

TRANSFER INNOVATIONS PROGRAM REVIEW

AN EXTERNAL REVIEW

FOR THE

BC COUNCIL ON ADMISSIONS AND TRANSFER

February, 2010

Prepared by Al Atkinson

A significant challenge for the B.C. post-secondary system has always been to maintain choice and diversity in degrees while balancing the needs of students to transfer smoothly between and among the member institutions.

Ministry of Education, Skills and Training, (1996).
*Charting a New Course: A Strategic Plan for the
Future of British Columbia's College, Institute and
Agency system.* British Columbia, Canada:
Government of British Columbia.

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I INTRODUCTION

The Transfer Innovations Program: A Brief History

The Transfer Innovations Program was developed by the BC Council on Admissions and Transfer (BCCAT) in response to a recommendation made by the Ministry of Education, Skills and Training in the 1996 release of its strategic plan for the college, institute and agency system:

“Block transfer agreements will be developed to allow transfer of credits between institutions and eliminate the time-consuming process of course by course institutional credit assessment”. (Ministry of Education, Skills and Training, 1996).

Early in 1997, BCCAT prepared a discussion paper, Block Transfer: Issues and Options (<http://bccat.ca/pubs/newblock.pdf>) within which various models were explored: system-wide transfer in which all receiving institutions (universities) would accept whatever the colleges offered as long as specific criteria were met; a general first year transfer program; a standardized pre-major curriculum; a flexible pre-major alternative; a learning outcomes model; and the development of “descriptive pathways”, or grids, that students could use for transfer planning.

This discussion paper was widely circulated throughout the system, and in December of 1997, a report, The Block Transfer Project: Consultation and Responses (<http://bccat.ca/pubs/block.pdf>) was prepared by BCCAT and distributed to all member institutions. Four options were identified for further consideration. Of these, the flexible pre-major was deemed “closest to representing an intersection of interests between sending and receiving institutions while at the same time offering real flexibility for students and for college faculty.” (Finlay 1997). Three other options, the development of descriptive pathways, block transfer arrangements for associate degrees and other credentials, and learning outcomes were also identified.

On December 12, 1997, the Council passed a motion supporting and encouraging the development and promotion of block transfer arrangements for arts and science programs and courses. The motion incorporated several principles with the intent of optimizing transfer opportunities for students and providing greater innovation and flexibility within the transfer system. As part of this motion the Council proposed several initiatives: increasing the flexibility of first and second year prerequisites and program requirements; developing clearly defined sets of course requirements for particular programs; providing block transfer arrangements for associate degrees and other credentials, developing first year transfer programs guaranteeing eligibility for admission at all receiving institutions, and exploring the implications of a learning outcomes approach to transfer arrangements. The full text of this motion is contained in The Block Transfer Project: Update bulletin

released by BCCAT in February, 1998. In the same bulletin, the flexible pre-major, the descriptive pathways model and the investigation of block transfer for the associate degree and other credentialed programs were chosen as logical next steps for development.

In the spring of 1999, BCCAT launched the Transfer Innovations Program, with an emphasis on the development of flexible pre-majors, descriptive pathways, and block transfer agreements. At this time, BCCAT decided to use the term “Block Transfer” more precisely to refer only to the program related transfer agreements, such as diploma to degree agreements already recorded in the BC Transfer Guide, rather than as a catch-all phrase that had emerged from “Charting a New Course” that appeared to mean “any alternative to traditional course-to-course transfer”.

The Transfer Innovations Program has been available since 1999. Articulation Committees are able to access funding for specific project proposals which are developed and presented to BCCAT’s Transfer and Articulation Committee (TAC) for approval. To date, 43 projects have been funded, 7 of which are in progress. Of the 36 completed projects, those which developed information for students, such as the flexible pre-major (FPM), block transfer agreements and transfer grids are contained within the “Program Specific Transfer Guides” section of the BC Transfer Guide (<http://bctransferguide.ca/program>). In a few of these cases, the student information initially posted in a “Program Specific Transfer Guide” has been removed as a result of the Articulation Committee not keeping it updated. Where the project deliverable was a report rather than a resource for students (e.g. a FPM analysis project, a research project) the final report is accessible on the BCCAT website from the Articulation Committee Home Page, or through the BCCAT publications menu. In a very few cases, the final report was not deemed publishable. A status report of all approved projects is appended to this report (See Appendix 1: Transfer Innovations Projects: Status Report).

