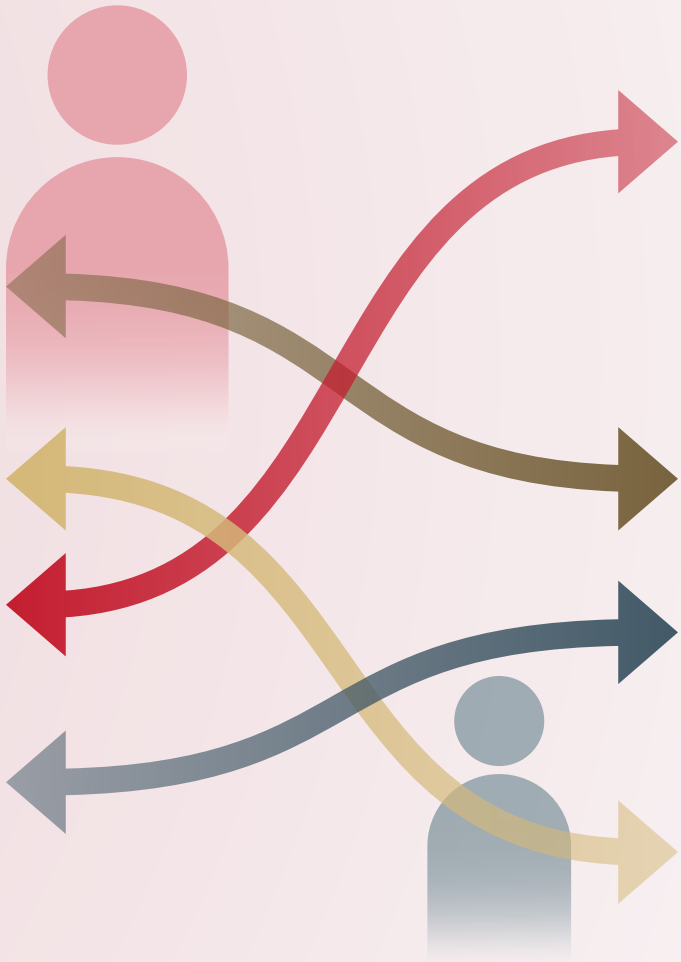
STRATEGIC DATA PROJECT

AUGUST 2026

BEYOND TRANSFER RATES

A Toolkit For Understanding Student Pathways & Progress



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TRANSFER DATA REVEAL MORE THAN STUDENT MOVEMENT

Transfer data can tell institutions more than who leaves or arrives. They can help practitioners uncover patterns and provide insight into how institutional policies, practices, and supports may shape student progression across increasingly complex educational pathways.

This toolkit supports higher education practitioners working to strengthen student progression and institutional practice. Because transfer touches enrollment management, advising, academic affairs, student success, and other functional areas, this toolkit is intended to foster collaborative inquiry across institutional roles. The toolkit includes guiding questions and information on evidence-informed practices that will be broadly applicable to institutions seeking to strengthen transfer pathways and improve student success.

This Toolkit Helps Institutions:

- **Identify** transfer trends and patterns using multiple sources of evidence.
- **Interpret** what transfer patterns reveal about students' educational pathways and institutional practice.
- **Engage** cross-functional partners in collaborative inquiry.
- **Apply** evidence-informed strategies to strengthen transfer pathways and student progression.
- **Advance** continuous institutional improvement centered on student success.

WHY FOCUS ON TRANSFER?

Transfer is a common part of today's student experience

Nationally, roughly one-third of college students in the United States transfer at least once during their academic journey. Students transfer for many reasons, including pursuing academic or career goals, navigating financial or personal circumstances, and geographic relocation. For some students, transfer is a disruption; for others, an intentional choice in pursuit of their goals. To ensure that all students have an opportunity to achieve their goals, institutions must be equipped to support students regardless of their reason for transfer.

A different way to think about transfer

Too often, institutions use transfer data primarily to measure enrollment gains and losses. While these outcomes matter, a student progression lens shifts the conversation from enrollment metrics to students' educational experiences. This shift encourages institutions to ask different questions: Where do students encounter barriers? What supports help them continue toward their goals?

This tool was developed in partnership with ResearchEd, with generous support from the Gates Foundation.

USING THIS TOOLKIT FOR INSITUTIONAL INQUIRY

This toolkit helps practitioners in cross-functional teams move from evidence to insight to action by identifying transfer patterns, interpreting what those patterns may suggest about institutional practice, and identifying policies and practices that can strengthen student pathways.

Throughout the toolkit, practitioners are encouraged to consider three complementary evidence lenses:

- **Student Movement: What is happening?**
  Postsecondary Data Partnership (PDP) transfer data provide insight into patterns of student mobility and progression, including who transfers, when transfer occurs, transfer destinations, and post-transfer outcomes. Key resources referenced throughout the toolkit include the Transfer Dashboards, Cohort Analysis-Ready (AR) File, and Course AR File (see **Appendix A** for links and more information).
- **Institutional Conditions: What structures and practices shape pathways?**
  Institutional data provide context about the policies, practices, and structures that influence students' ability to navigate transfer pathways.
- **Student Experiences and External Context: How do students experience pathways?**
  Student experience data and external research help practitioners interpret transfer patterns and understand the broader conditions influencing student decisions. These sources may include belonging and engagement surveys, advising experiences, transfer intention data, focus groups, state and national datasets, labor market information, and research on effective transfer and student success practices.

BEGIN WITH THE QUESTIONS MOST RELEVANT TO THE INSTITUTION

This toolkit is organized around three areas of inquiry that reflect key dimensions of transfer and student progression. Practitioners do not need to complete the toolkit sequentially; instead, they can begin with the guiding questions most relevant to their institutional priorities and return to other sections as inquiry develops. Each section is organized around guiding questions. Each guiding question helps practitioners move through three stages of inquiry: identifying patterns in the data, interpreting what those patterns may suggest about institutional practice, and identifying opportunities for action.

The three areas of inquiry are:

- **Section A** | Understanding Student Mobility Patterns: Establishes a baseline understanding of transfer at an institution by examining the scale, composition, and pathways of student movement.
- **Section B** | Understanding Transfer Pathways and Student Goals: Explores how transfer patterns relate to students' academic goals, choices, and pathways.
- **Section C** | Understanding Student Experience and Momentum: Considers how institutional practices, supports, and experiences may influence student progression.

Transfer is a common part of today's student experience

The appendices provide additional resources to extend and support inquiry, including PDP tools and research, external data sources, and guidance for prioritizing analysis activities based on institutional capacity and potential impact.

STARTING WITH EVIDENCE: PDP DATA RESOURCES FOR TRANSFER ANALYSIS

TRANSFER DATA IN THE POSTSECONDARY DATA PARTNERSHIP (PDP)

The Postsecondary Data Partnership (PDP) provides a foundation for understanding student transfer patterns across institutional boundaries. Administered by the National Student Clearinghouse (NSC), the PDP is a voluntary data-sharing initiative that enables institutions to examine student progress and educational pathways over time. Participating institutions submit student-level demographic, enrollment, and course outcome data, which the PDP standardizes and links with national enrollment and completion records. These data are returned to institutions through dashboards and Excel-based Analysis-Ready (AR) files. This data allows analysis of student outcomes that are both disaggregated and longitudinal. This makes it possible to understand where students transfer, whether they continue enrollment, and if they eventually complete a degree or credential.

With these data, leaders can better identify where transfer reflects strong pathway alignment and where it may indicate unmet need, structural barriers, or gaps in support. These insights can support decisions about advising, program design, and resource allocation. The section below provides an overview of the PDP Transfer Dashboards and AR Files and how they can be used to support analysis.

The Transfer Dashboard

The **Transfer Dashboard** is the starting point for understanding the overall scale of transfer at an institution over time and for specific student groups. It shows transfer counts and rates by cohort year and transfer window (one to eight years after entry), supports disaggregation across 14 student and enrollment characteristics, and reports post-transfer outcomes, including degree and/or credential attainment and stop-out.

The Transfer Benchmarking Dashboard

The **Transfer Benchmarking Dashboard** places an institution's transfer patterns in context by comparing them to aggregate data from a user-defined group of at least five peer institutions. It can help institutions identify where transfer outcomes align with peers and where differences may warrant exploration.

The Cohort-Level Analysis Ready (AR) File

The **Cohort-Level AR File** provides student-level transfer data, enabling deeper analysis than the dashboards alone. Each row represents an individual student and includes demographic and enrollment characteristics. The file is designed to be merged with additional institutional data sources (e.g., advising records or financial aid data, or the course-level AR file).

The Course-Level Analysis Ready (AR) File

The **Course-Level AR File** provides a detailed view of students' academic experiences before transfer. The Course file includes one row for each course that a student took at an institution. Fields offered in the file include program of study, gateway course enrollment, credit accumulation, and academic performance indicators.

EXTENDING UNDERSTANDING BEYOND PDP DATA

While PDP data provide a valuable foundation for identifying transfer patterns and student progression outcomes, they do not capture the full context of students' experiences or the institutional conditions that shape their pathways. To move from identifying patterns to understanding opportunities for action, institutions can combine PDP data with additional sources of information.

Internal Institutional Data

Institutional data can help practitioners understand the experiences, supports, and barriers that may shape students' educational pathways. Relevant sources will depend on the questions being explored and institutional context, but may include:

- Advising interactions and case notes
- Participation in student support programs (e.g., TRIO, tutoring, learning communities)
- Financial aid packages and information about unmet need
- Course sequencing and program requirements
- Measures of belonging, engagement, or satisfaction
- Commuting information
- Prior academic achievement (e.g., ACT scores, HS GPA, AP/IB participation)

External Data and Evidence

External data and research can help institutions interpret transfer patterns within the broader educational, economic, and policy contexts in which students make decisions and institutions operate. Relevant sources will depend on institutional priorities and capacity, but may include:

- The Integrated Postsecondary Education Data System (IPEDS)
- College Scorecard
- Labor-market statistic platforms
- State longitudinal data systems (SLDS)
- Articulation agreements
- Policy reports and analysis

Together, these sources can enable a more complete understanding of the conditions shaping student transfer pathways and where institutions can act to improve outcomes.

A UNDERSTANDING STUDENT MOBILITY PATTERNS

It is important to establish a shared understanding on campus of what student transfer patterns look like.

The questions in this section guide practitioners to:

- Establish a baseline by identifying who transfers and when.
- Examine how transfer patterns change over time.
- Explore where transfer is concentrated across academic programs.
- Compare institutional patterns with peer institutions.
- Identify where students transfer after leaving.

Together, these questions provide a descriptive picture of student mobility and identify areas for deeper inquiry. The remaining sections build on this foundation by exploring how these patterns relate to students' goals (Section B) and the institutional conditions and student experiences that shape transfer (Section C).

SCALE AND DISTRIBUTION OF TRANSFER

Q1 What does the scale and distribution of transfer indicate about who transfers, when transfer occurs, and where inquiry is needed?

WHY DOES THIS MATTER?

Transfer rates provide a foundation for understanding how students move through and beyond an institution. When combined with demographic disaggregation, these measures help understand how transfer might be concentrated among particular student groups.

Establishing this baseline helps practitioners identify patterns, challenge assumptions, and determine where additional inquiry is needed. It creates a starting point for examining whether transfer pathways align with student goals and whether different groups of students experience mobility in similar or different ways.

WHAT DATA CAN ANSWER THIS QUESTION?

The PDP Transfer Dashboard provides a starting point for understanding the scale, timing, and distribution of transfer at an institution. It helps practitioners identify who transfers, when transfer occurs, and whether transfer is broadly experienced across student populations or concentrated among specific groups. Transfer data, like that in the PDP, show where mobility patterns exist, but they do not explain the conditions or experiences that shape those patterns. To interpret transfer pathways, practitioners should consider multiple sources of evidence, including student movement data, institutional conditions, and student experiences.

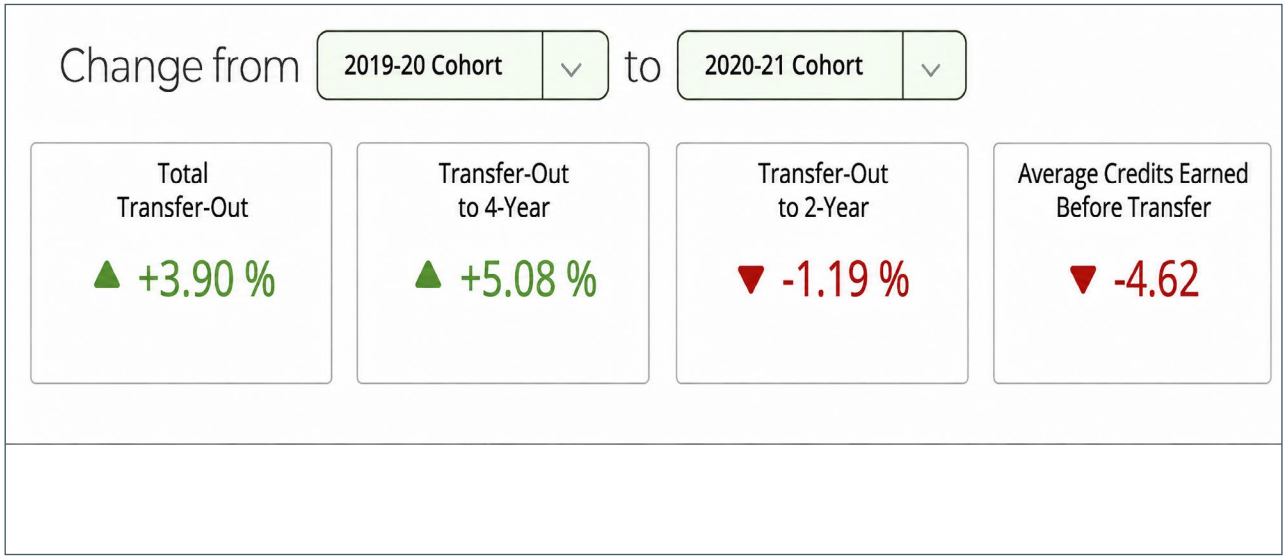
USING THE PDP DASHBOARD TO IDENTIFY TRANSFER PATTERNS

The PDP Transfer Dashboard allows practitioners to examine transfer patterns across cohorts, timeframes, and student populations. Practitioners can use the dashboard to:

- Examine transfer rates and counts across one- to eight-year transfer windows.
- Compare patterns across cohorts over time.
- Disaggregate transfer patterns by available student and enrollment characteristics.
- Apply filters to examine specific student populations.

