How to Articulate

Requesting and Assessing Credit in the BC Transfer System

2018 Edition

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2018 (3rd Edition)

BCCAT

Table of Contents

List of Abbreviations

The following abbreviations are used in this handbook.

ABBREVIATION	EXPANDED REFERENCE
BCCAT	British Columbia Council on Admissions and Transfer
BCTG	BC Transfer Guide
BTA	Block Transfer Agreement
CMEC	Canadian Ministers of Education Council
FPM	Flexible Pre-Major
ICP	Institutional Contact Person
TCS	Transfer Credit System

A full glossary of articulation-related terms appears as *Appendix I*.

Introduction

The BC Transfer System

The BC Transfer System is the collective name for a complex network of autonomous institutions that collaborate in many ways to facilitate student mobility and transfer of credits. Initially, most institutions participating in the BC Transfer System were public institutions located within British Columbia. Over many years, however, the system has expanded and now also includes private and out-of-province post-secondary institutions that have met provincial standards of institutional and program quality, integrity, and openness.
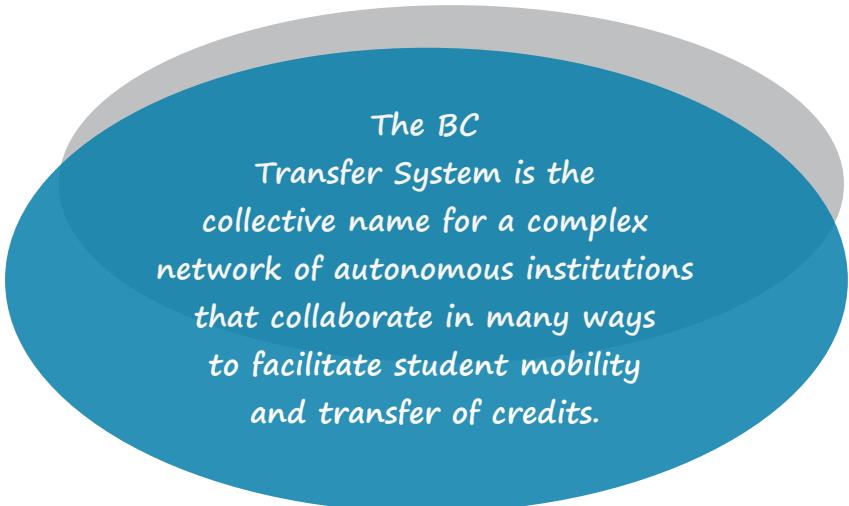
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The BC Council on Admissions and Transfer

The coordinator and manager of the BC Transfer System is the BC Council on Admissions and Transfer (BCCAT). BCCAT staff operate under the guidance and direction of a Council of representatives appointed by the provincial government and representing public universities, colleges and institutes, post-secondary students, private post-secondary institutions, and the public secondary school system. The Council is accountable to the minister responsible for advanced education. More information about BCCAT and its operations is available at bccat.ca

The BC Transfer Guide

The BC Transfer Guide (BCTG) is one of the chief instruments through which BCCAT coordinates transfer and articulation. This online searchable database is the official record of all formal transfer agreements in BC, including course-to-course and block transfer agreements (BTAs), as well as Advanced Placement and International Baccalaureate equivalencies. The BCTG also provides students with information on program transfer, associate degrees, and how to plan a successful transfer route. It is supported and informed by the Transfer Credit System (TCS), an interactive software through which participating institutions manage their articulation activities.

More information about the BCTG is available at bctransferguide.ca

TABLE 1: BC Transfer System Member Institutions (as of September 2018)

INSTITUTION	CODE IN BCTG LISTING
Acsenda School of Management*	ASM
Alexander College*	ALEX
Athabasca University	AU
BC Institute of Technology	BCIT
Camosun College	CAMO
Capilano University	CAPU
Coast Mountain College	CMTN
College of New Caledonia	CNC
College of the Rockies	COTR
Columbia College	COLU
Coquitlam College	COQU
Corpus Christi College	CCC
Douglas College	DOUG
Emily Carr University of Art and Design	EC
Fairleigh Dickinson University*	FDU
Fraser International College*	FIC
Justice Institute of BC	JIBC
Kwantlen Polytechnic University	KWAN
Langara College	LANG
LaSalle College Vancouver*	LCV
Nicola Valley Institute of Technology	NVIT
North Island College	NIC
Northern Lights College	NLC
Okanagan College	OC
Quest University*	QU
Royal Roads University	RRU
Selkirk College	SELK
Simon Fraser University	SFU
Thompson Rivers University	TRU
Thompson Rivers University, Open Learning	TRU-OL
Trinity Western University	TWU
University Canada West*	UCW
University of BC – Okanagan	UBCO
University of BC – Vancouver	UBC
University of Northern BC	UNBC
University of the Fraser Valley	UFV
University of Victoria	UVIC
Vancouver Community College	VCC
Vancouver Island University	VIU
Yorkville University*	YVU
Yukon University	YUKO

*Articulation at these institutions is limited to program(s) with ministerial consent. See also BCCAT Policy 3A: *Membership in the BC Transfer System:* bccat.ca/pubs/POL3A_BCTSMembership.pdf

The Purpose of this Handbook

The purpose of this handbook is to provide a resource for institutions, departments, faculty members, and articulation committees involved in articulating courses and programs for transfer credit within the BC Transfer System.

The information in this handbook is based on best practices observed and recorded by BCCAT over many years of coordinating and administering articulation and transfer activities. The handbook is intended to be a practical and user-friendly manual. As such, it includes suggestions, checklists, and models. It covers the basics of bilateral course-to-course transfer and provides essential information about other kinds of transfer such as multilateral and block transfer, and alternative or innovative approaches to articulation.

Examples of articulation agreements throughout this handbook are taken from the BCTG. These are provided as illustrations of different types of agreement and may not be current at the time this document is consulted. The most up-to-date information on any articulation agreement is in the BCTG (bctransferguide.ca).

What this Handbook is Not

This handbook is not intended to be a guide to the articulation and transfer policies in effect at all institutions. It does not deal with all aspects of the evaluation of credit for learning: for example, it does not address forms of articulation such as Prior Learning Assessment and Recognition (PLAR), challenge credit, credit awarded for non-articulated courses or programs, or advanced standing. The principles, best practices, and processes suggested in this handbook may be applicable to many forms of transfer credit agreement. This handbook addresses those transfer credit agreements that result from the formal articulation of courses and programs between and among institutions in the BC Transfer System.

What is Articulation?

Articulation is "the state of being jointed."[1] In the context of course transfer, articulation allows multiple sectors or branches of post-secondary education, each with its own distinctive characteristics, to function as a system. Through the process of articulation, institutions assess courses offered at other institutions to determine whether to grant course credit toward their own programs or credentials.

The process of articulation involves a series of transactions that

- rely on faculty assessment of equivalencies;
- acknowledge the different character and missions of institutions;
- acknowledge the integrity and autonomy of programs;
- depend upon trust;
- are enabled by the work of disciplinary articulation committees; and
- may result in the awarding of transfer credit.
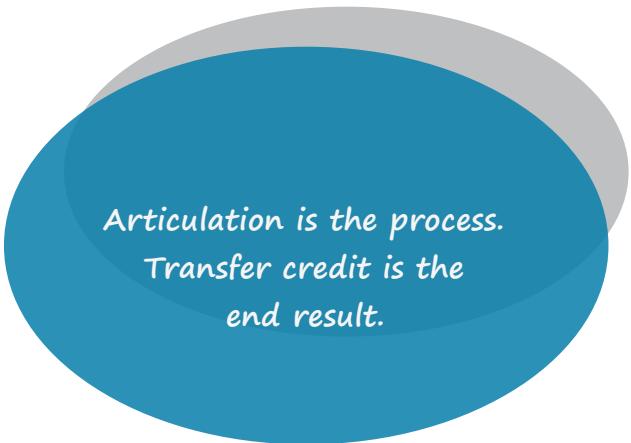
Articulation is the process. Transfer credit is the end result.

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[1] Oxford Dictionaries Online, en.oxforddictionaries.com/definition/articulation. Accessed 20th August 2018.

In BC the most common form of articulation for post-secondary courses is **bilateral course-to-course articulation**. This process starts when Institution A sends a request to Institution B asking that one of Institution A's courses be awarded transfer credit at Institution B. If Institution B determines that Institution A's course is equivalent to one of its own courses, Institution B indicates that it will accept a student having completed the course at Institution A as having completed the equivalent course at Institution B. Once this agreement has been determined, the course has been formally articulated. Any student whose transcript indicates completion of the course at Institution A will receive the transfer credit recorded in the BCTG for that course if s/he attends at institution B.

Within a **bilateral course-to-course articulation** process, the transfer agreement for each transferred course is articulated individually with each receiving institution. Therefore, each course receiving transfer credit at multiple institutions has multiple bilateral articulation agreements. This form of articulation is the most common: it is described at length in the sections on *Requesting Articulation* and *Assessing Articulation Requests*.

Multilateral articulation is used by several disciplines within the BC Transfer System, most notably by Adult Basic Education (ABE) and English as a Second Language (ESL). In multilateral articulation, programs articulate their courses collaboratively, comparing each institution's individual courses to a set of outcomes or content statements that have been jointly developed as representing an acceptable standard for the course. This form of articulation is described in the section on *Program-Specific Transfer Guides*.

Block transfer articulation occurs where institutions compare whole programs and award credit on the basis of total hours or credits, rather than for individual courses. This form of articulation is used, for example, in granting credit for a diploma completed at one institution toward a degree program at another institution. This form of articulation is described in the section on *Block Transfer*.

Other innovative approaches to articulation are often undertaken by articulation committees to improve students' transfer possibilities within their discipline. Some of these forms of discipline-specific articulation are described in the section on *Other Forms of Transfer Agreement*.

Articulation in BC: A Success Story

The British Columbia post-secondary system has a well-integrated system of differentiated institutions committed to recognizing and awarding credit for equivalent learning through the process of articulating courses and programs for credit.

As the BC post-secondary system has evolved, both the volume and types of transfer activity have increased. In the past, the majority of transfer credit involved students in non-degree programs, mostly at colleges, transferring into degree programs at universities. Newer student mobility trends indicate that students are often moving in multiple directions across post-secondary institutions.

The high level of activity in the BC Transfer System is also indicated by the number of course transfer agreements in effect. In 2018, there were approximately 210,000 active course transfer agreements in the BCTG, up from 79,150 in 2011–12. There were also 1,378 block transfer arrangements and 52 degree partnerships listed in the BCTG.[2]

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[2] Available at bccat.ca/about/annualreview/

FIGURE 1: Student Pathways Through BC Public Post-Secondary Education

Student Pathways to BC Public Post-Secondary Education (BC SYSTEM) 2014/2015 and Future Student Pathways, up to Fall 2016
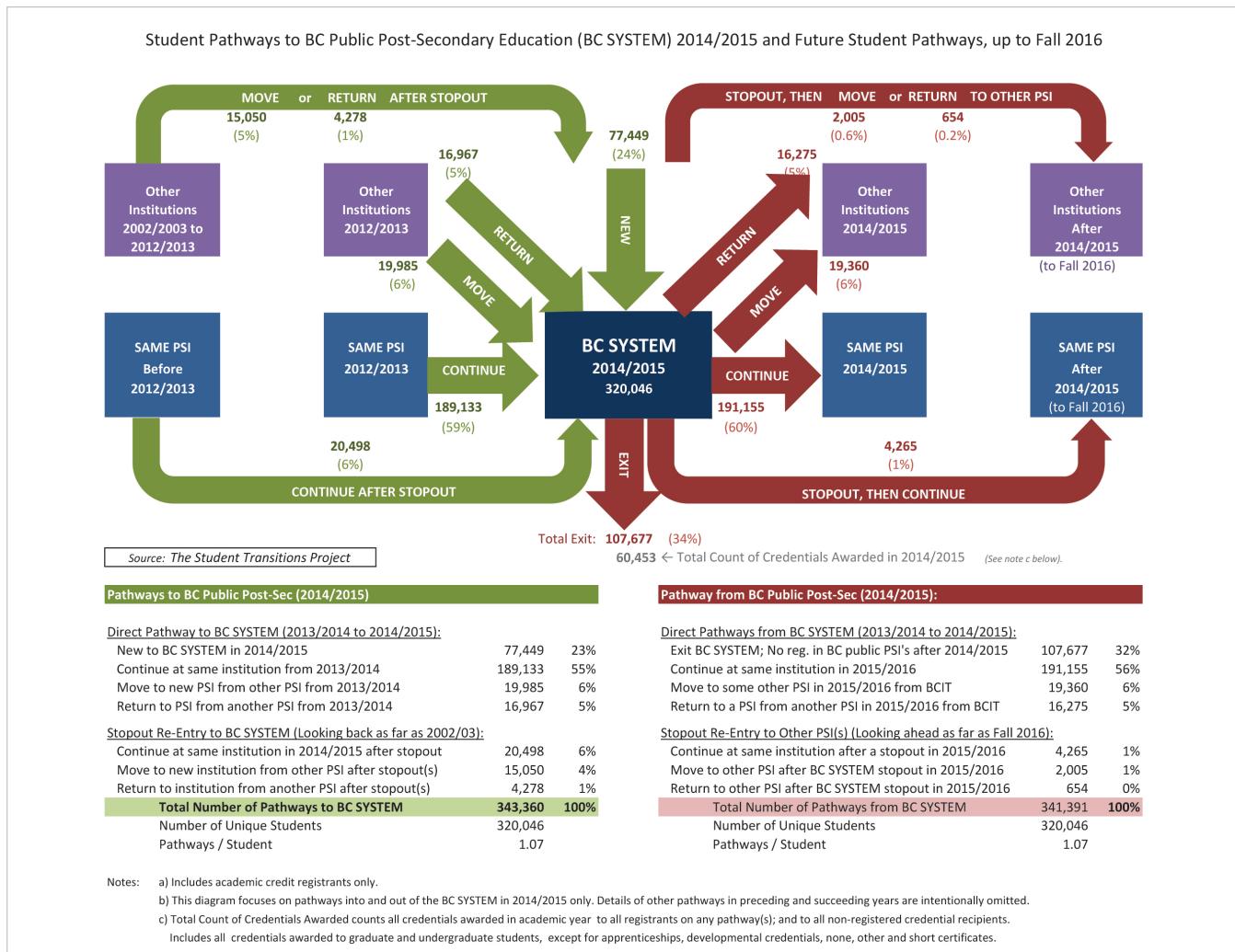
Source: Student Transitions Project:

www2.gov.bc.ca/assets/gov/education/post-secondary-education/data-research/stp/student_pathways_system_region_sector.pdf

BCCAT research indicates that students who transfer are generally satisfied with their transfer experience. Where student dissatisfaction is expressed, it tends to be tied either to unrealistic expectations about the outcomes of transfer requests, or to a lack of information about the transfer process itself.[3] Of the students who moved from BC public colleges, institutes, or teaching-intensive universities to BC research-intensive universities, 92% expected to transfer credits and 87% reported receiving all of the transfer credits expected. The proportion of students who expected to transfer credits and were dissatisfied with their experience has remained constant across multiple survey years at about 8%. In a 2011 survey, only 193 respondents reported being dissatisfied with their transfer experience; about half of these reported receiving all of the transfer credits they expected.[4]

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[3] *2011 Admission and Transfer Experiences of Students Continuing Their Studies in British Columbia* (Vancouver, BC: BC Council on Admissions and Transfer, 2011). Available at bccat.ca/pubs/bcstats11.pdf

[4] *Improving the BC Transfer Experience: Feedback from Students* (Victoria, BC: BC Stats, 2012). Available at bccat.ca/pubs/bcstats12.pdf

The Principles of Articulation

When considering how to articulate a course for transfer credit, evaluators are faced with numerous decisions, so it is helpful for evaluators to be aware that all institutions that are members of the BC Transfer System have agreed to adhere to the *Principles and Guidelines for Transfer*. These *Principles* appear in their entirety as Appendix II in this document. Summarized below are the ones most relevant to the actual articulation process—principles intended to guide the process and to ensure that courses are articulated fairly and consistently.

Student-Centredness: Students are the ultimate beneficiaries of the articulation process. The availability of the articulation process assures them that their learning will be appropriately recognized.

- Students should not have to repeat course content if they have already demonstrated mastery of it.

- Students should not be denied transfer credit because of technicalities.

- Students should not be credited with learning that they have not acquired, especially if that learning is fundamental to their advancement to further study, or is a required element of their program of study.

