

EdVisorly + Alabama Transfers

Year One Pilot Performance Assessment

*EddyNavigate™ Transfer Credit Evaluation Pilot — Troy University, Enterprise State Community College,
Lurleen B. Wallace Community College & Wallace Community College Dothan*

Prepared for the Prepared for, Alabama Transfers

Created by EdVisorly to support Keith Sessions, Ed.D. and Shannon Nichols's preparation for
Alabama Articulation & General Studies Committee (AGSC) meeting

August 2026

Executive Summary

Year One of the Alabama Transfers – EdVisorly pilot ran from the program's virtual kickoff in July 2025 through the 2025–2026 academic year, closing out with Phase 1 Navigate live and a clear, jointly-defined plan for Fall 2026 student activation. This assessment responds to Keith Sessions' request to develop clear success metrics and complete a formal Year One assessment covering platform usage, student engagement and impact, institutional feedback, and lessons learned, ahead of the August 25, 2026 AGSC meeting.

In one year, the partnership took EddyNavigate™ from concept to a live, working transfer-credit evaluation tool embedded on the websites of all four pilot institutions — Troy University, Enterprise State Community College (ESCC), Lurleen B. Wallace Community College (LBW), and Wallace Community College Dothan — and on the Alabama Transfers website itself. Two formal progress updates were delivered directly to the AGSC (February 23 and April 29, 2026), two rounds of structured product feedback were gathered from Keith Sessions and Shannon Nichols and turned into a full interface redesign now underway, and a qualified pool of 250–300 community college students has been assembled and is ready for structured outreach as Fall 2026 begins.

Year One was, by design, a *build and deploy* year. The most important lesson learned is that Alabama Transfers and EdVisorly did not yet have a shared, live way to measure usage once EddyNavigate™ was embedded across four separate institutional websites. Section 6 of this report proposes the success-metrics framework EdVisorly recommends adopting now, so that Year Two produces the hard usage and outcome numbers this committee needs. A companion cost and statewide-scaling proposal and delivery scope and timeline are being prepared separately and will be shared ahead of the August 25 meeting.

1. Pilot Overview & Year One Timeline

Alabama Transfers and EdVisorly entered a multi-year pilot partnership in **Summer 2025**, deploying EddyNavigate™ — an AI-powered transfer credit evaluation tool — across a cohort of one four-year institution (Troy University) and its three primary community college feeders (ESCC, LBW, and Wallace Dothan). The tool allows a student or advisor, from any device, to upload an unofficial transcript and receive an immediate transfer-credit evaluation.

Period	Milestone
Jul 2025	Virtual kickoff meeting held with all five partner organizations; process interviews begin at each pilot institution and the Alabama Transfers office.
Oct 2025	Process-map review sessions completed across all four pilot institutions.

Period	Milestone
Nov 2025	EdVisorly presents EddyNavigate™ at the ACCA Conference and an AGSC meeting; large-scale implementation meeting held with registrars, enrollment managers, advisors, and academic affairs staff from all four institutions to finalize technical configuration and branding.
Feb 2026	Phase 1 completed — EddyNavigate™ goes live on all four pilot institution websites and the Alabama Transfers website. Formal product feedback session held with Keith Sessions and Shannon Nichols. First formal AGSC progress update delivered (Feb 23).
Mar 2026	EdVisorly presents at the 8th Annual ACHIEVE Transfer Student Success Conference to nearly 400 registered attendees.
Apr 2026	Second formal AGSC progress update delivered (Apr 29). EdVisorly Partner Success team completes in-person visits to all three participating community college campuses.
Jun 2026	Full product feedback session held with Keith Sessions, Shannon Nichols, and the EdVisorly product team; comprehensive interface redesign initiated ahead of Fall 2026.
Aug 2026	EdVisorly and Alabama Transfers align on this Year One assessment, a Fall 2026 student-activation plan, and next steps toward the August 25 AGSC meeting.