For Example: Suppose your institution has observed increasing transfer among part-time students and wants to understand whether this trend is consistent across student groups. Select "Part-Time" in the attendance filter and "Gender" in the "broken down by" dropdown to compare transfer rates by gender. Then examine the trend across recent cohorts to determine whether changes are consistent over time or concentrated among particular groups. These observations can help identify where additional institutional or student experience data may be needed to better understand the pattern.

FIGURE 1 | PDP Transfer Dashboard Year-Over-Year Line Graph



Source: National Student Clearinghouse. (n.d.). Retention and transfer dashboard [Screenshot/Dashboard image]. PDP Knowledge Base. **Link here**

EXTENSIONS

Extensions allow practitioners to explore questions that PDP data alone cannot answer, such as which student experiences, institutional conditions, or external factors may influence transfer pathways.

Extend Student-Level Understanding

Because the PDP uses a standardized set of variables for filtering and disaggregation, institutions may consider incorporating additional student characteristics from institutional systems into their analysis. These data can provide deeper insight into how transfer patterns vary across student experiences and circumstances.

Examples may include:

- Disability status
- Employment status
- Financial indicators
- Student support program participation

Extend Understanding of Institutional Conditions

Institutional data can help explain how policies, practices, and structures may influence transfer pathways. Relevant sources may include advising records, financial aid information, course availability, enrollment policies, and student support participation.

Extend Understanding of Student Experiences Behind Transfer Patterns

Student experience data can provide insight into how students experience the policies, practices, and supports that shape transfer pathways. These data can help institutions understand factors that may not be visible in administrative records, including students' awareness of transfer options, advising experiences, sense of belonging, financial concerns, and reasons for considering or pursuing transfer.

Relevant sources may include:

- Student engagement or belonging surveys
- Transfer intention surveys
- Advising satisfaction surveys
- Student focus groups or listening sessions
- Exit surveys or stop-out surveys

Contextualize Transfer Patterns with External Benchmarks

The **Integrated Postsecondary Education Data System (IPEDS)**, administered by the National Center for Education Statistics (NCES), provides another source for understanding institutional transfer patterns.

- IPEDS has transfer-out data as part of the Graduation Rates data collection. These rates represent the percentage of first-time, full-time, fall-entering students who leave and enroll elsewhere within 150 percent of the normal program time (three yearsfor a two-year program and six years for a four-year program).[2]
- **Keep in mind:** Because IPEDS transfer rates are mostly limited to first-time, full-time students, they may exclude substantial portions of an institution's student population, particularly at community colleges. As a result, you will find that your IPEDS transfer rates likely differ markedly from PDP rates, which cover all new students regardless of entry term and enrollment intensity. Understanding this distinction is important when communicating transfer data to campus leadership, who may be more familiar with IPEDS reporting.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams move from describing transfer trends to identifying questions for further inquiry.

What patterns do we observe?

- **What the Data Show**
  - » How common transfer is.
  - » Which students transfer.
  - » When transfer occurs.
- **Insight Signal**
  - » Whether transfer is a common pathway or concentrated among particular groups.
- **Reflection prompts**
  - » How common is transfer relative to overall enrollment?
  - » How has transfer changed over time?
  - » Which student groups transfer at higher or lower rates?

What questions do the patterns raise?

- **Insight Signal**
  - » Patterns point to areas requiring deeper inquiry rather than immediate conclusions.
- **Team Reflection Prompts**
  - » Which student groups warrant closer examination?
  - » Which trends appear consistent?
  - » Which findings require additional evidence?

What additional evidence should we consider?

- What institutional data would help explain these patterns?
- What student experience data could add context?
- Which campus partners should be involved in interpreting these findings?

WHAT'S NEXT

Planning the Next Phase of Inquiry

- **Build a shared understanding:** Share key transfer patterns with institutional stakeholders and establish a common understanding of who transfers, when transfer occurs, and which student groups warrant additional attention.
- **Prioritize areas for deeper inquiry:** Use the observed patterns to identify which student populations, programs, or transfer pathways should be examined in greater depth in subsequent analyses.
- **Assemble the right evidence and partners:** Identify the institutional data, student experience evidence, and cross-functional partners needed to better understand the observed patterns before determining potential actions.

Q2 How are transfer patterns changing over time?

WHY DOES THIS MATTER?

Examining transfer patterns over time helps practitioners distinguish between isolated findings and sustained trends. Looking across multiple cohorts can reveal whether transfer is becoming more or less common, whether differences between student groups are widening or narrowing, and where changes may warrant closer attention. Rather than drawing conclusions from a single cohort, a longitudinal view helps identify patterns that deserve deeper investigation and provides important context for interpreting institutional change.

WHAT DATA CAN ANSWER THIS QUESTION?

The PDP Transfer Dashboard provides a starting point for examining transfer trends across cohorts. It helps practitioners identify whether transfer is increasing, decreasing, or remaining stable over time and whether those patterns differ across student groups. To better understand shifts in transfer and why these shifts occur, practitioners should consider multiple sources of evidence, including student movement data, institutional conditions, and student experiences.

USING THE PDP DASHBOARD TO IDENTIFY TRANSFER TRENDS

The PDP Transfer Dashboard allows practitioners to examine how transfer patterns change across recent cohorts. Practitioners can use the dashboard to:

- Compare transfer rates across up to eight recent cohorts.
- Examine overall trends using the year-over-year line graph.
- Disaggregate trends by available student and enrollment characteristics.
- Combine filters and disaggregations to explore changes within specific student populations.
- Compare changes between selected cohorts using the Total Transfer call-out.

For Example: Suppose your institution recently expanded a structured transfer pathway for nursing students. Filter the dashboard to "Nursing" as the program of study and disaggregate transfer rates by race/ethnicity. Compare recent cohorts to determine whether transfer patterns changed following implementation and whether changes were experienced similarly across student groups. These observations can help identify where additional institutional or student experience data may be needed.

Tip: Use the Total Transfer call-out above the line graph to compare the percent change in transfer rates between two selected cohorts. Because the call-out responds to applied filters, it can also be used to examine changes for specific student populations.

FIGURE 2 | Transfer Dashboard Call-Out Boxes



Source: National Student Clearinghouse. (n.d.). Retention and transfer dashboard [Screenshot/Dashboard image]. PDP Knowledge Base. Link here

Keep in mind: The Transfer Dashboard and Analysis-Ready files include up to eight years of historical data. Institutions with longer PDP participation may wish to archive and append successive AR files to support longer-term trend analyses.

EXTENSIONS

Extensions allow practitioners to explore factors that may help explain why transfer patterns change over time.

Extend Understanding of Institutional Conditions

Compare changes in transfer patterns with the timing of institutional initiatives or policy changes. Consider whether trends coincide with changes such as:

- Advising redesigns
- New articulation agreements
- Program or curriculum revisions
- Financial aid policy changes
- Enrollment management initiatives

Looking across these timelines can help identify periods where institutional changes may warrant further investigation.

Extend Understanding of Student Experiences

Student experience data can help determine whether changing transfer patterns coincide with changes in how students experience the institution.

Relevant sources may include:

- Student engagement or belonging surveys
- Advising satisfaction surveys
- Transfer intention surveys
- Student focus groups
- Exit or stop-out surveys

These sources can help determine whether changing transfer patterns are accompanied by shifts in students' goals, experiences, or perceived barriers.

Extend Historical Analysis

If an institution has submitted fewer than eight years of PDP data, institutional reporting systems or historical enrollment records may provide additional context for understanding longer-term trends.

Because PDP dashboards display only the eight most recent cohorts, institutions with longer submission histories may wish to develop a process for appending Analysis-Ready (AR) files over time to support longitudinal analyses beyond the dashboard's reporting window

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams move from describing transfer trends to identifying questions for further inquiry.

What do the trends tell us?

- **What the Data Show**
  - » Whether transfer is becoming more or less common over time.
  - » Whether changes are occurring across the institution or are concentrated among particular student groups.
  - » Whether trends appear gradual or are concentrated within particular cohorts.
  - » How transfer trends compare with broader enrollment patterns.
- **Insight Signal:**
  - » Whether student mobility patterns are stable or changing, and where those changes may warrant closer examination.
- **Team Reflection prompts**
  - » Is transfer becoming more or less common over time?
  - » Do changes appear gradual or concentrated within particular cohorts?
  - » Are differences between student groups widening, narrowing, or remaining consistent?
  - » What institutional or external changes coincide with these trends?

What questions do the trends raise?

- **Team Reflection Prompts**
  - » Which student groups are experiencing the greatest changes over time?
  - » Are differences between student groups widening, narrowing, or remaining stable?
  - » Do changes appear to reflect shifts in student mobility, broader enrollment patterns, or both?
  - » Are there identifiable points where trends begin to change?
  - » What additional evidence would help explain these patterns?
- **What additional evidence should we consider?**
  - » What institutional changes coincided with periods when transfer patterns shifted?
  - » Have students' experiences, goals, or needs changed during this period?
  - » What do advising, financial aid, course enrollment, or student support data suggest?
  - » What do student surveys, focus groups, or transfer intention data reveal?
  - » Are there external factors—such as state policy, labor market conditions, demographic shifts, or changes in transfer opportunities—that may provide additional context?

WHAT'S NEXT

Analysis to Action

- **Monitor changes in student mobility over time:** Include transfer trend data in regular institutional reporting so changes in student mobility and equity gaps become part of ongoing campus conversations rather than one-time analyses.
- **Investigate changing transfer patterns collaboratively:** When trends emerge for particular student groups, engage advising, academic affairs, enrollment management, student success, and institutional research departments to identify additional evidence that may help explain the changes.
- **Strengthen institutional learning:** Compare transfer trends with institutional initiatives, student experience data, and external conditions to identify where further inquiry is needed and where additional data collection or analysis could improve understanding.

3Q How do transfer patterns vary across academic programs?

WHY DOES THIS MATTER?

Student enrollment in a program of study that has a structured transfer pathway can be a strong predictor of future transfer. Examining transfer rates by program of study helps identify whether certain academic pathways are more or less aligned with transfer opportunities.

Understanding these differences provides important context for interpreting student mobility. Program-level variation can help identify where additional inquiry is needed into pathway design, student opportunities, or institutional supports before drawing conclusions about why students transfer.

WHAT DATA CAN ANSWER THIS QUESTION?

In the **PDP Transfer Dashboard,** you can filter by program of study, enabling analysis of program-specific patterns for selected student groups. However, a key limitation of the Transfer Dashboards and Cohort AR file is that they only provide the program of study for a student's first year at your institution.

Fortunately, the **Course AR File** contains the program of study for the term in which each course was taken, making it the most reliable source for determining each student's program of study at the point of transfer. The AR files identify programs of study using nationally standardized Classification of Instructional Programs (CIP) codes. The **NCES CIP Code Lookup Tool** can be used to translate codes into program names, or a crosswalk can be created within AR files that will translate the codes automatically into program names.

USING THE PDP DASHBOARD TO IDENTIFY PROGRAM-LEVEL PATTERNS

The PDP Transfer Dashboard allows practitioners to compare transfer patterns across academic programs. Practitioners can use the dashboard to:

- Filter transfer patterns by program of study.
- Compare transfer rates across academic programs.
- Disaggregate program-level transfer patterns by student characteristics.
- Combine filters and disaggregations to examine differences within specific programs.

For Example: Suppose your institution has established transfer pathways in Nursing and Business but wants to understand whether students experience those pathways similarly. Filter the dashboard by each program of study and disaggregate transfer rates by race/ethnicity or enrollment intensity. Comparing these patterns may help identify programs where transfer is broadly experienced and others where differences across student groups warrant additional inquiry.

Keep in mind: The Transfer Dashboard and Cohort AR File identify students' program of study only at initial enrollment. If your institution wants to understand students' academic pathways closer to the point of transfer, the Course AR File provides program of study for each term of enrollment and may offer a more accurate picture of students' academic trajectories.

EXTENSIONS

Extensions allow practitioners to explore factors that may help explain why transfer patterns differ across academic programs. These differences may warrant deeper inquiry into pathway alignment, advising, curriculum, or student experience.

Extend Understanding of Institutional Conditions

Institutional data can help determine how program design and institutional practices shape transfer pathways. Relevant sources may include:

- Articulation agreements
- Program maps and curriculum sequencing
- Credit transfer policies
- Advising models by program
- Course availability
- Degree requirements

Extend Understanding of Student Experiences

Student experience data can provide insight into how students navigate academic pathways within different programs. Relevant sources may include:

- Advising satisfaction surveys
- Transfer intention surveys
- Student focus groups
- Belonging and engagement surveys
- Exit or stop-out surveys

These sources can help determine whether students experience different levels of support, clarity, or opportunity across academic programs.

Contextualize Program-Level Pathways

State articulation resources and transfer policy databases can provide additional context for understanding how transfer pathways are structured beyond your institution.

Examples may include:

- State articulation repositories (e.g., California's **Assist**, or The **Pennsylvania Transfer and Articulation Center (PA TRAC)**)
- Education Commission of the States' **50 State Comparison: Transfer and Articulation Policies**
- Institution-specific articulation agreements

These resources can help determine whether observed transfer patterns align with available transfer pathways and statewide policies.

INTERPRETING THE DATA TOGETHER

What do the program patterns tell us?

- **What the Data Show**
  - » Which academic programs have higher or lower transfer rates.
  - » Whether transfer is concentrated within particular fields of study.
  - » Whether differences exist across student groups within programs.
  - » Whether student groups are differently represented across programs with higher or lower transfer rates.
- **Insight Signal**
  - » Whether transfer pathways appear broadly distributed across programs or concentrated within particular academic pathways.
  - » Whether access to higher-transfer programs appears equitable across student groups.
- **Team Reflection prompts**
  - » Which programs appear to function as common transfer pathways?
  - » Do transfer patterns differ across student groups within the same academic program?
  - » Are differences in transfer outcomes primarily occurring within programs, between programs, or both?
  - » Are some student groups more likely to enroll in programs with stronger or weaker transfer outcomes?

What questions do the program patterns raise?

- **Team Reflection Prompts**
  - » Do differences appear consistent across programs?
  - » Which programs warrant additional investigation?
  - » Are observed differences concentrated within particular student groups?
  - » What additional evidence would help explain these patterns?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » How do articulation agreements differ across programs?
  - » Do advising models, curriculum structure, or course availability vary by program?
  - » How do students describe their experiences navigating transfer within different academic programs?
  - » How do program requirements, prerequisites, scheduling, or resource availability affect access to transfer pathways?
  - » Which faculty, advisors, or program leaders should help interpret these findings?