Academic Integrity: Transfer credit agreements should be consistent with the academic integrity of programs and with the right of post-secondary institutions to determine program design and delivery, to determine academic prerequisites, and to establish admission criteria and certification requirements of academic achievement.[5]

Parity of Esteem: Every institution sends and receives students, and students request transfer credit for the courses they have taken. Faculty should treat courses from other institutions as they would like their own courses to be treated. In this context, John Dennison, former BCCAT Co-Chair, refers to a "parity of esteem"[6] among institutions as "the ideal goal in a diverse galaxy of post-secondary institutions." In practice, parity involves such actions as communicating diplomatically, offering constructive suggestions to assist with transferability, avoiding dictating terms of transfer agreements, and providing justification for an award of 'no credit.'

Equivalency: Equivalent means "equal in value, amount, function, [or] meaning"[7] A course submitted for evaluation for articulation purposes will likely never be identical to the corresponding course at the receiving institution. The assessment of equivalence involves identifying the degree to which the courses match in content or outcomes.

- The degree of similarity between the courses should be enough that students receiving transfer credit will have the necessary knowledge and background to be successful in more advanced courses.

- Conditions and restrictions on transfer (such as requiring a minimum grade in the course for credit to be transferable) should not be included unless those same restrictions apply to the equivalent course at the receiving institution, or unless there are clear and defensible reasons for doing so.

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[5] See the Canadian Ministers of Education Council (CMEC) statement on credit transfer (October 2002), available at cmec.ca/Publications/Lists/Publications/Attachments/216/ministerial-statement-credit-transfer-2009.pdf

[6] Dennison, J. (2000). *Student Access and Mobility within the British Columbia Post-Secondary System* (Vancouver, BC: BC Council on Admissions and Transfer). Available at bccat.ca/pubs/dennison.pdf

[7] Oxford Dictionaries Online, oxforddictionaries.com/definition/equivalent. Accessed 20th August 2018.

> ### The 'Golden Guideline' of Articulation:
>
> # TREAT ALL COURSES AS YOU WOULD WANT YOUR OWN TO BE TREATED.

Reciprocity: If a receiving institution recognizes a sending institution's course as equivalent to one of its own courses, then the sending institution should in turn determine whether to recognize the receiving institution's course as equivalent. Reciprocity may not be possible in all cases—for example, if there are differences in the level at which the course is taught, the prerequisites, the rigour of the curriculum, or the topics covered—but if articulation has already been established in one direction, this fact should be taken into account when a request to establish an articulation in the other direction is considered.

Communication: Prior to beginning studies at another institution, students should have knowledge of and current information about available credit transfer opportunities and limitations. Institutions should be committed as a matter of routine to providing current and reliable information about policies and procedures for transfer of credit, including the right of appeal.[8]

Transparency: Assessment practices should be open to scrutiny. Individuals who assign transfer credit based on their assessment of a course should be prepared to explain the reasons for their decision, including any influencing factors, and institutions should be prepared to explain how they process articulation requests. All institutions participating in articulation should have an appeal process available to students who do not agree with the outcomes of an articulation request.

Efficiency: Articulation processes should operate as quickly and simply as possible. Delays in processing requests for transfer credit may affect students' ability to move within and between institutions. However, institutions should also respect the workload of faculty members when assigning evaluations of articulation requests, and should not set unrealistic deadlines for completion of this key phase of the articulation process.

Respecting Disciplinary Expertise: Faculty members are asked to participate in the articulation process because of their specialized knowledge of a subject, discipline, or field. When processing articulation requests, institutions should make evaluators aware of appropriate transfer credit options. However, institutions should not overrule evaluators' decisions on transferability, or on amounts of transfer credit, when these decisions are based on the evaluators' expert knowledge of the specific subject, discipline, or field.

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[8] See CMEC statement on credit transfer, *op. cit.*

Requesting Articulation

Articulation is the process through which an institution secures transfer credit recognition for its courses at another institution. Articulation is routinely initiated by one institution sending course information to another institution and requesting credit for that course; it can also be initiated by a student. This section describes the steps in the articulation process, for new courses and for revisions to existing courses; describes considerations that apply when an institution receives a request for credit transfer from a student; and recommends best practices for each part of the process.

Requesting Articulation for a New Course

STEP	WHO IS RESPONSIBLE	ACTION
Developing Course Outline	Course developer(s)	Develops content and format of new course, and creates course outline. May consult with other institutions or with articulation committee members to determine structure and content of course appropriate for transfer credit. Finalizes course outline and submits it for departmental and institutional internal approval processes.
Requesting Articulation	Institutional Contact Person (ICP)	Once course is approved internally, forwards approved course outline to all relevant receiving institutions with a request that the course be considered for transfer credit. To facilitate the process, the request may include desired amount of credit, desired level of credit, and/or specific course(s) for which transfer credit is sought.
Awarding Credit	Course evaluator at receiving institution	Evaluates transfer credit request and determines whether course is transferable and, if so, the amount and type of credit to be awarded.
	ICP	Submits the completed evaluation, including details of evaluation, to BCCAT via the TCS.
	BCCAT	Reviews and publishes the articulation agreement in BCTG.

Articulating a new course can be a slow process. Institutions developing a new course for which transfer credit will be sought should start the course development process at least a year before they would like the transfer credit arrangement to be finalized.

Institutions new to the BC Transfer System might want to begin the process with a call or an email to prospective receiving institutions to provide information about the new member institution. Many people are unaware of newer and private institutions and their eligibility to participate in the Transfer System.

Developing a New Course that is Designed to Transfer

Every course fulfills multiple objectives for students, instructors, departments, and institutions, and all of these objectives should be taken into account as a course is being developed. Some courses are designed from the outset with transfer as one key objective, but sometimes other objectives are more important than transferability. For example, if an institution has determined that students have difficulty with certain material, it may develop a course to fill the gaps in students' knowledge and bring their skills up to a standard that will help them achieve success in their subsequent studies. This is sound pedagogical practice, but the course may be denied transfer credit because it is viewed as preparatory. Another example is when faculty expertise in a department may make it possible to offer a course on a particular topic, but the course may be so distinctive that other institutions may not view it as relevant to their own programs.

If a course is designed to transfer, its content and structure should be consistent with the norms, content, and standards of the institutions at which transfer credit is sought. It does not have to be identical to a course at a receiving institution, but it must demonstrate enough similarity or relevancy to the receiving program's content to be accepted for credit within that program.

A detailed course outline is the starting point of any articulation process, since articulation demands a close examination of course elements in order to establish equivalence.

If a course is designed to transfer, it should be consistent
with the norms, content, and standards of the receiving institution.

Preparing for Articulation

Before Requesting Articulation

✓	CHECKLIST
	Examine the calendars of the institutions or programs from which credit will be requested, and identify courses that seem similar to the new course. In the absence of similar courses, it may be possible to find some that may be equivalent in overall intent, approach, or broad subject matter, such as a second-year regional history course that might be comparable to a second-year Chinese history course.
	Review relevant course outlines from the receiving institutions. These may be available online at EducationPlannerBC or upon request from the receiving institutions. For articulation purposes, it will be most helpful to obtain, if possible, both the official course outline that was approved by the institution when the course was created or updated and the individual instructor's course outline distributed in class the most recent time the class was offered.
	Consult with the institutions or programs that will be receiving the transfer credit request. There may be institutional policies at receiving institutions that affect how a particular course must be structured or delivered to be transferable. For example, are final exams required? Are there limits to the percentage of the final grade that is based on exam marks? Are there class size limits? Are labs required (optional)? It will also be helpful to identify the person in the institution, department, or program who is the best source of information regarding the course, or regarding institutional transfer policies in general.
	Check the BC Transfer Guide. Use the 'by Receiving Course' function at bctransferguide.ca to help identify other institutions with similar courses that already receive transfer credit. Since these courses have already been determined to be transferable, the course outlines for those courses may be particularly useful in identifying the components of a transferable course on this topic.
	Consult the members of the relevant articulation committee. Once a draft course outline is ready, articulation committee members may be able to provide advice or feedback. Many articulation committees use listservs, group email lists, or other online tools (e.g., Moodle) and can circulate these requests. Articulation committee contact persons are listed on each committee's webpage at bccat.ca/articulation/committees. The person at the receiving institution who has been identified as the best source of information on the course may also be willing to provide advanced feedback on a draft course outline, especially if there is any doubt about transferability.
	Reflect on and balance advice received from external parties. Asking for advice and feedback on a course can be a sensitive area. The principles of professional responsibility and autonomy for faculty members include the principle of freedom to develop and teach a course according to one's best professional judgement. Occasionally, a receiving institution proposes modifications that may be unacceptable to the sending institution, or that may compromise the transferability of the course to other institutions. In these instances (rare, in BCCAT experience) best practice involves communicating these concerns as diplomatically as possible and seeking a mutually acceptable solution. The sending institution may decide that maintaining the intended purpose or content of the course in relation to the institution's own programs is more important than altering the course to make it transferable to other institutions.

Learning Outcomes and Course Outlines

Several institutions in BC construct and design courses based on learning outcomes, and have tailored their course outlines to reflect this approach. Some articulation committees have also spent considerable time defining and describing the learning outcomes appropriate to their disciplines.

Given that a learning-outcomes approach has not been universally adopted in BC, any course outline including learning outcomes that is submitted as part of a request for transfer credit should provide sufficient detail to ensure that equivalency can be evaluated by an assessor who may not be familiar with this approach. BCCAT advises that outcomes-based course outlines should also include a description of the curricular content of the course and/or the topics covered. Faculty members at institutions that do not use an outcomes-based course outline format have indicated that they need this additional information to determine transferability.

Submitting a Request to Articulate a New Course

Once the structure, content, and purpose of a new course are finalized, the course must be approved by the academic governance body of the sending institution, such as an Education Council or Senate. An electronic copy of the approved course outline is then sent to receiving institutions along with a request for transfer credit. At each institution this process is handled by the ICP. BCCAT's Transfer Credit System (TCS) is used to forward the articulation request and the course outline to the institutions receiving the request.

Institutions may send requests for course articulation to any other member of the BC Transfer System, but institutions should also be mindful of the extra workload that may be incurred at other institutions when they receive misdirected or inappropriate requests. Institutions have told BCCAT that it is frustrating and unproductive to receive articulation requests for courses that have no relationship to any programs offered at their institution. BCCAT strongly encourages institutions and/or programs to direct articulation requests to those institutions or programs where the new course might potentially be transferable.

It is also helpful for the institution sending the articulation request to specify the credit desired for the course and, if applicable, to identify the course for which equivalence is sought at each receiving institution. This information can be included on the form accompanying the course outline. Where this is not possible, every effort should be made to provide details about the desired transferability, especially the discipline or department to which the request should be routed. Receiving institutions have told BCCAT that this information assists them with directing the course to the most appropriate department or faculty member. If possible, institutions intending to request specific course equivalencies should consult with their counterparts at the receiving institutions in advance of sending the articulation request, to ensure that they are identifying the most appropriate equivalent course or program at that institution. When the request concerns an interdisciplinary or multidisciplinary course, a more detailed discussion may be necessary to determine who should evaluate the course, as an equivalent course or an appropriate choice of evaluator may not be obvious.

It is also good practice to specify the program year for which credit is desired if there is any possible ambiguity. For example, some institutions use 300- and 400-level course numbers for courses taught at the second-year level; this can create confusion at a receiving institution if that institution uses 300- and 400-level numbers exclusively for third- and fourth-year courses. If it is likely that the receiving institution will award unassigned credit because of this discrepancy, a request from the sending institution for a specific program level of credit can help the assessor determine the appropriate credit.

The process of evaluating an articulation request at the receiving institution is described in the section entitled *Assessing an Articulation Request.*

Checklist of Suggested Information for Requests for Transfer Credit for New Courses

✓	CHECKLIST
	Course code
	Course number
	Title of course as listed in calendar
	Institution
	Division/Faculty/School in which course is offered
	Department offering course
	Program of which course is a part
	Level of course (e.g., 1XX, 2XX, 3XX, 4XX, or year/semester in program)
	Credit awarded for course
	Calendar description of course
	Date when course is/was first offered
	Total contact hours for course
	Hours allocated to each part of course time (e.g., lecture, seminar, tutorial, laboratory, field experience, other)
	If laboratory included, description of topics
	Number of weeks over which course is usually scheduled
	If course is offered hybrid or online, number of face-to-face instructor contract hours
	If course involves a practicum, a) number of practicum hours, b) type of practicum
	Course prerequisites or co-requisites
	Name/number of course this course replaces [if applicable]
	Detailed description of course content and topics
	Text and text chapters covered
	Evaluation components used to calculate student's grade, including the weighting of each component
	Learning outcomes/course goals
	Amount of transfer credit requested
	Year/level of transfer credit requested
	Suggested equivalent course(s) at receiving institution(s)
	Discipline/department of suggested equivalent course(s)

Recording Articulation Agreements

Once the receiving institution determines the credit it will award for a transferred course, it communicates this information to the Institutional Contact Person (ICP), who submits it to BCCAT electronically (via the TCS) for publication in the BCTG. The information fields in the TCS differ slightly from those visible to users of the BCTG, but both systems require course subject, title and number, as well as the credit value for any course for which transfer credit equivalency is sought or awarded.

Every new course articulation must also be given an 'effective date,' which is the date when the transfer agreement comes into effect or the range of dates during which the transfer agreement was in effect. To ensure that agreements align with semesters, new agreement effective dates are limited to January, May or September. A student may not be eligible to receive the listed transfer credit for the course if he or she completed it before the effective date.

When an established articulation is re-evaluated and the decision is changed in any way by the receiving institution, the effective date will include an end date. End dates for articulation agreements are limited to April, August and December. Where an agreement's effective date specifies an end date, students who took the course during this period will receive the corresponding transfer credit for the course in that period only; they will not receive any other transfer credit previously or subsequently assigned to the course.

Examples of course articulation agreements as they appear in the BCTG follow (see *Types of Transfer Credit*).

Sometimes the transfer credit agreement is conditional. Receiving institutions may specify any number of conditions that the student must meet in order to be awarded transfer credit for a course; receiving institutions may also limit how transfer credit can be used. Any conditions on transfer credit must be included in the information provided by the faculty assessor for inclusion in the TCS information sent to BCCAT for publication.

For examples of conditions attached to transfer credit agreements, see *Attaching Conditions and Limits to Course Transfer*.

Requesting Credit for a Two-Course Sequence

If the course is a one-semester course equivalent to half of a year-long course, and is normally scheduled as part of a two-course sequence, it is highly recommended that **both** courses and course outlines be submitted for articulation at the same time. This allows the receiving institution to maximize the award of transfer credit by considering one type of credit for the first one-semester course and a different type of credit for the two-course sequence. Topics may be covered in different courses or in different sequences at different institutions, so providing the course outlines together allows for a comprehensive assessment of both courses at the same time.

Transcript Notations for Transfers of Non-Standard Courses

Some institutions record transfer credit for courses delivered in non-standard ways with special notations added to the course code. For example, an online French course might be recorded on the transcript as FREN 200E, while the classroom version of the same course might be recorded as FREN 200.

BCCAT does **not** recommend such practices, for two reasons:

- Course articulation is based on an assessment of equivalence of content or outcomes, and the method of course delivery is normally assumed to be immaterial (see *Method of Course Delivery*); and

- Such designations on a transcript can result in loss of credit to the student. At large institutions, transcripts are normally read electronically. A mapping file that is set to read and understand FREN 200 will reject FREN 200E as a non-articulated course.

There is an exception to this general rule. BC institutions have agreed that credit awarded as a result of a Prior Learning Assessment process may be so indicated on the transcript through the use of specialized transcript notations.

If Transfer Credit is Not Granted

A receiving institution may determine that it will not grant transfer credit for a course. In such cases, an award of 'no credit' will be recorded in the BCTG. In this situation, students at the sending institution should be informed which institutions the course will not transfer to. This information is important for them in planning their programs. If the sending institution disagrees with a 'no credit' evaluation by a receiving institution, the sending institution may contact the receiving institution for further discussion.

Assessing Cross-Listed Courses

A number of institutions have developed cross-listed courses. A cross-listed course is a course that is listed under two or more distinct course numbers. For example, a course may be offered as both ANTH 100 and SOCI 100 simultaneously. The course content and students are the same. However, depending upon the program of study in which the student is enrolled, the course will be listed on the student transcript as either ANTH 100 or SOCI 100.

Cross-listed courses require particular attention when articulation is requested for them. For example, when a cross-listed course is submitted for articulation, the request is often submitted under only one of the prefixes under which the course is offered. This leads to one prefix being articulated while the other is not. In addition, many institutions fail to notify receivers when a course is cross-listed. This results in receiving institutions evaluating the same course twice (once under each prefix), and this double evaluation can result in conflicting articulation evaluations for the same course. This in turn causes considerable confusion for students enrolled in the cross-listed course.

