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A SHORT GUIDE ON
HOW TO BEST SUPPORT
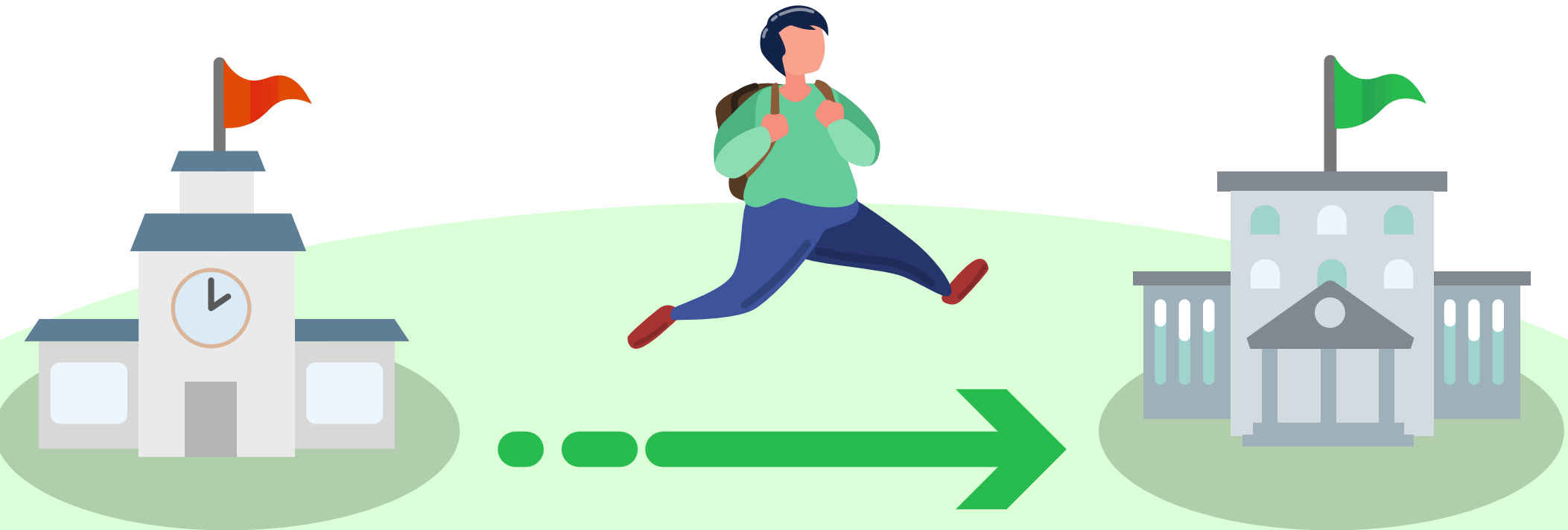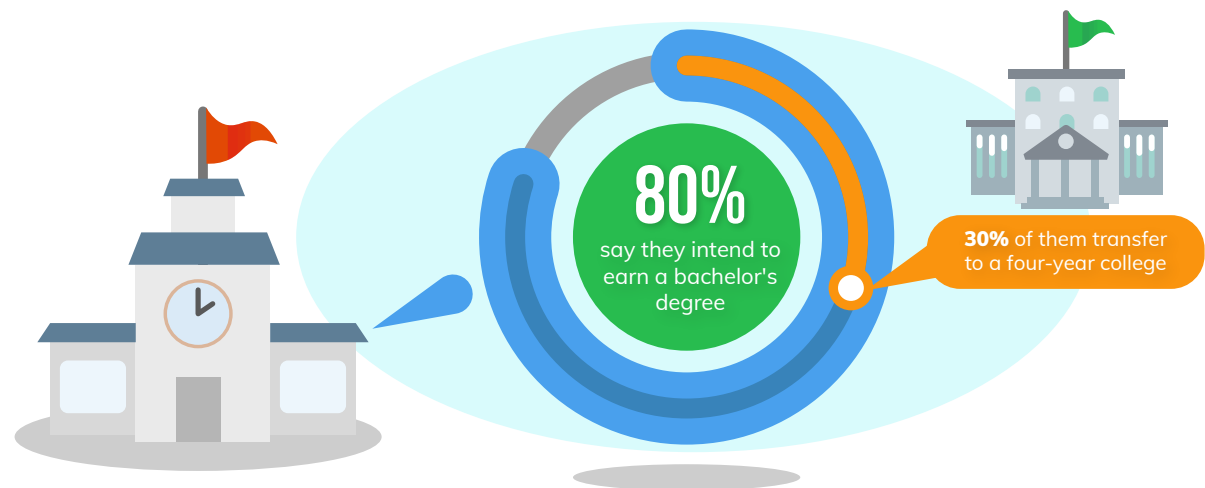# TRANSFER STUDENTS