To date, approximately \$500,000 has been spent on the Transfer Innovations Program, a significant portion of which funds a Special Projects Coordinator position within BCCAT that oversees the Transfer Innovations Program. However, the total administrative costs of the program, system-wide are difficult to determine. In addition to the administrative position established to oversee the program, considerable time is spent by other BCCAT staff in supporting the program. The costs associated with this additional time have not been included in this estimate. Neither have the in-kind contributions of numerous faculty members and administrators at institutions throughout the system.

Until an independent review of the program was announced by the BCCAT in the spring of 2009, no other review has been conducted to determine the program’s overall success.

Independent Program Review

In the spring of 2009, BCCAT announced an independent review of the Transfer Innovations Program. The review would focus on the four major components of the Program: the Flexible Pre-Major; Descriptive Pathways; any “transfer innovations

generated” Block Transfer Agreements, and other projects deemed by the Transfer and Articulation Committee to be innovative in nature.

The review would “provide an independent analysis of information from different sources about the successes and shortfalls of the Transfer Innovations Program” and “provide recommendations on changes that could be made to improve the program”.

Several key components would be addressed, specifically, awareness of the program, the use and usefulness of the program, the overall cost-benefit, adequacy of funding levels, selection criteria and administrative processes, maintenance and sustainability and generally, the overall effectiveness of improving transfer opportunities for students.

Al Atkinson, the former Vice-President of Educational Services from Douglas College was retained by BCCAT to conduct the review.

II PROGRAM REVIEW: METHODOLOGY

Information and data for the review were obtained from many sources, using a variety of methods. These included:

- collecting and examining pertinent background information and documents;
- conducting individual interviews and follow-up conversations with key BCCAT personnel;
- surveying BCCAT personnel;
- surveying members of the BCCAT Transfer and Articulation Committee;
- surveying Associate Registrars, BCCAT Institutional Contacts and Academic Advisors;
- surveying Project Coordinators;
- surveying Articulation Committee Chairs;
- interviewing one Project Coordinator;
- interviewing three institutional Registrars;
- monitoring visits to the “program specific” section of the BC Transfer Guide;
- surveying users of the “program specific” section of the BCCAT website;
- conducting an interim “feedback” meeting with key BCCAT personnel.

Detailed results of all the surveys are appended to the report.

III PROGRAM REVIEW: OBSERVATIONS AND FINDINGS

Preamble

The following section of the report is comprised mainly of people's perceptions regarding many aspects of the program and its overall effectiveness. This is the case for many reasons: the program has never been reviewed or evaluated, so there is no body of information upon which to assess effectiveness; no criteria or key performance indicators were developed upon which to evaluate outcomes; no tracking of students has been conducted.

What follows, therefore, is a set of observations and impressions gleaned from the results of several surveys and in-depth conversations with many of the key players, both individuals and groups.

The results of the review are reported in the following categories: awareness of the program; use and usefulness; overall cost-benefit; adequacy of funding levels; selection criteria and administrative processes; maintenance and sustainability; and the overall effectiveness of the program in improving transfer opportunities for students.

Awareness of the Transfer Innovations Program

Information for this section of the report was obtained from surveys sent to the Articulation Committee Chairs, Project Coordinators and to those professionals who work with or on behalf of students (Associate Registrars, BCCAT Institutional Contacts, BCCAT Transfer Credit Contacts and Academic Advisors), in-depth conversations with members of the BCCAT staff and others, and a survey of users of the "Program Specific Transfer Guides" section of the BC Transfer Guide.

Of the Articulation Committee Chairs 56% were aware of the program. (See Appendix 4: Articulation Committee Chairs Survey). Of this group, 90% became aware of the program through annual meetings, the Articulation Handbook and BCCAT bulletins. Project Coordinators became aware of the initiative from similar sources, a colleague or a System Liaison Person. (See Appendix 5: Project Coordinators Survey).

Results of the survey of professionals working with or on behalf of students indicated that overall, 78% were either somewhat or very aware of the program. Of this group, those working most closely with students on planning and transfer issues (Academic Advisors, Transfer Credit Contacts) were the most aware. Eighty-five percent of the Academic Advisors, and 81% of the Transfer Credit Contacts who responded to the survey indicated a somewhat or high degree of awareness of the program. Fifty percent of the Associate Registrars who responded to the survey indicated that they were aware of the program. (See Appendix 6: Institutional Contacts and Advisors Survey).