WHAT'S NEXT

Analysis to Action

- **Identify programs for deeper inquiry:** For programs where certain student groups show disproportionately high transfer rates, initiate a conversation between advising leadership and program faculty about whether advising practices, course sequencing, or program expectations may be contributing to unequal outcomes within those programs.
- **Assess and update articulation agreements for high-transfer programs:** If programs with consistently high transfer rates are not covered by formal articulation agreements, bring evidence of this gap to relevant leadership to evaluate whether new or updated agreements should be pursued with top destination institutions.
- **Examine pathway alignment across programs:** Bring together faculty, advising, registrar, and transfer leadership to compare program-level transfer patterns with articulation agreements, curriculum design, and advising practices to identify opportunities to strengthen pathway alignment.
- **Strengthen equitable access to transfer pathways:** Where differences emerge across student groups within academic programs, engage program leaders and student success staff in examining institutional conditions, student experiences, and available supports to identify opportunities to improve access and navigation.

BENCHMARKING TRANSFER

4 **How do transfer patterns compare with peers?**

WHY DOES THIS MATTER?

Without a reference point, transfer patterns can be difficult to interpret. Comparing an institution's transfer patterns with similar institutions can help identify whether patterns are unique to a campus, common among peers, or shaped by broader factors such as student populations, institutional mission, or transfer structures.

Rather than ranking performance, peer comparison (or benchmarking) should focus on understanding institutional roles, relative positioning, and drivers of difference to inform strategy and collaboration.

WHAT DATA CAN ANSWER THIS QUESTION?

Peer comparisons can help identify where transfer patterns are similar or different, but they do not explain why those differences exist. To better understand benchmarking results, practitioners should consider additional evidence, including institutional characteristics, student populations, academic programs, transfer pathways, and student experiences.

The PDP Transfer Benchmarking Dashboard allows comparison of an institution's transfer patterns against a selected group of five or more peer institutions.

Keep in mind: The dashboard compares an institution with aggregated peer data, meaning individual peer institution results are not visible. Peer institutions available for comparison are limited to those that also submit data to the PDP.

USING THE PDP DASHBOARD TO IDENTIFY PROGRAM-LEVEL PATTERNS

The PDP Transfer Benchmarking Dashboard allows practitioners to compare their institution's transfer patterns against a selected group of peer institutions. Practitioners can use the dashboard to:

- Compare transfer rates against aggregated peer benchmarks.
- Select peer groups based on characteristics such as sector, geography, and MSI status.
- Examine whether transfer patterns differ across available student characteristics.
- Identify areas where institutional patterns diverge from broader peer trends.

Continued next page

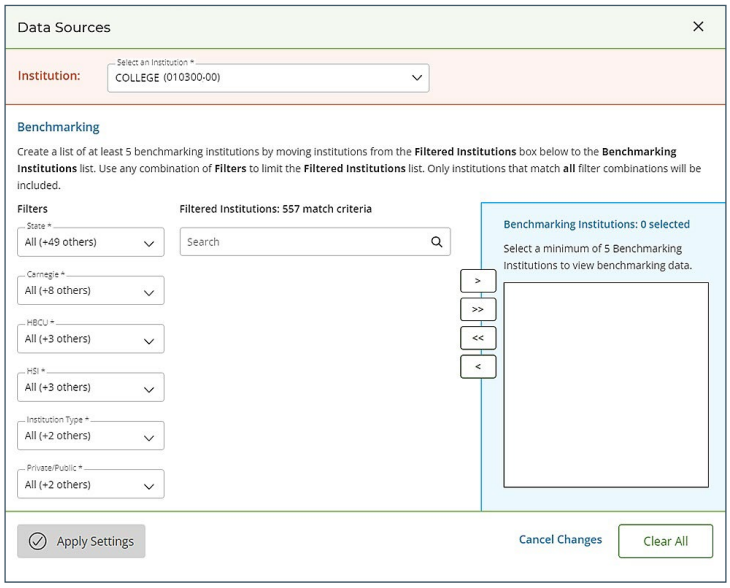
When selecting peers, institutions should consider both which institutions are most comparable and what question they are trying to answer. Meaningful comparisons may include institutions with similar:

- **Institutional characteristics**
  - » Mission and role within the transfer ecosystem (transfer-serving, destination, or mixed).
  - » Sector and institutional size.
  - » Student populations.
  - » Academic programs and credentials offered.
- **Transfer structures and opportunities**
  - » Articulation agreements and transfer partnerships.
  - » State transfer policies and requirements.
  - » Regional higher education landscape.
  - » Availability of nearby transfer destinations.
- **Student support practices**
  - » Advising and transfer support models.
  - » Degree pathways and curriculum alignment.
  - » Student success initiatives.

Considering these factors helps ensure that peer comparisons are used to better understand transfer patterns rather than as a simple measure of institutional performance.

Keep in mind: Given the limits of aggregation in the benchmarking dashboard, institutions may also consider exploring or developing data-sharing agreements with selected peers to support more direct comparisons. These partnerships can provide a clearer understanding of how transfer patterns compare across student groups, academic programs, and time, while creating opportunities to learn from different approaches to transfer pathways, advising structures, and student supports.

FIGURE 3 | PDP Transfer Benchmarking Dashboard (Institution Selection Interface)



Source: National Student Clearinghouse. (n.d.). Transfer Benchmarking Dashboard [Screenshot/Dashboard image]. PDP Knowledge Base. Link here

EXTENSIONS

Extensions allow practitioners to explore additional sources of evidence that can provide broader context for understanding transfer patterns.

Extend Benchmarking Using External Data Sources

Additional benchmarking resources include:

- The **NSC Tracking Transfer** report series provides a broader benchmarking source, offering transfer rates and post-transfer outcome data disaggregated by student characteristics at both the state and national levels.
- **College Scorecard** also has publicly available institution-level transfer rates and post-enrollment earnings outcomes that can be used to compare an institution's rates against a wide range of peers outside of the PDP. The difference in transfer definitions between the PDP and IPEDS should be noted prior to any in-depth analysis (see QA1 "Extensions" for IPEDS transfer definition).

When using external sources, practitioners should review differences in transfer definitions and measures before drawing conclusions. (See **QA1 "Extensions"** for additional discussion of transfer definitions.)

INTERPRETING THE DATA TOGETHER

What do peer comparisons tell us?

- **What the Data Show**
  - » How your institution's transfer patterns compare with aggregated peer patterns.
  - » Whether transfer patterns are similar to, higher than, or lower than peer patterns.
  - » Whether differences vary across student groups or outcomes.
- **Insight Signal**
  - » Whether your institution's transfer patterns appear consistent with peer institutions or suggest areas for deeper investigation.
- **Team Reflection prompts**
  - » Which comparisons stand out?
  - » Where are our transfer patterns most similar to or different from peers?
  - » Which findings challenge our assumptions about transfer at our institution?
  - » Are differences consistent across student groups and outcomes?

What questions do peer comparisons raise?

- **Team Reflection Prompts**
  - » Are differences related to our institutional mission, student population, academic programs, or transfer structures?
  - » Do institutions with similar missions and student populations show similar patterns?
  - » Are differences concentrated among particular student groups or programs?
  - » Which differences reflect intentional institutional choices, and which may indicate areas for improvement?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » How do our transfer pathways and articulation agreements compare with peers?
  - » How do advising, transfer supports, and student services differ?
  - » Do differences in academic programs or curriculum structures shape transfer opportunities?
  - » How do students experience transfer navigation compared with students at peer institutions?
  - » What external factors (such as state policy, geography, labor markets, or funding structures) provide additional context?

WHAT'S NEXT

Analysis to Action

- **Understand institutional role in transfer:** If transfer patterns differ substantially from peers, engage campus partners to understand whether differences reflect an intentional institutional role, such as serving primarily as a transfer pathway institution or receiving transfer students, or whether they point to areas where additional investigation is needed.
- **Use peer comparisons to guide further inquiry:** Use differences between an institution and peers to identify questions for further review. Focus on areas where differences are largest or where equity gaps differ from peer patterns, and explore factors such as advising structures, transfer pathways, and academic program alignment.
- **Strengthen peer learning and collaboration:** Engage peer institutions to better understand the practices, structures, and policies that may contribute to different transfer patterns. Consider opportunities for shared learning, including direct data-sharing partnerships that allow institutions to compare transfer patterns across student groups, academic programs, and time.

TRANSFER DESTINATIONS

5 Where are students transferring?

WHY DOES THIS MATTER?

Understanding where students transfer provides important context for understanding student mobility. Destination patterns show the pathways students are actually navigating after leaving an institution and can help identify whether students are following established transfer pathways, pursuing different opportunities, or responding to factors such as cost, location, or program availability.

Examining destination patterns over time and across student groups can help institutions understand how transfer opportunities are experienced by different students. Changes in destination patterns may also reflect shifts in institutional partnerships, academic offerings, labor markets, or student goals.

WHAT DATA CAN ANSWER THIS QUESTION?

To better understand destination patterns, practitioners should consider multiple sources of evidence, including transfer destination data, institutional partnerships, student characteristics, and student experiences.

The **PDP Transfer Dashboard** provides a starting point for examining destination patterns. It allows practitioners to understand whether students are transferring primarily to two-year or four-year institutions and identify broad patterns in where students continue their education.

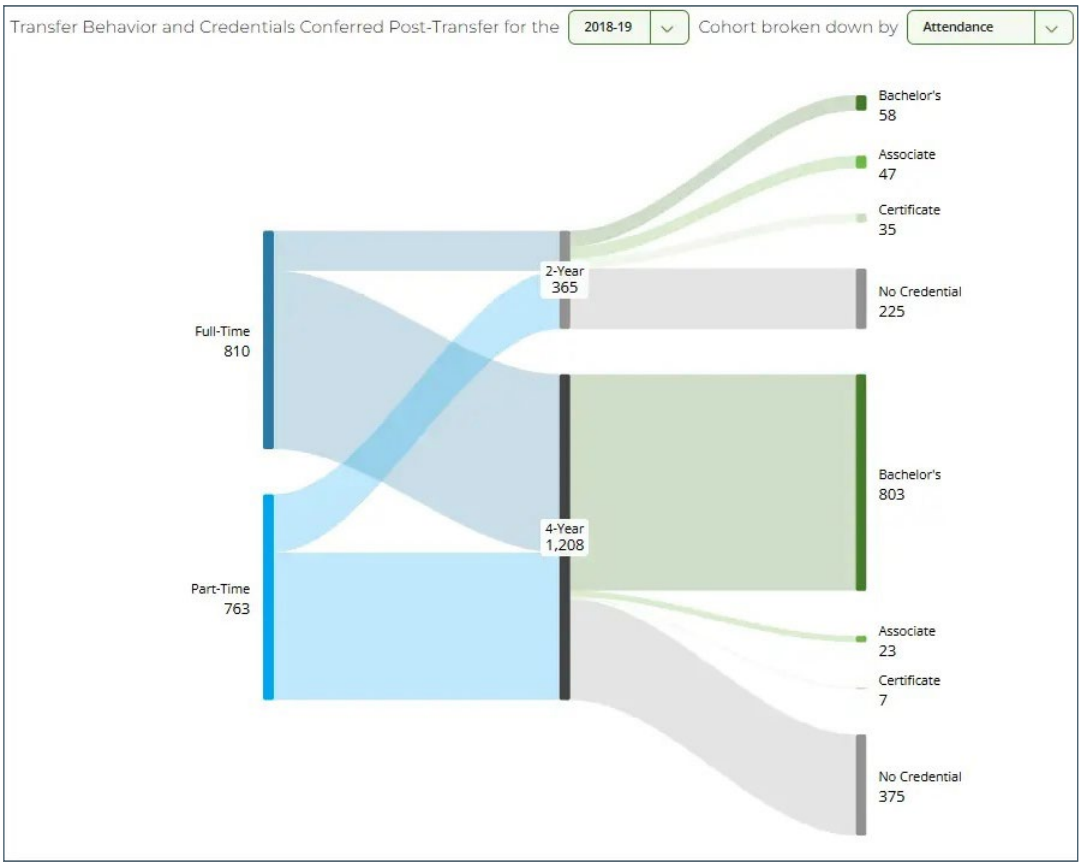
USING THE PDP TRANSFER DASHBOARD TO EXAMINE DESTINATION PATTERNS

The Transfer Dashboard's Sankey Diagram provides a high-level view of transfer volume by destination institution type and degree type (see Figure 4). Practitioners can use this view to understand whether students are primarily moving to two-year or four-year institutions after transfer.

Further disaggregating destination patterns by available student characteristics can help identify whether students are experiencing different transfer pathways and whether some groups are concentrated in particular destination types.

Figure 4 next page

FIGURE 4 | Transfer Dashboard Credentials Conferred Post-Transfer (Sankey Diagram)



Source: National Student Clearinghouse. (n.d.). Retention and transfer dashboard [Screenshot/Dashboard image]. PDP Knowledge Base. Link here

While the Transfer Dashboard provides a broad view of destination patterns, the **Cohort Analysis-Ready (AR) File** provides additional detail about the specific institutions where students transfer.

The Cohort AR file includes Office of Postsecondary Education Identifiers (OPEIDs), which can be used to identify destination institutions for transfer students. Relevant destination fields include:

- Most Recent Bachelors at Other Institution OPEID
- Most Recent Associates or Certificate at Other Institution OPEID
- Most Recent Last Enrollment at Other Institution OPEID
- First Bachelors at Other Institution OPEID
- First Associates or Certificate at Other Institution OPEID

The **Most Recent Last Enrollment at Other Institution OPEID** field is often the most useful for understanding immediate transfer destinations. However, practitioners should note that students who transfer more than once may have their subsequent destination reflected in this field.

EXTENSIONS

Extensions allow practitioners to explore additional evidence that may help explain why students transfer to particular destinations and whether those pathways align with institutional goals and student needs.

Identify Common Destination Institutions

To identify destination institutions by name within the Cohort AR File data, practitioners can use an OPEID-to-institution crosswalk available through NSC's **Working With Our Data** resources (labeled as "Clearinghouse Institution Code to IPEDS Unit-ID Crosswalk Table"). This allows institutions to convert OPEIDs into institution names and create summaries of the most common transfer destinations.

Because students may transfer to many different institutions, focusing analysis on the highest-volume destinations can help identify the pathways most important for further investigation. Comparing destination patterns across cohorts can also reveal whether common destinations are stable or changing over time.

Extend Understanding of Transfer Pathway Alignment

Comparing destination institutions with formal transfer agreements and partnerships can help institutions understand how students are using available pathways. Consider:

- Do the most common destination institutions have established articulation agreements?
- Are students transferring to institutions where clear pathways do not exist?
- Are structured transfer pathways accessed similarly across student groups?
- Where might additional partnerships or pathway development strengthen student mobility?

