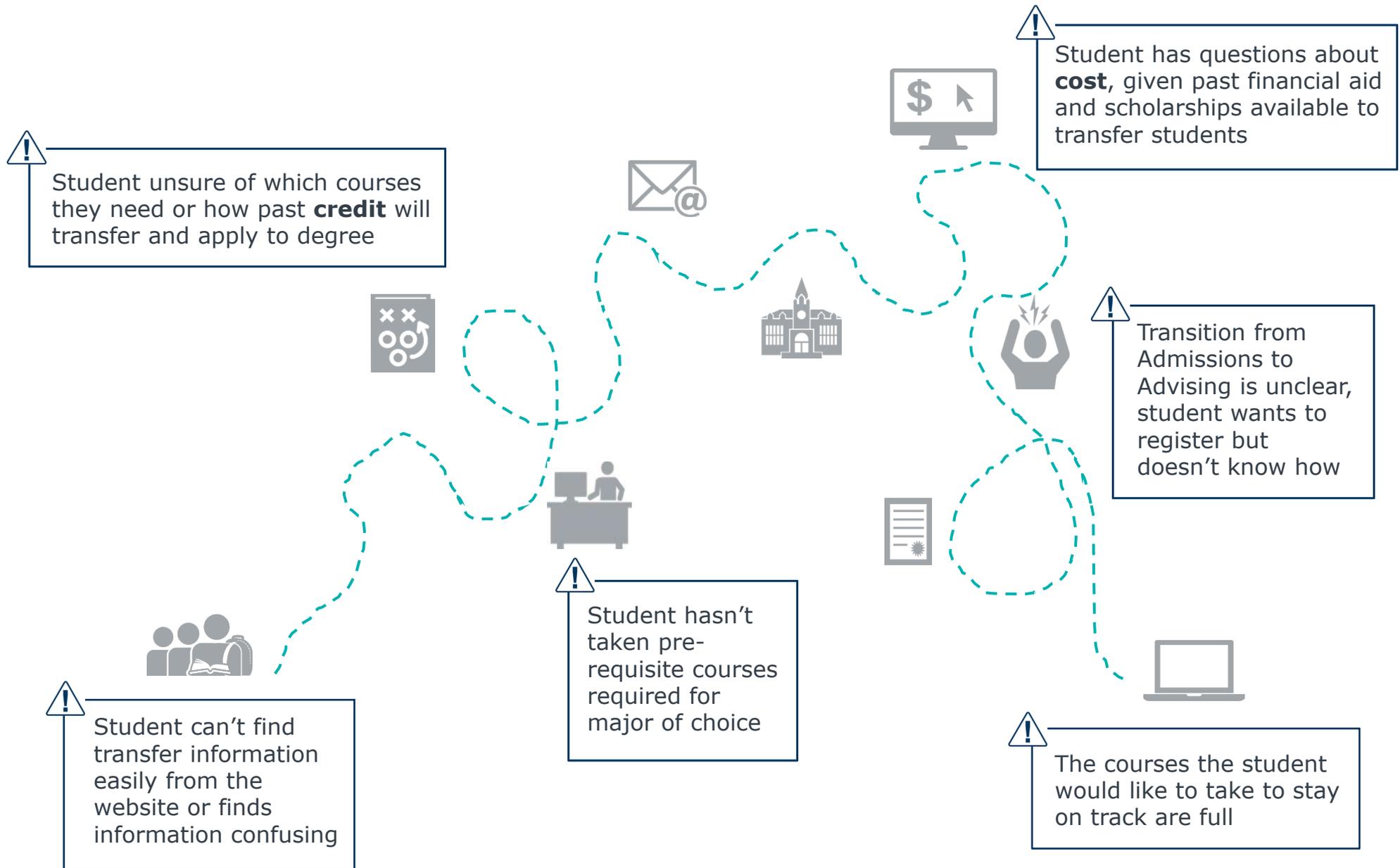
- 1 The State of Transfer
  - 2 **Transfer Challenges**
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# What are your most pressing transfer issues, questions, or challenges?