BCCAT advises institutions to be aware of the implications for articulation of cross-listing courses. Should an institution decide to cross-list a course and seek articulation, it should take the following steps when sending the course out for articulation:

- Submit the course and the course outline under **each** prefix and number under which the course is offered;

- Clearly write on all articulation requests **and** course outlines that the courses are cross-listed with one another;

- Clearly indicate in the 'comments' box on the articulation requests **all** disciplines by which the course should be evaluated; and

- Clearly indicate that students will receive credit for only **one** course when presenting a transcript with a cross-listed course (for example, if students request transfer credit for a course cross-listed as ANTH 100 and SOCI 100, they will receive credit for only one of these courses, not both).

Receiving Student-Initiated Requests
for Course Transfer

Articulation requests may also result from student requests for transfer credit. Student-initiated course articulation decisions are often recorded only within the receiving institution's internal database. Unlike articulation agreements initiated by institutions—which are published in the BCTG and constitute credit transfer guarantees for students for the life of each agreement—student-initiated transfer credit decisions may or may not be relied upon as precedent for future transfer credit requests. However, in keeping with the principles of consistency and fairness, an evaluator assessing an articulation request from a student rather than from an institution should rely upon the same principles and tools for articulation as are outlined in this guide, and should award transfer credit for equivalent learning where appropriate.

Generally, student-initiated requests for transfer credit are filed through the receiving institution's Admissions or Registrar's Office. Students may be required to complete a standardized form accompanying the request. They are usually expected to provide an official transcript showing their successful completion of the course and the relevant official course outline (i.e., the information on the course that was approved by Senate or Education Council at the institution where the student completed it); some institutions also require the individual instructor's course outline and detailed syllabus provided in class by the instructor from whom the student took the course.

Some institutions refuse to process or assess articulation requests if the student provides only the calendar description of the course, since this description usually does not include such information as the textbook used in the course, the number of course hours or classroom contact hours, or the evaluation components used to assess student performance. Some institutions will also refuse to process or assess articulation requests if the supporting information does not reflect the content or structure of the course as it was at the time the student took it, because official course outlines may be changed over time.

Students may apply for transfer credit for courses taken as part of a completed degree at the sending institution, but some receiving institutions do not consider such requests, as a matter of policy. In all cases, it is important for students to be informed of residency requirements or other credit-related policies at the receiving institution: such policies might set limits on the percentage of credits that a student may transfer in, or indicate if certain courses in the program at the receiving institution must be completed at that receiving institution regardless of transfer credit limits.

It should be noted that some institutions and programs have policies defining how recently a course must have been taken in order for a student to receive transfer credit for an equivalent course. Such 'recency' policies are often found in programs such as computing science where course subjects and contents are regularly updated. In cases when a student has taken a course outside the timelines set by such policies, the following decisions might be appropriate:

- The student may receive transfer credit, but the transferred course may not be considered applicable to program completion requirements;
- The student may receive unassigned transfer credit rather than assigned transfer credit; or
- The student may not receive any transfer credit.

There are increasing numbers of students within the BC Transfer System who study at one 'home' institution but take one or more courses at other institutions simultaneously, with the intention of transferring those credits back to their home institution. In such situations, students may be required to obtain a Letter of Permission from the home institution to permit them to register at another institution and to transfer any credits earned at the second institution back to the home institution. Students applying for this type of transfer credit should be advised in advance whether the home institution has any policies restricting the use of transfer credit toward the completion of a credential.

Institutions are encouraged to create and implement appeal processes that can be used by students who do not receive the transfer credit they requested. BCCAT's publication *Transfer Credit Appeals in BC Post-Secondary Institutions* contains recommendations for effective policy and practice regarding student appeals of articulation decisions. This document is available at bccat.ca/pubs/sr_dec11.pdf

Re-Articulating an Existing Course

BCCAT recommends that once a course has been articulated and transfer credit has been established, the course should be re-articulated only if it changes substantively. However, since some non-substantive changes may affect the way a course is recorded in the BCTG, it is important to notify all institutions of these changes, even where those changes do not require that the course be re-articulated.
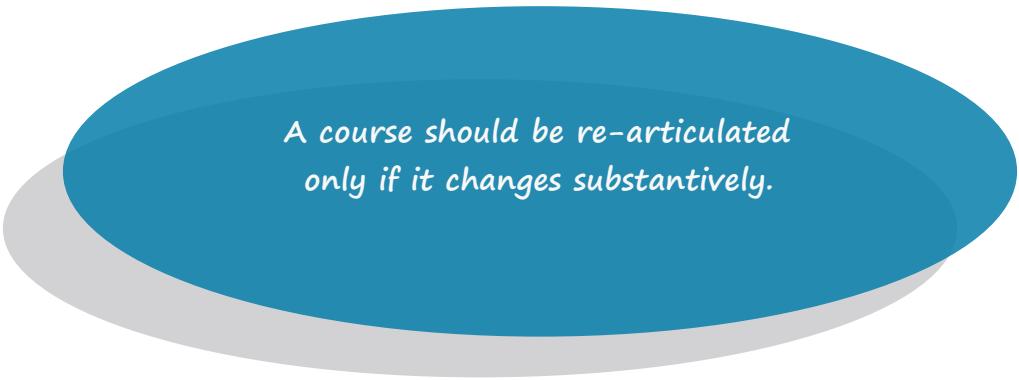
> A course should be re-articulated
> only if it changes substantively.

Types of Course Change Requiring Re-Articulation

Courses are re-articulated by an institution sending the revised and approved course outline to all relevant institutions, with a request that it be assessed for transfer equivalence. These requests are sent through the TCS. Re-articulation should be requested only when one or more of the following conditions exist.

- ***There is substantive change to the course content, subject matter, objectives, or outcomes.***
  Course articulation is based on the principle of equivalence between courses. Substantive changes are defined as changes to content, subject matter, topics covered, or objectives/outcomes that will alter the equivalence of the course to those courses with which it has been articulated. Relatively minor changes are not considered substantive: these include minor changes in topics; changes in texts, materials or assignments; reasonable modifications to learning outcomes; and/or changes intended to update the course or keep it in line with the evolving norms of the discipline.

- **There is substantive change to assessment criteria or evaluation methods that are <u>integral</u> to the articulation of a course.** For example, some institutions require all courses, or certain courses, to have a final exam, and some specify a minimum percentage of the final grade that must be based on the final exam. In these situations, if an articulated course is redesigned to eliminate a final exam, the course should be submitted for re-articulation to all institutions requiring a final exam in their equivalent course.

- **There are changes to the number of credits assigned to the course, or to the number of contact hours.** Normally, a change to credit hours signals that content has been added or subtracted. Such changes may affect the equivalence of the course, including the transferability of the course and/or the number of credits awarded. Therefore, re-articulation is appropriate.

Types of Course Change Requiring Notification but Not Re-Articulation

Some changes to courses require **notification** to institutions involved in a transfer agreement but should not trigger re-articulation of the course or reconsideration of the transfer agreement. Such changes include the following:

- **Changes in the course number.** For example, MATH 100 is re-numbered to become MATH 199.

- **Changes in the discipline or subject code.** For example, Fine Arts courses (FINA) are re-named Visual Arts courses (VISA).

- **Changes in the course title or course name.** For example, a course titled Women's Studies is re-named Gender and Sexuality Studies.

The TCS can be used to circulate notifications of non-substantive changes to articulated courses. The record of transfer credit will be updated in the BCTG, and contact persons at institutions awarding transfer credit for the course will also be notified to update their internal records. Since transcripts are often read electronically, failure to notify other institutions of such changes can jeopardize transfer credit for students, as a course with an established articulation agreement may not be recognized as transferable by the receiving institution if that institution's records have not been updated. Therefore, it is important for institutions to update their internal records promptly when notified of such changes.

In the Classroom

Students may complain about transfer credit assessment because of mistaken expectations that a course will transfer—for instance, that it will transfer as assigned credit rather than as unassigned credit, or that it will satisfy a program requirement at the receiving institution.

Where possible, BCCAT encourages instructors to support transfer students by doing the following:

- include information regarding course transferability in course outlines distributed in class;

- encourage students to check the BCTG to determine whether or how a specific course will be transferable;

- encourage students to keep the course outlines and syllabi from the courses they take, as these documents may be requested by the receiving institution if the student initiates a transfer request; and

- suggest that students read the *How Transfer Works* and *Frequently Asked Questions* pages on the BCTG website (bctransferguide.ca)

Instructor Qualifications for Transferable Courses

Assessing instructor qualifications may be a part of the articulation process when receiving institutions wish to verify that a course has been designed and/or is being delivered by a faculty member with appropriate qualifications or expertise in the subject matter. BCCAT has developed a statement on instructor qualification standards within the BC Transfer System. It is included in *Appendix IV* of this document, and is also available online at bccat.ca/articulate/request/instructor/

Assessing an Articulation Request

A request for transfer credit can be initiated by an institution or by a student seeking credit for a course taken at another institution. The request is sent to a faculty member with expertise in the discipline, and this content expert reviews the request to determine whether transfer credit will be granted and, if so, what course equivalency and/or credit value the transferred course will receive. The decision is then recorded in the BCTG. The steps in the process of assessing an articulation request initiated by an institution are outlined in the table below, and discussed in more detail in the following pages. The process for assessing student-initiated requests follows.

Steps in Assessing an Articulation Request

Step	Responsible Agent	To Do
Receiving the Articulation Request	ICP	Receives request through BCCAT's TCS. Sends request to appropriate department for evaluation.
Assigning the Request	Departmental contact	Assigns articulation request to appropriate faculty member for evaluation.
Evaluating the Request	Qualified faculty member	Evaluates articulation request and course information. Assigns appropriate course equivalency and credits for transferred course. May also add conditions on transfer credit being granted. Evaluator or departmental contact returns completed evaluation to ICP.
Completing the Request	ICP	Completes transfer credit evaluation and submits to BCCAT.
Publishing the Articulation Decision	BCCAT	Publishes articulation agreement in the BCTG.

Receiving and Assigning an Articulation Request

Normally an articulation request is sent to the receiving institution's Institutional Contact Person (ICP) through the TCS. The request is forwarded electronically and includes the official (approved) course outline. The ICP reviews the request to determine which program or department has the disciplinary expertise to assess it; the sending institution may have noted its preferred course equivalency or discipline on the request form. The ICP then directs the request to the appropriate program, department or qualified faculty member for evaluation. (For a list of components of a course outline that will assist institutions in assessing transfer credit requests, see the *Checklist of Suggested Information for Requests for Transfer Credit for New Courses* in the *Requesting Articulation* section of this handbook.)

Assessing Equivalence

The norms of academic autonomy include the right and responsibility of faculty members to design and teach a course using their individual expertise and judgement. Thus, faculty members assigned to deliver the same course in the same institution may not choose to teach in the same way. They may choose different texts and other resources, design different assignments and exercises, and emphasize different topics than their colleagues do. In each discipline, however, the traditions, norms, and body of knowledge of that discipline exercise a broad influence over what is appropriate content coverage at introductory, intermediate, and advanced levels. An institution's internal governance processes also regulate course and program content through curriculum approval policies and procedures.

Thus, a post-secondary course with the same name or title may not have the same content at every institution, and the degree of similarity between courses may vary by discipline. The assessment of course transferability must therefore rely on the judgement of faculty members as to the equivalence of content, structure, and format between or across courses. There are several broad criteria that can be used to assess equivalence.

Content: There is no universal rule regarding the amount of similarity in course content, structure, or format that is needed for a course to receive transfer credit. In courses where mastery of certain knowledge can improve students' chances of success in subsequent courses, it may be essential to have a substantial match of content between courses that transfer. Some institutions or disciplines have developed a general rule for the amount of common content that is needed for courses to be considered transferable, while others make case-by-case judgements. Evaluators should look at whether the articulation request involves a course in which it is important to have as close a match as possible with the equivalent course. If so, they should take that into account in evaluating the content of the course. If the content of a course involves regional practices (e.g., laws governing a profession in a specific jurisdiction), then a transfer request for a course from a different jurisdiction may be denied even if both courses' topics are the same, as familiarity with the regional content in the receiving course will not be achieved.

Outcomes: Courses can have similar goals, objectives, aims, and outcomes, even if their content, structure, or format varies. For example, two writing courses may be different in their texts, instructional styles, methods of delivery, and evaluation and grading practices, but have the same goal of teaching students to write at a post-secondary level. Evaluators may need to decide if an articulation request for a course with differences from the equivalent course at their own institution produces the same outcomes.

Applicability to Credential Completion: A course that has no equivalent at the institution at which transfer credit is requested may still be transferable for credit towards elective or breadth requirements of a credential. For example, some institutions may not offer courses in linguistics, criminology, religious studies, archaeology, or certain languages, and may not grant course-to-course transfer for courses in these disciplines at other institutions. In such cases, despite a course not having a direct disciplinary equivalent at the receiving institution, the receiving institution may grant the transfer course unassigned or elective credit so long as it is taught at the same academic level as other courses in a credential program at that institution, and so long as the standard of performance expected of students in the course is comparable to that in other courses in the program.

Types of Transfer Credit

Assigned Credit

If a course at a receiving institution is determined to be equivalent to the course for which transfer credit is being requested, the transfer credit request is completed with the name, code and number of credits of the matching course and, if applicable, the effective start date. This is referred to as granting 'assigned' credit.

The entry for an assigned credit transfer agreement in the BCTG will look like this:

From	To	Transfer Credit	Effective Date
DOUG LING 1101 (3)	KPU	KPU LING 1100 (3)	Sep/16 to -

Douglas' first-year three-credit Linguistics course (Introduction to Language and Linguistics) is accepted at Kwantlen Polytechnic University as the equivalent to KPU's Linguistics 1100 (Introduction to Language Structure), offered at the same level (first year) and with the same credit value. The agreement was established as of September (i.e., fall semester) 2016 and remains in effect so long as there is no end date stated.

A course articulation agreement that has been revised and resulted in a new decision appears in the BCTG with an 'effective date' range that states an end date, as with the following example:

From	To	Transfer Credit	Effective Date
CAPU HIST 109 (3)	SFU	SFU HIST 213 (3) B-Hum	Sep/04 to -
CAPU HIST 109 (3)	SFU	SFU HIST 213 (3)	Sep/95 to Aug/04

In this example, Capilano University's History 109 course (Issues and Themes in US History: 1865–Present), which has a credit value of three credits at the sending institution, is accepted for credit by the receiving institution, Simon Fraser University, as of September 1995. SFU determined that HIST 109 at Capilano would be accepted for transfer credit and considered equivalent to SFU's History 213 (United States History, 1877 to 2000), also with a value of three credit hours. Subsequently, the Capilano course was re-articulated, and the first agreement was given an end date of August 2004. Students taking CAPU's HIST 109 as of September 2004 still receive credit at SFU for HIST 213, but they can also use the Capilano course at SFU to fulfill a Humanities Breadth requirement in a degree program.

Most credential programs require that students complete specified courses at each level. Receiving assigned credit for transferred courses allows students to fulfill these requirements and is most useful to students. Therefore, assigned credit is preferred whenever possible.

Unassigned Credit

If a transfer credit request involves a course that is appropriate for credit in the discipline but does not closely match the topic, structure, content, or format of the courses in the department at the receiving institution, then 'unassigned' discipline-specific transfer credit can be awarded. This type of credit verifies that the course is taught at the expected level and standard for the discipline it is being awarded credit in; that it conforms to the norms of the discipline; and

that it is suitable for meeting elective credit requirements within a program. The course does not transfer with direct credit for a course at the receiving institution and does not replace a specific required course in any program.

Entries for unassigned transfer credit in the BCTG will appear in one of the following ways:

From	To	Transfer Credit	Effective Date
CAPU HIST 207 (3)	UNBC	UNBC HIST 2XX (3)	Sep/95 to Dec/16
COTR GLST 202 (3)	VIU	VIU GLST 2nd (3)	Jan/13 to Aug/16
NIC ABG 103 (3)	KPU	KPU ARTS 1XXX	Sep/18 to -

- Capilano University's HIST 207 has a value of three credits. It transfers as three unassigned second-year History credits at UNBC for the given dates.

- College of the Rockies' GLST 202 has a value of three credits. It transfers as three unassigned second-year Global Studies credits at Vancouver Island University for the given dates.

- North Island College's ABG 103 is a three-credit course. It has transferred to Kwantlen Polytechnic University as three unassigned second-year Arts credits since September 2018.

Note that in each case, the course receives unassigned credit at the first- or second-year level, but the credit is coded differently at each receiving institution. Coding is often based on the conventions of computerized registration systems, so when requesting or recording credit, it is important to follow the standards in use at each institution and the protocol of BCCAT's TCS.

Unassigned credit can also be awarded when there are discrepancies between when a student took a course and the effective date of a transfer agreement involving that course. For example, a course at the receiving institution may be newer than the course at the sending institution (e.g., the sending institution's course started in 2012 but the equivalent course at the receiving institution was created in 2016), so the effective date of the transfer agreement may reflect the year the receiving institution's course was created. In this situation, students who took the course at the sending institution before the transferable course was created at the receiving institution may be awarded unassigned discipline-specific level credit (e.g., HIST 1XX) for that course.