Extend Understanding of Student Decision-Making

Destination data show where students transfer, but additional evidence is needed to understand how students make transfer decisions. Relevant sources may include:

- Exit surveys.
- Withdrawal or stop-out surveys.
- Transfer intention surveys.
- Student focus groups.
- Advising or transfer support feedback.

These sources can help institutions better understand factors influencing destination choices, including affordability, location, program availability, student goals, and perceptions of opportunity.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams move from identifying transfer destinations to understanding what those patterns reveal about student pathways.

What do destination patterns tell us?

- **What the Data Show**
  - » Where students transfer and the types of institutions they enter.
  - » Whether transfer is concentrated among particular destination institutions.
  - » Whether destination patterns differ across student groups.
  - » Whether destination patterns change across cohorts.
- **Insight Signal**
  - » Whether students appear to follow established pathways, pursue a range of destinations, or experience different transfer opportunities across student groups.
- **Team Reflection Prompts**
  - » Are most students transferring to two-year or four-year institutions?
  - » Which destination institutions receive the largest number of students?
  - » Do destination patterns align with our understanding of student goals and transfer opportunities?
  - » Which findings challenge our assumptions about student mobility?

What questions do destination patterns raise?

- **Team Reflection Prompts**
  - » Do the most common destination institutions align with our formal transfer pathways?
  - » Are students transferring to institutions where we have strong partnerships and clear pathways?
  - » Are some student groups concentrated in particular destination institutions or institution types?
  - » Are destination patterns shaped by student goals, institutional structures, affordability, geography, or other factors?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » How do destination patterns compare with articulation agreements and transfer partnerships?
  - » What do destination institutions suggest about students' opportunities after transfer?
  - » How do students describe the factors influencing their transfer decisions?
  - » Are there institutional practices that could expand access to strong transfer pathways?
  - » What external factors, such as cost, geography, or program availability, provide additional context?

WHAT'S NEXT

Analysis to Action

- **Strengthen alignment between transfer pathways and student movement:** Compare common destination institutions with existing articulation agreements and transfer partnerships to identify where pathways are supporting student movement and where additional alignment may be needed. When students frequently transfer to institutions without established pathways, engage campus partners to explore opportunities for stronger connections.
- **Understand destination opportunities and outcomes:** Develop profiles of common destination institutions using available outcome data, such as completion rates, earnings, and debt measures. Use these insights with advising, academic leadership, and student success teams to consider whether common destinations align with students' educational goals and long-term success.
- **Examine destination institutions as a student success equity issue:** Disaggregated destination data can help identify whether students have equitable access to transfer destinations that support their goals. When differences emerge across student groups, engage academic affairs, advising, financial aid, and student support partners to explore how institutional practices, information, affordability, or other barriers may shape destination opportunities. Use findings to identify ways to expand access to strong transfer pathways.

UNDERSTANDING TRANSFER PATHWAYS AND STUDENT GOALS

Section A established a shared understanding of student mobility patterns: who transfers, when transfer occurs, how patterns vary across programs and student groups, how institutions compare with peers, and where students transfer.

This section builds on that foundation by examining how students navigate transfer pathways. It explores whether students who plan to transfer are able to do so, what happens after they transfer, whether formal transfer pathways are accessible and equitably used, and how effectively those pathways support students' continued academic progress.

The questions in this section guide practitioners to:

- Understand how students' transfer goals align with transfer outcomes.
- Examine what happens after students transfer, including continued enrollment and credential completion.
- Explore whether formal transfer pathways are reaching all students.
- Identify where transfer pathways and supports may be working well—or where additional support may be needed.
- Consider additional data that can strengthen understanding of students' transfer experiences.

Together, these questions help institutions move beyond measuring transfer rates to understanding how students experience transfer pathways and where institutional supports can strengthen student success.

Section C will build on this foundation further by exploring the institutional conditions and student experiences that shape these pathways and outcomes.

TRANSFER INTENT AND OUTCOMES

Q1 What share of students who plan to transfer successfully do so?

WHY DOES THIS MATTER?

Understanding whether students who plan to transfer follow through provides a clearer picture of how effectively institutions support transfer pathways. When students do not achieve their intended transfer pathway, it may point to opportunities to strengthen advising, communication, academic planning, financial support, or other aspects of the transfer experience.

WHAT DATA CAN ANSWER THIS QUESTION?

Transfer intent data help institutions understand whether students' goals align with their outcomes. The PDP does not collect or report transfer intent, so institutions will need to combine transfer data with other sources of information.

The PDP does not collect or report on transfer intent, but the Transfer Dashboards and AR files provide an entry point for this question by allowing users to quantify their transfer population. The dashboard's cohort-year filter allows users to identify the cohorts of interest and then examine transfer rates across successive windows. By leveraging a combination of data such as the program of study, destination school, and articulation agreements, institutions may be able to create a proxy for planned transfer, but this should be done with caution.

Keep in mind: Any proxy for transfer intent constructed from PDP data alone is inherently limited and should be clearly labeled as an approximation when presented.

EXTENSIONS

Extensions allow practitioners to build a stronger understanding of student transfer goals and outcomes.

Collect Transfer Intent Data

If an institution does not already collect transfer intent data, consider where this information could be captured within existing processes. Working with an institution's SIS team, advising platform administrators, and other relevant leaders, practitioners can develop a plan for systematically collecting transfer intent. Linking this population to PDP transfer indicators can establish a conversion rate from intent to transfer.

Potential sources include:

- Nationally administered surveys, such as the **CCSSE/SENSE survey**
- Admissions or onboarding surveys.
- Orientation forms.
- Advising intake forms.
- Transfer intent declarations.
- Dual admissions programs.
- Advising platform records (stated goals, appointment notes).
- Exit or stop-out surveys.

Embedding a transfer intent question into existing student touchpoints can create a consistent way to understand whether students' goals align with outcomes.

Connect Transfer Intent with Outcomes

When transfer intent data are available, institutions can examine:

- What share of students who plan to transfer actually do so?
- Where do students' intended pathways break down?
- Do outcomes differ across student groups?
- Are students receiving support at the points when they need it most?

INTERPRETING THE DATA TOGETHER

This section helps teams move from understanding transfer outcomes to asking whether students are successfully navigating the pathways they intend to pursue.

What do intent-to-transfer patterns tell us?

- **What the Data Show**
  - » The share of students with transfer goals who ultimately transfer.
  - » Where transfer goals align (or not) with outcomes.
  - » Whether outcomes differ across student groups.
- **Insight Signal**
  - » Whether students who plan to transfer are successfully navigating transfer pathways.
- **Team Reflection Prompts**
  - » What share of students with transfer goals ultimately transfer?
  - » Where do students appear to lose momentum?
  - » Are outcomes different across student groups?
  - » Which findings stand out or challenge our assumptions?

What questions do intent and outcome patterns raise?

- **Team Reflection Prompts**
  - » At what point do students' transfer goals diverge from outcomes?
  - » Are some student groups less likely to achieve their transfer goals?
  - » Are students receiving transfer support early enough?
  - » Are transfer requirements and options clear to students?
  - » What additional evidence would help explain these patterns?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » What do advising records show about transfer planning and support?
  - » Are students accessing transfer resources at key decision points?
  - » How do students describe their transfer experiences?
  - » What institutional barriers may affect students' ability to transfer?

WHAT'S NEXT

Analysis to Action

- **Initiate a conversation about collecting transfer intent data:** If applicable to an institution, bring the lack of transfer-intent data to enrollment management, advising, and IT leadership as a gap that limits the ability to evaluate the effectiveness of transfer support. Facilitate a conversation about where in existing workflows (orientation, advising intake, registration, exit survey) a single transfer intent question could be embedded.
- **Use intent-to-outcome gaps to improve supports:** When students plan to transfer but do not, examine where gaps occur and work with campus partners to identify opportunities to improve advising, communication, and transfer support.

Q2 What share of students who transfer continue toward a credential or degree?

WHY DOES THIS MATTER?

Transfer is only one step in a student's educational journey. Understanding what happens after students transfer provides a more complete picture of transfer success. When students stop out after transfer or do not complete a credential, it may point to challenges with transfer preparation, pathway alignment, advising, or the destination institution itself.

WHAT DATA CAN ANSWER THIS QUESTION?

The **PDP Transfer Dashboard** offers a good starting point for understanding post-transfer outcomes. It allows practitioners to see whether transfer students continue their education, earn a credential, or leave higher education after transferring.

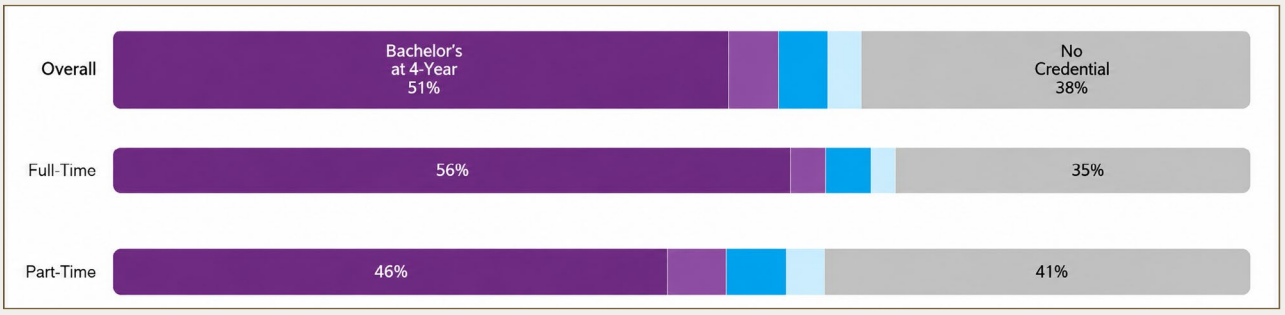
USING THE PDP TRANSFER DASHBOARD TO EXAMINE POST-TRANSFER OUTCOMES

The Transfer Dashboard's Sankey Diagram (see Figure 4) shows how students move after transfer, including whether they transfer to two-year or four-year institutions, earn a credential, or leave higher education.

The horizontal bar chart beneath the Sankey diagram uses the same disaggregation but shows how each group of students is distributed across different degree attainment outcomes (see Figure 5).

By disaggregating post-transfer outcomes by student group and destination institution type, users can identify whether certain student groups are disproportionately experiencing transfer-then-disenrollment and if specific institution types are associated with lower attainment.

FIGURE 5 | Transfer Dashboard Credentials Conferred Post-Transfer (Horizontal Stacked Bar Chart)



Source: National Student Clearinghouse. (n.d.). Retention and transfer dashboard [Screenshot/Dashboard image]. PDP Knowledge Base. Link here

The PDP Cohort AR file can help extend this analysis further. Following the OPEID crosswalk strategy outlined in QA5 can help determine outcomes post-transfer for specific destination institutions, providing insight into which destination schools have the highest attainment rates for an institution's transfer populations.

EXTENSIONS

Extensions allow practitioners to explore additional evidence that may help explain differences in post-transfer success.

Extend Inquiry to Examine Post-Transfer Experiences

Keep in mind: While the PDP does allow institutions to see which students completed a credential elsewhere, it is limited in the specific information it provides about academic performance and experience at the destination institution.

If an institution is part of a state network or has a formal articulation agreement with another school, it may be able to obtain data on how its students performed after transfer, including:

- Enrollment persistence after transfer.
- Credit accumulation.
- GPA or academic performance.
- Degree or credential completion.
- Time to completion.

These data require formal data-sharing agreements but, if accessible, can provide deeper insights into degree and credential attainment, as well as more granular aspects of student success at the destination school.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams move from measuring transfer to understanding what happens after students transfer.

What do post-transfer outcomes tell us?

- **What the Data Show**
  - » Whether transfer students remain enrolled after transfer.
  - » Whether transfer students earn a degree or credential.
  - » Whether outcomes differ across destination institution types or student groups.
- **Insight Signal**
  - » Whether transfer pathways are leading students toward successful educational outcomes.
- **Team Reflection Prompts**
  - » What share of transfer students complete a degree or credential?
  - » Do outcomes differ between two-year and four-year destinations?
  - » Which findings stand out?
  - » Which findings challenge our assumptions about transfer success?

What questions do post-transfer outcomes raise?

- **Team Reflection Prompts**
  - » Are some student groups less likely to complete credentials after transferring?
  - » Do outcomes differ across destination institutions?
  - » Are students transferring to institutions where they are more likely to succeed?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » How do completion rates vary across destination institutions?
  - » What do advising and pathway planning data suggest?
  - » What do students say about their transfer experiences after leaving?
  - » Are there differences in credit transfer, academic preparation, or support services that may affect completion?
  - » What partnerships or data-sharing agreements could help us better understand student success after transfer?

WHAT'S NEXT

Analysis to Action

- **Create a Definition of Transfer Success:** Convene a group of institutional stakeholders to develop a working definition of transfer success and metrics to track the transfer success rate. Determine whether there are commonalities among students who did, and did not, meet the definition of transfer success.
- **Use post-transfer outcomes to strengthen pathways:** Review completion patterns across destination institutions to identify where students are most successful and where they may face challenges. Use these findings to inform advising, strengthen transfer partnerships, and improve pathway alignment.

STRUCTURED AND INFORMAL TRANSFER PATHWAYS

Q3 Do some student groups have greater access to formal transfer pathways than others?

WHY DOES THIS MATTER?

Formal transfer pathways—such as articulation agreements, guaranteed admission programs, aligned curricula, and coordinated advising—are designed to make transfer more predictable and easier to navigate.

Understanding who appears to use these pathways can help institutions assess whether transfer opportunities are reaching all students. When some student groups are more likely to transfer outside established pathways, it may point to differences in access to information, advising, eligibility, or other institutional supports.

WHAT DATA CAN ANSWER THIS QUESTION?

The PDP does not directly identify whether a student transferred through a formal or informal pathway. However, the **Cohort and Course AR files** can be used to approximate pathway structure through destination analysis.

USING PDP DATA TO EXAMINE TRANSFER PATHWAYS

The Cohort Analysis-Ready (AR) file includes destination institution OPEIDs that can be linked to institution names (see QA5). By comparing destination institutions with an institution's articulation agreements or transfer partnerships, practitioners can estimate:

- How many students transfer to institutions with established pathways.
- Whether pathway use differs across student groups.
- Which destination institutions receive students outside formal transfer pathways.

Keep in mind: This approach identifies whether students transferred to institutions with established pathways. It does not indicate whether students intentionally used those pathways or were aware they existed.

EXTENSIONS

Extensions allow practitioners to explore additional evidence that may help explain differences in access to formal transfer pathways.

Extend Understanding of Pathway Participation

Institutional records can provide additional information about students' engagement with transfer supports before they transfer. Internally, advising records may be a good starting point for distinguishing structured from informal transfers. Relevant resources could include:

- Advising appointment records
- Participation in transfer workshops or transfer-center programming
- Dual admission participation
- Articulation-specific advising flags
- Transfer application support records

These data can help determine whether students who appear to use formal pathways also received transfer-specific support.

