TRANSFER GUIDE: BEST PRACTICE GUIDELINES

It became evident through the 2014 Phase 1 *ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Study* (the "Project") that 72% of institutional respondents were in the process of developing a Transfer Guide. This suggests a heightened interest in improving the quality and transparency of information for students. Therefore, these Guidelines are provided to assist institutional colleagues in this area.

Findings:

The Project identified that 50% or higher of the respondents to the Phase 1 national survey ensured the following was published in institutional student Transfer Guides:

- A listing of transfer agreements
- The course grade required to be eligible for transfer credit consideration
- Any limitations on the amount of transfer allowed
- The processes and related timelines for applying and assessing transfer credit
- Residency regulations
- An institutional glossary of transfer credit terminology

Less common elements included providing information regarding an appeals process, the entering average required to be eligible for transfer credit, any associated fees, the currency of courses eligible for transfer credit, and limitations on the type of courses eligible for transfer. The provincial councils on articulation/admissions and transfer tend to offer students Transfer Guides containing a host of information across a range of areas which is a finding that is not fully apparent in the above. For example, their Guides tend to contain a range of search options (course-to-course equivalences, program pathways, system wide pathways, transfer agreements, etc.), information on jurisdictional policies, pathways, and agreements, and more. These provincial examples serve as best practice models for institutions across the country.

Transfer Guide Content Recommendations:

Based on the findings from the research for the national Project, here is a summary of what the pan-Canadian registrarial and pathway community believes should be included in a Transfer Guide.

- ✓ A listing of Transfer Credit Agreements
- ✓ The eligibility expectations for Transfer Credit consideration such as the following:
  a. Course specific requirements
  b. Program specific requirements
  c. Minimal acceptable grade expectations
  d. Maximum allowable transfer credit
  e. Types of transfer credit and how each is defined (e.g., unassigned, assigned, etc.)

The material in this document results from research and consultation conducted as part of the *ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study* (September, 2015*)*

  f. Identification of circumstances that might result in forfeiting transfer credit evaluation or assignment

✓ The assessment fee, application, and deadline requirements (if applicable)

✓ Policy and protocol information impacting transfer credit that addresses the following at minimum:

  a. Overall transfer credit policy expectations

  b. Transfer policy for learning recognized through prior learning assessment and recognition of prior learning (PLA/RPL)

  c. Limitations on currency of credit, if any (sometimes known as "Shelf Life") i.e., refers to the age of courses eligible for transfer consideration

  d. Program specific requirements

  e. Residency requirements

  f. Limitations on types of courses allowed to transfer (if applicable)

  g. Appeals policy and processes

A review of Transfer Guides available online suggest the following items would also be of use to students.

✓ Principles governing the transfer credit assessment process that address expectations relevant to students

  • Examples where operating principles might be relevant include providing answers to the following questions:

    i. What if there is a discrepancy between what is published in a jurisdictional database versus an institutional database? Which material should guide the student?

    ii. What are the principles governing change notifications and how and when they impact transfer students? What are the grandfathering principles related to transfer credit assessment?

    iii. What limitations related to transfer credit assessment timing exist? For example, is assessment one-time-only or can a reassessment occur if a student changes their program after admission?

✓ Online, searchable databases that provide students with the option to search for course-to-course equivalencies, program transfer pathways, articulation agreements, or other forms of transfer whether institutionally specific or jurisdictionally available

  • Ideally, if a jurisdictional Transfer Guide is available in a particular province or territory, institutions are encouraged to link to that resource. Such resources typically offer students searchable information, additional jurisdictional level policy details, and cover a broader range of topics for students who are planning to move to a range of institutions across a particular jurisdiction or to other provinces or territories. These resources may also offer information in alternate formats as a support to students and institutions.

