Summary of Transfer Roles Overview

Created on October 13, 2026 by Summary AI

Lecture Info

- **Speaker / Instructor:** Speaker A (facilitator), Grace Holmes (participant)

Main Theme

The session defined three complementary campus roles—**Transfer Agent**, **Transfer Connector**, and **Transfer Advocate**—and taught concrete behaviors staff can adopt to help transfer students navigate institutional systems, build belonging, and create systemic change.

Key Takeaways

1. **Validate, explain, encourage**: transfer agents must **validate students' strengths and aspirations**, **explain written and unwritten rules**, and **offer ongoing encouragement and support**.
2. **Connect proactively**: connectors expand students' networks, coordinate referrals, and make opportunities visible so access is not left to chance.
3. **Fix systems**: advocates document recurring problems with data and student stories and push for policy/practice change across the institution.

Topics Covered

Transfer Agent

- Definition: people with insider access who help students navigate the institution and build relationships where students feel **safe**, **capable**, and **belonging**.
- Anchor behaviors (the **three anchors**):
  - **Validate students' strengths and aspirations**
  - **Explain written and unwritten rules** (academic catalog vs. lived practice)
  - **Offer ongoing encouragement and support** (not one-and-done)
- Practical examples:
  - Registrar described moving from a transactional interaction to **checking in** with students periodically.
  - Provide tangible help: give students a name/post-it to use when referred to another office.
- Tools used in session: **QR code** self-checks; facilitator noted the self-check is a **snapshot** and pointed to an expanded list of behaviors to review.

Transfer Connector

- Definition: staff who **link students to people and experiences** beyond their office and often beyond the institution so students don't rely on being "in the right place at the right time."

- Key behaviors:
  - **Expand students' networks** by introducing relevant campus or external contacts
  - **Make opportunities visible and reachable** (co-curriculars, leadership roles)
  - **Tie referrals to students' larger goals** so next steps align with academic/career plans
- Practical challenges and strategies:
  - **Warm handoff** practice: CC students and the next contact in an email and include the key question/summary
  - Teach students **who** to ask (avoid vague descriptors like "the short black woman with glasses")
  - Avoid "handoff syndrome": when students keep returning to the original contact instead of using referrals — requires campus-wide norms
  - Connectors may need to **learn other offices' functions** and proactively build relationships with colleagues

Transfer Advocate

- Definition: staff who **work to improve systems, policies, and practices** that repeatedly create barriers for transfer students.
- Role scope:
  - Notice recurring issues and collect **data + student stories**
  - Raise patterns to supervisors or decision-makers and propose fixes
  - Intervene when possible and document trends
- Cultural note: anyone (including frontline staff) can act as an advocate by surfacing patterns and escalating them through channels.

Notable Quotes

"Transfer agents are people whose role gives them access and insights students don't have. They proactively use their insider knowledge to help students navigate the institution. Crucially, they build relationships where students feel affirmed as capable learners who belong here and are safe enough to keep asking questions." — Speaker A

Speaker Recommendations

- Encourage peer education: **educate colleagues and neighboring offices** about transfer-friendly behaviors to reduce burden on single offices.
- Be intentional: **schedule regular tune-ups** to keep transfer practices active across campus.
- Attend the **transfer conference in Charlotte (next summer)** to deepen practice and coordination.

Homework

- **Finish reading** the provided resource at home (the extended behaviors list linked via QR code).
- **Complete the QR-code self-evaluations** for Agent, Connector, and Advocate (the facilitator emphasized these were quick, ~1 minute each).
- **Schedule a next tune-up** meeting to review transfer practices with your team.

- **Practice warm handoffs**: start including the student, the next contact, and a short summary in referral emails; give students the specific name/role to seek.
- **Collect patterns**: document recurring student issues with brief notes and examples to bring forward as advocacy evidence.