Extend Understanding of Awareness and Access

At the state level, articulation agreement databases can help define which formal pathways exist, and overlaying them against actual transfer destination data may highlight utilization gaps.

Survey data can also be a valuable external data source. Nationally, transfer-focused surveys, such as those conducted by the Community College Survey of Student Engagement (CCSSE), or intake and exit surveys, can capture whether students were aware of formal transfer pathways and if they felt supported in accessing them. Student surveys and focus groups can provide additional insight into questions such as:

- Were students aware of available transfer pathways?
- Did they understand transfer requirements?
- Did they know where to seek advising?
- Did they feel supported throughout the transfer process?

Together, these data can help institutions distinguish between pathways that exist and pathways that students are actually able to access.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams understand whether formal transfer pathways are reaching the students they are intended to serve.

What do transfer pathway patterns tell us?

- **What the Data Show**
  - » The share of transfer students whose destinations align with established transfer pathways.
  - » Whether pathway use differs across student groups.
  - » Which transfer destinations fall outside formal pathway structures.
- **Insight Signal**
  - » Whether formal transfer pathways appear to be broadly accessible or primarily used by certain groups of students.
- **Team Reflection Prompts**
  - » What share of transfer students appear to use formal pathways?
  - » Which destination institutions fall outside existing pathway structures?
  - » Which findings stand out?
  - » Which findings challenge our assumptions about pathway access?

What questions do transfer pathway patterns raise?

- **Team Reflection Prompts**
  - » Are some student groups less likely to transfer through formal pathways?
  - » Do pathway participation patterns differ across programs?
  - » Are students aware of available transfer pathways?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » How are formal pathways communicated to students?
  - » Do advising practices support pathway awareness and use?
  - » Are pathway eligibility requirements (e.g. GPA, enrollment intensity, or course sequencing) limiting access for some students?
  - » What do students say about their experiences navigating transfer?
  - » What institutional practices may affect who can access formal pathways?

WHAT'S NEXT

Analysis to Action

- **Examine formal pathway eligibility criteria for structural barriers:** Bring pathway eligibility requirements (GPA thresholds, credit minimums, enrollment status requirements) to a meeting with academic affairs and advising leadership. Discuss whether those criteria may systematically exclude student groups who are disproportionately relying on informal pathways.
- **Strengthen awareness of transfer pathways:** If equity analysis shows that certain student groups are less likely to use structured pathways, facilitate a conversation with advising, marketing, and student services about whether pathway information is reaching all students equitably.
- **Use pathway data to improve transfer support:** Compare pathway participation with advising records, transfer programming, and student feedback to identify where additional outreach or support may help more students successfully navigate established transfer pathways.

4 What share of students who transfer continue toward a credential or degree?

WHY DOES THIS MATTER?

Transfer along structured pathways is intended to help students continue their education, not start over. Credit loss and acceptance are critical indicators of student momentum after students' departure. When credits are not accepted by receiving institutions, students may have to retake courses, delay program entry, and extend time to degree. All of these factors can have a significant impact on students' financial standing, motivation, and ultimate completion.

Examining credit transferability helps institutions understand whether transfer pathways are functioning as intended. Patterns of credit acceptance and applicability can highlight strengths in existing articulation agreements, identify pathway misalignment, and reveal opportunities to strengthen partnerships that better support students' academic progress after transfer.

WHAT DATA CAN ANSWER THIS QUESTION?

Understanding whether students retain academic progress after transfer requires information about both the credits students earned before departure and the credits that are ultimately accepted and applied by receiving institutions. Because no single data source captures this entire picture, practitioners should draw on multiple sources of evidence, including student movement data, institutional partnerships, and transfer credit records.

USING PDP DATA TO EXAMINE TRANSFER PATHWAYS

Although the PDP does not capture how many credits receiving institutions accept or apply toward a student's next credential, it provides several important starting points for inquiry.

The Cohort Analysis-Ready (AR) File includes:

- The total number of credits students earned before transfer, establishing a baseline for the academic progress students bring with them.
- Destination institution identifiers (OPEIDs), allowing practitioners to identify the institutions receiving the largest numbers of transfer students.
- Students' program of study at the point of transfer, which can help institutions examine whether credit applicability differs across academic pathways.

Together, these data help institutions identify where to focus deeper analysis. By combining destination information with institutional transfer credit records, articulation agreements, or receiving institution policies, practitioners can estimate whether students are successfully carrying their academic progress into their next institution.

EXTENSIONS

Extensions allow practitioners to explore how institutional partnerships, articulation agreements, and transfer credit policies influence students' ability to carry academic progress into their next institution.

Extend Understanding of Institutional Conditions

Transfer credit evaluations maintained by the registrar or transfer center may provide the most direct evidence of how students' credits are accepted and applied after transfer. Institutions participating in reverse transfer initiatives or data-sharing partnerships may also have access to student-level credit acceptance information.

Extend Understanding of Transfer Pathways

Review formal articulation agreements and destination institutions' transfer credit policies to determine whether they align with students' most common transfer destinations. Statewide transfer systems, like **Transfer Credit Ohio**, and course equivalency databases can provide additional insight into pathway design and expected credit applicability.

Relevant resources may include:

- Institutional articulation agreements
- Transfer credit evaluation records
- State transfer portals and course equivalency systems
- Data-sharing agreements with destination institutions

These sources can help practitioners determine whether credit transfer patterns reflect pathway design, institutional policy, or differences across destination institutions.

INTERPRETING THE DATA TOGETHER

What do the patterns tell us?

- **What the Data Show**
  - » The extent to which students' earned credits are retained after transfer.
  - » Differences in credit transferability across destination institutions or academic pathways.
  - » Where students may experience substantial credit loss.
- **Insight Signal**
  - » Whether transfer pathways appear to preserve students' academic progress or whether students encounter barriers that slow progress toward their next credential.
- **Team Reflection Prompts**
  - » Which findings stand out?
  - » Which findings surprised us?
  - » Which findings challenge our assumptions?

What questions do the patterns raise?

- Which destination institutions appear to preserve students' academic progress most effectively?
- Are students experiencing greater credit loss in particular programs or pathways?
- How might articulation agreements or transfer policies contribute to these patterns?
- What additional evidence would help explain differences across destination institutions?

What additional evidence should we consider?

- How do receiving institutions evaluate and apply transfer credit?
- How do students describe their experiences transferring credit?
- Which institutional partnerships could help us better understand credit applicability and pathway effectiveness?

WHAT'S NEXT

Analysis to Action

- **Strengthen partnerships with key destination institutions:** Prioritize conversations with high-volume transfer destinations to better understand credit acceptance practices and explore opportunities for data sharing or pathway improvement.
- **Incorporate credit transferability into transfer advising:** Equip advisors with clear, up-to-date information about credit applicability so students can make more informed transfer decisions and understand the potential implications for time, cost, and degree completion.
- **Evaluate articulation agreements through the lens of student outcomes:** Review whether existing agreements are preserving students' academic progress and identify destination institutions where new or revised agreements may reduce unnecessary credit loss.

C

UNDERSTANDING STUDENT EXPERIENCE AND MOMENTUM (PRE-TRANSFER)

Section A established how students move through and beyond your institution. Section B examined how students navigate transfer pathways and what happens after they transfer. This section builds on those insights by exploring the academic progress and institutional experiences that precede transfer.

Rather than viewing transfer as a single event, these questions examine how students build momentum before departure and how institutional conditions may shape their transfer decisions.

The questions in this section guide practitioners to:

- Understand when students transfer and the academic progress they have made before departure.
- Examine whether students are transferring with the momentum needed for continued success.
- Explore how institutional experiences and supports may influence transfer timing and student progression.
- Identify where additional supports, partnerships, or pathway improvements may strengthen students' transfer experiences.

Together, these questions help institutions move beyond understanding where and when students transfer to examining the experiences and conditions that shape transfer pathways and outcomes.

PROGRESS BEFORE TRANSFER

Q1 Where are students in their academic journey when they transfer?

WHY DOES THIS MATTER?

Understanding when students transfer helps distinguish between transfer as an expected stage in students' educational pathways and transfer that may reflect disruption, unmet need, or changing educational goals. Students who transfer shortly after enrollment often have different experiences and support needs than students who transfer after completing substantial coursework or a structured transfer pathway.

Examining transfer timing across student groups, programs, and pathways can help institutions identify where students are progressing as expected and where additional advising, academic support, or pathway improvements may be needed.

WHAT DATA CAN ANSWER THIS QUESTION?

To better understand transfer timing, practitioners should consider multiple sources of evidence, including when students transfer, the academic progress they have made before departure, their engagement with advising and student supports, and other experiences that may shape their pathway.

The **PDP Transfer Dashboard** allows you to view transfer rates by cohort year and transfer window, ranging from one to eight years after first enrollment.

USING THE PDP TRANSFER DASHBOARD TO EXAMINE TRANSFER TIMING

The **PDP Transfer Dashboard** provides a starting point for understanding when students transfer. By adjusting the transfer window (1–8 years after first enrollment), practitioners can identify when transfer most commonly occurs and whether timing differs across student groups.

The Transfer Benchmarking Dashboard (see Figure 3) can provide additional context by comparing transfer timing with aggregated peer institutions. As discussed in QA4, benchmarking should be used to understand institutional context rather than to evaluate performance.

The **Cohort AR File** can extend this analysis using the "Year of Last Enrollment at Cohort Institution" field. Calculating the time between a student's first enrollment and last enrollment provides an estimate of how long students remain enrolled before transferring. For a more precise estimate, practitioners can use the **Course AR File** to identify the final term of enrollment prior to transfer. Together, these files make it possible to examine transfer timing across student groups, academic programs, and other characteristics.

EXTENSIONS

Extensions allow practitioners to explore the conditions that shape transfer timing.

Incorporate Institutional Data

Institutional data sources may provide additional context for understanding why students transfer when they do. Relevant sources could include:

- Advising appointment histories.
- Transfer advising participation.
- Early alert records.
- Academic milestone completion.
- Exit surveys or withdrawal documentation.
- Participation in structured pathways (e.g., 2+2 agreements).
- Engagement with community-based organizations, scholarship programs, and other external partners that support students at your institution.

Together, these sources help move the analysis from describing when students transfer to understanding the conditions that shape transfer timing. They can help distinguish between transfer that reflects planned pathway progression and transfer that may be influenced by academic, financial, or institutional conditions.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams understand whether transfer timing reflects expected student pathways or signals opportunities to strengthen student supports.

What do transfer timing patterns tell us?

- **What the Data Show**
  - » When students transfer in their academic journey.
  - » Whether students transfer before or after reaching key academic milestones.
  - » Whether transfer timing differs across student groups, programs, or pathways.
  - » Whether transfer timing aligns with expected pathway milestones and institutional expectations.
- **Insight Signal**
  - » Transfer timing can help identify whether students are progressing through expected pathways or transferring before they have built sufficient academic momentum. Early transfer patterns may signal opportunities to strengthen proactive advising, improve pathway communication, or ensure students are accessing needed supports before departure.
- **Team Reflection Prompts**
  - » At what point in their academic journey do most students transfer?
  - » Does transfer timing align with expected pathway milestones?
  - » Which student groups, programs, or pathways show different transfer timing patterns?
  - » Are students transferring before reaching milestones that indicate readiness for transfer success?

What questions do transfer timing patterns raise?

- Are we reaching students early enough to influence transfer decisions and support academic progress?
- Are advising interventions occurring at the points when students are most likely to need guidance?
- Are students transferring before accessing key institutional supports, services, or milestones?
- Do students who transfer early show different patterns of course-taking, credit accumulation, or service engagement?
- Where do student transfer patterns differ from the timelines assumed in institutional pathways or advising models?

What additional evidence should we consider?

- **Advising and student support access**
  - » What do advising records tell us about students who transfer early?
  - » Are there points where students may have benefited from earlier outreach or intervention?
  - » Which institutional supports or services did students access before transferring? Which did they not?
- **Academic and pathway context**
  - » Do early alert data or academic milestones help explain transfer timing?
  - » How do articulation agreements, program maps, and pathway structures shape expected transfer timing?
  - » Are institutional pathway timelines realistic based on actual student movement?
- **Student experience and decision-making**
  - » What do exit surveys, student communications, or withdrawal documentation tell us about why students transferred when they did?
  - » What institutional policies or practices may accelerate or delay transfer?

WHAT'S NEXT

Analysis to Action

- **Evaluate the timing of advising and early alert outreach.** Discuss with advising and student success teams whether outreach, early alert systems, and transfer advising are reaching students at the right time.
- **Discuss pathway timing expectations with academic affairs and program faculty.** If students in certain programs transfer earlier or later than expected, engage faculty, academic affairs, and advisors to explore whether program requirements, advising guidance, and pathway expectations align with student experiences.
- **Build on effective pathway structures.** If students in structured pathways transfer at expected milestones, use these patterns to strengthen existing pathways and identify opportunities to expand similar approaches.

2 What academic momentum have students built before transfer?

WHY DOES THIS MATTER?

Credit accumulation provides one of the strongest indicators of students' academic momentum before transfer. Examining how many credits students earn before departure helps institutions understand whether students are progressing efficiently toward transfer or leaving before building the academic foundation associated with successful transfer outcomes.

Nationally, a growing body of research affirms that students who transfer with fewer credits are less likely to complete a bachelor's degree than those who transfer with more, underscoring why credit accumulation at the point of transfer can be critically important.[4]

Students who transfer with relatively few credits may be leaving before reaching important milestones. Conversely, students who accumulate substantially more credits than a transfer pathway requires may be experiencing delays related to course availability, unclear pathway guidance, or other structural barriers. Examining credit accumulation across student groups, programs, and pathways can help institutions identify where students appear to be progressing efficiently and where additional supports or pathway improvements may strengthen students' academic momentum before transfer.

WHAT DATA CAN ANSWER THIS QUESTION?

To understand the academic momentum students build before transfer, practitioners should examine how many credits students earn before departure, whether they reach key academic milestones, and how these patterns vary across student groups, academic programs, and transfer pathways. Looking at credit accumulation alongside post-transfer outcomes can also help determine whether students who leave with greater momentum experience stronger outcomes after transfer.

USING THE PDP TRANSFER DASHBOARD TO EXAMINE ACADEMIC MOMENTUM PRE-TRANSFER

The **PDP Transfer Dashboard** provides a starting point for understanding the academic momentum students build before transfer.

