# Transfer Student Success and Outcomes Dashboard

## Detailed session notes created by AI through use of recorded transcript

Takeaway: The dashboard follows entering student cohorts over eight years to show who transfers, where transfer students complete credentials, and which broad fields they enter and graduate from. The session emphasized looking beyond transfer volume to eventual completion—and understanding the dashboard's definitions and data limits before drawing conclusions.

## 1. Session at a Glance

| Topic | What the session covered |
|---|---|
| **Primary resource** | A dashboard identified as "Transfer Students' Success and Outcomes." |
| **Purpose** | Show major transfer trends and examine transfer students' completion outcomes. |
| **Data source** | Institution-reported data in CHE's higher education management information system, referred to as CHEMIS. |
| **Cohorts discussed** | Students entering in fall 2014 and fall 2016. |
| **Outcome window** | Eight years of completion follow-up. |
| **Main comparisons** | Transfer participation, timing of transfer relative to completion, completion destinations, institutional sectors, credentials, and broad program fields. |
| **Demonstrated features** | Cohort selection, institutional views, interactive filtering, demographic filtering, and technical documentation. |
| **Central limitation** | The dashboard describes observed patterns; it cannot explain every student's experience, credit loss, or reason for not completing. |

## 2. Why the Dashboard Was Developed

The presenter explained that institutional feedback informed the decision to organize the dashboard around entering cohorts. Rather than showing only how many transfer students are enrolled in a particular semester, the dashboard follows a defined group over time to examine what happens after students begin college.

### Questions the work is intended to answer

- What share of an entering cohort transfers?
- How many students transfer after first completing at their starting institution?
- How many transfer students eventually complete at another institution?
- What does completion look like when awards at the starting institution are also considered?
- Which institutions appear most frequently as completion destinations?
- Which broad academic fields do students begin in and graduate from?

### Development sequence described

| Stage | Description |
|---|---|
| **Initial version** | Began approximately two years before the presentation using the 2014 entering cohort. |
| **Updated version** | Added the 2016 entering cohort, enabling comparison. |
| **Planned next cohort** | The 2018 entering cohort. |

## 3. Data Foundation: Institutional Reporting and Record Linkage

### Data sources used

The presenter identified three main types of institution-reported records:

1. Enrollment data.
2. Transfer data.
3. Completion data.

The dashboard is therefore built from administrative records submitted by institutions—not from a separate survey of transfer students.

### How the analysis was assembled

| Step | Purpose |
|---|---|
| **Establish the entering cohort** | Identify the students whose subsequent enrollment and outcomes will be followed. |
| **Link later enrollment records** | Examine continued enrollment, registration status, institution, and program information. |
| **Connect starting-institution and transfer information** | Identify students who meet the analysis's transfer criteria. |
| **Link completion records** | Determine whether and where students earned credentials during the eight-year follow-up period. |
| **Summarize results** | Produce the dashboard's metrics and comparisons. |

The presenter emphasized that preparing and merging the data requires substantial work. The transcript's description of the exact enrollment-linkage period is unclear; the eight-year completion window, however, is stated repeatedly.

## 4. Essential Definitions

The session introduced three definitions that anchor the analysis.

| Term | Meaning described in the presentation |
|---|---|
| **Transfer-from institution** | The in-state postsecondary institution associated with the student's transfer admission and transferred credit, as identified in institutional reporting. |
| **Start institution** | The institution where the student entered as a first-time undergraduate freshman in the cohort year. |
| **Another institution** | An institution other than the start institution where the student completed after transfer. |

The presenter stressed that the dashboard's technical information contains additional definitions needed to interpret the metrics correctly.

### Why these distinctions matter

A student's starting institution, reported transfer-from institution, and eventual credential-awarding institution are not necessarily the same. Reading the dashboard requires keeping these roles separate. Otherwise, a user might confuse:

- Where a student began.
- Which institution supplied transferred credit.
- Where a student later enrolled.
- Where the student ultimately completed.

## 5. Understanding the Cohort Approach

### Cohorts discussed

The analysis used fall-entering cohorts identified as: Fall 2014 & Fall 2016. The presenter described the cohort population as first-time, full-time undergraduate freshmen. Some additional eligibility wording is garbled, so the transcript should not be treated as a complete specification of inclusion rules.