Faculty or Program Credit

Transfer credit applicable to a Faculty or program, such as 'Arts (3)' or 'Science (3)' or 'Humanities (3)', may be awarded when a receiving institution does not have a corresponding discipline but the course is at a post-secondary level and considered appropriate to fulfill elective credit requirements within a Faculty or program.

Faculty or program credit entries in the BCTG appear as follows:

From	To	Transfer Credit	Effective Date
UFV RLST 201 (3)	SFU	SFU HUM 1XX (3); UFV RLST 201 & UFV RLST 202 = SFU HUM 130 (3) - B-Hum & SFU HUM 1XX (3)	Sep/07 to -
UFV RLST 201 (3)	UNBC	UNBC HUMN 2XX (3)	Sep/96 to -
UFV RLST 201 (3)	UVIC	UVIC HUM 1XX (1.5)	Sep/97 to -

The examples above show how the University of the Fraser Valley's Religious Studies 201 (Religions of the West) transfers. Its equivalents include the following:

- Three unassigned first-year Humanities credits at Simon Fraser University; OR, if a student has taken both UFV's RLST 201 and RLST 202 (Religions of the East), the two courses together will transfer to SFU as SFU's HUM 130 (Introduction to Religious Studies)—which also fulfills a Breadth requirement for Humanities credit in a degree program—**and** three unassigned first-year Humanities credits.

- Three unassigned second-year Humanities credits at the University of Northern British Columbia; and

- One-and-a-half unassigned 100-level Humanities units (equivalent to three credits) at the University of Victoria.

This diverse set of transfer equivalencies demonstrates how each institution evaluates a course and awards the most appropriate credit according to its own programming. The main determinant of whether the course receives unassigned Faculty or program transfer credit or assigned transfer credit may be whether or not the institution offers its own courses in the same discipline or subject.

General Elective Credit

If the receiving institution has no discipline, program or Faculty parallel to that at the sending institution but determines that the course for which transfer credit is being requested is at an appropriate academic level to receive credit, the receiving institution can award unassigned credit for the transferred course as a 'general elective.' In rare cases, a receiving institution may award general elective credit for a course for which it does has a corresponding discipline: this typically happens only if the course appears to fall outside the norm for how courses in that discipline are delivered or organized at the institution. When an institution assigns Faculty-level credit, including a year level is important.

A transfer credit assessment that leads to general elective credit will appear in the BCTG like this:

From	To	Transfer Credit	Effective Date
CAPU MUS 120 (3)	UFV	UFV GE 1XX (3)	Sep/95 to -
CAMO EXW 121 (3)	SFU	SFU GE 1XX (3)	Jan/07 to -

The first example shows the credit awarded for Capilano University's three-credit MUS 120 (Music History I) at the University of the Fraser Valley. UFV has assigned a transfer value of three first-year general elective credits. In the second example, Camosun College's first-year course, Exercise and Wellness 121 (Lifetime Sports 1), a credit course open only to students in two specific programs, is assigned a transfer value of three first-year general elective credits by SFU, which has no directly equivalent program.

No Credit

An evaluation of 'no credit' means that the course does not transfer to the receiving institution. Students who have taken the course at the sending institution will not receive any credit for it at the receiving institution. 'No credit' reflects an assessment decision by the receiving institution: it is considered a course articulation and is recorded in the BCTG.

These are situations in which a 'no credit' evaluation is commonly awarded:

- The course is not taught at the post-secondary level. For example, a course's title may refer to English composition, but if the course is an English as a Second Language course, it may be evaluated as offering preparatory rather than post-secondary level study.

- The course is in a program area not offered at the receiving institution. For example, some vocational/trades courses may transfer only to similar programs at a few other institutions and may be designated as 'no credit' if sent for articulation to university-level programs.

- The course at the receiving institution is not open for transfer credit. For example, program requirements may dictate that students complete specific courses, such as those involving specific technologies, practicum placements, studio- or field-based work, at the receiving institution where the credential will be awarded, to ensure that the student's performance meets the receiving institution's standards of competency or that local content requirements are met. There may be an award of 'no credit' in such cases, even if the course the student completed at the sending institution is parallel or similar to a course at the receiving institution.

While institutions and evaluators have the right to deny transfer credit for a course that they feel does not meet their institution's or program's standards or expectations, they should also be mindful that a 'no credit' evaluation may have an impact on the program completion plans of transferring students.

It is recommended that evaluators awarding a 'no credit' evaluation be asked to explain the reasons for their decision and that, based on that information, other credit options be suggested if any are feasible, such as awarding elective credit.
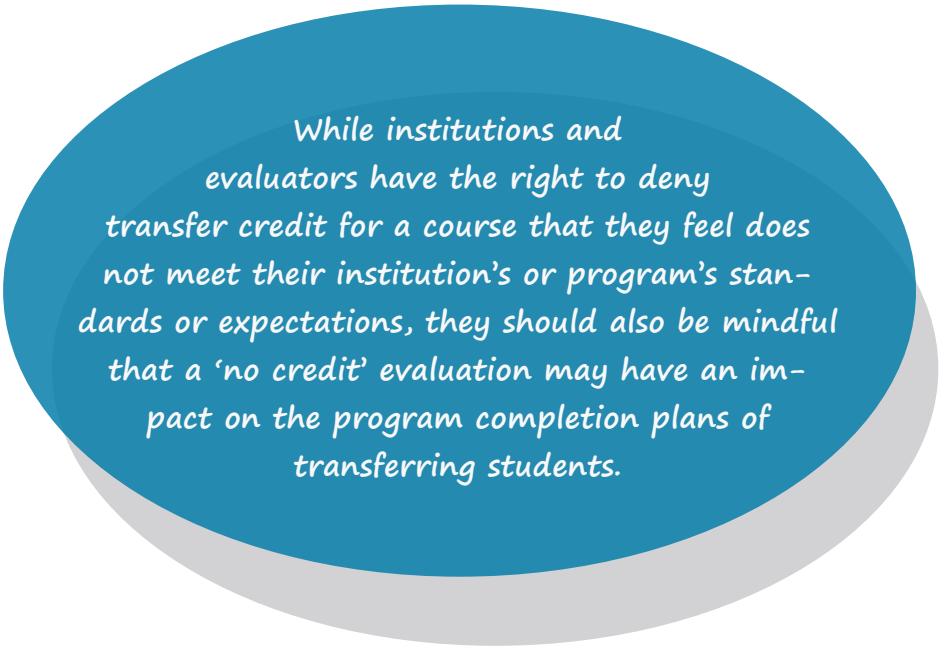
> While institutions and evaluators have the right to deny transfer credit for a course that they feel does not meet their institution's or program's standards or expectations, they should also be mindful that a 'no credit' evaluation may have an impact on the program completion plans of transferring students.

Attaching Conditions and Limits to Course Transfer

Specifying a Minimum Grade

The BCTG defines a 'transfer student' as a student who has "completed the minimum number of transferable credits (usually 24 or higher) with a minimum GPA of C (or 60% or 2.00 average) or better on all courses, as calculated by the [receiving] university" (see *Appendix II*).

Regarding individual courses being considered for transfer credit, however, Section 2 of BCCAT's *Principles and Guidelines for Transfer* states that "[t]he minimum grade for individual course transfer is normally a passing grade, as defined by the institution awarding the original credit," and that "[a] higher course grade should not be required by the receiving institution unless the same requirement applies to the equivalent internal course" (see bccat.ca/system/principles/).

In some circumstances, students may be required to achieve a minimum grade, or a minimum grade calculated over all transferable courses, to be able to receive transfer credit at a receiving institution. However, requiring a grade for a transferred course that is higher than the grade required to pass the same course at the receiving institution is inconsistent with both BCCAT's *Principles* and the principle of fairness, and is not recommended. There may, however, be situations in which requiring a higher grade to receive transfer credit is appropriate: for example, when a higher grade will allow transferring students to receive an exemption from taking another course or to apply credit from the transferred course toward a particular program at the receiving institution.

Agreements specifying a minimum grade are recorded in the BCTG as follows:

From	To	Transfer Credit	Effective Date
CNC COM 204 (3)	UVIC	UVIC COM 202 (1.5); Must have a C or better to receive Commerce credit towards a B.Com degree.	Sep/97 to -
CAPU PHIL 208 (3)	UNBC	UNBC PHIL 2XX (3); Exemption from UNBC ENVS 414 (3) with grade of B+ or better.	Sep/01 to -

It is recommended that such requirements be carefully assessed and justified. If, for example, a department has researched the performance of transferring students, and can demonstrate a consistent correlation between grades in transferred courses and student performance in courses at the receiving institution, the department may be justified in requiring a higher than minimum grade for transfer students to receive exemptions or program credit. It is recommended that before making such a decision, the receiving department contact the sending institution and discuss its proposal and its possible impacts.

Cluster Credit

The term 'cluster credit' is used in the BCTG to indicate when two or more courses at a sending institution must all be transferred to receive credit for a single course at the receiving institution.

It is always good practice to award transfer credit for courses completed at the appropriate level.

An entry for 'cluster credit' in the BCTG looks like this:

From	To	Transfer Credit	Effective Date
CNC PHIL 101 (3)	UVIC	UVIC PHIL 1XX (1.5); CNC PHIL 101 (3) & CNC PHIL 102 (3) = UVIC PHIL 100 (3)	Sep/95 to -

In this example, the College of New Caledonia's PHIL 101 (Moral Philosophy) transfers to the University of Victoria as one-and-a-half unassigned 100-level Philosophy units (three credits). However, students who transfer both CNC's PHIL 101 **and** PHIL 102 (Theory of Knowledge) will receive credit for UVIC's three-unit (six-credit) PHIL 100 (Introduction to Philosophy) course.

Awarding unassigned discipline-specific credit for single courses, as the University of Victoria has done in the above example, allows students to earn transfer credit even if they have not completed both courses needed to receive credit for a single course at the receiving institution.

However, if transfer credit is not possible unless two or more courses are taken, this should also be clearly stated, as in the following example:

From	To	Transfer Credit	Effective Date
COLU BUSN 272 (3)	UBC	COLU BUSN 272 (3) & COLU BUSN 273 (1) = UBC COMM 292 (3) & UBC COMM 2nd (1)	Sep/98 to Aug/07

Another type of cluster credit occurs when several courses at the sending institution cover outcomes similar to those covered by one year-long course at the receiving institution. This appears in the BCTG in this format:

From	To	Transfer Credit	Effective Date
DOUG PHIL 1102 (3)	UBC	Any 2 of DOUG PHIL 1102 (3) or DOUG PHIL 1103 (3) or DOUG PHIL 1151 (3) or DOUG PHIL 1152 (3) or DOUG PHIL 2250 (3) = UBC PHIL 100 (6)	May/15 to -

A course at the sending institution may also be evaluated as equivalent to more than one course at the receiving institution, or as suitable for credit towards two or more programs. Such an articulation appears in the BCTG in this format:

From	To	Transfer Credit	Effective Date
NVIT MATH 100 (3)	UBCO	UBCO MATH 125 (3) or UBCO MATH 126 (3)	May/04 to -

A sending institution may decide to break a single course's content into two semesters, in order to assist students with deficiencies in their academic backgrounds (for example, students without Grade 12 Math) to achieve mastery of the content. In such cases, a receiving institution may assign the same number of transfer credits to the two courses that their own students earn for covering the same content in a single semester. In other words, the two courses may collectively be worth six credits at the sending institution, but will collectively receive only three credits (i.e., the equivalent of a single course) at the receiving institution.

The BCTG entry reflecting a difference in credit value for the coursework completed will look like this:

From	To	Transfer Credit	Effective Date
CAPU BFIN 141 (3)	UNBC	CAPU BFIN 141 (3) & CAPU BFIN 142 (3) = UNBC COMM 210 (3)	Sep/96 to -
CAPU BFIN 142 (3)	UNBC	CAPU BFIN 141 (3) & CAPU BFIN 142 (3) = UNBC COMM 210 (3)	Sep/96 to -

There may also be instances where a sending institution offers two distinct courses that cover content that is similar but not identical to the content of a single course at the receiving institution. For example, the content of a Geology and a Physical Geography course at one institution may be covered in a single course at another institution. In this case, it is likely that the two courses will have covered more material, or the same material in greater depth, than the single course. Therefore, it is appropriate that this extra learning be adequately credited. An option in this situation is to assign three credits for the most similar course at the receiving institution, plus three unassigned credits.

Such an entry in the BCTG looks like this:

From	To	Transfer Credit	Effective Date
CNC ENGL 214 (3)	SFU	SFU ENGL 1XX (3), B-Hum; CNC ENGL 213 & CNC ENGL 214 = SFU ENGL 1XX (3) - B-Hum & SFU ENGL 1XX (3)	Sep/16 to -

Individual Assessment

A credit assignment of 'individual assessment' indicates that the receiving institution will assess the level of mastery the student has attained before determining whether transfer credit will be granted. This type of credit assessment is commonly used for language courses, fine and performing arts courses, or other courses where portfolios, auditions, or interviews may be required for an accurate assessment of the student's level of achievement. It can also be used for courses identified as Special Topics or Independent Study where it is likely that the course topic or content will be different each time the course is offered.
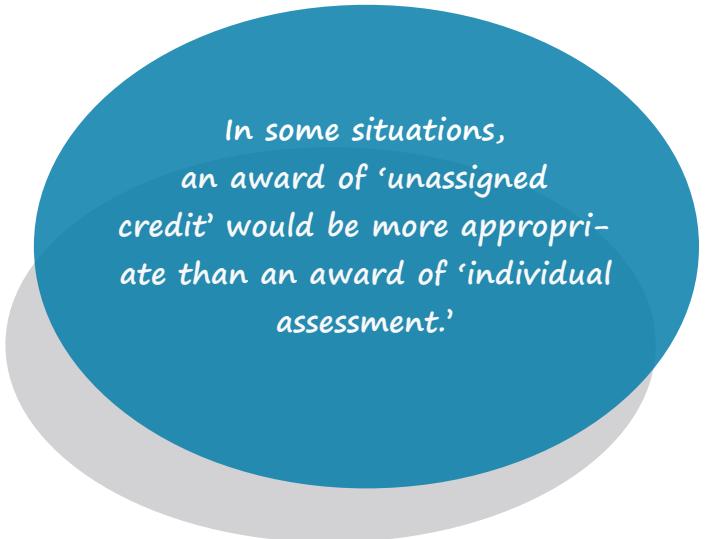
In some situations, an award of 'unassigned credit' would be more appropriate than an award of 'individual assessment.'

From	To	Transfer Credit	Effective Date
NVIT BUSM 222 (3)	UFV	Individual assessment	Sep/00 to -

Evaluators may be tempted to award 'individual assessment' if they are unsure of the level of mastery expected for students to receive credit for the course at the sending institution, or if they are unsure about the breadth of the course's content or depth of its subject coverage. 'Individual assessment' is also sometimes used when there is rapid change in the content of the course or the relevant discipline, and the evaluator is not sure that an award of credit would guarantee that the student has up-to-date knowledge of the subject. Individual assessment is most often used in courses like Fine Arts where an audition or portfolio review is required. Its use is fairly rare in all other disciplines. However, evaluators should be aware that an award of 'individual assessment' may lead to confusion and lack of certainty for students and for sending institutions. (Note that individual assessment is used differently within block transfer:)

Restricted Applicability

Institutions can designate a course as appropriate for credit only in certain Faculties or toward certain programs (e.g., 'only for credit towards a BSW'; 'not for credit towards a BSc'). Sometimes institutions will offer unassigned credit but, due to course content, want it to be used towards an elective only. Restricted applicability is often used to regulate transfer credit in specialized, professional, or applied programs.

The listing for transfer credit with restricted applicability appears in the BCTG like this:

From	To	Transfer Credit	Effective Date
CAMO CHEM 110 (4)	UBC	UBC CHEM 1st (4); Not for credit in Science	Sep/00 to -
CCC LAST 100 (3)	SFU	SFU LAS 1XX (3); Cannot be counted toward the requirements for the LAS major/minor.	Sep/09 to -

In the first example, UBC has awarded unassigned Chemistry credit but has added the note, 'Not for credit in Science.' This means that students who are enrolled in the Faculty of Science cannot use it as credit towards a BSc degree. Many of the Science or Applied Science Faculties require their students to complete a certain number of science-based credits, and this transfer credit decision would prevent them using the sample course towards meeting this requirement; however, the course could be used as elective credit. Students enrolled in other Faculties may use this same course for elective credit towards their degrees. This type of credit is fairly rare and mostly a UBC/UBCO notation.

In the second example, Corpus Christi College's LAST 100 (Latin American Studies) will transfer to SFU as three unassigned first-year Latin American Studies credits; however, credit for the transferred course will not fulfill the credit requirements of SFU's major or minor in Latin American Studies.