Practitioners can use the dashboard to:

- **Compare students who reach key credit milestones.** Use the "Credit Milestone" filter to compare transfer rates for students who did and did not reach a selected earned-credit threshold before leaving your institution.
- **Identify differences across student groups.** Apply dashboard disaggregations (e.g., race/ethnicity, enrollment intensity, Pell status) to determine whether students build academic momentum at similar rates across populations.
- **Examine momentum within academic programs.** Filter by program of study to identify whether students in particular pathways consistently transfer before, at, or beyond expected credit milestones.
- **Connect momentum to post-transfer outcomes.** Adjust the credit milestone filter and review the Sankey diagram and post-transfer outcome charts to explore whether students who transfer with more credits are more likely to earn a credential after transfer.
- **Compare cohorts.** Use the dashboard's call-out boxes to see how transfer patterns change across selected cohorts as you apply different credit milestone thresholds.

For example: Suppose your institution expects students in a business transfer pathway to complete approximately 60 credits before transferring. Set the credit milestone filter to "60 credits," filter to "Business" as the program of study, and disaggregate by race/ethnicity. Then compare post-transfer outcomes to explore whether students who reached the milestone were more likely to complete a credential after transfer.

Keep in mind: The dashboard reports only credits earned at your institution. Students who entered with dual-enrollment, transfer, or other prior college credits may appear to have accumulated fewer credits than reflected in their complete academic record. Consider supplementing PDP data with information from your student information system or degree audit platform when interpreting academic momentum.

The **Course AR File** includes fields for credits attempted and earned for every course each student enrolled in at an institution. Leveraging these fields can create more specific earned credit bands for analysis in addition to calculated variables for analysis that look at the proportion of credits attempted versus earned.

EXTENSIONS

Extensions allow practitioners to explore institutional conditions that may influence students' academic momentum before transfer.

Build a More Complete Picture of Academic Momentum

Institutional systems such as the student information system (SIS) or degree audit platform can supplement PDP data by incorporating credits earned before students enrolled at an institution, including dual enrollment, transfer credit, and prior college coursework. These sources provide a more complete understanding of students' cumulative progress toward transfer.

Compare Momentum with Pathway Expectations

Credit threshold requirements in formal articulation agreements provide another important layer of context. Many formal transfer pathways, including 2+2 agreements, specify minimum credit or credential thresholds, such as completion of an associate's degree or a defined set of transferable credits, before guaranteed admission or full pathway benefits apply.[3] Existence of these thresholds means that credit accumulation in dashboards and AR files may directly reflect whether students are meeting or falling short of formal requirements.

Examine Momentum Across Programs

Academic departments, advising offices, and registrars can provide additional context about program sequencing, prerequisite structures, and course availability that may influence students' ability to reach expected milestones before transfer.

INTERPRETING THE DATA TOGETHER

What do the patterns tell us?

- **What the Data Show**
  - » How much academic momentum students build before transfer.
  - » Whether students reach key credit milestones before leaving.
  - » Whether credit accumulation varies across student groups, academic programs, and transfer pathways.
  - » Whether students appear academically prepared to continue their education after transfer.
- **Insight Signal**
  - » Credit accumulation patterns can help institutions understand whether students are progressing efficiently toward transfer or whether academic structures, advising practices, or other barriers may be slowing students' ability to build momentum before departure.
- **Reflection Prompts**
  - » Which findings stand out?
  - » Which findings surprised us?
  - » Which findings challenge our assumptions?

What questions do the patterns raise?

- Are students transferring before reaching key academic milestones?
- Which student groups consistently transfer with fewer or greater numbers of earned credits?
- Do some academic programs consistently produce higher or lower levels of academic momentum?

What additional evidence should we consider?

To better understand the factors shaping credit accumulation and transfer readiness, consider:

- **To better understand the factors shaping credit accumulation and transfer readiness, consider:**
  - » Are course sequencing, prerequisite requirements, or course availability affecting students' ability to build momentum?
  - » Do articulation agreements define clear and realistic transfer milestones?
  - » Are students accumulating credits that apply toward their intended degree after transfer?
- **Advising and student support**
  - » Do advising practices clearly communicate transfer-readiness milestones?
  - » Are students receiving guidance early enough to select courses that support efficient progress?
  - » Are students aware of which credits will transfer and apply toward their intended program of study?
- **Student experience and barriers**
  - » What do students say about factors influencing their academic progress and timing of transfer?
  - » Are students leaving before they have had opportunities to access academic supports that could help them build momentum?

WHAT'S NEXT

Analysis to Action

- **Strengthen transfer milestone advising:** If students consistently transfer before reaching key credit milestones, partner with advising leadership to incorporate transfer-readiness benchmarks into degree planning tools, advising protocols, and milestone alerts.
- **Address barriers to academic momentum:** If students consistently accumulate fewer or more credits than expected, work with department leadership and advising to examine potential contributors such as prerequisite sequencing, limited course availability, pathway design, or unclear transfer guidance.
- **Reduce inequities in academic momentum:** If differences in credit accumulation persist across student groups, engage cross-functional partners to identify institutional conditions that may contribute to these patterns and prioritize strategies that improve equitable access to advising, coursework, and transfer.
- **Monitor momentum as an early indicator of transfer readiness:** Incorporate credit accumulation milestones into routine institutional reporting to help identify where students may be falling behind expected transfer pathways and evaluate whether improvements in advising or pathway design strengthen academic momentum over time.

3Q How are students performing academically before they transfer?

WHY DOES THIS MATTER?

Understanding the academic performance of your transfer population can help distinguish between students who transfer as part of a planned academic pathway and students who transfer following academic challenges. Examining academic performance before departure provides insight into whether students are building the preparation needed for transfer success or whether transfer may be functioning as an alternative pathway after academic difficulty.

Looking at academic performance alongside transfer timing and credit accumulation can help institutions identify where students may need additional support before transfer, whether academic interventions are reaching students at the right time, and whether institutional structures are helping students remain on track toward their goals.

WHAT DATA CAN ANSWER THIS QUESTION?

The PDP Dashboards and AR files provide multiple fields that can provide insight into academic performance prior to transfer, including GPA information, course outcomes, and patterns of academic progress before departure.

USING THE PDP TRANSFER DASHBOARD TO EXAMINE ACADEMIC STANDING BEFORE TRANSFER

The Transfer Dashboard contains GPA bands for filtering and disaggregation for the first term and year of enrollment at an institution.

The **Cohort AR File** offers each student's GPA for the first term and year that they were enrolled, and the **Course AR File** shows grades for each course the student took at the institution. By leveraging the **Course AR File**, institutions can examine patterns in academic performance leading up to transfer, including whether students' performance was improving, declining, or remaining consistent before departure. Course-level analysis can also identify whether specific programs, courses, modalities, or instructional experiences are associated with higher rates of poor academic outcomes among students who later transfer.

These patterns should be interpreted within the broader context of students' transfer pathways. For example, if students are transferring after repeated course withdrawals, failed gateway courses, or declining academic performance, this may indicate academic barriers that could be addressed earlier through advising, academic support, or pathway redesign. Conversely, students transferring with strong academic performance may reflect successful progression through established transfer pathways.

Merging Course and Cohort AR files on student identifiers can expand an analysis to examine correlations between academic performance at the point of departure and at the destination institution, as well as degree or credential attainment.

EXTENSIONS

Internal institutional data can extend analysis of academic performance in meaningful ways, offering context that the PDP's standard reporting does not capture.

Extend Understanding of Academic Performance

Internal institutional data can extend analysis of academic performance in meaningful ways. Given that the PDP does not report GPA after a student's first academic year, leveraging SIS data on GPA at the time of departure is a more reliable proxy for academic performance at an institution.

Extend Understanding of Early Alert Engagement

Early alert platform data can add another layer of context. If an institution uses an early alert system, linking alert records to its transfer population can help determine whether students who subsequently transferred were flagged for academic risk and if those flags resulted in intervention. Where transfer students show high rates of early alert flags and low rates of subsequent contact, that pattern may point to gaps in intervention capacity rather than student disengagement.

Extend Understanding of Course-Level Progress and Transfer Alignment

Institutional course-level data from the registrar or LMS can add additional depth. LMS engagement data, such as login frequency, assignment completion rates, and participation metrics, can reveal whether students who later transferred showed signs of academic struggle or were progressing. State articulation agreement databases can be used alongside Course AR data to build a crosswalk of courses accepted for credit at common destination institutions. This information can help inform both future advising practice and articulation discussions.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams understand whether students are transferring from a position of academic strength or whether academic challenges may be shaping transfer decisions.

What do academic performance patterns tell us?

- **What the Data Show**
  - » How academic performance varies across student groups, programs, and transfer pathways.
  - » Whether specific courses or academic experiences are associated with transfer patterns.
- **Insight Signal**
  - » Whether transfer reflects academic progress and readiness, academic disruption, or opportunities to strengthen academic support before departure.
- **Team Reflection prompts**
  - » What academic performance patterns characterize transfer students?
  - » Are students leaving in strong academic standing?
  - » Do GPA patterns differ across transfer pathways, destinations, programs, or student groups?

What questions do academic performance patterns raise?

- **Team Reflection Prompts**
  - » Do academic performance patterns differ across programs, pathways, or student characteristics?
  - » Are there courses or academic milestones where students appear to experience challenges before transfer?
  - » Are academic structures, course sequencing, or program requirements contributing to academic barriers?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » What do advising and early alert records suggest about students' academic experiences before transfer?
  - » What do course-level outcomes reveal about gateway courses, prerequisite structures, or potential academic bottlenecks?
  - » What do students say about the academic factors influencing their decision to transfer?
  - » What institutional practices or partnerships could help more students transfer from a position of academic readiness?

WHAT'S NEXT

Analysis to Action

- **Use course grade distribution findings to evaluate academic support targeting:** If analysis reveals that a meaningful share of transfer students departed after poor course performance, discuss whether academic supports are reaching students early enough, whether intervention timing aligns with points of academic risk, and where additional proactive supports may be needed.
- **Conduct course-level review for programs with persistent academic barriers:** Where course-level grade analysis reveals that transfer students show higher failure, withdrawal, or repeat rates in specific courses or sequences, bring those findings to academic affairs and faculty leadership. Use the data to examine whether course design, prerequisite structures, course availability, instructional support, or other academic conditions may be creating barriers to student progress.
- **Strengthen early identification and intervention practices:** If students who later transfer show patterns of academic risk before departure, examine whether early alert, advising, tutoring, or other academic supports are reaching students before challenges affect their progress. Consider whether additional outreach points or coordinated interventions are needed for students approaching key academic milestones or experiencing repeated academic setbacks.

PROGRESS BEFORE TRANSFER

4 **How did academic preparation and placement experiences shape students' pathways before transfer?**

WHY DOES THIS MATTER?

Academic preparation experiences shape how students enter, navigate, and progress through their academic journey before transfer. Placement decisions, developmental coursework, and prerequisite structures are intended to provide the support students need to succeed, but they can also influence when students access college-level coursework, complete transfer milestones, and build academic momentum.

Understanding the academic preparation experiences of transfer students provides important context for interpreting their pathways. Examining developmental course-taking, placement patterns, and differences across student groups can help institutions understand whether students are progressing through expected academic pathways, where additional support may be needed, and how institutional structures shape students' experiences before transfer.

WHAT DATA CAN ANSWER THIS QUESTION?

The PDP Dashboards and AR files provide several indicators that can help you understand academic preparation experiences among students who transfer.

USING THE PDP COURSE AR FILE TO EXAMINE DEVELOPMENTAL COURSEWORK BEFORE TRANSFER

The Course-Level AR File includes a course type indicator that distinguishes developmental and remedial courses from college-level courses. Filtering the Course AR file to include only records flagged as developmental or remedial and then merging with the Cohort AR file using student identifiers can help determine what share of transfer students took at least one developmental course before departing.

This analysis can be extended by examining:

- Whether students completed developmental sequences before transferring.
- How long students remained in developmental coursework before progressing to college-level courses.
- Whether developmental course-taking patterns differ across student groups, programs, or transfer pathways.
- Whether developmental coursework was associated with differences in credit accumulation or time to transfer.

Understanding these patterns can help institutions identify how academic preparation experiences vary within their transfer population and whether some students encounter different pathways toward transfer readiness.

EXTENSIONS

Extensions allow practitioners to explore how institutional placement records, course scheduling structures, and external research can deepen understanding of students' academic preparation experiences before transfer.

Extend Understanding of Institutional Placement Records

Institutional placement records can provide additional context beyond what is available through PDP data. SIS or registrar records may include placement measures, placement policies, co-requisite enrollment, course sequences, and changes in placement practices over time.

Linking these records with PDP data can help institutions examine not only whether students enrolled in developmental coursework, but also how placement experiences and academic structures shaped students' progress before transfer.

Extend Understanding of Course Scheduling and Pathway Structures

Institutional course scheduling and pathway data can provide additional context on students' experiences navigating academic requirements. For example, prerequisite structures, course availability, and program requirements may influence how efficiently students complete coursework before transfer.

Disaggregating these experiences by student group can help institutions understand whether academic preparation pathways differ across populations and identify opportunities to improve access to effective supports.

Extend Understanding Through External Research

External research can also inform the interpretation of findings. The **Center for the Analysis of Postsecondary Readiness (CAPR)** at Columbia University found that traditional multi-course developmental sequences are associated with significantly lower completion rates among students of color, and that low-income students are disproportionately placed into the longest sequences.[5] If institutional data shows that transfer students were concentrated in extended remedial sequences, and that those students are disproportionately from underrepresented groups, the pattern may reflect structural inequities that are in need of reform.

INTERPRETING THE DATA TOGETHER

What do academic preparation patterns tell us?

- **What the Data Show**
  - » How developmental course-taking patterns vary across student groups, programs, and transfer pathways.
  - » Whether developmental coursework is associated with differences in credit accumulation, academic momentum, or timing of transfer.
- **Insight Signal**
  - » Whether academic preparation experiences are supporting students' progress toward transfer readiness or whether placement structures, sequence requirements, or academic supports may be contributing to differences in students' ability to build momentum.
- **Team Reflection prompts**
  - » What developmental course-taking patterns characterize transfer students?
  - » Do developmental course-taking patterns differ across transfer pathways, programs, or student groups?
  - » Are some students experiencing longer developmental pathways before reaching college-level coursework?

What questions do academic preparation patterns raise?

- Are some students transferring before completing developmental or foundational coursework?
- Are some student groups more likely to experience extended developmental sequences or delays in reaching college-level coursework?
- Are course sequencing, prerequisite structures, or program requirements creating unintended barriers to progress?

What additional evidence should we consider?

- What do academic advising records suggest about how students are guided through developmental pathways?
- What do institutional course scheduling and pathway data reveal about students' ability to complete required coursework efficiently?
- Are there differences in developmental experiences across student groups that warrant further investigation?