- ▶ **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

# How this Translates to Students: Winding Road of Transfer



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

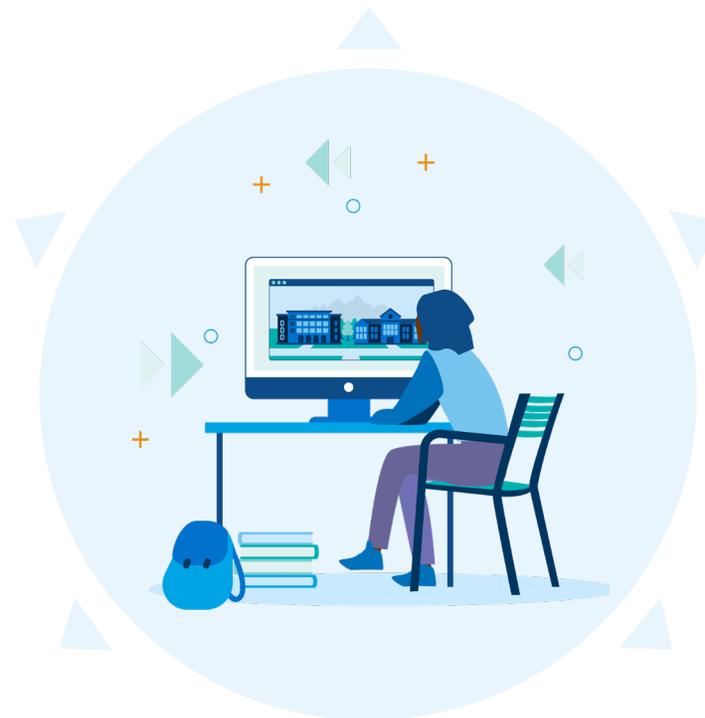
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They are doing self-directed research on your website

**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 extremely concerned about the cost of college

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

They are using virtual tours to evaluate your campus

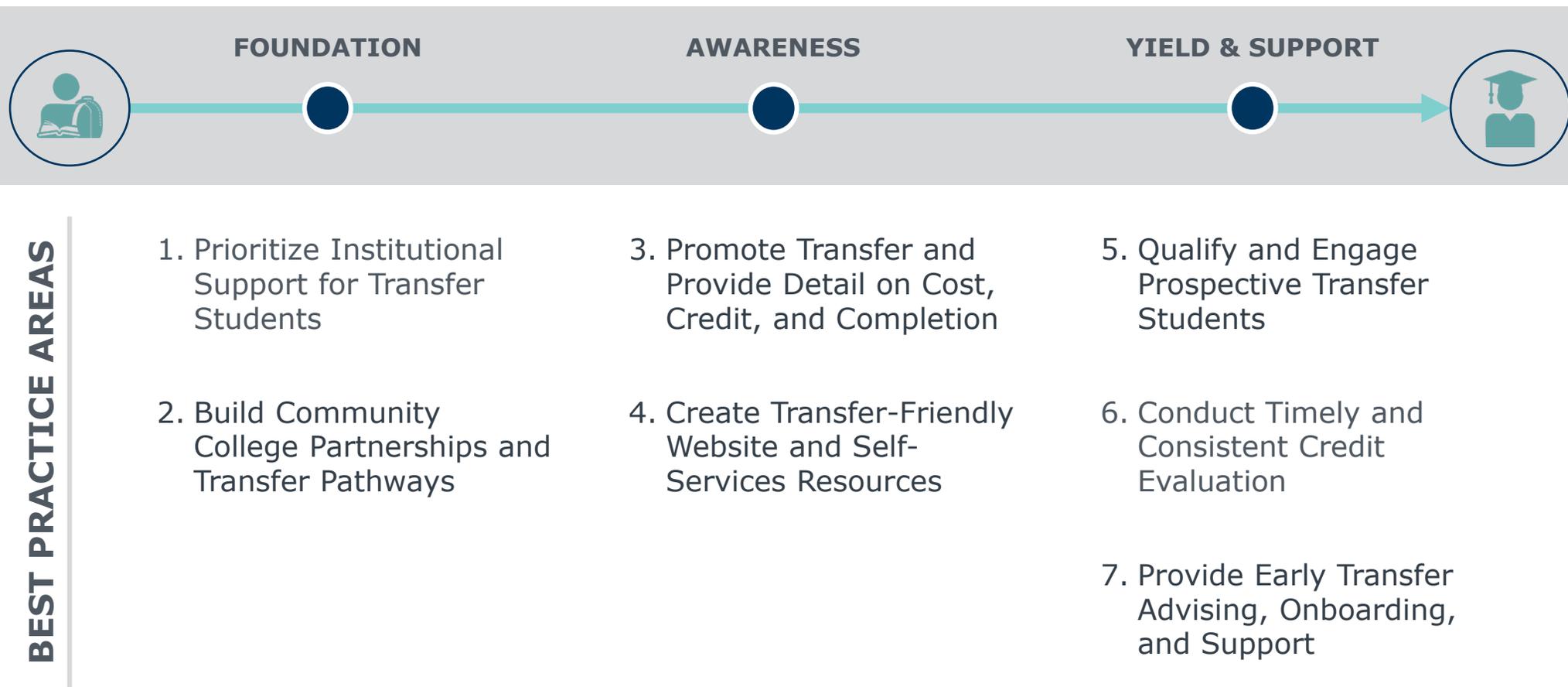
**3X** increase in virtual tour traffic in 2020