During the course of the review, at a meeting of the BC Registrars attended by BCCAT staff, it became apparent that registrars are generally unaware of the program, particularly the “Flexible Pre-Major” component. Several issues and concerns were identified by the Registrars that are reported in following sections of this report.

The survey of users of the “Program Specific Transfer Guides” produced very limited, and therefore inconclusive, results. (See Appendix 8: Program Specific Transfer Guide User’s Survey). The few individuals who chose to respond to the survey, however, were amongst the targeted audiences: students, prospective students, or those working with or on their behalf.

Use and Usefulness

Information for this section of the report was obtained from the surveys of Articulation Committee Chairs, Institutional Contacts and Academic Advisors, and the Project Coordinators. From the surveys it was difficult to determine whether the responses were based on respondents’ knowledge of actual use and usefulness, or on their perceptions. Information was also obtained through conversations with key BCCAT staff and an in-depth conversation with a Project Coordinator. The “user” survey produced little reliable information.

Of the institutional contacts and academic advisors who responded to the survey, 79% agreed or strongly agreed that the program enhances transfer opportunities for students. 72% also agreed or strongly agreed that they use the information in their work (94% of the Academic Advisors and 47% of the Transfer Credit Contacts). When asked whether or not the initiative seems to have benefited students, 50% agreed, 43% indicated that they did not know, and 16% disagreed.

Most of the Chairs did not respond to the question regarding benefits to students. Of those who did, most indicated that they did not know. Seventy percent of the Project Coordinators who responded to this question indicated that the program was either beneficial or very beneficial for students.

The in-depth conversations conducted with key BCCAT staff and others revealed, almost without exception, a strong perception that the program does enhance transfer opportunities for students. There appears to be strong “support in principle” for the program, especially for the “Flexible Pre-Major” component.

From August 17, 2009 to January 4, 2010, the number of visits to the “Program Specific Transfer Guides” was monitored. Pages in this directory were viewed 11,577 times. The main page was the most-often viewed (4,746 times); page views for specific program content in this section was extremely low, ranging from 91 visits to 1,066 visits. These statistics don’t compare favourably with the course-by-course section of the guide (1,748,268 page views during the same time period). Part of the reason for this low

volume could be due to the fact that this section of the guide contains only a fraction of the equivalencies contained within the course-to-course section (115,000 plus); thus, by default users will most often go to the course-to-course section. The relatively low usage might also be due to the fact that this section is too embedded and therefore difficult to find. A complete breakdown of page views, by program area, is appended to this report. (See Appendix 2: Program Specific Transfer Guides: Page Views).

Cost Benefit

Information for this section of the report was obtained from surveys sent to the Institutional Contacts and Advisors, the Articulation Committee Chairs, and the Transfer and Articulation Committee. In addition, much valuable insight was obtained through in-depth conversations with BCCAT staff.

Since its inception, approximately \$500,000 (approximately \$45,000 per year; \$11,000 per project) has been spent on the Transfer Innovations Program. This figure represents the direct funding of projects and any associated administrative costs. Currently, a .50 FTE staff member oversees the initiative, as well as assuming other BCCAT functions; the Transfer Innovations Program, however, occupies most of her time.

From the surveys, 63% of the institutional contacts and advisors indicated that the initiative provides somewhat or very good value for the money spent. (See Appendix 6: Institutional Contacts and Advisors Survey). Seventy-one percent of the Transfer and Articulation Committee indicated that the program provides somewhat good value. (See Appendix 7: Transfer and Articulation Committee Survey). Most of the Articulation Committee Chairs did not respond to this question. A few individuals contacted directly indicated that the budgetary allocation to the project has produced exceptional value. Others were not sure, and a few others questioned the value based mainly on administrative issues and lack of evidence that the information is being used.

The ratio of direct project funding to administrative costs, over time, is approximately 50-50. Some have suggested this to be too heavily weighted on the administrative side. Indeed, in a conversation with the incumbent who oversees this initiative, and other BCCAT personnel, the program requires considerable front-end nurturing and administrative follow-up to ensure that the information contained in the grids and the transfer agreements is kept current.

Funding Levels

Information for this section of the report was obtained from the survey sent to the Project Coordinators, an in-depth conversation with one of them, and from conversations with BCCAT staff, and an examination of actual project costs.

Eighty-eight percent of the Project Coordinators indicated that they mainly or definitely were able to complete the project within the funding levels provided. (See Appendix 5: Project Coordinators Survey). For 2009, funding levels were increased from a maximum of \$10,000 to a maximum of \$15,000 to reflect inflation and the increased costs of providing faculty time assignments to approved projects.