WHAT'S NEXT

Analysis to Action

- **Review academic preparation and placement practices:** If findings show transfer students are disproportionately represented in developmental sequences, experience longer pathways before reaching college-level coursework, or differ across student groups, bring these insights to academic affairs and student success leadership. Use the findings to examine whether placement practices and academic preparation structures are supporting students' progress toward their goals.
- **Assess whether co-requisite or multiple-measures models should be expanded:** Where data show that students placed into developmental sequences have lower credit accumulation and earlier departure, discuss with academic affairs whether expanding co-requisite instruction or revising placement criteria could improve outcomes.
- **Raise equity implications of developmental sequences with senior leadership:** If students from specific demographic groups are disproportionately placed in the longest developmental sequences and show the highest transfer-before-completion rates, bring this to cross-functional leadership as a structural equity concern.
- **Strengthen advising and academic support around key transition points:** If students appear to experience challenges progressing through developmental coursework or reaching academic milestones before transfer, work with advising and student success teams to evaluate whether students receive timely guidance and support as they navigate academic requirements.

5 How did financial experiences shape students' pathways before transfer?

WHY DOES THIS MATTER?

Financial circumstances can influence how students navigate their educational pathways, including their ability to remain enrolled, access resources, and make informed decisions about their next step. Changes in financial aid eligibility, unmet financial need, or unexpected financial challenges may affect when and where students transfer.

Understanding the financial experiences of transfer students can help institutions distinguish between transfer as a planned transition toward a student's goals and transfer that occurs alongside financial pressures or limited access to resources. Examining financial patterns before transfer can also help institutions identify opportunities to strengthen communication, support, and financial planning resources.

WHAT DATA CAN ANSWER THIS QUESTION?

Financial aid data and institutional records can provide important context for understanding the financial experiences of students before transfer.

USING THE PDP TRANSFER DASHBOARD TO EXAMINE ACADEMIC STANDING BEFORE TRANSFER

If an institution submits a financial aid file to the PDP, it will receive access to a Financial Aid Dashboard and **Financial Aid AR File**, which will be the best place to begin analysis.

If this file is not submitted, the only financial indicator within the Cohort AR file is whether or not a student received a Pell grant at any point during their first year of enrollment at an institution. While this may not be a reliable indicator of financial standing at the time of departure, it is worthwhile to disaggregate transfer dashboards and AR files by Pell status to assess whether any patterns exist.

EXTENSIONS

Extensions allow practitioners to explore how financial aid records, student-reported experiences, and external benchmarks can deepen understanding of the financial factors shaping students' pathways before transfer.

Extend Understanding of Institutional Financial Aid Records

Institutional financial aid records can provide additional context about students' experiences before transfer. By linking financial aid records with PDP data using student identifiers, institutions can examine whether transfer students experienced financial events such as:

- Changes in financial aid eligibility.
- Satisfactory Academic Progress (SAP) warnings or financial aid probation.
- Increased unmet financial need.
- Emergency aid requests or basic needs challenges.

Examining these patterns alongside enrollment and academic data can help institutions understand whether financial circumstances intersect with other aspects of students' pathways, such as academic momentum, enrollment patterns, or timing of transfer.

Understand Financial Factors Behind Transfer Decisions

Exit survey data, if an institution collects it, may also provide insight into financial standing as a factor in transfer decisions. A simple question asking students to identify the driving factors behind their transfer decision can yield valuable insights. The **Hope Center for College, Community, and Justice's basic needs assessments** found that food and housing insecurity, not just tuition costs, are meaningful predictors of whether students persist or depart.[6]

Where an institution has participated in basic needs surveys or similar data collection efforts, linking those records to its transfer population can surface whether students who transferred were disproportionately experiencing financial challenges prior to their departure.

Contextualize Transfer Destinations with External Benchmarks

College Scorecard can provide additional context on the cost-of-attendance and net price profiles of an institution's most common destination institutions, helping assess whether students who transfer for financial reasons are landing at more or less affordable options.

INTERPRETING THE DATA TOGETHER

This section is designed to support cross-campus conversations by helping teams understand how financial experiences shaped students' pathways before transfer and identify opportunities to strengthen support.

What do financial patterns tell us?

- **What the Data Show**
  - » Financial aid patterns among transfer students before departure, including changes in aid eligibility, SAP status, unmet need, or emergency aid use.
  - » Whether financial experiences differ across student groups, programs, or transfer pathways.
  - » Whether financial patterns overlap with other experiences before transfer, such as academic progress or enrollment changes.
- **Insight Signal**
  - » Whether financial circumstances appear to shape students' ability to continue their current pathway, access resources, and make informed decisions about transfer.
- **Reflection prompts**
  - » Are financial disruptions or changes in aid common before transfer?
  - » Do financial experiences differ across student groups or transfer pathways?

What questions do the patterns raise?

Financial patterns can identify areas for deeper inquiry into how students experience financial support, navigate challenges, and make decisions about their educational pathways.

- **Team Reflection Prompts**
  - » Are some student groups more likely to experience financial disruptions before transfer?
  - » Are students receiving timely information and support when financial circumstances change?
  - » Do financial challenges appear to intersect with academic progress, enrollment patterns, or transfer timing?

What additional evidence should we consider?

- **Team Reflection Prompts**
  - » What do advising records, emergency aid records, or basic needs data reveal about students' experiences before transfer?
  - » What do student surveys, exit surveys, or focus groups suggest about financial factors influencing transfer decisions?
  - » What additional evidence would help identify opportunities to strengthen financial support and planning?

WHAT'S NEXT

Analysis to Action

- **Strengthen proactive financial communication and support:** If findings show changes in financial aid eligibility, SAP concerns, or unmet financial need are common among transfer students before departure, bring these insights to financial aid, advising, and student success leadership. Discuss whether students receive timely information about financial changes, available resources, and options for continuing their educational pathway.
- **Evaluate financial support structures and basic needs resources:** If financial patterns suggest that students are navigating significant challenges before transfer, assess whether existing supports—such as emergency aid, payment options, or basic needs services—are accessible and aligned with students' needs.
- **Examine equity in financial experiences and access to support:** If financial patterns differ across groups, explore whether students have equitable access to financial information, resources, and support. Engage campus partners in identifying opportunities to reduce gaps in financial support and improve students' ability to navigate their pathways.
- **Strengthen coordination between financial aid, advising, and student support teams:** If financial experiences overlap with academic challenges, enrollment changes, or transfer timing, bring together financial aid, advising, and student success teams to examine opportunities for coordinated support. Discuss whether shared indicators or referral processes could help students receive guidance before financial circumstances affect their educational decisions.

6 How did institutional supports and experiences shape students' pathways before transfer?

WHY DOES THIS MATTER?

Institutional supports and experiences shape how students understand their options, navigate academic decisions, and connect their educational goals to available resources. Advising, career exploration, engagement opportunities, and other student supports can help students make informed decisions about their academic pathways and transitions.

Understanding the experiences of students who transfer can reveal whether students had access to timely information, guidance, and support before making their transition. Examining patterns in support engagement can also help institutions identify whether opportunities to strengthen connection, belonging, and pathway clarity exist across different student populations.

WHAT DATA CAN ANSWER THIS QUESTION?

Institutional data can provide important context about the supports and experiences available to students before transfer.

The PDP does not capture advising or student engagement data, but it can help institutions identify populations of interest for deeper analysis. For example, institutions can use PDP data to identify transfer students and connect those students to internal advising records, career services participation, engagement data, or student experience surveys.

Advising platform data is the central internal resource for this question. Advising platforms typically capture appointment dates and types (drop-in vs. scheduled), caseload assignments, early alerts, and notes about student goals, which may include transfer intent. Advising records can help institutions examine:

- The frequency and timing of advising interactions before transfer.
- Whether students accessed transfer planning or academic advising.
- Whether students received support at key academic or transfer decision points.

EXTENSIONS

Additional institutional data can help broaden understanding of students' experiences before transfer.

Explore Career and Pathway Exploration Data

Career and pathway exploration data can reveal whether students had opportunities to connect academic choices with future goals. Career advising participation, career assessments, internships, work-based learning, and program-specific career supports can help institutions understand whether students had clarity about their next steps.

Examine Student Engagement and Belonging Data

Student engagement and belonging data can provide insight into students' connection to the institution. Student surveys, engagement measures, participation in campus activities, and learning community participation can help identify whether students who transferred experienced differences in belonging or institutional connection.

Consider Student Wellbeing and Basic Needs Data

Student wellbeing and basic needs data can add additional context about students' experiences before transfer. Where available, linking these data sources to transfer populations can help institutions understand whether students had access to supports addressing academic, financial, and personal challenges.

Contextualize Advising Access with Satisfaction and Staffing Data

Student satisfaction surveys, such as the Community College Survey of Student Engagement (CCSSE), ask students about the accessibility and quality of advising. When combined with transfer status, data can reveal patterns in advising satisfaction and perceived quality. Institutional staffing data (including advisor-student ratios) can help contextualize the extent to which advising capacity constraints are a structural factor in access disparities.

INTERPRETING THE DATA TOGETHER

What patterns do we observe?

- **What the Data Show**
  - » The frequency and timing of advising and other institutional support interactions before transfer.
  - » Whether students accessed transfer planning, career supports, or engagement opportunities.
  - » How support experiences vary across student groups and transfer pathways.
  - » Insight Signal: Whether students had equitable access to information, guidance, and institutional resources that supported their educational decisions and transitions.
- **Reflection Prompts**
  - » What patterns characterize the support experiences of transfer students?
  - » Are students accessing advising and other supports before transfer?
  - » Do support experiences differ across student groups, programs, or pathways?
  - » Which findings stand out?
  - » Which findings challenge our assumptions about how students navigate transfer?

What questions do the patterns raise?

Patterns in support engagement point to areas for deeper inquiry about how students experience connection, guidance, and opportunity before transfer.

- **Team Reflection Prompts**
  - » Are students accessing supports at the points when they are most likely to need them?
  - » Are some student groups less likely to engage with advising, career, or student support resources?
  - » Do students have clear information about transfer options and pathways?
  - » Are students transferring toward opportunities aligned with their goals?
  - » Are there aspects of the institutional experience that may influence students' decisions to seek opportunities elsewhere?

What additional evidence should we consider?

Team Reflection Prompts

- » What do advising records reveal about students' access to guidance before transfer?
- » What do career services, engagement, or belonging data suggest about students' connection to the institution?
- » What do student surveys or exit surveys reveal about students' experiences before transfer?
- » Which campus partners should be involved in interpreting these findings?
- » What institutional practices could strengthen students' access to support, connection, and pathway information?

WHAT'S NEXT

Analysis to Action

- **Strengthen advising and pathway guidance:** If findings show that transfer students have limited advising contact or inconsistent access to transfer guidance, engage advising leadership to examine outreach practices, advising capacity, and opportunities for more structured support at key decision points.
- **Expand coordinated student support pathways:** If students who transfer show limited engagement with career services, belonging initiatives, or other institutional supports, work across student affairs and academic units to identify ways to strengthen connection and access to resources.
- **Examine equity in support access:** If support engagement differs across student groups, use findings to examine whether institutional structures, outreach practices, or resource availability create unequal access to guidance and support.
- **Use student experience data to improve pathways:** If students report limited connection, unclear pathways, or unmet needs before transfer, engage campus partners in identifying improvements to the student experience that help all students navigate their educational goals.

APPENDIX A: PDP TOOLS, RESOURCES, AND RESEARCH FOR TRANSFER ANALYSIS

Table A1. PDP Help Resources

RESOURCE NAME	ORGANIZATION	DESCRIPTION
PDP Knowledge Base	National Student Clearinghouse (NSC)	Central support hub webpage for PDP users. Includes guides for data submission, dashboard interpretation, AR file use, and a weekly office hours link.
Cohort AR File Data Dictionary	National Student Clearinghouse (NSC)	Webpage that defines all variables in the Cohort-Level AR File.
Course AR File Data Dictionary	National Student Clearinghouse (NSC)	Webpage that defines all variables in the Course-Level AR File.
PDP YouTube Playlist	National Student Clearinghouse (NSC)	YouTube playlist featuring videos and webinars covering PDP data submission, dashboard use, and leveraging AR files for institutional change.
Clearinghouse Academy Courses	National Student Clearinghouse (NSC)	Free self-paced courses created by NSC, including PDP-specific classes on data submission, dashboard use, and AR files.
Working With Our Data	National Student Clearinghouse (NSC)	Webpage that hosts the most comprehensive publicly available OPEID to institution name crosswalk, enabling users to convert OPEID's in their AR files to destination institution names. To find the crosswalk, navigate to the "Lookup Tables" subsection of the webpage and select the hyperlink titled "Clearinghouse Institution Code to IPEDS Unit-ID Crosswalk Table (April 2023)." This will automatically download the crosswalk in Excel format.

Table A1. PDP Help Resources, continued

RESOURCE NAME	ORGANIZATION	DESCRIPTION
PDP Tutorials	Association for Institutional Research	AIR produces Postsecondary Data Partnership (PDP) training tutorials to help users better understand and get the most out of their PDP service. The tutorials provide an overview of the PDP, offer basic functionality and dashboard insights, and culminate in case studies.
PDP Commons	First Gen Forward	Resources outline key practices that support effective use of the Postsecondary Data Partnership (PDP), along with guidance for third-party partners working with institutions who are participating in the PDP. This guide provides a practical resource to help institutions and third-parties deepen their use of PDP data and translate insights into sustained action for student success.
PDP Toolkit	State Higher Education Executive Officers Association (SHEEO)	Web-based toolkit focused on PDP submission and data usage. ***Note that some dashboard-related content may be outdated.***
Leveraging PDP Data To Advance Transfer	Achieving the Dream (ATD)	Online guide that documents essential functions and use cases for the PDP Transfer and Transfer Benchmarking Dashboard. The guide also provides an overview of how two ATD tools can generate transfer insights from PDP AR Files. ***Note that the dashboard images are outdated, but the descriptions of dashboard functionality remain accurate.***
CIP Code Lookup Tool	National Center for Education Statistics (NCES)	Webpage for looking up and searching Classification of Instructional Program (CIP) codes and program names—an essential resource for translating CIP codes in the PDP AR files into actual program titles.