2. Platform Usage & Deployment

What is live today

Phase 1 of the pilot — the EddyNavigate™ transfer-credit evaluation experience — is fully deployed:

- Live and accessible on the websites of all four pilot institutions (Troy University, ESCC, LBW, Wallace Dothan) and on the Alabama Transfers website.
- Usable from any device, including smartphones, with no separate login required for a student to receive a transfer-credit evaluation.
- A qualified outreach pool of approximately 250–300 community college students who have already expressed interest in transferring to Troy University and opted in to be contacted is compiled and ready for Fall 2026 outreach.

What Year One did not yet measure

In the interest of giving this committee a fully candid assessment: Year One's focus was building and embedding the platform across four separate institutional websites, and a shared mechanism to track usage and source attribution across those embedded instances was not yet operational by year end. This is the single most important gap this assessment surfaces, and it is directly addressed by the Year Two success-metrics framework in Section 6 — the first priority of which is standing up the usage dashboard Keith requested in our August 14 meeting so that hard adoption numbers are available for future AGSC reporting.

3. Student Engagement & Impact

Fall 2026 is the first full semester with EddyNavigate™ embedded and actively promoted across all four pilot sites, and Alabama Transfers and EdVisorly have jointly built a coordinated activation plan to drive real student usage this term:

- Canvas announcements at each community college at the start of the fall semester.
- Counselor-led computer lab sessions where students use EddyNavigate™ in a structured setting, with guidance on retrieving an unofficial transcript.
- Direct outreach to the 250–300 student pool who have already expressed transfer interest to Troy.
- Incentive items for students who complete a transfer-credit evaluation through the tool.

Because Phase 1 only reached full, all-institution deployment in February 2026, Year One was necessarily an infrastructure and readiness year rather than a full measurement year for student outcomes. With deployment now complete and an activation plan in place, Fall 2026 is positioned to be the first semester with meaningful engagement volume — and, once the Section 6 metrics are instrumented, the first semester Alabama Transfers and EdVisorly can report hard engagement and impact numbers to the AGSC.

4. Institutional Feedback

Year One included sustained, structured engagement with Alabama Transfers leadership and all four pilot institutions:

- **Two structured product feedback sessions** with Keith Sessions and Shannon Nichols (February 16 and June 17, 2026) produced detailed, actionable interface feedback — the direct catalyst for the comprehensive interface redesign now underway (see Section 5).
- **In-person campus visits** to all three participating community colleges were completed by EdVisorly's Partner Success team in Spring 2026; all institutional relationships were reported as strong and productive.
- **Statewide visibility:** EdVisorly presented EddyNavigate™ at the ACCA Conference and an AGSC meeting in Fall 2025, and demonstrated it live at the 8th Annual ACHIEVE Transfer Student Success Conference in March 2026 to an audience of nearly 400 higher-education professionals from across the state.
- **Direct AGSC accountability:** two formal progress updates were delivered to the committee during Year One (Feb 23 and Apr 29, 2026), in addition to this Year One assessment.

5. Lessons Learned

The two structured feedback sessions with Keith Sessions and Shannon Nichols surfaced consistent, specific lessons that are now driving Year Two design decisions:

- **Transcript retrieval is the biggest point of friction.** The most common reason a student disengages mid-evaluation is not knowing how to retrieve an unofficial transcript from their community college's Banner system. Because all three pilot community colleges share a single Banner instance, this is solvable with one standardized fix rather than three separate ones — a real Year Two efficiency opportunity.
- **Students need a guided, step-by-step flow.** An embedded-widget format built for a general audience did not fit how 17–19-year-old students actually engage with a tool; both Keith Sessions and Shannon Nichols asked for a full-page, TurboTax-style experience that walks a student from current school → target school → transcript upload one step at a time. This is the anchor of the redesign now in progress.
- **Local, specific language builds trust.** Small details — using “Wallace Dothan” rather than a full legal institution name, showing only the schools relevant to a given site, replacing generic example schools with Alabama institutions — meaningfully affect whether students and advisors trust and use the tool.
- **Shared measurement infrastructure has to be built deliberately, not assumed.** Deploying to four separate institutional websites did not automatically produce a single, shared view of usage. That gap is the direct reason for the Year Two metrics and dashboard priority in Section 6.

