

Transfer Advising Strategy Planning Tool: Instructions

STEP 1. CURRENT STATE OF TRANSFER

Fill out this tool based on your current state of transfer advising.

- **AIMS:** Review the aims in the top-left quadrant.
 - What do your systems do well? Check all that apply.
 - Where there is opportunity for improvement leave the checkboxes blank.
- **IMPACT:** Take a first pass at identifying the impact your department/institution aims to achieve in the bottom-left quadrant.
 - What short- and longer- term measurable changes do you want to see because of improved transfer student advising?
 - What short- and longer- term measurable changes do you want to see because of improved transfer student advising? Add any existing transfer student success goals to this section.
- **RESOURCES:** Outline your resources in the bottom-right quadrant.
 - What elements are currently available to your institution/partnership?
- **ACTIVITIES:** Complete the activities section in the top-right quadrant.
 - What activities or practices does your institution/partnership currently employ that support the aims of transfer advising?
 - The template's optional categories connect back to each aim. Activities may include training for advisors, creating tools like program maps to help the transfer advising process, or improving information sharing between institutions.



Find strategies and best practices in [Transfer Advising: Sharpening a Powerful Tool for College Success and Equity](#).

STEP 2. PLANNING FOR THE FUTURE

Revisit each quadrant again to consider the relationships across quadrants and plan for the future. Identify new additions with an asterisk.

- **AIMS & ACTIVITIES:** Revisit the aims of transfer advising to inform new activities. Consider the following questions:
 - Are there any aims that your current activities do not support?
 - Are there current activities that could be improved to better align to the aims of transfer advising? If so, propose new or improved activities that could help advance those aims.
- **RESOURCES & ACTIVITIES:** Revisit your current resources.
 - What new resources would your institution/partnership need to acquire to implement the proposed activities?
- **IMPACTS & ACTIVITIES:** Revisit your identified impacts.
 - What short and long-term impacts can you track/measure to understand if your transfer advising strategy is having the intended effect, based on the current and proposed activities?

STEP 3. NEXT STEPS

Based on your completed Transfer Advising Strategy Planning Tool, identify next steps by considering the following questions:

- Who needs to be engaged to realize your proposed activities?
- Do you have the data systems in place to evaluate your efforts?
- Do you need to make the case for new resources? Which new resources would you prioritize?
- What are your next steps in the next 3-6 months to maintain or improve transfer advising practices? Next 6-12 months?

Notes:

TRANSFER ADVISING STRATEGY PLANNING TOOL Template

Mission: Structure transfer advising to advance improved transfer student outcomes and equity for Black, Hispanic, Native American, rural, first-generation, Veterans, student parents, older students, and other historically marginalized student communities.

Assumptions: Transfer student success is co-owned by two- and four-year institution leaders and practitioners. Advising infrastructure meets basic standards in the number of advisors, tools, training, and resources.

AIMS

What happens to transfer advising as a result of the activities?

EARLY CONNECTIONS TO TRANSFER

Transfer aspirations are cultivated as early as possible, especially among historically marginalized communities in majors in which they are typically underrepresented.

Transfer intent is identified as soon as possible and prompts specific advising action.

RESPONSIVE TRANSFER ADVISING PROCESSES

Regular advising interactions support prevention and early identification of missed transfer milestones.

Engagement with and translation of high-quality transfer-specific resources is timely and based on individual needs.

Financial planning and/or routine collaboration between the advising and financial aid offices is a core component of advising interactions.

TIMELY AND QUALITY TRANSFER ADVISING INTERACTIONS

Advisors across the board can easily access and convey a strong foundation of accurate transfer information, direct students to transfer resources, and understand when to escalate to known transfer specialists.

Early advising shifts to minimize basic information delivery and maximize transfer/major/career exploration and alignment, and connections to non-academic resources that foster success.

Upper division advising shifts from focusing on credit loss to timely completion, career alignment, post-graduate success, and connections to non-academic resources that foster success.

SCALED AND SUSTAINABLE TRANSFER SUPPORT

Transfer advising is embedded in a broader transfer-supportive culture, considered as a major advising priority, and reflected in a larger institutional strategy to advance success and equity.

Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions.

Internal and external stakeholders have evidence-based understanding of transfer advising strengths and needs.

ACTIVITIES

What does your institution do or need to do for transfer students individually and in partnership to support the transfer advising aims?