Table A2. PDP Data Tools

RESOURCE NAME	TOOL TYPE	ORGANIZATION	DESCRIPTION
Momentum Data Explorer	Excel-Based Data Visualization Tool	Achieving the Dream (ATD) and Columbia University Community College Research Center	This is a free Excel-based tool where users load their analysis-ready (AR) files into an Excel workbook, which populates a series of visualizations related to early momentum, course and program enrollments, and transfer. Transfer outcomes Insights can be found in Excel workbook Sheets 9 and 10, and include: • Transfer degree attainment disaggregated by student group; • Transfer destination institutions including volume, degree attainment rate, and years to completion. Includes filters for student groups.
Student Journey Explorer	Excel-Based Data Visualization Tool	Achieving the Dream (ATD) and ResearchEd	Free Excel-based tool where users load their analysis-ready files (AR files) into an Excel workbook and populate a series of visualizations. The Student Journey Explorer contains two Excel-based tools: The **Gateway Tool**, which looks at how students navigate the gateway course sequence, and the **Longitudinal Tool**, which allows for the tracking of student progress across their first four years, making it especially valuable for transfer insights. Users can use this tool to deepen their transfer analysis by tying transfer and completion together in a four-year view, allowing them to isolate students who transfer by completion status and then analyze early momentum metrics such as gateway course completion.
Career Technical Education (CTE) Diagnostic Toolkit	Code-Based Diagnostic Tool (Stata or Python)	Strategic Data Project (SDP), Center for Education Policy Research (CEPR) at Harvard University and ResearchEd	This diagnostic toolkit uses longitudinal student-level data, including the PDP, to examine CTE students' completion and transfer patterns across various pathways. Using provided Stata or Python code, users can estimate predicted probabilities of completion and transfer by pathway and student subgroup. Users can also visualize term-by-term transitions via Sankey diagrams and identify gateway courses and early-momentum credit patterns most strongly associated with completion or transfer.

Table A3. PDP Case Studies and Research

RESOURCE NAME	TOOL TYPE	ORGANIZATION	DESCRIPTION
How to Leverage PDP AR Files for Institutional Impact (2025)	Case Study & Webinar	National Student Clearinghouse (NSC) & United Tribes Technical College (UTTC)	Brief case study with linked webinar on how UTTC leverages Power BI to create deeper insights from the PDP AR files.
Learner Insights Case Study: Northeast Lakeview Constantly Looks for New Ways to Use PDP Data (2023)	Case Study	National Student Clearinghouse (NSC) & Northeast Lakeview College	Case Study describing how Northeast Lakeview College uses the PDP to integrate their data systems and be responsive in meeting student needs.
Learner Insights Case Study: SLCC Uses PDP to Develop High Impact Student Retention and Completion Strategies (2023)	Case Study & Webinar	National Student Clearinghouse (NSC) & South Louisiana Community College (SLCC)	Case Study and Webinar describing how South Louisiana Community College (SLCC) uses PDP dashboards and AR files to build retention and completion strategies.

Table A3. PDP Case Studies and Research, continued

RESOURCE NAME	TOOL TYPE	ORGANIZATION	DESCRIPTION
PDP Insights: Early Indicators of Timely Completers	Research Report & Data Dashboard	National Student Clearinghouse (NSC) Research Center	Research report and data dashboards that use PDP data to highlight national trends among students who were timely completers and non-completers. The report and dashboards disaggregate second-year enrollment into retention, transfer, and non-enrollment to map students' movement across institutions. These disaggregations are also used as early indicators in mixed-effect models to estimate how different enrollment trajectories relate to timely completion for associate/certificate and bachelor's seekers.
Tracking Transfer	Annual Report & Data Dashboard	National Student Clearinghouse (NSC) Research Center	Annual report and dashboard series measuring community college students' transfer and bachelor's completion rates within six years of first enrollment. The dashboards provide system- and state-level metrics on community college students' transfer rates to four-year institutions and bachelor's completion rates within six years, with disaggregations by cohort, sector, and key student characteristics.
Transfer Enrollment and Pathways	Dashboard	National Student Clearinghouse (NSC) Research Center	Annually updated dashboard offering national and state-level insights on undergraduate transfer enrollment and pathways.
Navigating the Numbers – How Mercy University Used PDP Insights to Lower Barriers for Returning Students Post-COVID (2024)	Case Study	American Association of Collegiate Registrars and Admissions Officers (AACRAO) & Mercy University	Case study that highlights how Mercy University used PDP data, including credit completion, gateway-course completion, part-time student patterns, and transfer student analysis, to identify and address financial and academic barriers for students returning post-COVID.

APPENDIX B: EXTERNAL DATA SOURCES FOR TRANSFER ANALYSIS

Table B1. External Data Resources for Transfer Analysis

SOURCE	ADMINISTRATOR	ACCESS TYPE	DESCRIPTION
Integrated Postsecondary Education Data System (IPEDS)	National Center for Education Statistics (NCES), U.S. Department of Education	Publicly available; institution-level data tables, web tools, and downloadable files via the IPEDS "Use the Data" portal	Provides standardized enrollment, completion, graduation rate, finance, and institutional characteristics data for nearly all U.S. colleges and universities. Includes transfer rates for first-time, full-time cohorts as part of the Graduation Rates data collection. Transfer rates are limited to first-time, full-time, fall-entering students who are within 150% of the normal program time. This is a narrower definition than PDP transfer rates, which is important context when comparing IPEDS and PDP figures.
College Scorecard	U.S. Department of Education	Publicly available website with downloadable institution- and field-of-study-level data	The College Scorecard provides comprehensive data on institution costs and financial aid, student debt and loan repayment, earnings, graduation and retention rates, student body demographics, and admissions and academic metrics.
StudentTracker	National Student Clearinghouse	Annual subscription; fee-based (tiered pricing based on institutional size)	StudentTracker enables institutions to submit cohort files and receive longitudinal enrollment and degree records for their students at other institutions. Records include transfer destinations, enrollment timelines, and credential attainment. While the PDP provides standardized dashboards and AR files, StudentTracker allows for custom cohort queries beyond what the AR files include.
50-State Comparison: Transfer and Articulation Policies	Education Commission of the States (ECS)	Public comparison tool and accompanying report	Summarizes state-level transfer and articulation policies, including common course numbering, guaranteed associate-to-bachelor transfer, and reverse transfer mechanisms.

Table B1. External Data Resources for Transfer Analysis, continued

SOURCE	ADMINISTRATOR	ACCESS TYPE	DESCRIPTION
Community College Survey of Student Engagement (CCSSE)	Center for Community College Student Engagement (CCCSE)	Available to participating institutions; fee-based administration; institution-level benchmark reports provided to colleges; aggregate national benchmark data publicly available	Community college student survey on educational practices, student-faculty interaction, academic challenge, and institutional support. Includes items on advising satisfaction, transfer intent, and pathway awareness.
Survey of Entering Student Engagement (SENSE)	Center for Community College Student Engagement (CCCSE)	Available to participating institutions; fee-based administration; standard and custom reports provided; aggregate national benchmark data publicly available	Surveys entering community college students during their first weeks of enrollment on early experiences including onboarding, advising access, basic needs, and academic expectations.
Hope Center Basic Needs Survey (Student Basic Needs Data)	Hope Center for Student Basic Needs, Temple University	Participating institutions receive institution-level results; survey administration fee-based; annual national aggregate findings published publicly	Annually administered survey measuring food insecurity, housing insecurity, and other basic needs challenges among college students.
Transfer Archives	Ithaka S+R	Publicly available research publications, blogs, events, and reports	Compilation of Ithaka resources on transfer student success, credit mobility, and academic momentum with direct relevance to institutional IR work.

Table B1. External Data Resources for Transfer Analysis, continued

SOURCE	ADMINISTRATOR	ACCESS TYPE	DESCRIPTION
Transfer Playbook 2.0: A Practical Guide for Achieving Excellence in Transfer and Bachelor's Attainment for Community College Students	Aspen Institute College Excellence Program & Community College Research Center (CCRC) at Columbia University	Publicly available; free download	Research-based practice guide synthesizing findings from high-performing community college-university partnerships, drawing on quantitative research, college interviews, and site visits. Organizes evidence-based strategies around three areas: prioritizing transfer at the executive level, aligning program pathways and instruction to support timely bachelor's completion, and tailoring transfer advising and nonacademic support.
Transfer Research Hub	Community College Research Center (CCRC), Columbia University	Publicly available	CCRC's landing page for transfer research, providing access to publications, reports, fast facts, and additional resources on community college transfer and bachelor's degree attainment. Covers transfer outcomes, institutional barriers, equity gaps, and evidence-based strategies for improving transfer at scale.
AACRAO Transfer and Articulation Resources	American Association of Collegiate Registrars and Admissions Officers (AACRAO)	Publicly available resources and publications	AACRAO produces practitioner-facing guidance on credit evaluation practices, transfer policy, and articulation agreement development. Resources include case studies, policy briefs, and tools for evaluating credit transfer practices.
Lightcast (formerly Emsi Burning Glass)	Lightcast	Subscription-based; pricing varies by product and institutional size	A leading labor market intelligence platform used by postsecondary Institutions. Enables mapping of program graduates to workforce outcomes by program. Particularly useful for assessing whether transfer destination patterns align with regional labor market demand and whether specific transfer pathways lead to strong workforce outcomes.

Table B1. External Data Resources for Transfer Analysis, continued

SOURCE	ADMINISTRATOR	ACCESS TYPE	DESCRIPTION
State Education Research Centers and Administrative Data Systems	Varies by state	Access varies by state; typically requires a formal data request or research partnership agreement; some states have open-access portals for aggregate data.	State administrative data systems link individual student records across K–12, postsecondary, and the workforce, enabling tracking of student pathways from high school through transfer and into employment outcomes including wage data. Where accessible, these systems can be a valuable source of longitudinal transfer outcome data.
50-State Comparison: Statewide Longitudinal Data Systems	Education Commission of the States (ECS)	Public comparison tool and accompanying report.	An interactive 50-state comparison of Statewide Longitudinal Data Systems (SLDS) policies and infrastructure, covering all states and DC. For each state, the tool documents whether an active SLDS exists, which core data domains are included (early learning, K–12, postsecondary, workforce), how the system was established, and key governance and privacy policy details. Serves as a helpful starting point for learning about your states' SLDS.
Value Data Collaborative	Institute for Higher Education Policy (IHEP)	Publicly available research publications and reports; collaborative participation is selective and application-based	A research and practice initiative that works with institutions and state systems to use administrative data, including state longitudinal data, to track student outcomes across postsecondary and workforce sectors. Publications document how institutions like Dallas College have used linked administrative data to track transfer rates, bachelor's degree completion, and post-transfer earnings outcomes across student cohorts.

APPENDIX C: EFFORT-IMPACT MATRIX FOR TRANSFER ANALYSIS EXTENSIONS

Throughout this toolkit, each guiding question includes an **Extensions** section highlighting additional data sources and analyses to deepen your understanding of transfer. Each extension varies in the time, technical capacity, partnership development, and resource investment required. This matrix is designed to help institutions consider and prioritize extensions based on their specific needs and context. The matrix provides dimensions of **Effort** and **Impact** to help determine next steps.

Effort: The time, technical skill, staff capacity, data access, and partnership development typically required to leverage the extension. High-effort extensions generally require system integration, data-sharing agreements, new survey instruments, or specialized technical skills. Low-effort extensions can typically be completed using existing data and tools within a short period of time.

Impact: The degree to which completing this extension is likely to generate insights that meaningfully inform policy, programmatic, or advising decisions that affect student outcomes. High-impact extensions produce findings that change what institutions do. Low-impact extensions can add useful context but are less likely to drive immediate action.

Note: Effort and impact ratings are general estimates. Existing data infrastructure, staff capacity, financial resources, and relationships vary widely among postsecondary institutions, and are critical factors in shaping the effort required to make extensions actionable. Treat these ratings as starting points for team discussion, not fixed assessments.

Table C1. Effort-Impact Matrix for Transfer Analysis Extensions

EXTENSION ANALYSIS	QUESTION(S)	EFFORT	IMPACT
Link institutional student-level data (e.g., disability status, employment, financial aid, student support participation) with PDP data to expand subgroup analyses of transfer patterns.	**QA1**	**Medium**	**High**
Integrate student experience data (e.g., engagement, belonging, advising, transfer intention, exit, or withdrawal surveys) to better understand the experiences and motivations associated with transfer.	**QA1**	**Medium**	**High**
Compare with external benchmarks. Compare PDP transfer patterns with IPEDS, NSC Tracking, College Scorecard, and other external benchmarks to contextualize institutional findings.	**QA4**	**Low**	**Medium**

Table C1. Effort-Impact Matrix for Transfer Analysis Extensions, continued

EXTENSION ANALYSIS	QUESTION(S)	EFFORT	IMPACT
Develop longitudinal transfer analyses by appending historical PDP AR files and institutional enrollment records.	**QA2**	**Medium**	**Medium**
Map institutional initiatives to transfer trends. Compare changes in transfer patterns with institutional policies, programs, or reforms over time.	**QA2**	**Medium**	**High**
Link advising records to examine advising engagement, pathway participation, and support prior to transfer.	**QC6**	**Medium**	**High**
Review advising capacity. Review advising staffing, advisor-to-student ratios, and appointment availability to understand institutional advising capacity.	**QC6**	**Low**	**Medium**
Link financial aid records. Link financial aid records to examine how financial aid events and barriers relate to transfer.	**QC5**	**Medium**	**High**
Link basic needs data. Link basic needs survey data to examine food, housing, and transportation insecurity among transfer students.	**QC5**	**Medium**	**High**
Link early alert data. Link early alert system data to examine academic and engagement concerns preceding transfer.	**QC3**	**Medium**	**High**
Link LMS engagement data. Link LMS engagement data to examine academic participation prior to transfer.	**QC3**	**Medium**	**Medium**
Link departure-term academic records. Link SIS, GPA, degree audit, and developmental placement records to examine students' academic preparation and standing prior to transfer.	**QC3, QC4**	**Low**	**High**

Table C1. Effort-Impact Matrix for Transfer Analysis Extensions, continued

EXTENSION ANALYSIS	QUESTION(S)	EFFORT	IMPACT
Develop program-level transfer analyses. Develop program- and course-level transfer analyses using CIP codes, Course AR data, and articulation information.	**QA3, QB3**	**Medium**	**High**
Compare transfer pathways with articulation frameworks. Compare institutional pathways, course requirements, and articulation agreements with state transfer frameworks and destination institution policies.	**QB3**	**High**	**High**
Establish peer benchmarking partnerships. Establish data-sharing partnerships with peer or destination institutions to support benchmarking and post-transfer outcome analyses.	**QA4**	**High**	**High**
Develop institutional transfer intent data. Develop institutional processes for collecting and tracking transfer intent through advising or student information systems.	**QB1**	**High**	**High**
Compare institutional findings with external research. Compare institutional findings with relevant transfer and student success research to inform interpretation.	**QA1**	**Low**	**Medium**

ENDNOTES

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