Facilitated Discussion

Transfer Student Success Model
Transition Programs and Services, Partnerships and Collaboration

Creating an advising-coaching model with coordination and collaboration across campus led to increased retention in just one year. Developing a holistic model to support students, focused on transition, intentional on-boarding and advising, and career readiness created a clear pathway for increased transfer engagement. Beginning with on-boarding, which requires an individual meeting with a Success Coach, a Career Services Counselor, and Financial Aid Advisor, every student develops a personalized success plan.

Kelsey Samsel, Associate Director and Success Coach
Michael Kinsey, Associate Director and Success Coach
Roel Martinez, Associate Director and Success Coach

St. Edward's University
Transfer Student Success Model

Speakers

Mrs. Kelsey Samsel
Associate Director Academic Counseling and Exploration

Mr. Roel Martinez
Associate Director Academic Counseling and Exploration

Mr. Michael Kinsey
Associate Director Academic Counseling and Exploration
To discuss how to best serve transfer students. We will:

- **Define** individualized support and what it means to attendees within their institutions
- **Identify** unique opportunities that can be capitalized on in their campuses
- **Share** how we meet students where they are, while using resources and tools available to the campus

**Learning Outcomes**

01. **Transfer Success Model**
   Learn about St. Edward’s Transfer Success Model and implementation process

02. **Reflection**
   Spend time reflecting on your institution and what may be helpful takeaways from the discussion

03. **Tools and Resources**
   Share current resources and learn about what other institutions are using

04. **Exploration**
   Explore current technology and personnel that could be used to support this model
St. Edward’s Institution Overview

- Private, 4 year
- Liberal Arts
- 15:1 Student-to-Faculty; 18 Average Class size
- 3,388 Undergraduate; 25% Transfer Population
- Onboard 300 transfer students a year

1-yr Retention Rate by Transfer Cohort
- Transfer 1-yr retention rate well below that of First-Time-Freshman.
Task Force Created to Address Challenges

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| • Academic Counseling and Exploration  
• Admissions  
• Career and Professional Development  
• Deans  
• Department Chairs  
• Registrar  
• Student Financial Services  | • Review retention data showing gap in persistence  
• Review student success survey data showcasing the questions and concerns transfer students have  
• Review current practices and work to create transparent and streamlined process.  
• Goal: to ensure, prior to first day of class students have a graduation plan, understand their financial obligations and connect to career resources.  
• Make recommendations |

Transfer Challenges

Credits
“How do my credits transfer?”

Time to Graduate
“How long will it take me to graduate?”

Registration
“When can I register for classes?”

Cost
“How much will it cost?”

Other questions to consider when determining support:
• How do we serve our transfer students more effectively and efficiently and ultimately increase retention?  
• How do we expand our outreach to potential transfer students to increase enrollment?
**Transfer Credits**

**Challenge**
- Transcripts not being sent by student in time for advising, causing advising and registration issues
- Courses previously taken not applying to degree plan, causing extension of graduation time frame
- Students were retaking courses they had already taken
- Credits being approved and tracked through multiple, various offices
- Accumulated credit not being tracked and updated in Banner

**Recommendations**
- Create 2+2 and 3+1 plans
- Align requirements or Transfer acceptances with Texas Common Core and Core Complete
- Actively participate in TX Higher Ed Common Course Numbering

**Time to Graduation**

**Challenge**
- Transfer students want to graduate quickly and have difficulty understanding all of the requirements of a new institution, including understanding and having a clear path to graduation
- Unevaluated credits were causing graduation time frames to be extended
- Students felt uninformed about the tools and resources available (IE: DegreeWorks, myHilltop, Transfer equivalency guide, etc.)
- Students needed to know how much it would cost to graduate from St. Edward's
- Students want to be ready for a job directly after graduation

**Recommendations**
- Early advising and registration
- Mining for credit
- Early connection to support services: CAPD and SFS
- Continuous personalized communication and transition to faculty advisor

**Registration**

**Challenge**
- Registering on time to get the best schedule
- Ensuring courses were in correct sequence to promote success
- Ensuring courses were applicable to degree plan or finding a degree plan that worked for their credits
- Finding time to attend an advising and registration appointment

**Recommendations**
- Create a Centralized Transition Model
- One-stop shop service
- Streamlined and coordinated communication
- Provides support to students, faculty, and deans

- Created 3-prong Approach
- Early advising and registration
- Mining for credit
- Early connection to support services: CAPD and SFS
- Continuous personalized communication and transition to faculty advisor

- Support the creation of a Transfer Task Force to Review Articulation Agreements
- Creation of a Religious Studies (general education degree requirement) landing pad course for connection to the campus
From that Committee...

**Action:** Address gap in credit issues by:
- Review and discuss any outstanding credit
- Continuously search for and review credit, to maximize applicable degree credit
- Create efficiency and accuracy in assisting schools in credit evaluation
- Track all “found credit”

**Action:** Address questions surrounding graduation time frame by:
- Pro-active, early and ongoing outreach prior to registration and orientation
- Include conversation regarding projected time frame to graduate
- Continuously answer questions related to transfer work, degreeworks training, and degree completion requirements
- Create tentative graduation plan

**Action:** Address concerns with registration by:
- Collaborate with each school to develop appropriate course sequence
- Assess student’s academic history prior to advising and orientation
- Provide students with updated information about general education, curriculum equivalencies, mission markers, etc.
- Increase accessibility to Transfer Advising Office

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**New Transfer Model**

- Developed a Transfer Office and a strategic plan working with Admissions, Registrar’s Office, Academic Advising, Career Services and Student Financial Aid
- Hired a Transfer Success Coach
- Developed an onboarding plan where the student attended a personal advising and registration session to, met with campus partners and communication was sent to student and school advising professional
- Summer:
  - Initial Advising and Registration (Onboarding) > Mining for credit > Campus Partner Connection > Orientation
- Fall/Spring:
  - Communication > Check-ins
  - Transition Meetings in preparation for advising
  - Assisted in transition to faculty advisor
**Continued Support**

**Students**
- Meeting student where they are: In class > Roaming
- In class presentations
- Online and night hours
- Multiple modes of communication: Phone > Online > Text

**Campus Collaboration**
- Frequent partner collaboration and training
- Weekly Advisor Workgroup
- Faculty support
- Working with support staff in each school

**Tools and Technology**

- Salesforce Advisor Link
- Communication
  - Alerts
  - Phone calls
  - Roaming
- Forms
  - Transfer Advising Guides
  - Onboarding Qualtrics forms
- Virtual Assistance
  - Advising and Registration Qualtrics
  - Quick Fix
- Online Transition
  - Google Chat & Voice
  - Zoom & Google Hangout
First year Success!

1000+ Credits Found
Surpassed 1st Year goals
83.3% Retention rate
**Discussion Questions**

- Share how your institutions works with transfer students.
  - What do you think is most effective and why?
  - Are there any gaps?

- What are some takeaways from this model that may work for your campus?

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**Thank you!**

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