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INTRODUCTION

Transfer students comprise a significant percentage of the total student body on most college campuses. Did you know that more than 1.4 million students transferred from one institution to another between 2015 and 2020? That's more than 10% of all students. According to the Jack Kent Cooke Foundation's work on transfers, students are transferring at equal numbers from both 2-year and 4-year institutions and comprise approximately 30% of all incoming new students.

Students transfer for a variety of reasons including cost, academic or social reasons, availability of majors, and proximity to home. In a national survey of undergraduates conducted by New America and Third Way, in the academic year 2020-2021 nearly 9% of surveyed students considered transferring, with one in four of those students moving closer to home due to COVID-19. Almost 18% indicated they were unlikely to re-enroll in their current institution in fall 2021—and nearly a third of those students said they intended to transfer.

Although there are many good reasons for students to transfer, the process can prove exceptionally challenging for the sending institution, the incoming institution, and students. Student expectations and reality often do not match. Consider this data:

80 percent of students who start out at a community college say they intend to earn a bachelor's degree, fewer than a third of them transfer to a four-year college within six years

80% say they intend to earn a bachelor's degree

30% of them transfer to a four-year college

More than 4 in 10 students who seek to transfer academic credits from one college lose a meaningful proportion of those credits, and 15 percent are unable to transfer any credits at all.

>4 OUT OF 10 LOSE CREDITS

1.5 STUDENTS ARE GETTING NO CREDITS AT ALL
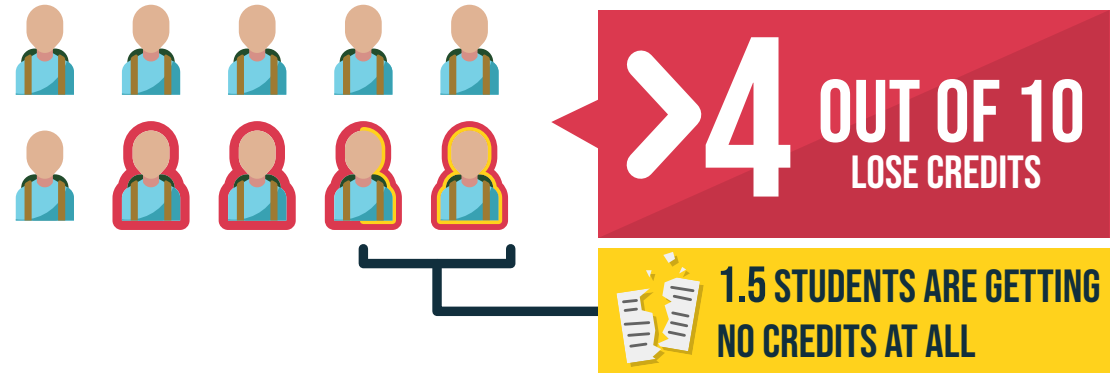
COVID-19 has only exacerbated the challenges of transferring. Students have lost the ability to visit campuses and speak in person with admissions and advisors. Institutions have made changes in deadlines, incentives, and acceptable credits. Additionally, students may be facing economic and workforce pressures that impact their schedules, flexibility, and income levels. Family responsibilities such as childcare and elder care may have become more expensive and difficult to outsource.

Demographic shifts and declining enrollments have increased competitiveness for many institutions, heightening the need to showcase programs and provide targeted and personalized support while offering a high level of responsiveness to incoming students. Supporting incoming or outgoing transfer students helps schools maintain reputations, improve revenue, and bolster equity and retention.

"

Transferring was hard during COVID, but especially hard as a STEM student. There are a ton of rules to follow. Luckily I found a school that was transfer friendly and met the STEM requirements for graduate school.