### What a cohort percentage means

The finding that 16% of the 2016 cohort transferred refers to the share of that defined entering group observed to transfer during follow-up. It does not mean that 16% of all students enrolled statewide in a particular semester were transfer students.

### Why eight years?

The presenter said the eight-year period was selected by a committee to allow time for students' later completion outcomes to emerge. An eight-year window can capture longer pathways than a shorter graduation measure, but it also means the dashboard's findings describe older entering groups rather than current-semester conditions.

## 6. Main Findings: 2014 and 2016 Cohorts

### Reported comparison

| Measure | Finding stated during the session |
|---|---|
| **Transfer participation** | Approximately 16% of the 2016 entering cohort transferred. |
| **Transfer after completing at the start institution** | Increased by approximately 3 percentage points compared with the 2014 cohort. |
| **Completion at another institution among transfer students** | Remained around 60% across the two cohorts. |
| **Completion considering the start institution and another institution** | Remained around 70% across the two cohorts. |
| **Institutional-sector and credential patterns** | The presenter reported a 5-percentage-point increase associated with graduation from public four-year/two-year-affiliated institutions and bachelor's-degree completion. |
| **Broad graduating fields** | Business and health professions showed modest increases, described as approximately 2 percentage points. |

The sector/credential comparison is compressed in the transcript, and the full denominators are not reproduced. The dashboard's technical definitions should be consulted before using those figures in a formal comparison.

### Distinguishing the completion measures

The approximately 60% figure concerns completion at an institution other than the start institution. The approximately 70% figure uses a broader completion measure involving the starting institution as well. These are not interchangeable rates. The transcript also does not fully specify how overlapping awards are handled in the broader metric.

### Percentage points versus percent

The presenter described changes of 3, 5, and 2 percentage points. These should be reported as differences in percentage values—not as relative percentage growth.

## 7. Institutions Appearing Most Frequently as Completion Destinations

The presenter identified the same five institutions across both cohorts:

- Clemson University.
- USC Columbia.
- USC Upstate.
- College of Charleston.
- Tri-County Technical College.

### How to interpret the list

The presentation sometimes combined "transfer-to" and "graduate-from" language. During the question-and-answer discussion, the presenter emphasized that eventual completion destinations are especially useful. Accordingly, the list is best read in the context of the dashboard's transfer-and-completion measures—not automatically as a ranking of every institution students attended along the way.

### Why the endpoint matters

A student can enroll at an institution without completing there. The presenter encouraged users to ask not only, "Where did our students go?" but also, "Where did they finish?" That distinction helps connect transfer activity with the outcome the dashboard is intended to examine.

## 8. Program Patterns: Where Students Start and Where They Finish

### Broad findings described

| Stage | Pattern reported |
|---|---|
| **Starting program** | More than half of transfer students began in liberal arts and sciences/general studies. |
| **Graduating program** | Approximately half completed in business/management, health professions, and liberal arts-related fields collectively. |
| **Cohort comparison** | Modest increases were reported in the graduating shares associated with business and health professions. |

These are broad program categories, not necessarily individual majors.

### Audience interpretation

An audience member noted the movement from general studies or liberal arts into health and business fields and suggested that institutions could examine whether more intentionally aligned associate-level pathways would help students.

The discussion also raised possible connections to reverse-transfer opportunities. These were planning ideas prompted by the data, not conclusions that the dashboard had established course-by-course alignment.

### Presenter interpretation

The presenter suggested that the observed changes could indicate:

- Better access to transfer information.
- More available program pathways.
- More structured preparation at starting institutions.
- Improved clarity about completing before transferring.

These are plausible interpretations offered during the session. The analysis described in the transcript does not establish that a particular policy or pathway caused the changes.

## 9. Dashboard Layout and Navigation

The presenter demonstrated the dashboard through the CHE website's analytics/dashboard area, under student-level metrics.

### Two main pages

| Page | Contents described |
|---|---|
| **Dashboard** | Interactive metrics and visualizations. |
| **Technical information** | Key findings, summary information, data sources, and metric definitions. |

The presenter strongly encouraged users to read the technical information before interpreting the visualizations.