INVESTMENTS IN PARTNERSHIPS & EARLY OUTREACH

TRANSFER ADVISING PROCESS IMPROVEMENT

TRANSFER ADVISOR PROFESSIONAL DEVELOPMENT

PRESIDENTIAL/SENIOR LEADER SUPPORT OF TRANSFER INITIATIVES

IMPACT

What are your department/program and institutional short and longer-term transfer goals?

SHORTER-TERM INDICATORS

LONGER-TERM MEASURES

RESOURCES

What does your institution have or need to support transfer advising?

HUMAN RESOURCES

INTERNAL AND EXTERNAL PARTNERS

TOOLS

FINANCIAL RESOURCES

TRANSFER ADVISING STRATEGY PLANNING TOOL Completed Example

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SCALED AND SUSTAINABLE TRANSFER SUPPORT

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- ☑ Transfer advising initiatives/programming are adequately and sustainably resourced by both institutions.
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ACTIVITIES

What does your institution do or need to do for transfer students individually and in partnership to support the transfer advising aims?

INVESTMENTS IN PARTNERSHIPS & EARLY OUTREACH

- Support early high school or Community Based Organization outreach programs
- Dedicate four-year advisors in community colleges
- Targeted programming for historically marginalized students, by discipline as needed.
- Create information-sharing/communication feedback loops between partners.

TRANSFER ADVISING PROCESS IMPROVEMENT

- Develop/refine tools like program maps that facilitate transfer advising interaction and information consistency.
- Develop/refine shared transfer advising processes, frameworks, and/or expectations across advisors.
- Track student intent vs. critical transfer milestones in the student information system.

TRANSFER ADVISOR PROFESSIONAL DEVELOPMENT

- Engage and train advisors with standardized tools, processes, frameworks, and expectations.
- Enable advisor participation in inter and intra-institutional networking and best practice sharing.
- Elevate and compensate advisors to lead or participate in process improvement efforts, such as map development.

PRESIDENTIAL/SENIOR LEADER SUPPORT OF TRANSFER INITIATIVES

- Ensure alignment between transfer advising and broader transfer/student success goals.
- Set expectations and goals for transfer student success and equity for transfer advising systems and staff.
- Include transfer success and equity in accountability and incentive structures for advising and other support staff.
- Pave the way for advising collaboration across two- and four-year institutions, high schools, and other partners.
- Devise plans to convert grant support for advising initiatives to institutional budget over time.
- Ensure transfer outcomes data are collected and shared internally—including with advisors—and with partners.

IMPACT

What are your department/program and institutional short and longer-term transfer goals?

SHORTER-TERM INDICATORS

- Increased number of students who receive transfer advising, especially for students from historically marginalized communities (e.g., Black, Hispanic, Native American, rural, first-generation, lower-income).
- Increased average frequency (e.g., # engagements per term) of advising interactions with prospective transfer students.
- Increased number of prospective transfer students meeting transfer milestones (e.g., complete college-level math in their first year, choose potential transfer destinations by 30 credits, choose major by 30 credits).
- Increased number and frequency of advisors participating in transfer advising professional development.
- Increased number of advisors use program maps to guide students.
- Increased number of students are on a transfer plan or understand how to navigate their transfer plan.

LONGER-TERM MEASURES

- Increased number of students from historically marginalized communities represented on your campus.
- Increased number of students overall and from historically marginalized communities intending to transfer.
- Increased number of transfer students from historically marginalized communities in STEM, Business, Nursing, other impacted majors and/or other disciplines in which they are underrepresented.
- Increased rate of students transferring with an associate degree, and closed gaps for students from historically marginalized communities.
- Increased transfer mobility and graduation rates for transfer students, and closed gaps for students from historically marginalized communities.
- Reduced and equitable time and credits to bachelor's degree completion.

RESOURCES

What does your institution have or need to support transfer advising?

HUMAN RESOURCES

- Professional advisors and/or
- Faculty advisors

INTERNAL AND EXTERNAL PARTNERS

- High Schools
- Two-Year Institutions
- Four-Year Institutions
- Community-Based Organizations (CBO)
- Employers
- Career Services
- Student Success staff
- Admissions staff
- Institutional Research/Data

TOOLS

- Program Maps/Transfer Guides
- Technology
- Website

FINANCIAL RESOURCES

- Grant funding
- Institutional budget
- Institutional innovation/start-up funds