An examination of actual project costs revealed that over 90% of the projects were completed within or below budget allotments (see Appendix 3: Completed Projects: Budgets vs. Expenditures).

Selection and Administrative Processes

Information for this section of the report was obtained from the survey sent to the Transfer and Articulation Committee and from conversations with BCCAT personnel, a Project Coordinator, and an institutional Registrar.

Although not clearly identified in any of the documents reviewed, responses from members of the Transfer and Articulation Committee regarding the criteria used for the selection of projects was clearly articulated, consistent and comprehensive in nature. These criteria included assessing whether or not the project was student-focused, included broad consultation, had clearly-stated outcomes, and whether a grant was really necessary to carry out the project. (See Appendix 7: Transfer and Articulation Committee Survey). Less clear, however, were the responses regarding the criteria for determining when a project is successful. Is a project successful just because a transfer agreement has been reached, or a grid has been developed? Or, is a project successful only when it can be demonstrated that it is useful for students and that they indeed are using the information or the provision to assist in their transfer? To date, no evaluation of projects has been undertaken, including any tracking of students.

As indicated in the previous section on cost-benefit, considerable administrative time is spent nurturing projects throughout their development, and on follow-up activities related to maintenance and currency. Information about these transfer initiatives is manually posted on the BCCAT site, and all updates are also done manually. Responsibility for documenting requirements is unclear for both sending and receiving institutions and is very “person” intensive. Most people surveyed or engaged in conversations agreed that these processes are inefficient and that other ways to accomplish these tasks should be explored and, if feasible, developed. For, example, it was suggested that by simply designating all institutions as both “Sending” and “Receiving” much of the information could be updated electronically. In addition, it was suggested by the incumbent overseeing the program, and others, that more accountability measures need to be built into the project proposal, the vetting and approval process, and the follow-up or updating process.

In an in-depth conversation with a Project Coordinator and with an institutional Registrar, involvement of administrative personnel (usually the Registrar or designate at each institution) at the outset of the development of the proposal is considered to be critical to

the project's success. However, there is little evidence to suggest that this has been the case, leaving the personnel who are expected to administer the agreements finding out about them after the fact.

Maintenance and Sustainability

Information for this section of the report was obtained through surveys of the Institutional Contacts and Advisors and the Project Coordinators. Additional information was obtained through a meeting with key BCCAT staff, in-depth conversations with several BCCAT staff, an in-depth conversation with a Project Coordinator, and through in-depth conversations with three Registrars.

One of the biggest challenges with the program is keeping the information within the grids and agreements current. Only 42% of the Institutional Contacts and Advisors indicated that information is current. Thirty-seven percent indicated that the information is inconsistent with other information in the Transfer Guide. (See Appendix 6: Institutional Contacts and Advisors Survey).

A few of the approved projects have been removed from the "Program Specific Transfer Guides" section either because information was not kept current or the information was inconsistent with the course-to-course guide (See Appendix 1: Transfer Innovations Projects: Status Report).

BCCAT staff and the Project Coordinator interviewed all indicated that this is an ongoing challenge.

Although newly-approved projects must include a mechanism for updating the information, responsibility usually falls to an individual or to a committee, and is manually done, as is the input by BCCAT staff onto the site. With frequent turn-over in committee memberships, retirements, etc., these tasks are often neglected or left undone.

An additional issue was recently identified at a meeting of the BC Registrars attended by BCCAT staff, where most of the Registrars appeared to be unaware of the flexible pre-major component of the program. In most cases they had not been consulted or involved regarding the documentation required to indicate whether a student had fulfilled the requirements for completion of a flexible pre-major. Many of the Registrars were not aware that several flexible pre-major projects have either been approved, or are being developed. Concern was raised about the expectations and responsibilities of both "Sending" and "Receiving" institutions regarding how documentation would be provided, and who would be responsible.

Overall Effectiveness

Information for this section of the report was distilled from all sources and also contains the observations, impressions and opinions of the reviewer.

As implied earlier in the report, there is no consensus regarding the intended purpose of the Transfer Innovations Program. While originally designed as a strategic initiative intended to introduce more flexibility into the transfer system, others perceive that it has been operating as a special fund for projects “outside” the mainstream. Still others question its value, primarily related to the complexities involved in administration and maintenance. Overall, though, there is widespread agreement, at least in principle, that the program does provide flexible options for students that are not otherwise available through existing mechanisms, and/or does provide additional and useful information on transfer.