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

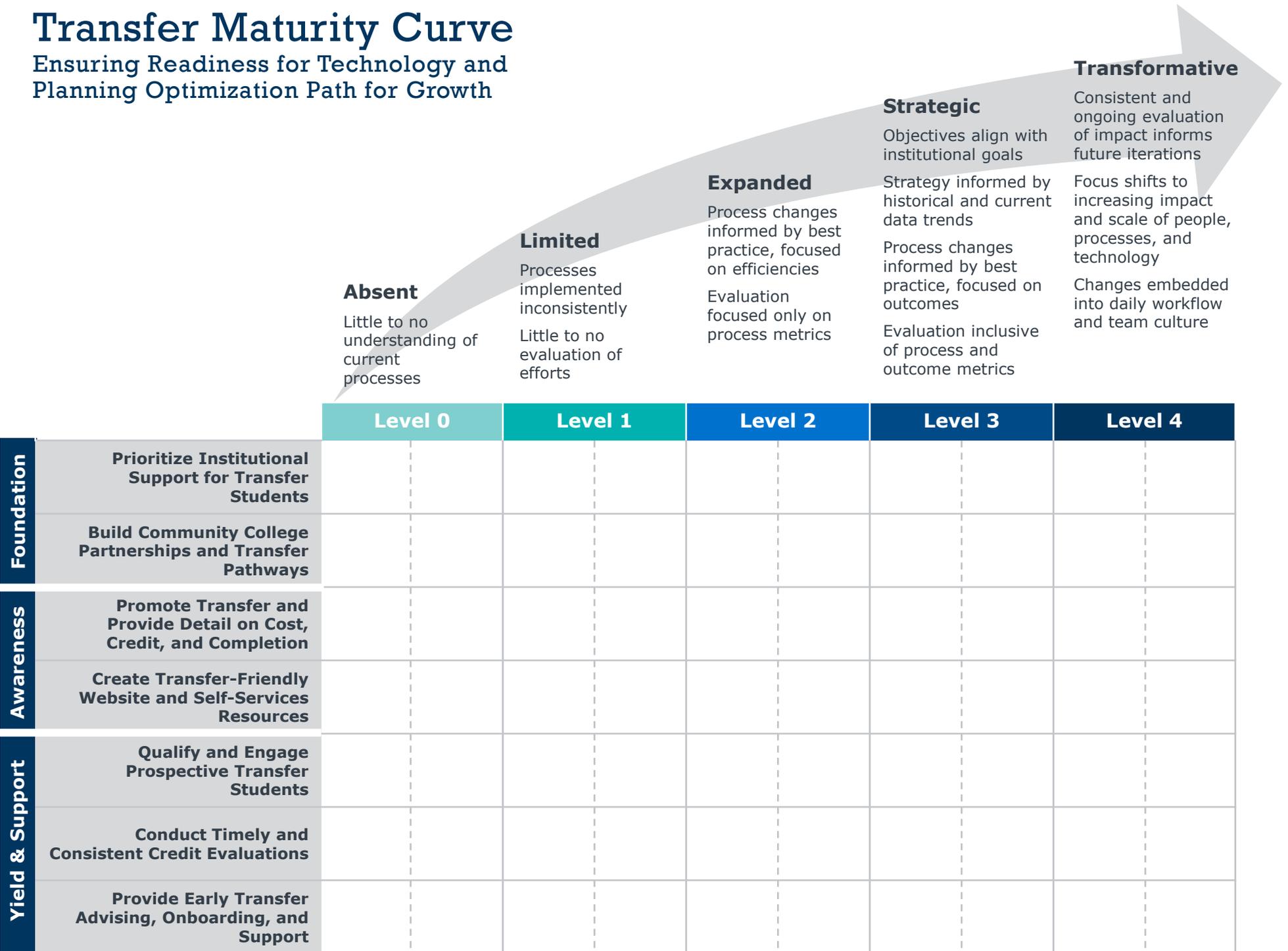


“Our conversations with EAB **made us realize we need to take a strategic approach to community college partnership development** and to focus our attention on where it matters most.”

– Vice President of Enrollment Management, Regional Public University

# Transfer Maturity Curve

Ensuring Readiness for Technology and Planning Optimization Path for Growth



## Transfer Portal Recap & Questions

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**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

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## Expanding Beyond Core Markets

1 in 3

Portal users comes 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



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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

## Human Capital to Support Launch



### Strategic Leader and Launch Team

Dedicated staff work directly with your institution to facilitate implementation, identify opportunities for impact, and advise on systemic challenges

## Years of Expertise to Guide the Way



### Change Management and Workflow

Customized support and strategies to launch the project, followed by ongoing monitoring of utilization and effectiveness

