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

2835 - It Takes a Village to Recruit a Transfer Student
Credits and Degree Pathways, Credits and Degree Pathways

This interactive session will focus on how you can build cross-departmental transfer champions, create efficiencies in administrative systems and processes, and use best practices to market your institution to transfer students. Through a combination of expert speakers, peer-to-peer networking, and facilitated activities, participants leave the session with a better answer to the question, how do I make my institution more transfer-friendly?

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It Takes a Village to Recruit a Transfer Student

February 22, 2023
Today’s Facilitators

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1 Building Cross-Department Transfer Champions

2 Creating Efficiencies in Systems and Processes

3 Positioning as Transfer-Friendly Destination through Partnerships
Building Cross-Department Transfer Champions
Transfer is a Strategic Priority, Supported by Leadership

1. **Goals and Planning**
Transfer goals are defined, with a strategic enrollment or transfer recruitment plan in place to guide implementation of activities.

2. **Transfer Data**
Data are used by unit leaders and community college partners to inform decisions and strategy.

3. **Transfer Team and Student Experience**
Transfer is a defined area of focus for the Enrollment Management Committee (EMC) and/or a Student Success Committee.
Establishing Transfer Goals and Planning

### Transfer Landscape and Your Regional Market

Economists expect traditional student pipelines to continue shifting and some regions will be more impacted.

- Factor these changes into your enrollment strategies and consider the future needs of your transfer student demographic.

### Feeder Institutions and Transfer Pipeline

Examine your top feeder institutions to better understand which strategies need revisiting.

- Example: Compare yield and degree conferment rates, anticipated growth, and shifts to major offerings/core curricula at feeder institutions. Apply insights to shift recruitment strategy and transfer pathways.

### Transfer Policies or State Initiatives

Increasingly, policymakers are creating guidelines for institutions to follow (e.g., transfer credit acceptance benchmarks, associate degree-to-bachelor degree requirements, etc.).

- These policies can have immense implications for transfer enrollment, awareness, and competitive landscape.

### Transfer Competition

Identify your key competitors, their competitive threat, and risk to your market share.

- Consider their transfer-in rate (available on IPEDS) and key components of their transfer program.
- Craft responses to maintain or grow market share based on your analysis.
## Types of Data to Consider for Analysis

### Understanding Your Transfer Student Population and Support Needs

<table>
<thead>
<tr>
<th>Demographic Data</th>
<th>Transfer-Specific Data</th>
<th>Institutional Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assess how/if the transfer student population differs from your general student population.</td>
<td>Uncover support needs and resources for incoming students and those early in their career at your institution.</td>
<td>Analyze existing institutional data with a transfer lens to help justify transfer programming and support.</td>
</tr>
</tbody>
</table>

**Example data points:**
- Age, Gender, Ethnicity/Race
- First-Generation Status
- Part Time vs. Full Time
- Academic College/Major

**Example data points:**
- Name and type of feeder institutions
- Number of transferred credits
- Incoming GPA
- GPA in first and second terms

**Example data points:**
- Retention between terms and years
- Graduation rates
- Percentage of graduating class who transferred

Sources:
Purpose and Responsibilities

- Understand transfer market and make recommendations regarding 1–3-year transfer enrollment forecasts
- Identify barriers that impact strategic transfer enrollment and student success goals
- Develop strategies and action plans that align with goals and address barriers
- Ensure that the institution moves forward with identified initiatives and accountability metrics are in place
- Continuously monitor and evaluate progress, provide opportunities for updates and discussion, iterate as needed

Recommended Committee Members

Co-chairs: VPEM and VPAA

Core Cross-Functional Team Members:
- Enrollment Management and Admissions
- Registrar
- Credit Evaluation/Degree Audit reps
- Academic Deans or Department Chairs
- Academic Advising
- Student Affairs (Orientation)
- Marketing and Website

As needed:
- Financial Aid
- Information Technology
- Institutional Research
- Finance and Business Office
- International Student Office
Breakout Questions

1. Is your institution’s leadership supportive of transfer students? Why or why not? How involved are they?

2. Do you have any existing groups that look at transfer student enrollment or student success? What’s the structure?
Creating Efficiencies in Systems and Processes
How Does Transformation Happen?

People + Process + Technology

How it Should Look

People  
Process  
Technology

How it Frequently Looks

People  
Process  
Technology
Death By a Thousand Cuts

Managing the Quality of Touchpoints is Everyone’s Job and No One’s Job

Higher Ed Touchpoints Varied and Decentralized

Touchpoint: Any point of contact or interaction between a business and its customers

<table>
<thead>
<tr>
<th>Website</th>
<th>Sporting Events</th>
<th>Ads</th>
<th>Admission Letters</th>
<th>Bills</th>
<th>Course Registration</th>
<th>Move-in Day</th>
<th>Health Center Visits</th>
<th>Classes</th>
<th>Advisor Visits</th>
</tr>
</thead>
</table>

Touchpoint Math: Satisfaction Is a Multiplier

<table>
<thead>
<tr>
<th>Inquiry</th>
<th>Apply</th>
<th>Admit Events</th>
<th>Enroll</th>
</tr>
</thead>
<tbody>
<tr>
<td>Touchpoint satisfaction</td>
<td>80%</td>
<td>70%</td>
<td>50%</td>
</tr>
<tr>
<td>Journey satisfaction</td>
<td>28%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Answer Lies in Customer Journey Mapping

Following a Customer Identifies Milestones, Touchpoints Across the Journey

Customer Journey Maps

These are visual illustrations of a customer’s experience with a product or service, from initial discovery through purchase and usage.