-Rachel Beyers, Transfer Student

"

I haven't made a personal connection at the incoming institution yet, but I have a strong advisor relationship at my outgoing. My advisor helped me have a relatively seamless, stress-free, and successful transfer.

-Tara Douglas, Transfer Student

UNIQUE STUDENTS, UNIQUE PROGRAMS

Every transfer student has a unique set of motivations for transferring. Transfer students are either moving away from or towards various personal or academic factors.

AWAY FROM ➤ **TOWARDS**

Bad Grades ➤ Wrong Major ➤ Closer to Home ➤ New Major ➤ Clean Slate

Difficult Roommate ➤ Poor Campus Experience ➤ Bachelor Degree

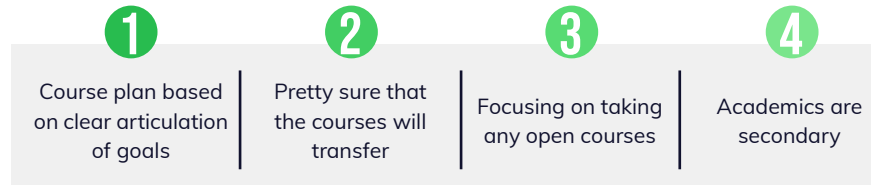Lost Scholarships ➤ Cheaper Program ➤ New Partner

Bachelor Degree ➤ Certificate

> *Personal drive has a lot to do with transferring. I had to figure out how to reach my goals. I need a bachelors and masters degree to become a counselor. While it will be a little bit harder, I know I have the drive to do it.*
>
> **-Sierra Rutnik, Transfer Student**

Students have very different perceptions and knowledge about the transfer process. Consider students' varying positions within these primary factors.

1 Course plan based on clear articulation of goals

2 Pretty sure that the courses will transfer

3 Focusing on taking any open courses

4 Academics are secondary

ACADEMICS

FINANCES

1 Self-funded (family, savings, etc.)

2 Understand finances and financial aid; actively seeking scholarships, tuition reimbursement, etc.

3 Don't understand costs or the process of obtaining financial aid

4 Haven't considered finances in their decision making

STUDENT **A**

STUDENT **B**

MOTIVATION

1 Motivated to transfer and stay on a planned path

2 Need to transfer to complete a degree within the "window of opportunity"

3 Want to transfer because friends are

4 Not sure if transferring is worth it; friends/family have a great job without a degree

PLANNING

1 Have conducted thorough research and have a long-term plan

2 Some research; are playing with the idea of transferring

3 Are within a semester; have done minimal research

4 Made a last-minute decision; no plan

INSTITUTIONS

1 Have considered and compared multiple institutions/programs Must make a change, no choice

2 Reviewed a couple of options

3 Just know they need to make a change

4 Must make a change, no choice

WHERE DO YOUR STUDENTS FALL?

Student A has full funding, but is not not fully committed to the idea of transferring. They have looked at a couple of institutions where they think that their courses will transfer, but lack the motivation given what they know from their family and friends. Student A needs compelling information on the value of transferring to another organization.

Hi Rachel, it's Sara in admissions. I noticed that you are still thinking about attending. Make sure to join our session with new graduates to discuss how their degree decisions have opened up new career opportunities.

Student B is committed, they have a plan and know which institution is the right match. However, they are struggling with the financing. Student B needs help understanding how to navigate the impact on finances.

Hi Rachel, it's Sara in admissions. We are so excited to have you on campus. Are you planning on completing the FAFSA? We use the FAFSA to determine not only financial aid, but also scholarships and other grants.

Ones are the most similar. They don't need a lot of guidance, but when they reach out they expect help and answers quickly. These students are prepared and independent. Fours on the other hand need a great deal of targeted support and may be more pressure prompted.

> " *Being able to start over by transferring can be a saving grace for people who were unsatisfied with their previous institution. It's a nice thing to be able to have a second chance and a fresh start.*
>
> **-Sierra Rutnik, Transfer Student**

SIMPLIFY MESSAGING

Students have thousands of schools to choose from. Most will make a decision based on location, cost, delivery type, rankings, or prestige. Understanding these decision factors help schools successfully recruit transfer students and create a communications plan that sets them up for success.