### Device consideration

The dashboard was described as not phone-friendly because it contains many metrics and visual elements. The demonstration therefore supports viewing it on a larger screen rather than assuming that the mobile experience will show all information clearly.

## 10. Main Dashboard Features

### Measures and displays discussed

- Transfer students.
- Students transferring from the start institution.
- Students who completed at the start institution before transferring.
- Students who transferred and completed at another institution.
- A broader completion measure involving the start institution and another institution.
- Top institutions associated with completion.
- Institutional sector.
- Credential level.
- Starting program.
- Graduating program.

### Interactive filtering

The demonstration showed that users could:

- Switch between the 2014 and 2016 cohorts.
- Examine institutional views.
- Select program categories within the visuals.
- Filter by race/ethnicity.
- Observe related measures changing with the selected view.

### Why filters require care

Selecting a program category changes the population being examined. The presenter demonstrated a filtered category appearing as 100% of that selected view. That illustrates why a percentage should always be interpreted with its current selection and denominator in mind.

### Institution-specific demonstration

The presenter opened an institution-specific example and discussed transfer, completion, credential, and program results.

## 11. Cohort Outcomes Versus Current Enrollment

The presenter also demonstrated a separate fall-enrollment dashboard.

### Different tools answer different questions

| Question | Resource discussed |
|---|---|
| **"What share of an entering group eventually transferred?"** | Transfer cohort/outcomes dashboard. |
| **"Where did that group's transfer students complete?"** | Transfer cohort/outcomes dashboard. |
| **"How many enrolled students in a particular fall semester have transfer registration status?"** | Fall-enrollment dashboard. |

The enrollment dashboard allowed institutional selection and examination of registration status, including transfer status.

### Why the distinction matters

A current enrollment count and a longitudinal transfer rate describe different populations and time frames. The presenter identified confusion between these questions as a recurring practical issue. Users need to decide whether they are asking about students enrolled now or the later outcomes of an earlier entering group.

## 12. Program Detail: Two-Digit Versus More Specific CIP Codes

The dashboard uses two-digit Classification of Instructional Programs, or CIP, categories. These support broad comparisons such as health professions, business, or liberal arts-related fields.

### Additional detail discussed

| Level | Use described |
|---|---|
| **Two-digit CIP** | Broad categories displayed in the dashboard. |
| **Four- or six-digit CIP** | More detailed program distinctions that could make the dashboard lengthy or difficult to use. |
| **Six-digit detail by request** | The presenter said more detailed information could be requested separately. |

The presenter indicated that requested detail might be supplied as percentages rather than student counts. The reason given is not clearly transcribed, so a specific privacy or reporting rule cannot be established from the notes.

### Practical implication

The dashboard can identify broad patterns worth investigating. More specific curriculum or major-level questions may require a separate request and additional institutional analysis.

## 13. What the Data Cannot Explain

The presenter was explicit about several limitations.

| Question | Limitation described |
|---|---|
| **How many credits did a student earn at each institution?** | The analysis does not contain the required credit-level detail. |
| **How much credit was lost or did not apply?** | The dashboard cannot determine course-by-course transfer loss. |
| **How did a student perform academically?** | GPA and other detailed academic-success information were not available for this work. |
| **Why did a student stop enrolling or fail to complete?** | The administrative records do not establish the reason. |
| **Which exact course choices would support reverse transfer?** | The dashboard lacks the detailed credit and requirement information needed. |
| **Did a particular agreement cause an improvement?** | The cohort comparisons do not establish policy effects. |

These limits are central to appropriate use: the dashboard is a tool for examining patterns and identifying questions, not a complete account of each student's pathway.

### Limited transfer-specific reporting

The presenter emphasized that the underlying transfer information is relatively limited, including a reported transfer-from institution and a transfer-status indicator, alongside the broader enrollment and completion records.

The analysis therefore derives its view of transfer pathways from linked administrative reporting rather than a comprehensive student-level transfer-history record containing every relevant detail.