✓ Information about the admission and transfer processes, the types of documents required to assess a student, and related assessment timeframes (both for transferring within provinces and inter-provincially/territorially)

- It is helpful to also include sample documents with associated explanatory material so that students can see what types of documents they will receive once their courses are reviewed for transfer credit (e.g., a sample of a Statement of Transfer Credit, if used).
- ✓ Explanations about how much time it will take to complete a program once transfer has been awarded
- ✓ Information about prerequisites and/or co-requisites
- ✓ The meaning of core terms such as what constitutes a credit and how many credits will result in a year's worth of transfer credit
- ✓ A glossary of terms unique to the institution or jurisdiction
  - Where possible, the organization should first review the definition for the term published within the Transfer Glossary on the ARUCC PCCAT Transcript and Transfer Credit Guide website, if available (see http://www.guide.pccat.arucc.ca).
- ✓ Any additional resources that would assist students with the transfer process
  - As students present courses or experiences eligible for transfer credit consideration from a host of curricular experiences, it is helpful for institutions to include in their Transfer Guide information on any policies, protocols, and processes that might apply in those unique situations. Examples include dual credit, advanced courses at the secondary school level such as international baccalaureate or advanced placement, prior learning assessment, letter of permission, exchange, etc. As an illustrative example, BCCAT maintains transfer equivalencies in its Transfer Guide for Advanced Placement (AP) and the International Baccalaureate (IB) programs. This is very helpful to transferring students.

Additional Resources:

The following additional resources are provided to assist practitioners with developing Student Transfer Guides.

Bautsch, B. (January, 2013). Hot Topics in Higher Education: State Policies to Improve Student Transfer. Denver, CO: National Conference of State Legislature (NCSL). http://www.ncsl.org/research/education/student-transfer.aspx

I.S. Educational Consulting Inc. (January, 2015). Transfer Credit Assessment: A Survey of Institutional Practices. Vancouver, BC: British Columbia Council on Admissions and Transfer (BCCAT). http://www.bccat.ca/pubs/TCA2015.pdf

Paez, D., Byrnes, J., Blacker, J., Jackson, A., Dwyer, C. (2011). The Corporate Strategy and Approach to Articulation and Transfer. Queensland, Australia: University of Southern Queensland. http://eprints.usq.edu.au/20414/1/Corporate-Strategy.pdf

Usher, A., Jarvey, P. (2011). Student Experiences in Credit Transfer at Ontario Colleges – Summary Report. Higher Education Strategy Associates. http://www.collegesontario.org/research/external-reports.html

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Sample course equivalency databases and websites

Institutional databases and websites:

- Athabasca University (see https://secure3.athabascau.ca/tcas/)
- Dalhousie University (see https://dalonline.dal.ca/PROD/fyskeqiv.P_TransEquiv)
- George Brown College (see http://www.georgebrown.ca/transferguide/)
- McGill University (see https://nimbus-ssl.mcgill.ca/exsa/search/searchEquivalency)
  - This website combines TWU internal tables with BCCAT's tables from the BC Transfer Guide. When a BC institution is selected, information is provided in a real time web service from the BC Transfer Guide.
- Trinity Western University (https://www1.twu.ca/undergraduate/admissions/transfer-students/credit)
- University of Maryland (see http://www.transferadvising.umd.edu/)
- University of Regina (see http://www.uregina.ca/student/registrar/transfer-credit/transfer-credit-course-equivalents.html)
- University of Saskatchewan (see http://explore.usask.ca/admissions/transfer/)

Provincial databases and websites:

- ACAT's Online Search option in the ACAT Transfer Alberta website (see www.transferalberta.ca)
- BCCAT's Course Search in the BC Transfer Guide (see http://www.bctransferguide.ca/) – also available is a Block Transfer Search, Degree Partnership Search, and course level equivalencies for Advanced Placement and International Baccalaureate.
- Government of Newfoundland and Labrador's Online Transfer Guide (see http://www.aes.gov.nl.ca/postsecondary/transferguide/index.html)
- NBCAT's Credit Search in the NBCAT Transfer Portal (see http://portal.nbcat.ca)
- ONCAT's Transfer Search option in the ontransfer.ca Guide which allows searches by course or by program
- Note: Campus Manitoba is developing a transfer system based on the BC model. It is expected to launch in Spring, 2016. http://www.ecampusmanitoba.com/