Credit with restricted applicability is usually awarded when the receiving institution wants to ensure that some or all of the coursework leading to a credential is delivered by the receiving institution itself. In some cases, this decision may be motivated by external regulation (e.g., licensing requirements of a professional regulatory body).

Exemptions

An 'exemption' has the effect of waiving a prerequisite or required course for students who have completed a similar course, which may or may not transfer directly, at another institution.

An exemption appears in the BCTG in this format:

From	To	Transfer Credit	Effective Date
CAMO CRIM 200 (3)	UFV	UFV CRIM 1XX (3); Exempt UFV CRIM 129 for Crim Just.	Sep/08 to -

In this example, Camosun College's CRIM 200 (Professional Practice) transfers to the University of the Fraser Valley as three 100-level Criminology credits. Students with transfer credit for the Camosun course are exempted from taking CRIM 129 (Academic and Professional Development) in UFV's Criminal Justice program. In most transfer arrangements involving exemptions, credit is not earned for the exempted course—students will be required to replace the exempted course with an alternative course if the exempted course is required for the program the student intends to complete.

Preclusions

'Preclusion' credit can be awarded where a course from a sending institution is determined to have similar content to a course at a receiving institution, but institutional policy at the receiving institution prohibits awarding assigned credit. For example, UBC's Transfer Notes in the BCTG (bctransferguide.ca/notes/ubc#notes) contain the following explanation:

Preclusion of Credit

Where a student is granted unassigned credit on transfer, the student will not also receive degree credit if a similar UBC course is taken subsequently. This applies in cases where the student has taken one half of a six-credit UBC course and where the college course is similar to a third- or fourth-year UBC course. In the tables this is normally clarified with the statement: precludes credit for…. The name of the course refers to the UBC course unless otherwise stated.

Transfers involving precluded credit appear in this format in the BCTG:

From	To	Transfer Credit	Effective Date
LANG HKIN 2361 (3)	UBC	UBC KIN 2nd (3) Precludes credit for UBC KIN 361.	Sep/04 to Aug/13
CAPU PHIL 208 (3)	UVIC	UVIC PHIL 2XX (1.5); May not take UVIC PHIL 333 or UVIC ES 314 for credit.	Sep/95 to -

In the first example, a student from Langara College who has taken HKIN 2361 (Sports Medicine) will receive three second-year Human Kinetics credits at UBC but may not then also take UBC's HKIN 361 (Introduction to Athletic Training) for credit. If HKIN 361 is a required course in the student's UBC program, the UBC department will direct the student to choose an alternative course to fulfill that requirement. In the second example, Capilano University's PHIL 208 (Environmental Ethics) will receive one-and-a-half 200-level Philosophy units (three credits) at the University of Victoria; but students receiving transfer credit for that course will not receive program credit if they take UVic's PHIL 333 or ES 314 (Philosophy and the Environment).

Additional Notes in BC Transfer Guide Entries

Receiving institutions entering transfer agreements in the TCS are encouraged to include additional information in the conditions field if there are conditions attached to the transfer that students should be aware of. Here are some examples:

From	To	Transfer Credit	Effective Date
LANG HIST 2243 (3)	UVIC	UVIC HSTR 200 (1.5); May be taken more than once for credit in different topics with permission of the department.	May/14 to -
SELK BIOL 214 (3)	UNBC	UNBC BIOL 2XX (3). Biology & NRM Wildlife Fisheries majors will have one of UNBC BIOL 307 or UNBC BIOL 308 waived.	Sep/95 to -
OC MATH 142 (3)	UBC	UBC MATH 1st (3); Not for credit in Science. Exempt UBC MATH 105 for Commerce students.	Sep/05 to – Aug/10

Awarding Differing Credit Values

Evaluators of articulation requests may feel that, because of their own assessment of the course or because of their institution's own policies on determining course credit hours, a transferring course should have a different amount of course credit than it has at the sending institution. Generally, when a course transfers as a direct equivalent, the transferred course should not receive more credit than the equivalent course at the receiving institution.

An articulation agreement reflecting a difference in credit values may appear in the BCTG as follows:

From	To	Transfer Credit	Effective Date
KPU BIOL 2321 (4)	UBC	UBC BIOL 200 (3)	Sep/06 to -
KPU BIOL 2321 (4)	VIU	VIU BIOL 200 (3)	Sep/06 to -

In this example, a second-year course in Cell Biology that carries four credits at Kwantlen Polytechnic University is awarded three credits when it transfers to the equivalent second-year Biology course at either the University of BC or Vancouver Island University, consistent with the credit value of the course (coincidentally, BIOL 200 in both cases) at either receiving institution.

Sometimes, a receiving institution might award a number of assigned credits to a course transferring in that are fewer than the credits earned by students when they take the equivalent course at the receiving institution, as seen in this example:

From	To	Transfer Credit	Effective Date
COQU BIOL 104 (4)	SFU	SFU BISC 100 (4); B-Sci	Sep/04 to -
COTR BIOL 151 (3)	SFU	SFU BISC 100 (3)	Sep/04 to -

Coquitlam College awards four credits to its BIOL 104 (Introduction to Biology), and the course transfers to SFU as BISC 100 (Introduction to Biology), with the same four-credit value as that course is worth at SFU. However, an equivalent course offered at College of the Rockies, BIOL 151 (Biology of the Environment), is a three-credit course, and so transfers to SFU as three credits, even though the assigned equivalent SFU course is the same four-credit BISC 100.

However, other institutions may decide to award the same amount of credit to a transferred course as they award to the equivalent course at their own institution, even when the course being transferred carries a different credit value at its institution, as in the following example:

From	To	Transfer Credit	Effective Date
CAMO BIOL 230 (4)	KPU	KPU BIOL 2321 (4)	Sep/00 to Aug/15
DOUG BIOL 2321 (5)	KPU	KPU BIOL 2321 (4)	Sep/07 to -
COTR BIOL 201 (3)	KPU	KPU BIOL 2321 (4)	Sep/00 to -

In the above example, Kwantlen Polytechnic University has awarded the same number of credits (four) for three different courses that all transfer in as BIOL 2321, regardless of the number of credits each transferred course has at its sending institution.

Method of Course Delivery

Normally, how a course is taught is not an issue in assessing its equivalency, but there are some cases in which the structure and delivery of a course are integral to mastery of the course content. For example, at SFU, in order to assign a 'W' ('writing intensive') designation to a transferred course, a committee assesses the course for the nature and number of opportunities students are given to write and to revise their writing. Some institutions will choose not to grant transfer credit for specific science courses if the laboratory component of the course was conducted online rather than in an actual laboratory setting. If conditions such as these will affect how a receiving institution will evaluate a transfer request, the receiving institution should notify sending institutions of any policies related to course structure or delivery that may affect course transferability.

Transfer Credit for Online and Distance Education Courses

Generally, institutions regard courses taken online or through distance education as equivalent to the same courses taken in a classroom setting. However, requests for transfer credit involving online or distance education courses may face difficulties if the evaluator is not familiar with the norms of an online or a distance education environment, or does not see the value of online learning or of learning in non-traditional formats. There may also be institutional policy regarding the equivalency of online or distance education courses, or components of those courses.

Such requests become problematic when, in the absence of reliable information and processes for assessing equivalence, faculty or administrators with concerns about online or distance education deny transfer credit to students who have successfully completed such courses. The principles used to assess transfer credit should apply to the assessment of all courses for which transfer is requested, regardless of the method of delivery.

There may be circumstances in which a receiving institution requires additional information in order to assess transfer credit for a course that is completed online or offered through distance education, or which has online or distance education components. As is true for any course outline submitted for transfer assessment, the sending institution should ensure that the outline contains all relevant information for the receiver to make a fair assessment. It may be relevant, for example, to include information on how students might satisfy the lab component of a science course (e.g., a student could take the course online but be required to perform lab-based assignments in a face-to-face setting). However, the principle of respecting disciplinary expertise also should be upheld: if, based on her/his expert knowledge of the subject, an evaluator determines that an online or distance education version of a course is not equivalent to the course in another format, that decision should be respected.

As previously mentioned, BCCAT does not recommend that method of course delivery be recorded on a student's transcript with any special notations. These notations may cause difficulties for the student in having the course recognized for transfer credit at other institutions.

Closing Requests

If an institution sends a transfer credit request for which there is no matching program or course at the receiving institution, the receiving institution has the option to 'close' the request rather than establishing or denying credit. When a request is closed, the sending institution is notified that no formal agreement will be established. Requests for credit should be closed only when there is no matching program or course and the receiving institution does not want to create a formal articulation.

When a request has been 'closed' by the receiving institution without any decision, a student can still request transfer credit for the course: in this case, the request is considered and the course evaluated for credit on a case-by-case basis, as a student-initiated request (see below).

Assessing Student-Initiated Requests

Student-Initiated Requests for Transfer of Credit from Institutions Within the BC Transfer System

Student-initiated articulation decisions relating to courses completed at institutions within the BC Transfer System are not automatically entered into the BCTG; instead, they are typically added to the institution's internal database. These decisions can be formalized, however, if the receiving institution submits the relevant information to BCCAT via the TCS for publication. Institutions should be aware that publication in the BCTG constitutes a credit transfer guarantee for the life of the agreement.

Some institutions publish student-initiated transfer credit decisions on their websites, and students can consult this information to anticipate transfer request outcomes where precedents exist. However, transfer credit decisions maintained in institutional databases and not recorded in the BCTG do not constitute formal agreements. There may be reasons—such as time limitations—that justify a student being refused transfer credit for a course for which there is an internal precedent available at an institution. However, in the interest of fairness and consistency, such instances should be exceptions.

Student-Initiated Requests for Transfer of Credit from Institutions Outside the BC Transfer System

Institutions and programs in BC often receive student-initiated transfer credit requests for coursework completed at institutions that are not members of the BC Transfer System. These requests may involve non-member institutions within BC; institutions from other parts of Canada; or international institutions.

Institutions that are members of the BC Transfer System are under no obligation to accept or evaluate transfer credit requests involving institutions that do not belong to the BC Transfer System. However, public universities across Canada have agreed to abide by the Pan-Canadian Protocol on the transferability of university credits, and BCCAT is a partner with several Councils of Admissions and Transfer in other Canadian jurisdictions working to improve supports

for student mobility nationally. BC Transfer System member institutions are encouraged to recognize equivalent learning wherever appropriate.[9]

Institutions that do accept these requests are encouraged to evaluate them using the same standards of course quality, content, and similarity that would be used in evaluating transfer credit requests from BC Transfer System member institutions. Institutions may also have internal policies governing the awarding of transfer credit to institutions outside the BC Transfer System. For example, some institutions may not grant transfer credit for courses from institutions that are not accredited by a recognized and credible regional accreditation agency, or may not grant transfer credit for courses that have not already been accepted as transferable by at least one other BC Transfer System member institution.

For credit requests involving institutions outside Canada, some institutions use the services of an international credit evaluation agency. Some institutions request this type of evaluation to determine the relevance of the completed credential before deciding whether to forward any transfer credit requests to a faculty member at their own institution for evaluation. Other institutions require students to have their transcript evaluated externally and to submit the completed evaluation along with their request for transfer credit for specific courses.

Institutions that require external evaluations of international transcripts should make this known to students prior to their submitting credit requests involving institutions outside Canada. Likewise, before incurring the cost of an external evaluation that may not be necessary, students should check with the receiving institution to see whether an external evaluation of an international transcript is required for transfer credit requests. Institutions that do not use international credit evaluation services generally rely on internal information and knowledge about non-Canadian institutions in assessing the appropriateness or applicability of transfer credit requests.

Transfer credit awarded for courses at institutions that are not members of the BC Transfer System is not currently recorded in the BCTG. In future, BCCAT's TCS may make internal databases of student-initiated transfer decisions available to all BC Transfer System member institutions, for their information; currently, however, these decisions are maintained only on these internal databases.

Denial of Credit for Student-Initiated Requests

Student requests for consideration of courses taken previously, at other institutions, may reasonably be denied in some situations. These situations—which may be governed by policy or procedures specific to individual institutions—may include the following:

- The request comes from certain categories of student—for example, a visiting or casual student who is not seeking a credential;

- The coursework is deemed not appropriate for transfer credit because it is
    - not at the undergraduate level,
    - outside a defined curriculum range (e.g., biblical studies),
    - a practicum course, or
    - a duplicate of a course already taken;

- The course credit has been granted by an unrecognized institution;

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[9] See cmec.ca/Publications/Lists/Publications/Attachments/198/Pan-Canadian-Protocol-Transferability-University-Credits.pdf

- The course credit was earned too long ago;

- The coursework is part of a completed credential;

- The coursework cannot be applied to degree or graduation requirements (e.g., a request for a science course to receive transfer credit towards a social work degree); and/or

- The request for transfer credit does not meet degree or graduation requirements for the student's Faculty or program (e.g., the amount of requested transfer credit exceeds the maximum allowable for a given category, such as for lower- or upper-division or unassigned credit).

Remember that good communication is two-way. If in doubt, ask for information.

Changes to Curriculum

One of the primary purposes of articulation committees is to provide a forum for the discussion of curricular issues, especially as they relate to articulation. Representatives of institutions with upcoming curriculum changes should discuss these changes at articulation meetings. However, institutions also have a duty to inform other institutions about proposed changes even if they do not have a representative at the articulation meeting, or if waiting until the next articulation meeting would cause difficulties for other institutions – for example, if changes are to come into effect in January but the articulation committee does not meet until the following May.

There are three key elements to the consultation process:

1. All details of proposed curricular changes should be explicit and should be communicated to institutions whose students may be affected by them. Information such as revised calendar descriptions and course outlines, changes to assessment/evaluation practices, changes in prerequisites, degree or credential requirements, or changes to course levels (e.g., from lower-level to upper-level) should be provided to other institutions. Feedback from affected institutions should be sought. At receiving institutions, it is important that the articulation committee member or meeting attendee inform department colleagues and relevant administrators of the proposed changes.

2. Timelines for the implementation of curricular changes should, ideally, provide institutions affected by the changes with the opportunity to respond. This may include adapting their own curriculum to fit the proposed changes.

3. The implications of the changes for transfer agreements should be thoroughly examined by both the institution making course changes and the institutions to which those courses may transfer. The impact of a proposed change may extend beyond the relevant department or discipline at the receiving institution: for example, if credit for a Math course changes from assigned to unassigned, there may be several programs at an institution that will have to decide whether that course still fulfills their program's Math requirements.

When Not To Articulate

All member institutions in the BC Transfer System may send and receive articulation requests. This function is limited in the case of private institutions to subject and program areas in which the institution has received ministerial consent to offer a degree (at the associate or bachelor level).

However, an institution can decide not to send or not to receive depending on its institutional mission or strategy or on the resources available to engage in articulation.

Certain types of course are generally not eligible for articulation, including secondary school courses, preparatory or upgrading courses, and practicum courses in some programs (e.g., nursing). Some programs designed for specific regional or student needs may not need to be articulated if there is minimal student interest in transferring credits elsewhere. (Remember, however, that even when programs and institutions decide not to articulate particular courses or programs, students may still initiate articulation requests.)

Course articulation and credit transfer give students greater flexibility in meeting their program goals and can attract transfer students to an institution. While it is true that some students' goals might include leaving the institution, and the institution might thus lose enrolment and its associated funding, it is also true that articulating programs or courses may result in students across the system seeing the institution as a destination, with the program and institution gaining qualified and motivated students.

For more detail on this topic, see *Using a Business Case Strategy to Plan Articulation Activities*.

Block Transfer Agreements

What is Block Transfer?[10]

Block transfer *is the process whereby a predetermined number of credits is granted to students who have successfully completed a certificate, diploma, or cluster of courses that is recognized as having an academic wholeness or integrity, and that can be related meaningfully to a degree program or other credential at the receiving institution.*

Block transfer has been used for many years in the BC post-secondary system to facilitate the credit transfer of completed credentials, such as certificates and diplomas. Although most block transfer agreements (BTAs) deal with the transfer of professional and applied programs, there are also some in place for associate degrees. Currently, over 1,300 BTAs are documented in the BCTG.

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[10] This section draws upon and updates BCCAT's *Block Transfer Handbook: Constructing and Negotiating Block Transfer Agreements* (Vancouver, BC: BC Council on Admissions and Transfer, 2000). Available at bccat.ca/pubs/bthbook.pdf

BTAs represent the most efficient mechanism for arranging transfer credit for graduates of many diploma programs. These programs may be delivered at a standard consistent with degree studies, but the individual courses within the program may lack equivalents at the receiving institution and may not be readily transferable on a course-to-course basis.