- Popularized in the 1990’s
- Common among marketing-savvy firms

Key Touchpoints

- Awareness of a problem
- Explore solutions
- Compare and evaluate options
- Make a purchase
- Repurchase and/or recommend the product

Use Process Mapping to Visualize the Student Journey and Staff Steps

Onboarding Journey Stages

- **Aware**
- **Inquire**
- **Applied**
- **Admitted**
- **Deposit**
- **Registration**
- **Transition to Advisor (at admission)**
- **1st Day of Classes (or other enrollment census milestone)**

**Student**

**Staff**

**PRE-ENROLLMENT**

**ENROLLMENT**

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Where to Start?

Process Mapping Steps to Change

1. Identify a Specific Process
   - Gather stakeholders

2. Choose Your Map
   - Depends on your process
   - Populate your map

3. Assess the Status Quo
   - Clear sense of the process
   - What is happening?

4. Identify the Issues
   - Remove steps that don’t make sense or are duplicative
   - Identify obvious gaps

5. Redesign the process
   - Brainstorm ideas
   - Refine and improve

6. Iterate on Steps 3-5
   - Until you have a process that best serves your students

Source: Bridget Burns and Alexandria Aljets, "Using Process Mapping to Redesign the Student Experience," Educause Review, March 26, 2018
Goal: To coordinate all university activities related to the recruitment and retention of transfer students.

Participants: Current Transfer Students, Admissions, One Stop, Financial Aid, Registrar, Bursar, College Advising, Credit Transfer, Curriculum Services, Articulation, Orientation, Student Success, Housing, Information Service, Marketing and Communications, Enrollment Management, College Credit Plus

Activity: LEAN Review conducted to analyze all transfer related activities on campus to determine potential organizational change, efficiencies, and provide more effective student service.

Insight:
- Strategic Enrollment Management for Transfers.
- Transfer enrollment and student services needed to be coordinated better.
- Development of transfer credit tools (Flash Credit Estimator).
- Centralized transfer activities such as enrollment, articulation, degree pathways
- Coordination of process map, dates and benchmarks of all transfer initiatives.
Breakout Questions

1. What are the major barriers your students experience in their enrollment journey?

2. What are the major barriers your staff experience with supporting incoming transfer students?

3. Do you have any tech systems that help or hinder?
Positioning as Transfer-Friendly Destination through Partnerships
Community College Identification

Analyze Transfer Data to Inform Partner Identification

Components of Strong Partnership Alignment

Location and Modality
- Proximity to campus
- Ease of commute
- Modality of top transfer-in programs (4-year campus only, online, hybrid, 2-year campus option)

Relationships and Support of Partnership
- Existing relationships at Feeders
- Support at the CC to foster partnership
- Notable considerations that might prevent successful and long-standing partnership

Growth Potential and Program Alignment
- Trends in top transfer degrees
- Your institution’s transfer majors
- High-enrollment academic programs
- Articulations agreements/MOUs/formal programs
- CC transfer out (number and percentage)
- CC number of degrees conferred
- CC top degrees conferred
- Number of transfer students with Associate Degree

Blueprint for Getting Started
Research and Identification, Activation, Partnership Management

1. Coordinate transfer-specific internal meetings
2. Research 2-year partners using data
3. Define 2-year target institutions
4. Formalize relationship-building activities
5. Engage internal stakeholders and 2-year partners
6. Build and implement admissions outreach plans
7. Create materials to support admissions
8. Manage 2-year partnerships and maintain relationships

Source: Transfer Portal Resource Hub > Strategic Resources > Building Community College Partnerships and Transfer Pathways > 2-Year Partnership Development Toolkit
Best Practices for Creating Transfer Pathways

1. Conduct Data Discovery
   - Identify the barriers to transferring credits
   - Establish the trends in top transfer degrees and high academic programs

2. Involve the Right People
   - Get the right people involved to determine how, what, and why the pathway is important (staff, faculty, etc.)
   - Designate accountability

3. Prioritize Pathways
   - Prioritize the most important transfer pathways and majors to focus on
     - Pathways should benefit both institutions and their students

4. Develop a Plan
   - Identify key components
   - Establish a firm process (review, development, promotion, signatures, implementation, and evaluation process)

5. Execute the Plan
   - Develop pathways
   - Schedule regular meetings to share curriculum updates, finalize content & track pathways
   - Notify your campus community once a pathway is developed (faculty, advisors, student, etc.)

6. Integrate Continuous Improvement
   - Determine a process to evaluate and update the process
   - Use data to provide feedback on the success of the pathway

Breakout Questions

1. How have you developed and maintained community college partnerships?

2. What are the benefits of transfer pathways for your institution and students?
Next Steps

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

Email us with your questions!

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