

Creating a Transfer Student Advocate Training for Staff & Faculty
U OF M TRANSFER ADVOCATE
TRAINING WORKSHEET



The purpose of this worksheet is to give you time to reflect on how your college/unit is currently serving transfer students and to develop an action plan to use the information you have learned today to better serve transfer students and be a Transfer Advocate.

Part 1: Transfer Student Resource Checklist

Use this section to evaluate the current services and resources you offer to transfer students.

Adapted from the Aspen Institute Transfer Playbook [Tool for Assessing Progress Toward Adoption of Essential Transfer Practices for Four-Year Institutions.](#)

Effective Practices, Events, & Resources	Not Offered	Developing	Offered	Required	Unsure	N/A
Check-back/advising appointments for first-semester transfer students						
Reserved seats in key courses for incoming transfer students						
A First Year Experience course or seminar for first-semester transfer students						
A transfer-specific student organization						
Welcome Week event for Transfer students						
Event(s) just for transfer students						
Specific outreach to transfer students regarding events, resources, and opportunities.						
Career events for Transfer Students						
Specific outreach regarding career planning for transfer students						
Scholarship funds for Transfer students						
Transfer student representation on student advisory boards						
Tracking transfer student participation in events & opportunities						
An assessment plan that includes transfers as a specific population						



Are there other effective practices/events/resources your unit engages in that are not listed on the checklist?

After completing the above checklist, what resource gaps for transfer students in your college/unit did you identify?

[Part 2: Assessing What You Currently Know about Your Transfer Students](#)

What do you currently know about the transfer students in your college/unit? How many transfer students are there? What are their graduation/retention rates? What is their level of participation in activities and resources compared to their freshmen counterparts? What barriers to success do they face?

What would you like to know about the transfer students you serve that you do not already know? How can you get this information and who can help you get this information?



Part 3: Develop a Transfer Advocate Action Plan

Now is the time to identify tangible next steps and create a Transfer Advocate Action Plan.

Identify at least one goal related to transfer student advocacy (this can be something that involves serving transfer students directly via an event or communication effort, raising awareness of transfer issues in your unit, or improving a process for transfer students):

What resources do you need to meet this goal?

Who can you partner with to help you meet this goal?

What action steps will you take to meet this goal...

Within the next week?

Within the next month?

Within the next 6 months/year:

How will you measure success? How does this relate to your unit/college mission and goals?