## 14. Interpreting Noncompletion Carefully

The presenter expressed concern that only somewhat more than half of transfer students completed at another institution within the follow-up period. However, not observing a completion is not the same as knowing why a student did not complete.

### What the records support

The dashboard can identify whether a completion is recorded within its data coverage and eight-year observation window.

### What remains uncertain

The transcript does not establish whether each student without an observed completion:

- Permanently stopped pursuing education.
- Returned after the observation window.
- Followed an educational pathway outside the available records.
- Was affected by financial, academic, family, or employment circumstances.

The presenter said most observed completions occurred in years four through six, with fewer in years seven and eight. No detailed year-by-year distribution was provided.

## 15. Reverse Transfer and Policy Timing

The session raised the question of whether the dashboard could help evaluate reverse transfer.

### Potential connection

The broader completion measure may capture some circumstances in which students receive credentials associated with their starting institution after moving elsewhere. The presenter said this measure might include reverse transfer, but did not present a dedicated reverse-transfer identification method.

### Timing problem discussed

The presenter referred to agreements reportedly beginning around 2021 and considered how their effects might appear in later entering cohorts. She also noted that the 2020 cohort would be affected by the pandemic, complicating interpretation.

### Important qualification

The transcript does not provide the agreement terms, implementation dates, student eligibility, or exposure periods needed to determine which cohorts could show an effect. The reliable lesson is that policy evaluation requires attention to both timing and other changes affecting a cohort—not simply comparing dashboard percentages.

## 16. Appropriate Institutional Uses

The session identified several practical uses for the dashboard.

| Use | What it can contribute |
|---|---|
| **Transfer planning** | Identify the proportion of an entering cohort observed to transfer. |

| | |
|---|---|
| **Partnership review** | Examine institutions where transfer students eventually complete. |
| **Program exploration** | Compare broad starting and graduating fields. |
| **Student-success discussion** | Identify completion gaps warranting further investigation. |
| **Institutional comparison over time** | Examine differences between defined cohorts using consistent metrics. |
| **Follow-up analysis** | Generate more specific questions for institutional researchers and program leaders. |

The presenter invited institutions to report unexpected patterns or apparent inconsistencies and to provide feedback on improvements.

## 17. Findings, Interpretations, and Unanswered Questions

| Category | Example |
|---|---|
| **Reported finding** | Approximately 16% of the 2016 entering cohort transferred. |
| **Reported comparison** | Transfer after completing at the start institution increased by about 3 percentage points. |
| **Presenter interpretation** | More information or more structured pathways may have supported the change. |
| **Audience suggestion** | Explore associate-level alignment with common destination fields such as business or health. |
| **Unanswered question** | Which specific advising practice or agreement produced better outcomes? |
| **Data limitation** | Credit-level detail and reasons for noncompletion are not available in this analysis. |

Keeping these categories separate allows institutions to use the dashboard constructively without overstating what the evidence establishes.

## 18. Practical Follow-Up Checklist

The checklist below translates the session into an institutional review aid. It is derived from the discussion, not a set of commitments made by the presenter.

### Before using a figure

- Confirm the cohort year.
- Read the metric definition.
- Identify the denominator.
- Check the selected institution and filters.

- Distinguish completion at another institution from the broader completion measure.
- State the observation window.

### When examining patterns

- Separate cohort outcomes from current-semester enrollment.
- Review completion destinations, not only movement between institutions.
- Compare broad starting and graduating program fields.
- Request more specific program detail when needed.
- Treat explanations about improved information or pathways as hypotheses unless supported by additional evidence.

### When planning action

- Identify a specific pattern requiring institutional investigation.
- Supplement the dashboard with local course, credit, advising, and student-experience information.
- Check whether a policy or agreement actually applied to the cohort being examined.
- Consider pandemic-related disruption when reviewing later cohorts.
- Share apparent anomalies and improvement suggestions with the dashboard team.

### When reporting results

- Describe percentage-point changes accurately.
- Avoid presenting the dashboard as a measure of credit loss.
- Do not equate unobserved completion with a known reason for stopping.
- Distinguish findings, interpretations, and proposed actions.
- Note that the next cohort update was planned, not given a confirmed publication date.