For example, graduates of a two-year college forestry diploma program, designed as a terminal, employment-oriented credential, receive little or no course-to-course credit towards a forestry degree because the content of first- and second-year courses at the sending and receiving institutions is sufficiently different to preclude the establishment of individual course equivalencies. Still, an assessment of the entire diploma curriculum has established that diploma graduates are likely to possess the prerequisite knowledge, skills, and abilities necessary for success in upper-division degree courses. Thus, under bilateral BTAs, students from some forestry diploma programs who have successfully completed the diploma are eligible for either one or two years' credit towards a forestry degree at some institutions.

In the example above, and in a typical BTA, the transfer credit is applicable only to a specific program at the receiving institution. For example, a social work diploma program may receive block transfer credit only towards a social work degree. Each BTA involves a unique program at the sending and the receiving institution.

Models of Block Transfer

The educational content of programs and the context of each institution dictate the nature of each BTA. Depending on the desired outcomes, negotiating parties may want to explore several models. The following section describes some of the models of block transfer currently in use in BC. Note that in the BCTG the term 'individual assessment' is often used in the 'conditions' column. This denotes that there are underlying terms and conditions to the agreement that are normally recorded in the agreement document, but for which there is not enough space in the BCTG.
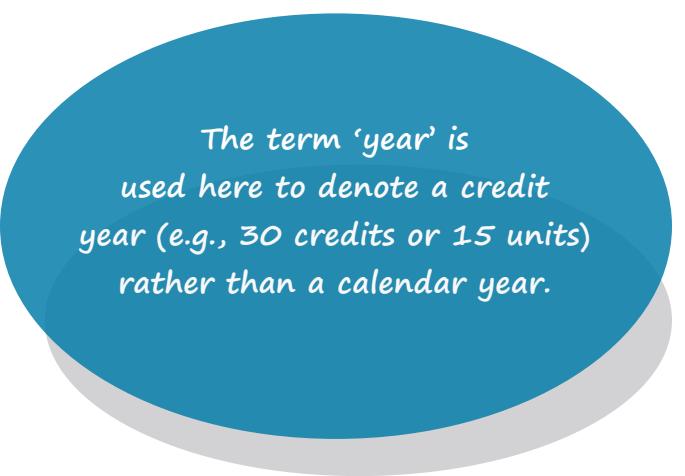
> The term 'year' is used here to denote a credit year (e.g., 30 credits or 15 units) rather than a calendar year.

The 2 + 2 Model

The receiving institution grants two full years of credit towards a four-year degree program, with no additional requirements. Students should be able to graduate in a total of four years. There are two variations on this model:

a) The receiving institution accepts a two-year diploma for entry, provided that the diploma contains specified courses, or that specified standards or additional prerequisites (e.g., grade 12 Math) have been met; or,

b) The receiving institution accepts a two-year diploma for entry into a two-year degree completion program. (Royal Roads University uses this model exclusively for some degrees.) In those instances, the diploma is considered among criteria for admission.

BTAs are recorded in the program-specific section of the BCTG in this format:

Program	Receiving Institution	Program	Credit	Conditions
College of New Caledonia Business Administration Diploma (Accounting and Finance)	RRU	B.Comm. in Entrepreneurial Management	2 years	Individual assessment
Douglas College Hospitality Management Diploma	Capilano University	B. Tourism Management	Up to 60 credits	Minimum GPA 3.0

The Bridging Model

The receiving institution grants two full years of credit towards the degree; however, because it judges transferring students' backgrounds to be deficient in some areas, it specifies courses that must be taken before the students can proceed, or as soon as possible after admission into the receiving program. There are two variations on this model:

a) The bridging courses are taken in the first semester of the third year, and students should be able to graduate in a total of four years; or,

b) The bridging courses are taken in a summer semester or over an additional semester of study. Students should be able to graduate in a total of four and a half years.

The 2 + 3 (or more) Model

The receiving institution grants one year of credit for completion of a two-year diploma. Students can finish the degree in an additional three years after the diploma (a total of five years). In some cases, as in the example below, receiving institutions grant only a few credits for the completed diploma, in which case, it may take students up to six years to finish a degree.

Program	Receiving Institution	Program	Credit	Conditions
SELK Forestry Technology Diploma	University of British Columbia	B.S.F. Forest Resources Management or Forest Operations	1 year exemption	Must have been awarded diploma and must have a 65% overall average. Must present prerequisites from high school.

Other Models

- **The 'upside-down' model:** Students who have transferred with block transfer credits take additional lower-division general education courses for credit in the third and fourth year of their degree program.

- **The '60-credit guarantee' model:** The receiving institution guarantees students two years of credit for a completed diploma, but also establishes equivalencies for as many courses as possible. Courses that have no equivalents are granted elective credit 'within the block.' This is the model used for the BC Associate Degree.

- **The 'bilateral multilateral' model:** Although most BTAs consist of bilateral agreements between one sending and one receiving institution, some are governed through consortia, where a group of receiving institutions will collaborate to agree on transfer criteria.

- **The 'admissions model':** A receiving institution accepts diplomas in specific disciplines from any sending institution. For example, Athabasca University's Bachelor of Management program grants between 45 and 90 credits of block transfer to students who have completed a two-year business diploma program. This model may or may not involve course-to-course transfer, depending on the institution, and may also require specific courses to be completed for admission if those courses were not included in the student's diploma program.

- **Eclectic models:** Institutions or programs focused on student-centred and flexible admission policies may be open to maximizing transfer credit, and may grant blocks of credit for previous degrees, diplomas, or certificates, workplace or prior learning, or non-traditional accreditation. Students can often receive three years' credit (or more) and finish their degree by completing the minimum residency requirements of the institution.

Assessing the Block to be Transferred

In preparing for a BTA, the sending institution submits all relevant documentation to the receiving institution for evaluation. The receiving institution assesses all the material it has received, and makes a determination as to the appropriate transfer arrangements.

Step	Who is Responsible	Action
Requesting Articulation	The programs participating in the BTA	Usually a BTA is initiated by a program seeking to establish block transfer arrangements with programs at other institutions. A representative of the sending program will contact the representative of the receiving program, and collectively they will determine the specific conditions of the BTA. The sending and/or the receiving institution may require the terms of any BTA to be approved internally before a formal agreement is proposed or established.
	ICP at sending institution	Forwards program description and course outlines for all courses in the program to the relevant receiving institution(s) with a request that the program be considered for block transfer credit. The request may include desired amount of credit, desired level of credit, and/or specific program for which block transfer credit is sought.
Awarding Credit	Course evaluator at receiving institution	Evaluates block transfer request and determines whether program is transferable and, if so, the amount and type of credit that will be awarded. If, in the evaluator's opinion, the program as a whole is not appropriate for block transfer credit, the evaluator may award course-by-course transfer credit. The evaluator may also award block transfer credit **and** establish additional criteria (e.g., completion of additional courses) that must be met by the student to be admitted to the program at the receiving institution and to receive the block transfer credit.
	ICP at receiving institution	Submits the completed evaluation, including details of evaluation, to BCCAT via the TCS.
	BCCAT	Reviews and publishes BTA in program-specific transfer guide section of BCTG.

Some variations on this assessment process are:

- *Transfer is based on informed assumptions about the content of the diploma and no real assessment of programs at individual institutions is attempted.* For example, some institutions accept applications from graduates of any Business Management diploma program from a BC institution and award block transfer of two years towards a business degree-completion program.

- *Transfer is based on an in-depth assessment of individual courses within the diploma.* The receiving institution is satisfied that the courses are substantially comparable to its own lower-division requirements or offerings.

- *Transfer is based on an in-depth assessment of the entire diploma.* The receiving institution is satisfied that, while individual courses do not match its own courses exactly, sufficiently similar curriculum content is covered in the program.

- *Transfer is based on a holistic assessment of the diploma or its outcomes.* The receiving institution is satisfied that, while the content of the diploma may be quite different from its own lower-level curriculum, graduates are likely to have the knowledge and abilities to be successful at the third-year level.

In each of the above cases, where differences are identified in the content or structure of the sending and receiving programs, receiving institutions may stipulate how and when students transferring with block transfer credit must acquire the missing content needed for the receiving institution's credential.

The Role of Advising

Students who receive block transfer credit for a completed associate degree may assume that they can finish a bachelor's degree in a further two years (or 60 credits) of study. However, given that general degree requirements must be fulfilled, as well as all requirements for major or minors, students may still have more than two years of study ahead. It is vital that the exact terms of all BTAs are clear and transparent for students and advisors so that all parties understand exactly what the agreements entail. Parties to any BTA should take time to review the provisions of the agreement carefully with anyone who will be in a position to advise students. It is also crucial to ensure that any relevant promotional materials clearly state all provisions and requirements.

Parties to a BTA will find it helpful to consult the 'Checklist for Negotiating a Non-Standard Articulation Agreement' in Appendix III of this handbook.

With careful planning, and the assistance of an experienced advisor, a BTA can be a great asset to the transfer student.

Other Forms of Transfer Agreement

While bilateral course-to-course articulation is the foundation of transfer in BC, other models can supplement traditional articulation or substitute for it. This handbook has already described two different approaches to articulation: multilateral articulation and BTAs. This section describes other types of transfer agreement that may be facilitated through the work of articulation committees to increase transfer opportunities for students.

Flexible Pre-Majors

The flexible pre-major (FPM) is a formal inter-institutional agreement facilitating student transfer into programs offering a major in a discipline or subject. A 'pre-major' is defined as the set of first- and second-year courses in a discipline or subject area that students are required to complete in order to be admitted to a major within a degree program, with admission usually occurring at the end of the second year of a four-year degree. The intent of a FPM agreement is for programs and institutions to identify and agree upon the set of lower-level courses in a discipline or subject that students will need to complete if they wish to transfer directly into the third year of a degree program, ideally without having to complete any additional lower-level courses at the receiving institution. The agreement is usually accompanied by a grid identifying courses at each participating institution that fulfill each component of the first two years of the major.

The FPM agreement is designed and facilitated by an articulation committee. The committee collectively identifies the set of relevant courses, or the learning outcomes, for the completed first and second years of a four-year degree program. Participating institutions then identify which of their own courses satisfy these requirements, and sign the FPM agreement. Signing the agreement acknowledges that the institution's courses will transfer to the other participating institutions and/or that the institution will accept the other participating institutions' courses as satisfying its pre-major requirements. After a FPM is established, the articulation committee is responsible for reviewing the agreement annually, and for maintaining the transferability of the relevant courses.

A FPM is essentially an advising tool, rather than a credential, and its completion is not noted on a student's transcript; it will be identified by the receiving institution when a transcript is assessed for admission. It is important to note that a student's completion of a FPM does not guarantee *admission* to the receiving institution or to the degree program. Institutions participating in FPM agreements will maintain other admission requirements, such as minimum GPAs or breadth requirements in elective courses.

More information on FPMs can be found in BCCAT's publication *Flexible Pre-Majors: Final Report of the FPM Working Group* (available at bccat.ca/pubs/FPMFinalReport.pdf). This report includes a description of the process of developing and signing a FPM agreement and answers frequently asked questions about FPMs. An example of a current FPM agreement can be viewed at bccat.ca/pubs/EnglishFPM.pdf

Core Curriculum Initiatives

Articulating individual courses can be challenging when the curriculum is constructed differently across institutions. Articulation committees have taken various approaches to address this issue. For example, the BC Committee on Undergraduate Programs in Mathematics and Statistics (BCcupms) has agreed on a core curriculum for first-year calculus courses and identified courses at individual institutions that fulfill the requirements of this curriculum. The resulting list of calculus courses is available at bctransferguide.ca/program/math/calculus/

Another core curriculum initiative has been led by the Engineering Articulation Committee, working on a common first-year engineering curriculum for post-secondary institutions within the province. To accommodate institutional differences, this committee has formulated a set of learning outcomes arranged in suggested course units. These units may be articulated between institutions either on a course-by-course basis or as blocks consisting of the equivalent of two or more course units.

Program-Specific Transfer Guides

Some articulation committees have developed transfer guides for their own discipline—these list transfer agreements among programs or institutions that are not eligible to be included in the BCTG. Usually this is because the courses involved are not university-level academic courses or because the programs combine credit and non-credit courses. Although these courses and programs do not fall within the scope of the BCTG, the institutions and programs listed in these guides have agreed to honour the transfer agreements that are described therein. The program-specific transfer guides are available on the BCTG website at bctransferguide.ca/program/

Undergraduate Degree Partnerships

In a degree partnership, an institution enters into a contractual agreement with another institution or organization. This agreement guarantees that students completing courses with a minimum grade level at the first institution will be guaranteed admission into more advanced studies at the second institution. For example, Douglas College and Simon Fraser University have a degree partnership agreement in which students with fewer than 45 university-level credits can enrol in one of three SFU undergraduate degree programs and complete the SFU degree while taking classes at both Douglas College and SFU. The degree is conferred by SFU.

Degree partnerships differ from block and other forms of transfer because students continue to be enrolled at the first institution while taking classes at the second. The classes may be offered at the second institution, or they may be delivered at the first institution to students enrolled in the second institution's programs. The courses are identified and recorded as the second institution's courses.

Some post-secondary institutions in BC also have partnerships with institutions outside Canada. Usually, in these agreements, the BC institution's courses are delivered at the partner institution using instructors employed by or approved by the BC institution, and students are enrolled in the BC institution although they are not physically in BC.

The courses offered in such partnership agreements are generally first- or second-year courses, and students who are eligible to study in Canada will move to the BC institution to complete their program or for additional studies.

Transferability of courses is not always an issue in degree partnership agreements because courses may not be required to transfer between the partner institutions. As part of the partnership agreement, the participating institutions determine which courses at which institution will be accepted for credit toward the credential; which institution(s) students will register at while in the program; and which institution will be responsible for maintaining student transcripts. If courses are to transfer between the institutions involved in the partnership, and these courses are not already listed as transferable in the BCTG, a transfer request must be processed through the TCS.

There may also be conditions affecting transfer that are outlined in the partnership agreement, such as limitations on the number of credits earned at each partner institution and applied toward the credential.

In some partnership agreements, courses or credits delivered through a partner institution are identified with a special notation on the course code. (As noted elsewhere in this guide, BCCAT does not recommend this practice, as such coding can interfere with the course being recognized as transferable by other institutions.) When an institution's courses are delivered in part or in whole by a partner institution, that partner is considered responsible for maintaining the same content, coverage, quality of delivery, and grading standards that would be in effect if the course were delivered by the institution itself.

Institutions have made use of numerous degree partnership models to accommodate specific goals. A partnership may include dual enrolment, permitting students to attend institutions simultaneously or in succession. Some institutions have developed processes that make dual admission seamless to students, such as calculating combined cumulative GPAs (rather than a separate GPA for courses taken at each institution); jointly offering scholarships; and sharing timetables/course schedules. A less complex form of partnership would provide qualified students with assurance that they will be accepted at the second institution after completing a specified number of credits at the first institution.

Institutions benefit from these partnerships through increased student recruitment, retention, and credential completion.

The BCTG maintains a listing of degree partnerships within the BC Transfer System at bctransferguide.ca/search/partnerships

Using a Business Case Strategy to Plan Articulation Activities

An institution using a business case strategy for articulation will determine the value that transfer activity has for its students, and the impact it has on student recruitment, retention, and direction. The institution will plan the transferability of its courses and programs accordingly. Notably, BCCAT policy[2] requires prospective new members of the BC Transfer System to make a business case for joining: an institution seeking to join the Transfer System must demonstrate that there already exists significant student transfer and articulation activity between itself and member institutions; and that its inclusion in the Transfer System would provide valuable information to students about viable transfer pathways that are not now recorded in the BCTG.

An assessment of the value of an institution's transfer activities may address the following:

- *The number of students that the institution expects to transfer credits in or out in a given time period or periods.* The institution may want to determine if this level of activity is appropriate or sustainable, and develop strategies to increase or reduce transfer activity as necessary.

- *The amount of transfer activity within each program or discipline, as an indicator of the importance of transfer activity to the ongoing operation of the program or discipline.* For example, if many students in a program are transferring elsewhere after completing the first or second year of study, it may be difficult for the institution to justify offering third- and fourth-year courses in the program unless other students are transferring into the program at that level of study.

- *Whether specific courses or programs should be designed to be transferable.* If a course or program is designed to serve a specific need or a specific group of student (e.g., a degree relevant to an activity in the institution's geographic area), the transferability of courses or of the program may not be a major concern, especially if graduates of the program are not expected to move on to further studies. However, if a course or program is in a subject or discipline that is offered at many other institutions, transferability may be more important, especially if students taking the course or program are likely to continue with their studies elsewhere.

- *The need for dedicated staff to manage articulation activity for the institution.* Expectations of all member institutions are detailed in BCCAT's *Principles and Guidelines for Transfer* (see *Appendix II*). While funding for costs associated with faculty participation at articulation meetings is included in the funding that public institutions receive annually from the ministry responsible for advanced education, many institutions with significant transfer activity also find value in dedicating additional resources to support and manage transfer activities.