6. Proposed Year Two Success Metrics Framework

Neither party had finalized a formal set of Year One success metrics at the outset of the pilot; this was confirmed as an open item in our August 14, 2026 planning meeting. EdVisorly proposes the framework below as a starting point to finalize together with Alabama Transfers ahead of, or shortly after, the August 25 AGSC meeting, so that Year Two produces concrete, reportable numbers.

Category	Proposed Metric	How It Will Be Measured
Platform Usage	Unique students served; transcript evaluations completed, by institution	New cross-institution usage dashboard (Year Two priority #1)
Platform Usage	Transcript-upload completion rate (started vs. finished)	Dashboard funnel tracking; directly targets the friction point identified in Section 5
Platform Usage	Usage by device type and by institutional site	Dashboard analytics
Student Engagement	Outreach-to-usage conversion rate among the 250–300 seeded student pool	Compare Shannon Nichols' opted-in contact list against evaluation completions
Student Engagement	Computer-lab session participation and completion	Attendance and completion logs from counselor-led sessions

Category	Proposed Metric	How It Will Be Measured
Student Impact	Transfer applications/enrollments at Troy among tool users (where data-sharing and student consent allow)	Coordinated tracking with Troy University admissions, subject to FERPA consent
Institutional Feedback	Annual satisfaction check-in with each of the four pilot institutions	Brief structured survey of registrars/advisors, paired with the existing biweekly feedback cadence
Continuous Improvement	Delivery of interface redesign against Q3/Q4 2026 target; reduction in transcript-retrieval drop-off	Product roadmap tracking; before/after funnel comparison

EdVisorly recommends finalizing this framework jointly with Alabama Transfers — including any refinements the AGSC evaluation process calls for — and using it as the basis for both the Fall 2026 activation reporting and future annual AGSC updates.

7. Looking Ahead: Year Two Priorities

- Complete the comprehensive interface redesign, targeted for Q3/early Q4 2026, directly addressing the transcript-retrieval and guided-flow lessons from Section 5.
- Execute the Fall 2026 student activation plan across all four pilot institutions and begin reporting against the Section 6 metrics framework.
- Advance Phase 2 (integrating Alabama Transfers' official transfer guides directly into EddyNavigate™) and Phase 3 (full applicability and “what-if” transfer planning), building on the foundation delivered in Year One.
- Continue the biweekly working cadence between Alabama Transfers and EdVisorly's dedicated pilot team.

A separate, companion proposal for statewide scaling is being prepared by EdVisorly's leadership team and will be delivered to Keith Sessions ahead of the August 25 AGSC meeting, alongside this Year One assessment.

Prepared by the EdVisorly team supporting the Alabama Transfers partnership. Questions on this assessment can be directed to Suny McKaughan, EdVisorly.

Proposed Timeline



1 · Discovery & Validation — Q3 2026 (4-5 wks)

- Technical audit: root-cause the satellite-campus bug, institution-locking logic, and ACCS Banner integration feasibility.
- Re-validate June 17 requirements directly with Keith, Shannon, and pilot institutions — nothing carried forward on assumption.
- Wireframe the step-by-step flow and integration dependencies to create a lower-friction experience.
- **Output:** a scoped, dated engineering plan for the redesign and Phase 2.

2 · Redesign + Phase 2 Build — Q4 2026

- Build the validated full-page, device-adaptive redesign against real wireframes.
- Engineer transfer-guide integration once state-law requirements are mapped with Alabama Transfers' team.
- Stand up the usage/tracking dashboard.
- **UAT in hand:** written sign-off from Keith, Shannon, and pilot institutions required before Phase 2 is marked complete — not before.

3 · Applicability & What-If — Q1-Q3 2027

- Build only once Phase 2's guide-mapping is proven in production.
- Parallel track: Troy IT scoping on the SIS-integration dependency.

4 · Statewide Expansion Plan — Q4 2027-Q1 2028

- Provide all-at-once and phased implementation approach optionality.

5 · Reverse Transfer — Backlog, 2027+

- Montgomery stakeholder workshop (scoping only) scheduled post-AGSC.
- Build blocked on NSC/Banner automation + FERPA opt-in workflow — not started until Phase 3 lands.