## Strategies to Ensure Adoption



### Promotion, Communication, Transfer Strategy

Strategic resources and toolkits with clear directions for all stakeholders and a variety of resources to successfully launch the platform



### Streamlined Data Extracts

EAB specialists pull files directly from your institution's SIS twice a day, validating data to ensure quality



### Implementation Best Practices

Prepared documents, templates, and configurations, to help you launch without starting from scratch



### Training and Coaching

Virtual and onsite orientation, guided training on functionality and features, and ongoing support sharing best practices and super-user tips to optimize value

"...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



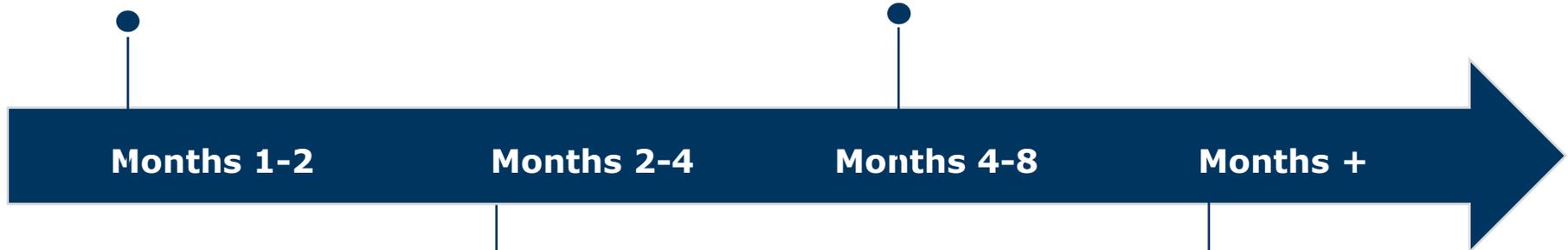
## Readiness and Optimization Accelerator

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

Months 2-4

Months 4-8

Months +



## Build and Testing

Complete Transfer Portal build, including customization of checklist and list of key resources; pilot in soft launch with transfer team



## 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

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"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*



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