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[2] Adapted from p. 3 of Policy 3A (consolidated) at bccat.ca/pubs/POL3A_BCTSMembership.pdf

Participants in the BC Transfer System

BC Council on Admissions and Transfer (BCCAT)

BCCAT facilitates the operation of the BC Transfer System by administering the operations of the BC Transfer Guide. BCCAT also facilitates and supports the work of 66 articulation committees. These committees promote communication and discussion about articulation and transfer issues within disciplines and program areas. BCCAT also provides policy guidelines and research resources to assist in developing efficient and effective articulation practices, and it represents the BC Transfer System in interactions with relevant institutions, associations, and agencies.

The members of the Council are appointed by the BC ministry responsible for advanced education and represent different functions, institutions, and positions within the BC post-secondary system. The Council meets regularly to set the direction and policy that guides the work of BCCAT's staff members. There are also three standing committees that advise BCCAT in its work: Transfer and Articulation, Research, and Admissions.

BCCAT's work is advisory and facilitative. BCCAT does not make decisions on individual transfer credit requests, and it does not direct institutions' actions regarding transfer unless the issue involves compliance with BCCAT's operating policies or principles. Nor does BCCAT make rulings in transfer-related disputes between institutions. However, it can facilitate discussions with the goal of resolving such disputes.

Profiles of current staff members can be found at bccat.ca/about/work

BCCAT's offices are located at:

709 – 555 Seymour Street
Vancouver, BC, Canada V6B 3H6
Telephone: 604 412 7700
Fax: 604 683 0576

The BCCAT email address for general enquiries is info@bccat.ca

Member Institutions

Institutions that are members of the BC Transfer System have undergone a quality assurance process and have signed an agreement indicating their compliance with BCCAT's *Principles and Guidelines for Transfer*. The basis for institutional membership in the BC Transfer System is described at bccat.ca/system/membership/

Member institutions are entitled to send and receive articulation requests with other BC Transfer System institutional members. This function is limited in the case of private institutions to subject and program areas in which the institution has received ministerial consent to offer a degree (at the associate or bachelor level). The list of current BC Transfer System members is available at bccat.ca/system/psec/

Institutional Staff

Each member institution has identified staff who participate in the operation of the BC Transfer System. These individuals fulfill the following roles:

- **Admissions Staff:** receive transfer requests from students; depending on the institution, oversee electronic or manual review of student transcripts for transfer credit; ensure that appropriate transfer credit is awarded and properly recorded; initiate articulation or transfer credit requests and send to appropriate department; depending on how duties are divided in the institution, maintain internal transfer tables.

- **Advisors:** advise students on transfer options; provide advice to ICPs regarding student interest in or use of transfer credit options; if attached to a program or department, may provide specific advice related to transfer to or from that program or department.

- **Deans:** facilitate faculty members' attendance at articulation committee meetings; may act as System Liaison Person for specific articulation committees; may delegate to a committee or adjudicate/mediate in situations where faculty cannot agree on articulation or transfer credit.

- **Department/Program Head:** may act as the articulation representative for the department; receive notification of articulation committee meetings and distribute to faculty; contact other institutions regarding possible articulation opportunities or take lead in arranging block transfer agreements.

- **Faculty Members:** evaluate articulation requests for courses related to their own discipline, subject, or program; determine whether transfer credit should be granted and, if so, how much credit should be given and at what level.

- **Institutional Contact Persons (ICPs):** see below.

- **Registrars:** oversee staff who deal with transfer credit requests and processes; accountable for institutional decisions on transfer credit; receive appeals from students on transfer credit decisions.

- **Students:** may initiate transfer credit requests or appeal transfer credit decisions; work with advisor to plan transfer pathway.

Institutional Contact Persons (ICP)

The process of faculty review that leads to the articulation of courses between institutions is coordinated and facilitated by the ICP(s) at each institution. ICPs are often Registrars, directors, admissions staff, advisors, or other administrators responsible for transfer policy and practice at their institutions. They advise BCCAT on transfer-related administrative matters, verify the transfer agreements that are published in the BC Transfer Guide (BCTG), and serve as part of an important communication network throughout the transfer system. ICPs also oversee the daily updating of the BCTG through BCCAT's Transfer Credit System (TCS): they initiate transfer credit evaluation requests, forward requests for evaluation, and enter evaluation results for publication in the BCTG.

Depending on size and complexity, BC Transfer System member institutions may have more than one ICP and subdivide responsibilities as they see fit. A list of current ICPs is available at bccat.ca/articulation/contacts

In general, ICPs facilitate transfer and articulation and support student mobility by:

- **Advocating** for transfer students by facilitating the articulation process.
- **Serving as well-informed resource people** for students, faculty, administration, advising and admissions staff on ttransfer, curriculum, articulation, and related matters.
- **Disseminating current, accurate, articulation data** to students, staff, departments, programs and campuses.
- **Serving on appropriate institutional committees** to provide input and receive information about proposed changes in transfer-related policy and curriculum.
- **Providing materials and information** to faculty and to academic and student service units about course articulation proposals and decisions.
- **Facilitating institutional participation in system activities** such as regional transfer fairs, BCCAT activities, and system discussions.
- **Monitoring each stage of the articulation process** and follow up with departments, programs, and faculty for timely responses and decisions.
- **Managing and updating institutional articulation data** and providing data on transfer-related curricular changes for both internal and external recipients.
- **Maintaining lists** of course outlines, agreements, and other articulation-related data.
- **Advocating** for efforts to enhance and improve existing articulation arrangements.
- **Facilitating the formalization of faculty-approved articulation agreements** between post- secondary institutions.
- **Facilitating the resolution of problems** or disagreements between faculty members of the home and articulating institutions;
- **Serving as the campus liaison** to the members of the BC Transfer System and BCCAT.
- **Attending and participating** in conferences and workshops on articulation and transfer issues.[11]

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[11] Adapted from *California Articulation: Policies and Procedures Handbook* (San Bernadino, CA: California Intersegmental Articulation Council, 2009). Available at http://ciac.csusb.edu/documents/CIAC_Handbook_7-22-09.pdf

Articulation Committees

There are 66 articulation committees that participate in the BC Transfer System. The role of these committees in the system is to "expand educational opportunities for students by facilitating transfer of students from one educational institution to another."[12] Articulation committees normally meet once a year. While some articulation committees schedule time at their meetings to discuss course-to-course articulation, transfer credit is not usually established at most of these meetings. Rather, discussions at the table emphasize a sharing of information, particularly about curricular matters, and lead to common understandings regarding course objectives and outcomes, as well as relevant teaching methodologies. These discussions foster collaborative and collegial relationships among disciplinary colleagues throughout the system, and thereby establish the basis for informed articulation decisions affecting student mobility.

All member institutions offering a program or courses in a specific discipline are expected to send an appropriate faculty representative to the annual meeting of the relevant articulation committee.

A list of articulation committees, and the website for each individual committee, can be found at bccat.ca/articulation/committees/

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[12] Adapted from BCCAT's *Articulation Committee Companion* (Vancouver, BC: BC Council on Admissions and Transfer, 2018). Available at bccat.ca/companion/

Frequently Asked Questions

Q1:   Once an articulation agreement is in place, can it be cancelled?

Yes. There are several legitimate reasons to consider cancelling an articulation agreement. For example, a program may revise its curriculum, or changes in the content or format of a course over time may alter its equivalence. In such situations, an end date is assigned to the effective date listed for the agreement in the BC Transfer Guide (BCTG), but the agreement will continue to be listed. This is to provide a record of when the course was considered transferable in case a student who took the former version of the course applies for transfer credit. If a new agreement is negotiated to replace the old agreement, the new agreement will also be recorded in the BCTG. However, if the course code has not changed, both courses will show up in a search on the BCTG.

Occasionally, institutions or programs will consider cancelling articulation agreements because of a pattern of under-prepared students. Cancelling an articulation agreement for this reason is a very serious matter and one that should be undertaken only after weighing the evidence, the justification, and the consequences. Rather than relying on anecdotal information, institutions considering such an action should undertake an analysis of how students from the sending institution have performed in the courses they have taken after transferring to the receiving institution. If, based on the review of evidence, the receiving institution continues to feel there is cause for concern, it should address the matter directly with the sending institution. All member institutions of the BC Transfer System understand the need to be in good standing in the system, and often respond well to advice, assistance, and direction. A good place to start may be a friendly contact between articulation committee representatives.

In light of the serious consequences that result for a sending institution and its students when a receiving institution makes a decision to cancel or alter transfer credit, BCCAT always recommends a preventative approach whenever possible. BCCAT, if requested, can also play a mediation role if the receiving institution's own efforts at reaching a solution are not welcomed.

Q2:   How are articulation disputes resolved?

Despite the size and complexity of the BC Transfer System, disputes over course articulation or transferability are not common. The most common cause of an articulation dispute is when a receiving program changes its curriculum. The change may create difficulties for sending programs trying to balance the requirements of several receiving programs or trying to adapt quickly to a curriculum change within a restricted timeline. Other contentious issues have included appropriate qualifications for instructors or curriculum developers of transferable courses; perceived problems with academic standards affecting course quality; practices around recording courses on transcripts; and admissions or transfer policies that advantage or disadvantage particular types of student.

Articulation committees can play an important role in preventing disputes by ensuring that curriculum changes and other issues that may potentially affect articulation agreements are given adequate time on meeting agendas. Reliable methods of communication in-between meetings, such as via electronic mailing lists, are also very useful in ensuring that accurate, current information from institutions or programs is circulated as needed. Articulation committees can also assist in resolving disputes when they arise, through discussions or through the work of a sub-committee.

If the parties in an articulation dispute have made a sincere effort to resolve the dispute but have been unable to reach agreement, BCCAT will act in a mediation role if invited to do so. BCCAT has no jurisdiction to make rulings on disputes and cannot interfere with the internal policies and practices of autonomous institutions. However, BCCAT can bring together relevant personnel from the affected institutions and attempt to reach an outcome satisfactory to all sides.

Q3: Can an institution articulate courses with an institution that is not a member of the BC Transfer System?

Yes, if it so chooses. As autonomous entities, BC post-secondary institutions are free to articulate as they see fit. However, the BCTG will list only those articulation agreements that are made between BC Transfer System member institutions. Institutions may choose to keep internal records of any other types of articulation agreement. Private institutions that are not members of the BC Transfer System may request articulation with member institutions. (See BCCAT policy 3B for policy and procedures governing the *Listing of Transfer Agreements with Non-Member Institutions in the BC Transfer Guide*.)

Q4: Can courses taken at a secondary school be transferred for credit at post- secondary institutions?

Yes, but only under certain circumstances. Many BC institutions award credit for secondary-level Advanced Placement and International Baccalaureate courses. These transfer agreements can be found in the BCTG at bctransferguide.ca/search/ap and bctransferguide.ca/search/ib.

In addition, a number of secondary schools in BC have entered agreements with post-secondary institutions for dual-credit or transfer credit agreements. However, these are not recorded in the BCTG.

Q5: What is the difference between Prior Learning Assessment and Recognition (PLAR), challenge credit, and transfer credit?

While transfer credit is one way of recognizing a student's prior learning, articulation is a very different process from PLAR and challenge credit. Credits awarded through PLAR processes are based on assessment of what students can demonstrate that they know or are able to do. This learning may have been acquired in informal or non-formal settings, such as work experience, on-the-job training, or personal study. A student requesting PLAR credit is generally required to produce a portfolio documenting their knowledge or skills, or to demonstrate this learning in other ways (e.g., writing a formal examination). The PLAR assessment is carried out by a qualified assessor who determines the amount of PLAR credit a student receives; the PLAR credit may be awarded in the form of credit hours, or as credit for individual courses. In most institutions, the official course outline for a course identifies whether credit for that course can be obtained through a PLAR process. Additionally, credit awarded through a PLAR process may be applicable only to a specific program or course and/or may not be transferable to another institution.

Challenge credit is awarded to a student for a specific course, if the student can demonstrate mastery of the course material or achievement of the course's learning outcomes. Generally this will be assessed through the administration of an examination or other formal test. At most institutions, a student can receive challenge credit only by registering

for the course and paying the course's tuition fees. Instructor or program permission may be required for a student to challenge a course.

Q6: If a course is delivered in a language other than English, can it be articulated?

Occasionally institutions receive requests to articulate a course that is delivered in a language other than English that is not intended to give students skills in that language (e.g., not a French or Spanish language class). In this situation, it is important to refer to the principle that students should not have to repeat content of which they have already demonstrated mastery.

In the case of learning acquired in another language, an individual assessment by program faculty of the course outline or program materials is the only method of assessing what the appropriate transfer credit is. Normally, a course outline should be provided in translation so an accurate assessment can be conducted. An additional consideration is whether the receiving institution feels that it is appropriate to award a credential to a student who may know the material in his/her own language but not be able to reproduce it, or apply it, in English. If the receiving institution offers the credential in English, employers or other institutions may assume that a student who has graduated with the credential will be able to function in English.

Q7: As an evaluator or administrator, can I say 'no' to a request for transfer credit?

BC Transfer System member institutions are entitled to decline requests involving transfer credit from outside the BC Transfer System: see sections on *Closing Requests* and *Student-Initiated Requests for Transfer of Credit from Institutions Outside the BC Transfer System*. They are also entitled to decline requests involving transfer credit from BC Transfer System members if, in the evaluator's opinion, the transfer credit being requested is for a course that has no equivalent at the receiving institution or that does not meet the program or institution's course quality or content standards. However, an award of no credit may have a negative effect on a student's educational plans. Before determining an award of no credit, evaluators and administrators are strongly encouraged to consider the entire range of possible transfer credit awards, including unassigned credit, restricted applicability, or differing credit values (see the relevant sections of this handbook). In addition, the receiving institution has the option to close a request rather than establishing or denying credit.

APPENDIX I:
Glossary of Articulation Terms

Academic Program

A program of study, usually involving theoretical knowledge and research, and usually leading to a diploma, certificate, associate degree, or bachelor's degree.

Admission

Being allowed to enrol in an institution, Faculty, or program once the entrance requirements are met. Some admission is limited by spaces available and/or by selection criteria.

Advanced Placement

An agreement that allows high school students to obtain credit for post-secondary courses through courses taken at their high school. See also **Dual Credit.**

Advanced Standing

Placement at a certain level of study when entering a program or course, based on assessment of previous work, or on achievement in a placement test.

Articulation

The process used by post-secondary institutions to determine which courses are equivalent to one another. Articulation normally entails course-to-course analysis or comparison, but it can also involve whole programs. The term 'articulation' also refers to the development and implementation of agreements that provide for inter-institutional movement of students, and to the connection of two or more educational systems.

Articulation Committee

A committee recognized by BCCAT for a discipline, subject, or program offered at more than one member institution of the BC Transfer System. Representatives from each institution offering courses or programs in the discipline meet regularly to discuss curriculum, transfer, and articulation issues.

Assigned Credit

The credit value that is 'assigned' to a course at a sending institution when it is assessed as being equivalent to a specific course at a receiving institution. See also **Unassigned Credit**.

Associate Degree

A two-year undergraduate academic credential awarded by a college, an institute, or a university upon completion of a 60-credit course of study with an Arts or Science focus. It is equivalent to the first two years of a four-year degree (undergraduate or bachelor's) and has prescribed general outcomes, curriculum, and program requirements.[13]

Basis of Admission

The evidence on which a decision on admission is based, e.g., the applicant's secondary school record or completion, post-secondary credits that the applicant may have already acquired, or **Grade Point Average (GPA)**.

BC Transfer Guide

The list of transfer agreements between BC Transfer System members. The BCTG is administered by BCCAT but the agreements are established by the institutions themselves. The BCTG includes listings for course-to-course transfer, block transfer, advanced placement, degree partnerships, and program-specific transfer guides.

BC Transfer System

The group of institutions approved to participate in transfer agreements listed in the BCTG. Members include BC public post-secondary education institutions, BC private institutions that have received ministerial consent to offer one or more degrees (associate's or bachelor's), Yukon University and Athabasca University. Membership in the BC Transfer System is based on approval through a quality assurance process.

Block Transfer

A transfer agreement in which a predetermined number of transfer credits is granted to transferring students who have successfully completed a certificate, diploma, or cluster of courses at another institution. Generally, block transfer is used to award credit for courses that, as a group, are recognized as having an academic wholeness or integrity and that collectively satisfy part of the requirements for another credential.

Bridging Programs

Programs that provide students who have completed a credential with the opportunity to continue to another program by providing content that is typically not covered in the previously completed program.

Calendar

The book of rules, regulations, policies, programs, and courses for a particular post-secondary institution. Sometimes referred to as the 'academic calendar'.

Certificate

A credential granted after the successful completion of a program of study, usually one year or shorter in duration. A certificate may be completed prior to, during, or after the completion of another credential.

