

NISTS 2021

NOT-SO-SECRET TRANSFER AGENTS FEBRUARY 23-25, 2021 | VIRTUAL CONFERENCE

The following presentation was given at the 19th Annual Conference for the National Institute for the Study of Transfer Students. In some cases, photos have been removed to avoid possible copyright infringement. Please cite responsibly and direct questions to the original presenter(s).

Facilitated Discussion

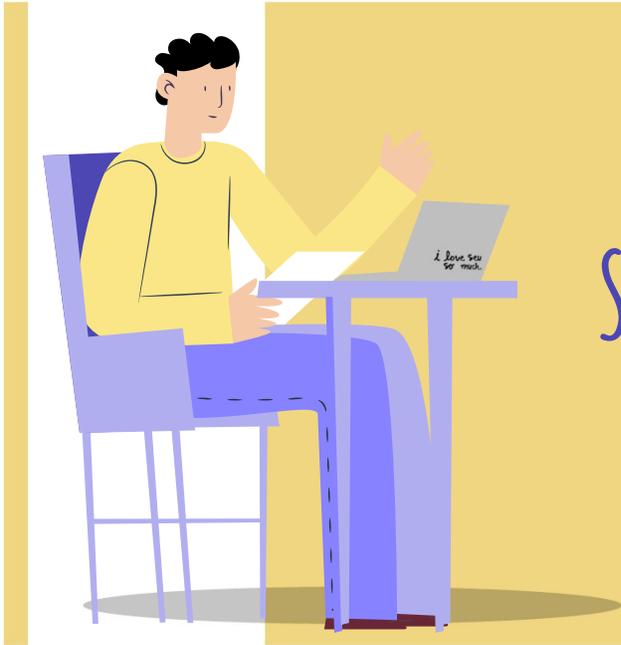
Transfer Student Success Model

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. Michael Kinsey
Associate Director Academic
Counseling and Exploration



Mr. Roel Martinez
Associate Director Academic
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PURPOSE

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.

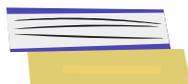
TOOLS AND RESOURCES

Share current resources and learn about what other institutions are using

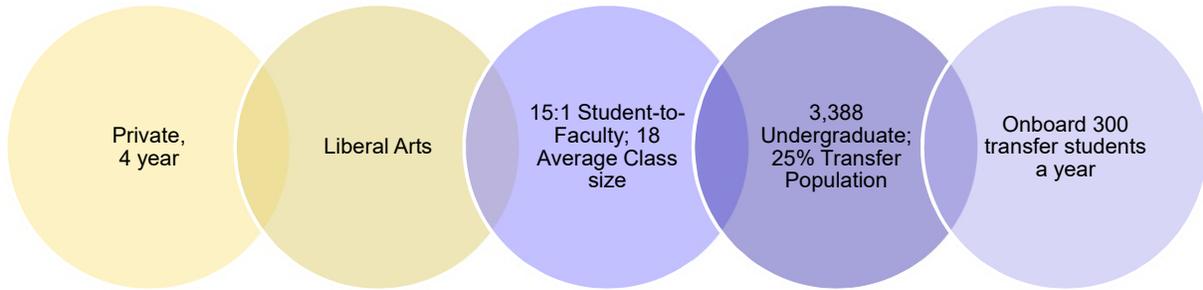
04.

EXPLORATION

Explore current technology and personnel that could be used to support this model

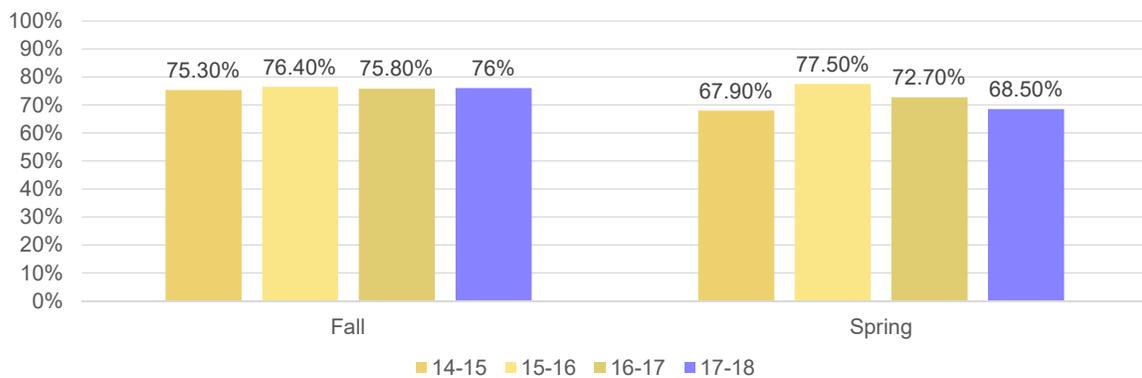


ST. EDWARD'S INSTITUTION OVERVIEW



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

Members

- Academic Counseling and Exploration
- Admissions
- Career and Professional Development
- Deans
- Department Chairs
- Registrar
- Student Financial Services