The Transfer Innovations Program has achieved much of its success through the development of several “Block Transfer” and “Descriptive Pathways” initiatives. While few would dispute the value of the individual projects, both initiatives must be reassessed against their intended purpose and the current context of the post-secondary educational environment. For example, there are now 900-plus block transfer agreements contained within the BC Transfer Guide. One could argue that the block transfer initiative has become part of the mainstream. If there is no distinguishable difference between these agreements and those that are part of the Transfer Innovations Program, is there any compelling rationale to keep them separate? Why should they be specially funded while most are not? Equally, few would argue that the information contained within the transfer grids generated through the “descriptive pathways” is not useful for students and those who work with them. But can this component truly be described as innovative, especially as it applies to the academic areas where the information in the grids is parallel to the information already provided in the course-to-course guide? Is it reasonable to expect that both of these initiatives, particularly in academic disciplines, could be pursued through existing transfer and articulation mechanisms or processes?

In the 10-plus years that the Transfer Innovations Program has been in effect, only one Flexible Pre Major has been developed and sustained (Music), although several are now in the investigative or developmental stages. Many have indicated that this option has sparked recent interest from faculty in “thinking outside the box”, and several flexible pre-major projects are currently under development. As an innovation, this provision probably has the greatest potential for introducing real change and flexibility into the transfer and articulation system. Now may be an opportune time to re-purpose the initiative and launch it as a new strategic direction. However, whatever its future, two major issues need to be resolved quickly: the issues identified by the Registrars regarding documentation, and issues recently identified by several smaller institutions who may not have the resources to offer the breadth of courses to meet the requirements of the emerging flexible pre-majors in addition to those already employed to meet the requirements of the Associate Degree.

Several projects completed in the “other” category have produced valuable context and information regarding transfer issues within specific disciplines. Good examples include the “ESL Canadian Language Benchmarks” project, the “First-Year English Aims”, and the “Mathematics Core Calculus” project.

There are many outstanding challenges associated with the Transfer Innovations Program that must be addressed. These include building awareness and institutional buy-in throughout the system (especially as this applies to the Flexible Pre-Major option), addressing the issues around maintenance in order to keep the information contained in the agreements and grids current, making better use of information technology to reduce the intensity of manual operations, developing a more visible “presence” on the BC Transfer Guide website, and developing a process whereby the personnel within institutions who are expected to administer these agreements are involved with their development from the outset.

IV RECOMMENDATIONS

The recommendations contained in this section of the report are of two types, strategic, and operational.

Strategic Recommendations

It is recommended that the Council, the Transfer and Articulation Committee, and BCCAT personnel:

- Revisit the Transfer Innovations Program based on the current environment to develop an overall statement of purpose for the future of this program, complete with intended outcomes and indicators of success.
- Assess what components, if any, could or should be subsumed within existing transfer and articulation mechanisms and processes (e.g. Block Transfer) and what new components, if any, should be included.
- Develop a strategy based on the above, with a plan to ensure both system and institutional “buy-in”, especially as this applies to the Flexible Pre-Major. The plan should include the immediate appointment of a representative task force (faculty, Registrars, IT experts, smaller institutions) to resolve issues identified by the Registrars and some of the smaller institutions with regard to this initiative.
- “Re-launch” the program in light of the above.

Operational Recommendations

It is recommended that the Council, the Transfer and Articulation Committee, and BCCAT personnel:

- Ensure that all those involved in the administration of any new articulation and transfer initiatives are kept informed of plans and projects, including those not previously part of the BCCAT liaison and communications network (e.g. Registrars, Academic Advisors).
- Assure that the Articulation Committee Chairs are regularly kept informed of the program.
- Build in strict accountability measures into the selection and approval processes that include clear statements of expectations regarding the maintenance and updating of information, the consistency of the information with information already contained in the BC Transfer Guide, the involvement of those responsible for administering the agreements in the development of any project, and a requirement that the project includes a follow-up evaluation that demonstrates its use and usefulness for students.
- Develop an internal review mechanism for the program.
- Conduct an internal financial review to determine the actual costs of administering the program.
- Investigate how information technology might be employed in order to reduce the overhead administrative costs and time associated with the development, updating and maintenance of agreements and grids. As part of this investigation, determine to what extent designating all institutions as both “Sending” and “Receiving” could assist in this regard.
- Develop a more visible presence on the BC Transfer Guide site so that these agreements and grids are more readily accessible to students, prospective students, and those working with them and on their behalf

V REFERENCES

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