Students are juggling schools with different policies, timelines, and expectations. Simplifying communications to smooth the transfer process will have double benefit for administrators and students.
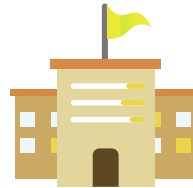
OUT-BOUND SCHOOL
(Schools that intentionally support students transferring)

Offer a seminar for students planning to transfer; explain factors to consider and how to identify a good destination program

Provide transfer advisors to answer questions and contextualize course planning
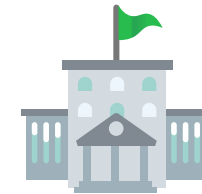
Make it easy to obtain referrals and transcripts

UNPLANNED OUT-BOUND
(4-year programs with higher transfer rates)

Stay positive (students may in fact choose to re-enroll or "boomerang")

Make it easy to get referrals and transcripts

Highlight the opportunity to return and explain reverse transfer options

IN-BOUND SCHOOL
(Schools committed to bringing in transfer students)

Break down the transfer process into a step-by-step sequence

Clearly communicate any new policies (i.e. acceptance of COVID pass/fail)

Provide access to upper division classes for transfers

DESTIGMATIZING TRANSFER STUDENTS

There is often a stigma that goes along with transferring—even though 1 in 3 college students transfer at least once. Transfer students, especially planners that have completed two years at a different institution, expect to be treated as equal to students continuing at the institution. Incoming institutions can create a more welcoming environment by:

Transfer orientation: Although it may be easier to run one orientation for all new students, welcome your transfers with their own orientation. Help transfer students recognize unique opportunities at your institution and chart a path to success on your campus. It is especially important for them to have an opportunity to reconcile what they have achieved with what they need to accomplish going forward before classes start.

Transfer-friendly policies: Balancing quality and rigor with the realities of transferring can be tricky. Consider flexible policies. For example, if a freshman seminar is required for every student to graduate, offer transfer students the option to test out. Reconsider accepting pass/fail for courses taken during COVID. Set a timeline for courses to have credits evaluated and updated in the system and a quick-appeal process.

> *Because transfer students are essentially upperclassmen, they need a transfer orientation separate from freshman orientation.*
>
> **Ray Morris, Outgoing Institution Counselor/Advisor**

Course Selection: The greatest support for transfer students is providing access to the courses they need. Holding seats for transfer students in high-demand or gateway courses ensures that transfers can map a viable path to completion. Most importantly, it signals to them that they are important to your institution.

Housing Selection: For transfer students moving to a new location, transfer-friendly housing can be a great opportunity to meet new people, get comfortable with school culture, and not have to live with first-year, first-time college students. Creating spaces for transfer students to live together or integrate with other same-age students is a welcoming gesture when institutions have the space available.

Events: Beyond orientation, provide support for transfers through their first semester on campus to ease the transition to campus. Events can help integrate students who share similar majors, interests, and graduation plans. Post pandemic, consider broadening events to include sophomores (last year's freshmen) who may actually feel like transfers.

Mental Health: Change is hard. Transferring means changes beyond academics—for many students, transferring impacts their personal lives. Remind students of their access to mental health support and normalize its use. This can help transfer students settle into their new experience.

TRANSFER COMMUNICATION PLAN

Most communication plans for outbound or inbound programs lack specific, personalized information. Outside of niche programs that are preparatory or bridge programs into four-year programs, most communication plans don't include information and guidance for students who wish to transfer. Two-year schools are largely understaffed; and most four-year schools are naturally more committed to retaining students than to helping them transfer out. Outgoing institutions tend to communicate reactively. Thus, it largely rests on inbound schools to guide students through the transfer process.

OUT-BOUND SCHOOL

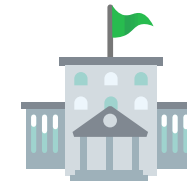Affirm the desire to transfer

Understand objections or fears

Assist with identifying destination transfer

Build registration plan

Facilitate decision making across options

Make it easy to access official transcripts

Partner with inbound schools and consider how best to support students

IN-BOUND SCHOOL

Affirm the desire to transfer to your school

Understand gaps in knowledge while confirming commitment to your school

Quickly review courses and build a graduation registration plan based on remaining courses (which courses count, how they apply, courses they should take prior to arriving)

Is the receiving institution taking all of the credits? Is there benefit to reverse transfer?

