Educational Partner/Sponsor Session

2874 - Recruiting Transfer Students in a Changing Enrollment Landscape
Credits and Degree Pathways, Matriculation Trends and Issues

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 Portal
Matt Sheldon, Associate Director, Business Development
EAB
Recruiting Transfer Students in a Changing Enrollment Landscape

February 2023
Matt Sheldon
Associate Director, Transfer
EAB Enrollment Services

Allison Ray Akalonu
Director, Transfer
EAB Enrollment Services
We partner with 2,500+ institutions to accelerate progress and enable lasting change.

95%+ of our partners return to us year after year because of results we achieve, together.
1. Understand the Transfer Landscape

2. Introduce Framework to Improve Transfer Friendliness and Transfer Program

3. The Transfer Portal and How It Supports are Partners
Transfer Landscape
NSC and Inside Higher Ed

- **Transfer enrollment declines**: 14%
  - National decline in transfer enrollment during the pandemic

- **Highly selective transfer**: 10%
  - Increase in transfer to highly selective schools from 19-20

- **Community College decline**: 20%
  - National decline in first time student enrollment in Community College

- **Enhanced competition**: 77%
  - Of Directors of Admissions indicated that recruiting transfer would be a priority next year

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1) National Student Clearinghouse press release (2022, September)
2) National Student Clearinghouse press release (2022, January)
3) Transfer students are key to recovering lost pandemic enrollment, EAB (2022, March)
4) Admissions Survey in a World of Change, Inside Higher Ed (2022, September)
Transfer Landscape
2022 AACRAO Survey

Lack of staff investment
75%
Of schools surveyed have 4 or fewer employees dedicated to transfer

Long wait times for students
38%
Of schools can turn around a transfer evaluation in 2 – 3 days

Lack of communication with partners
39%
Of schools regularly communicate via email with community college partners

Struggle with alignment across campus
“We have a series of independent initiatives that are not tied to a campus-wide purpose”

1) Untangling Transfer, Who, When and Why, AACRAO; (April, 2022)
2) Untangling Transfer, Who, When and Why, AACRAO; (April, 2022)
3) Untangling Transfer, Who, When and Why, AACRAO; (April, 2022)
4) Untangling Transfer, Who, When and Why, AACRAO; (April, 2022)
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. Understand the Transfer Landscape

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How Does Transformation Happen?

People + Process + Technology

How it Should Look

People

Process

Technology

How it Frequently Looks

People

Process

Technology
How Transfer-Friendly Is Your Institution?

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

FOUNDATION

1. Prioritize Institutional Support for Transfer Students
2. Build Community College Partnerships and Transfer Pathways

AWARENESS

3. Promote Transfer and Provide Detail on Cost, Credit, and Completion
4. Create Transfer-Friendly Website and Self-Services Resources

YIELD & SUPPORT

5. Qualify and Engage Prospective Transfer Students
6. Conduct Timely and Consistent Credit Evaluation
7. Provide Early Transfer Advising, Onboarding, and Support
## Transfer Maturity Curve

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

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

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

### Expanded
- Process changes informed by historical and current data trends
- Process changes informed by best practice, focused on outcomes
- Evaluation inclusive of process and outcome 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
1 Understand the Transfer Landscape

2 Introduce Framework to Improve Transfer Friendliness and Transfer Program

3 The Transfer Portal and How It Supports are Partners
Transfer Portal
Demo
Transfer Portal Recap & Questions
Provides End-to-End Support to Boost Enrollment and Drive Yield

Student-Facing Dashboard

- Unique **Self-Service Credit Estimations**, Including Progress to Degree
- Unparalleled **Major and Career Exploration**
- Customizable, **Personalized Checklist** to Keep Prospects on Track to Enroll
- Consolidated List of **Key Institutional Resources**

Administrator-Facing Dashboard

- Pipeline **tracking and analysis**
- **Full-funnel metrics** and gap-to-goal
- Use data to inform targeted outreach strategy and prioritize recruitment efforts

“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.”

*David Wright*
*Chief Data Officer*
Impact for Transfer Portal Partners

**Expanding Beyond Core Markets**

1 in 3

Portal users come from out of state

**Driving Application Velocity**

30+%

Increase in application completion percentage among Portal users

**Building the Future Pipeline**

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

**Improving Yield**

24%

Higher yield among Portal users
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**
Comprehensive Approach to Technology Delivery

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<th>Human Capital to Support Launch</th>
<th>Years of Expertise to Guide the Way</th>
<th>Strategies to Ensure Adoption</th>
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| **Strategic Leader and Launch Team**
  Dedicated staff work directly with your institution to facilitate implementation, identify opportunities for impact, and advise on systemic challenges | **Change Management and Workflow**
  Customized support and strategies to launch the project, followed by ongoing monitoring of utilization and effectiveness | **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**
Transfer Resources and Upcoming Events

EAB Transfer Resources

• EAB’s one stop shop for research and news.

• Transfer Podcast: Featuring Ted R. McKown, Senior Associate Director of Transfer Enrollment at Kent State University. Available now.

• Transfer Resources:
  • National Student Clearinghouse: Transfer Mobility and Tracking Transfer
  • Inside Higher Ed: Beyond Transfer
  • CCRC: Tackling Transfer
  • Aspen Institute: Tackling Transfer
  • ACE: Reimagining Transfer for Student Success

Upcoming EAB & Industry Events

• 2023 AACRAO Tech & Transfer Summit – More information here
  ◦ July 11 - 13, 2023
  ◦ Virtual
Open Forum Q&A
Next Steps

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Rate today’s session by completing the survey

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