Directive

- 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

TIME TO GRADUATION

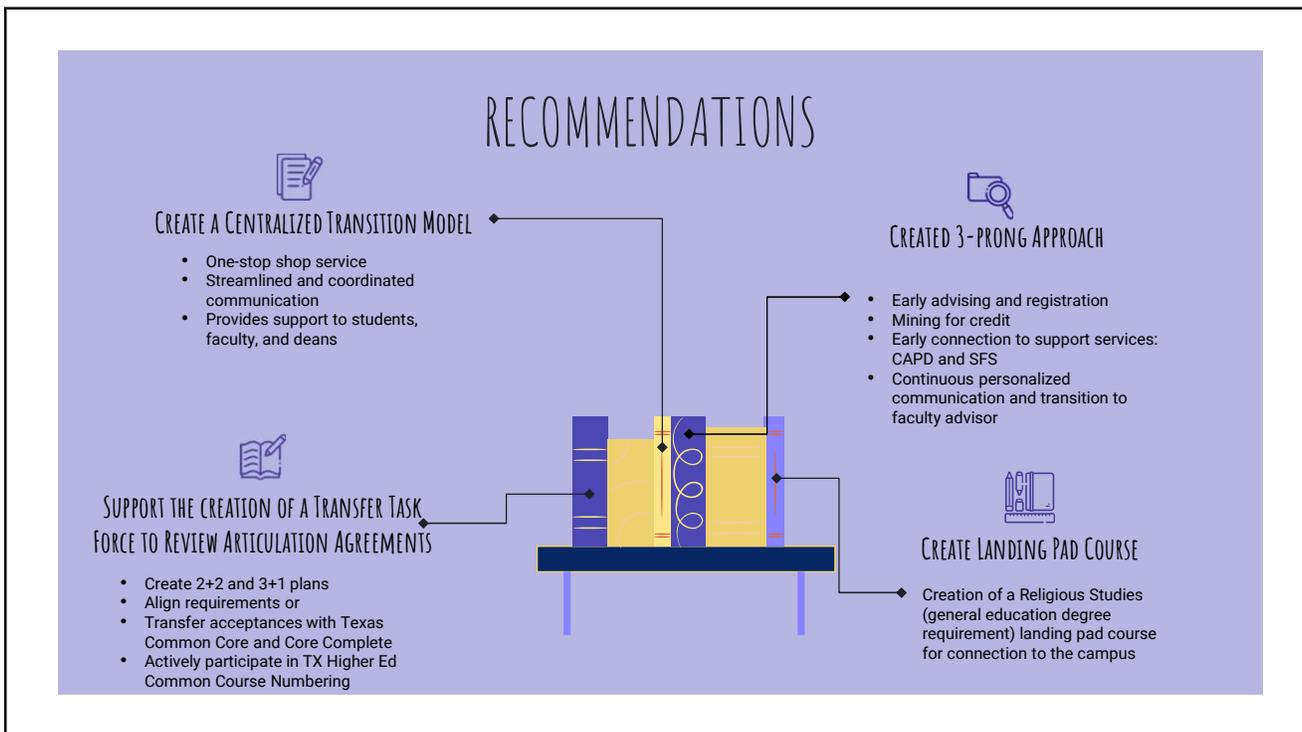
Challenge

- 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

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



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, degree works 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



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

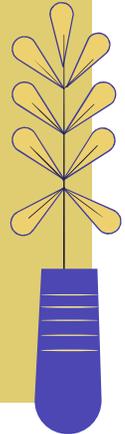
CONTINUED SUPPORT

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	Forms	Virtual Assistance	Online Transition
Alerts	Phone calls	Transfer Advising Guides	Advising and Registration Qualtrics	Google Chat & Voice
Notes	Roaming	Onboarding Qualtrics forms	Quick Fix	Zoom & Google Hangout

FIRST YEAR SUCCESS!



1000+
CREDITS FOUND



SURPASSED 1ST
YEAR GOALS



83.3%
RETENTION RATE



NSSR 2020 LIVE #NSR2020LIVE

Presented by the Commission on Student Experience from February to the University of Ontario



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?

THANK YOU!

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