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[13] Associate Degree program requirements can be found at bctransferguide.ca/associate/requirements

Cluster Credit

The credit awarded when two or more courses must be combined, at either the sending or the receiving institution, for a student to obtain credit for equivalent courses at the receiving institution.

Concentration

A program of study, usually within a degree program, offering concentrated study in a specific topic or discipline, but usually involving fewer courses or credits than a major or minor.

Co-requisite

Completion of a course that is required for enrolment in another course, but which may be taken at the same time as the other course. See also **Prerequisite**.

Course Outline

A description of the main content, organization, and expected outcomes of a course. A course outline normally includes such information as the number of credits awarded for successful completion of the course, hours of class time required, evaluation procedures, assignments, texts, and readings. The term 'course outline' may refer to the official document approved by the institution when a course is initially developed and established, or to the document that is distributed in class to students each time the course is taught. See also **Syllabus.**

Course-to-Course Transfer

A transfer agreement in which a specific course at a sending institution is accepted as the equivalent of a specific course at a receiving institution. Also referred to as **Assigned Credit.**

Credit

The value assigned to a course. For example, many courses are valued at 3 credits. Most credentials specify the number of credits to be earned for the credential to be awarded. See also **Unit.**

Credit Transfer

The granting of credit by one institution for equivalent courses completed at another institution. Once transfer credit is granted, completion of the other institution's course is accepted in lieu of completion of the institution's own course. The transfer credit can be applied in the same way as credit for the internal course to fulfill general or specific credential requirements. Block transfer may also be granted for completed programs. Course and program equivalencies that have been articulated (i.e., assessed for equivalence and awarded credit through a formal inter-institutional request process) are recorded as transfer agreements in the BCTG.

Cumulative Grade Point Average (CGPA)

A cumulative GPA (CGPA) is the average of a student's grades for all courses taken to date at one institution. See also **Grade Point Average (GPA)**.

Degree (Bachelor's or Undergraduate)

Credential awarded upon successful completion of a program of studies (usually about 40 courses, or 120 credits, or 60 units), often with a specific major, minor or concentration.

Degree Partnership

An agreement between two institutions that allows students to earn credit toward a credential at one institution while enrolled at the other institution. May also be called 'dual enrolment'.

Degree Quality Assessment Board (DQAB)

The DQAB oversees the quality assurance process for new proposed degree programs at both private and public post-secondary institutions, to ensure they meet consistent and high quality criteria.[14] It makes recommendations to the minister responsible for advanced education on the approval of new degree programs and on the use of the word 'university' by post-secondary institutions operating programs in BC.

Diploma

Credential awarded upon successful completion of a program of study, usually two years in length. Post-degree diplomas are often one year in length.

Dual Credit

Credit awarded at both the secondary and post-secondary levels for high school students taking introductory-level post-secondary courses delivered at the secondary school. In addition to locally developed arrangements, Advanced Placement (AP) and International Baccalaureate (IB) programs and courses completed in secondary school may be eligible for transfer credit in BC post-secondary institutions.

Exemption

The waiving of a program or course requirement. A student granted an exemption because he or she has transferred a course may be required to take another course to replace the credits or content associated with the exempted course.

Grade Point Average (GPA)

The average overall grade for all courses taken for credit in a particular period of study (usually a semester or a year). See also **Cumulative Grade Point Average.**

Institutional Contact Person (ICP)

BCCAT's main contact at a member institution. The ICP will be the first point of contact for any issues or concerns relating to transfer, and processes (or delegates) course articulation requests via the electronic Transfer Credit System.

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[14] Adapted from the Degree Quality Assessment Board website (www2.gov.bc.ca/gov/content/education-training/post-secondary-education/institution-resources-administration/degree-authorization/degree-quality-assessment-board/responsibilities-and-reporting). Accessed 24th August 2018.

International Baccalaureate (IB)

An enriched secondary school program that provides students with the opportunity to earn advanced credit to-wards an undergraduate degree. See also **Advanced Placement** and **Dual Credit.**

Letter of Permission (LOP)

A document that gives a student permission to take a course at an institution other than the post-secondary institution in which he or she is currently enrolled. The letter is issued by the institution or the program in which the student is currently enrolled.

Level Credit

See **Unassigned Credit.**

Lower-Level (or Lower-Division) Courses

Introductory courses, usually part of the first two years of a university degree program, or the first half of a credential program.

Major

A program of study, usually within a degree program, offering concentrated study in a specific topic or discipline.

Minor

A program of study, usually within a degree program, offering concentrated study in a specific topic or discipline but usually involving fewer courses or credits than a major.

Preclusion

A condition of a transfer credit agreement establishing that a student receiving transfer credit for a course will not also receive credit at the receiving institution for a specific course at the receiving institution.

Prerequisite

A course or courses, number of credit hours, or enrolment status (e.g., admission to a particular program) a student must complete or achieve before he or she can take a specific course. See also **Co-requisite.**

Program-Specific Transfer Guide

A set of transfer agreements among institutions or programs relating to courses in a specific discipline. A program-specific transfer guide is used for transfer agreements that are not eligible to be recorded in the BCTG. However, the institutions and programs participating in a program-specific transfer guide have agreed to honour the transfer agreements outlined in it.

Receiving Institution

The institution to which a student intends to transfer credits. In an articulation agreement, the receiving institution grants credit for courses completed at the sending institution.

Registration

The process of enrolling in individual courses after completion of all required admission procedures.

Requirement

A course or set of courses a student must take in order to complete a credential.

Residency

The number of courses or credits (or percentage of courses or credits) in a program that a student must take at an institution to receive a specific credential from that institution. Residency requirements can be established at the program, Faculty, or institutional level.

Sending Institution

The institution from which a student intends to transfer credits. In an articulation agreement, the receiving institution grants transfer credit for courses completed at the sending institution.

Syllabus

At some institutions, the term 'syllabus' refers to the document with course information that is distributed to students each time a course is taught, and the term 'course outline' refers to the official course description and information used in the internal course/program approval process. See also **Course Outline**.

System Liaison Person (SLP)

A non-voting member of an articulation committee, usually an administrator with responsibility for the discipline. SLPs are appointed by BCCAT and provide the articulation committee with system perspectives and linkages to administrative bodies.

Transcript

A record issued by an institution of a student's enrolment, course completion, credits acquired, grades, credential completion, and any other academic activity. An official transcript is certified (e.g., by signature and/or seal) by the institution. It is normally sent directly, by mail or electronically, to another institution upon the student's request.

Transfer Credit

Transfer credit indicates the granting of credit toward a credential by one institution for programs or courses completed at another.

Transfer Credit System (TCS)

The electronic system operated by BCCAT that allows institutions to request transfer credit and to submit evaluations of transfer credit agreements. Each BC Transfer System member institution has an account in the TCS that allows an institutional representative to submit and process transfer credit requests. The articulation agreements established through the TCS are recorded and published in the BCTG.

Transfer Student

A student who wishes to transfer credit from one institution to another. Some institutions formally define a basis of admission for transfer students and specify criteria for students applying in that admission category.

Unassigned Credit

A form of transfer credit that can be awarded when a course is assessed as not being equivalent to a specific course at a receiving institution. Unassigned credit is usually specified as applying toward the requirements of a particular discipline or program at a particular level (e.g., BUS 1xx (3)). May be called 'level credit' at some institutions.

Unit

Two institutions in BC (the University of Victoria and North Island College) use a unit rather than credit system to define the value assigned to a course toward a program or credential (3 credit hours = 1.5 UVic units). See also **Credit**.

Upper-Level (or Upper-Division) Courses

Courses offered in the final two years of a university degree or in the second half of a credential program.

APPENDIX II:

Principles and Guidelines for Transfer

Purpose

Credit transfer provides efficient, cost-effective access to post-secondary education and limits geographical barriers for students. The BC Transfer System includes public and recognized private and out-of-province institutions, facilitates student mobility, supports system quality and ensures the portability and applicability of credit by providing dependable, accurate resources to students and institutions. Key system values are those of transparency, fairness, autonomy, predictability and accountability, built upon trust between system partners.

The BC Council on Admissions and Transfer as manager of the BC Transfer System and on behalf of its members adopted this revised set of Principles and Guidelines in May 2010. Originally approved by all members, they have been revised and updated to reflect the changing BC post-secondary system.

Principles and Guidelines in the BC Transfer System:

1. **Students earn transfer credit for equivalent learning and can apply that credit to fulfill credential requirements.**

    A. Formal transfer credit agreements recorded in the BC Transfer Guide constitute a guarantee to students.

    B. Students should not be required to retake courses successfully completed elsewhere, nor should they expect to receive duplicate credit for equivalent courses.

    C. To support and encourage planning, students must have access to information on course equivalencies, program prerequisites, and levels of achievement on which admission and transfer credit will be awarded.

    D. Students are responsible for informing themselves about transfer processes.

2. **Students can expect to be treated equitably by all member institutions.**

    A. Where an institution defines a basis of admission for transfer students, the institution should specify the minimum cumulative GPA and the minimum number of credits required.

    B. Where an assessment of previous academic performance forms part of an admission decision, a transfer student's post-secondary academic record should be the primary consideration, rather than performance in secondary school.

    C. The minimum grade for individual course transfer is normally a passing grade, as defined by the institution awarding the original credit. A higher course grade should not be required by the receiving institution unless the same requirement applies to the equivalent internal course.

    D. Students should have access to avenues of appeal for transfer credit decisions.

    E. Students should not be disadvantaged by changes made to transfer arrangements while courses are in progress.

3. **All members acknowledge and respect the primary jurisdiction of each institution for transfer policy and academic integrity.**

   A.   Each institution in the BC Transfer System should plan for and accept transferring students using clearly stated policies and procedures to govern the awarding of transfer credit.

   B.   Institutions may limit admission to programs based on space availability or on criteria pertinent to the program.

   C.   Variations in institutional programs that reflect differing missions, context, expertise, and modes of delivery should be respected and accommodated: accommodation strategies may include institutions setting flexible course or credit requirements for transfer students.

   D.   Given system norms and expectations regarding appropriate qualifications for instructors of transferable courses, institutions should be prepared to provide information on their instructor qualification policies upon request.

4. **Transfer agreements are based on rigorous articulation processes and transparent communication.**

   A.   Institutions should allocate appropriate resources to transfer administration, including sending a representative to the relevant articulation committees.

   B.   Institutions should respond to articulation requests in a timely manner, preferably within two months of the receipt of the request.

   C.   All articulation shall be based on an assessment of equivalence that recognizes that effective learning can occur under a variety of arrangements and conditions. Assessment may include (but not be limited to) comparisons of learning outcomes, scope and level of content, assessment strategies, hours of instruction, student success in subsequent courses, program accreditation and provincial or national certification requirements.

   D.   The institution seeking transfer credit should provide course or program outlines that contain all the elements necessary for the assessment of equivalence.

   E.   Institutions should provide a rationale for a denial of an articulation request.

   F.   It is the responsibility of all institutions to maintain the standard of content, outcomes and instruction upon which an original transfer agreement was based, to re-articulate when necessary and to provide adequate notice of curricular changes affecting established transfer agreements.

   G.   An award of transfer credit should confer certainty: it should be clear what credit is being awarded as well as the number of credits awarded (normally the same number of credits as for the equivalent course).

5. **Evaluation of the BC Transfer System is focused on assessing its effectiveness for students.**

   A.   Members of the BC Transfer System are expected to submit data regularly to the relevant system repositories.

   B.   Institutions are encouraged to review research on the effectiveness of the BC Transfer System and to adjust their policies, practices or standards where advisable.

   C.   Institutions should be advised by student mobility research when assessing the business case for articulation for their institution, courses or programs.

APPENDIX III:

Checklist for Negotiating
A Non-Standard Articulation Agreement

The following checklist is designed to assist institutions and departments with the negotiation and assessment process involved in negotiating articulation agreements between institutions, other than standard course-to-course agreements, within the BC Transfer System. Institutions wishing to conclude transfer agreements with private institutions outside the BC Transfer System, or with institutions outside BC, or to reach agreement on the block transfer of specific programs, may find this checklist useful.

It is not intended that partners to an agreement follow every step in the checklist.

Rather, the list is provided as a set of helpful suggestions

to be used at the discretion of the institutions and programs involved.

Preparing for the Agreement

✓	CHECKLIST
	Consult appropriate individuals/groups within your institution.
	Obtain the necessary internal approval to proceed.
	Evaluate the cost to the organization, if any, of proceeding.
	Decide what type of agreement is appropriate (e.g., course-to-course, block transfer, flexible pre-major)
	Check the BC Transfer Guide (BCTG) for existing or similar agreements.
	Select an individual to lead the articulation process.
	Decide who will perform the detailed articulation (e.g., examination of course content).
	Alert any internal committee that should review results.
	Inform the appropriate people if the agreement will affect multiple campuses.
	Consult relevant licensing or professional bodies.
	Consult public institutions with which the course/program has links.
	Consider internal approval policies and prepare relevant documents (e.g., for Senate or Education Council).
	Establish a timetable for finalizing the agreement.

Establishing Course, Program, and Institutional Fit

✓	CHECKLIST
	Clarify the purpose of the course(s) or program(s) under consideration for articulation.
	Ensure the resources used by the course/program are appropriate and sufficiently current.
	Ensure software used by the course/program is appropriate and sufficiently current.
	Determine the length of the course/program.
	Determine what content the course/program covers.
	Check that there is an appropriate match of course/program content between sending and receiving institution.
	Ensure the content is covered to the same depth.
	Determine the teaching or content delivery methods.
	Ensure assessment practices are • clearly related to the goals and objectives of the course/program; and • proven to be effective in assessing student learning.
	Request information about the institutional policy regarding qualifications required of instructors.
	Enquire whether the program can demonstrate a history of success as measured by student learning, student satisfaction, employment outcomes, or subsequent performance of transfer students.

Finalizing the Agreement

✓	CHECKLIST
	Conduct site visits, if necessary, at each institution.
	Ensure the following details are included in the agreement: • an official implementation date; • a renewal date; • terms by which either party may terminate the agreement; • terms for regular review (note: substantive changes to curriculum, program/course length, delivery methods, equipment, outcomes, etc., may trigger earlier review); • a process to exchange relevant information which may affect the agreement after it is signed and before the next scheduled review; and • an indication of whether the agreement is reciprocal—that is, whether students can move between institutions in either direction (note: while this may not be feasible in many situations, good practice is to encourage reciprocity whenever possible).
	Specify whether the agreement will apply retroactively to accommodate graduates of either institution's articulated program(s), and for what period of time.

	Plan what action should be taken if the decision is not to complete an articulation agreement (note: parties should be prepared to state reasons).
	Decide who will sign the agreement for each institution.
	Decide what format to use to record the agreement (e.g., Memorandum of Understanding, Block Transfer Agreement Form).

After the Agreement is Signed

✓	CHECKLIST
	Receiving Institution: Send a copy of the agreement to (a) the Registrar's Office, with a request to submit the relevant information to the BCTG, and (b) the sending institution.
	Receiving Institution and Sending Institution: Check who in the institution must be made aware of the agreement (e.g., faculty/department, the Registrar's Office, advising services).
	Decide who will maintain links with the partner institution for purposes of coordinating or making changes to the agreement.

APPENDIX IV:

BCCAT Statement on Instructor Qualification Standards for Transferable Courses

1. BC Transfer System Instructor Qualification Standards

a) Based on long-standing precedents in the BC Transfer System, BCCAT expects that instructors who teach academic, degree-level transfer courses will usually possess, at a minimum, a master's degree or equivalent in the discipline or in a closely related area.

b) Instructors teaching in other transferable programs (e.g., diploma programs) will usually possess, at a minimum, credentials consistent with the normative requirements for that program in the BC Transfer System.

c) It is recognized that there may be programs in which other qualifications are equally, or more, appropriate. (Examples of alternatively qualified instructors include First Nations elders, practicing artists, acknowledged or renowned experts or practitioners.)

d) When, for legitimate reasons, it is not possible to engage faculty who meet the standards described above, institutions should provide appropriate mentoring and supervision.

2. Establishing and Monitoring Expectations

a) BCCAT expects institutions participating in the BC Transfer System to develop and/or make explicit and accessible their policies on instructor qualifications for

   i.   The hiring of instructors in programs for which transfer credit may be negotiated; and,

   ii. The awarding of transfer credit for courses taught at other institutions.

b) It is reasonable for any receiving institution upon occasion to seek assurance as to the hiring policies or practices at a sending institution, or to request specific information about the qualifications of an instructor for an articulated course.

c) In the event that a concern arises that cannot be resolved between the institutions, BCCAT can provide mediation services, if requested. Mediation entails facilitating further discussions between the institutions with the goal of achieving a mutually acceptable outcome. Although BCCAT may suggest possible solutions, it has no authority to impose a binding resolution to the issues in dispute.

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