Connect them with a transfer counselor knowledgeable about policies and with agency to make decisions

Provide clarity about additional documents needed, timelines, and outstanding items that must be completed

Partner with outbound schools and create easy-to-find/understand transfer articulation tables

Messages to "APPLY APPLY APPLY" or "REGISTER REGISTER REGISTER" fall on deaf ears. Students are tuning broad, impersonal messages out. On the other hand, too much information can be overwhelming and confusing.

The best transfer-student communications plans are timely, responsive, and personalized. A communication plan that considers the following parameters will optimize staff time and focus efforts where students need guidance most.

> *Communication is key but over communication is detrimental. If an institution floods my email inbox I am less likely to open and go through them.*
>
> **Tara Douglas, Transfer Student**

Timing is critical to good communications. A student who applies 10 months early needs (and presumably wants) different support and information than a student who applies a week before classes start. Building processes and communication templates that consider both planners and pressure-prompted students will ensure that all students get information pertinent to them in the correct sequence to create the right amount of urgency for completion.

TRANSFER STUDENT COMMUNICATION
DO'S AND DON'TS

✓ DO:

Personalize each message with key information relevant to that transfer student

Ask students why they aren't taking action

Collect and analyze insights on students' behaviors

Stay positive regardless of the student response

Consistently respond and refer to appropriate support

✗ DON'T:

Merge your new transfers in with freshman or current students prior to the start of classes

Send generic messages without actionable items

Assume that a student's non-response is positive or negative

Avoid getting into the specifics of how credits will count towards graduation

Forget to remind students of regional benefits in transferring with degrees

SAMPLE TRANSFER TEXTS

Many institutions send all information to every student "just to make sure." This leads to information overload and confusion for students. Streamline processes and build texts to support steps that you have data for to nudge the student forward. Identify when students are confused, if they have reconsidered, or when they need alternative guidance.

THE "ADMITTED 2-STEP"

Being admitted is exciting and reaffirming. A formal letter can be an energy booster and "proof" of achievement. Follow up the formal letter with texts that begin to build a personal connection:

> *Congratulations on being admitted, [First_Name]! I'm [Advisor_Name], your academic advisor who will be helping you build a plan and supporting you along the way. Texting makes it easy to ask me questions. You can reply STOP to opt out (I hope you don't — this is a great way to stay in touch!)*

> *Hi [First_Name], It's [Advisor_Name], just checking in. I noticed you haven't signed up for or attended an orientation. There are two orientations left <<link>>. Are you still planning on joining us this fall?*

> *Hi [First_Name], it was great meeting you at orientation! Your registration matches your graduation plan. How are you feeling about the fall?*

Hi [First_Name], it's [Advisor_Name]. Your official transcripts haven't been submitted yet. I need those to finalize your transfer credits. Have you requested them from Sussex?

[First_Name], we are one week out! Just a reminder to get your immunization documents submitted <<link>>. It only takes a minute.

Hi [First_Name], we are so excited to have you in class — reminder that you have two weeks to add/drop without penalty. Text me if you have any questions.

Hi [First_Name], how are classes going? 1.Love them all! 2.These will work. 3.Need to make some adjustments.

RACHEL'S CASE FOR STRONG COMMUNICATION:

1. Provides a sense of relief—alleviates worries about the unknown

2. Builds connection, crucial to short- and long-term success

3. Gives credit transfer clarity—which courses to take and how long it will take to graduate

Signal Vine is the leading higher education AI messaging platform transforming how you reach, support, and engage students throughout their life cycle. With more than 50 million student interactions, Signal Vine's Blended Messaging® personalizes engagement using AI, workflow automation, and one-to-one messaging to keep students on the path to success. Signal Vine has been improving enrollment and retention outcomes with a proactive approach across the entire campus and student life cycle.

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Written By:
Jesse Boeding, EdD
Ashley Belz, Marketing Associate
Rachel Beyers, Transfer Student

Produced By:
Lester Ona (Graphic Designer)
Radha Marcum (Copyeditor)