

BLOCK TRANSFER AGREEMENT EVALUATION PROJECT

Presented to the British Columbia Council on Admissions and Transfer

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EXECUTIVE SUMMARY

Purpose of the Report

The objective of this project is to evaluate for the BC Council on Admissions and Transfer (BCCAT) the effectiveness of block transfer agreements (BTAs) in the BC Transfer System and recommend steps to be taken to improve their effectiveness.

Findings/Conclusions

Institutions want to expand block credit transfer; current BTAs that work well are seen to provide seamless transfer options, to be promoted and understood, and to be supported by clear terms and communication channels. Confusion over the meaning of block transfer and over BTA terms and conditions and BTA-related institutional processes did, however, emerge. Use of BTAs and the *Block Transfer Guide* was found to be low, and a comparison of institution websites with the *BC Transfer Guide* revealed some inconsistencies. The following recommendations aim to improve the effectiveness of BTAs:

Recommendations

1. Ensure that all BTAs provide clear, specific details on credit transfer, and encourage institutions to negotiate more block transfer in the strict sense, that is, the granting of a block of credits for a block of courses.
2. Consider a change of name from Block Transfer Agreement to Program Transfer Agreement and from *Block Transfer Guide* to *Program Transfer Guide*.
3. Revise the current Block Transfer Form, with full consideration given to the development of an electronic form, and ensure that the form requires definitive details on agreement terms and dates for renewal or cancellation of the agreement.
4. Improve the currency of the *Block Transfer Guide*: request a review of all BTAs currently listed as well as verification that agreements currently in use are entered in the *Block Transfer Guide*.
5. Provide greater accessibility, visibility, and ease of navigation related to block transfer information on BCCAT-managed websites.

6. Encourage institutions to review their homepages and program pages for clear BTA accessibility and navigation links as well as for consistency with the *Block Transfer Guide*.
7. Define more clearly the roles and responsibilities of the institutional contact persons (ICPs) and transfer credit contacts (TCCs), and encourage each institution to have a designated position specifically responsible for block transfer arrangements and processes, known throughout the institution, and filled by a person who is knowledgeable about block transfer.
8. Facilitate a review of existing resource materials and processes in place for the creation, implementation, and maintenance of BTAs.
9. Determine the next steps to facilitate negotiations of out-of-province block transfer arrangements.
10. Encourage institutions to develop a method of identifying students admitted through a BTA, thereby enabling the collection and analysis of block transfer information to improve the effectiveness of BTAs.

INTRODUCTION

The objective of this project is to evaluate for the BC Council on Admissions and Transfer (BCCAT) the effectiveness of block transfer agreements (BTAs) in the BC Transfer System and to make recommendations for steps to be taken in order to change or improve the current effectiveness of these agreements.

Questions to be considered include the following:

- Are institutions aware of BTAs and how they can be created and implemented?
- Do institutions regularly review BTAs so that those listed in the *BC Transfer Guide* are up-to-date?
- How are BTAs promoted at the institutions?
- Do students take advantage of BTA opportunities, and are they satisfied with the credit they receive?
- What is the student success rate for those admitted under a BTA?
- Do BTAs improve the articulation and transfer process? If yes, how? If no, what are the challenges?

In order to gain some preliminary understanding of the issues related to BTAs, the contractor consulted BCCAT resources and staff and additional secondary sources and made background inquiries with a number of individuals in post-secondary institutions. Then the contractor developed and posted two web-based surveys: one for users of the *Block Transfer Guide* (mainly students and prospective students) and one for institution professionals presumed to be familiar with block transfer and BTAs. Findings from the latter comprise the single most significant data for the project.

This report begins with an overview of block transfer, BTAs, and the *Block Transfer Guide*. A discussion of student mobility and credit transfer follows, as well as usage statistics of the *Block Transfer Guide* and observations on the *Block Transfer Guide User Survey*. The next section focuses on BC post-secondary institutions and block transfer, including a look at institution websites, a summary of the preliminary background inquiries on block transfer and BTAs, and an analysis of the *Block Transfer Professionals Survey*. Conclusions and recommendations end the report.

BLOCK TRANSFER, BLOCK TRANSFER AGREEMENTS (BTAS), AND THE *BLOCK TRANSFER GUIDE*

The BC Transfer System: Past and Present

1966 to 1996. According to the history of the BC Transfer System on the BCCAT website (bccat.ca/transfer/history.cfm), the first transfer students were accepted at university through informal agreements in 1966, and by 1976 the first *Principles and Guidelines for Transfer* was adopted. The principles, as they read now, state that “the primary purpose for transfer among colleges, universities and institutes is to increase student accessibility to post-secondary education by facilitating student mobility between Institutions.” (Appendix A) BCCAT, created in 1989, published the *BC Transfer Guide* in 1990 and posted it online in 1995.

Charting a New Course and block transfer. Recommendations in *Charting a New Course*, published by the Ministry of Education, Skills and Training in 1996 became a catalyst for a system-wide examination of transfer policy and models led by BCCAT (bccat.ca/pubs/newblock.pdf); it was concluded that block transfer should supplement, not replace, course-by-course transfer (bccat.ca/pubs/block.pdf). BCCAT decided to use the term block transfer, no longer as any alternative to course-to-course transfer, but in its stricter and more correct sense: a process for granting a block of credits for a block of courses, most commonly, a diploma or certificate. Two motions passed at the Council’s December 12, 1997 meeting supported several principles of block transfer that were published in *Special Report* (bccat.ca/pubs/sr_blockup.pdf).

1998 to 2009 and block transfer agreements (BTAs). Articulation committees and deans and faculty continued to develop BTAs over the past decade. The *BC Transfer Guide* (bctransferguide.ca), by 2005 a standalone website, includes the BTAs in the *Block Transfer Guide* (bctransferguide.ca/block/), in which 26 of the 38 public and private member institutions in the BC Transfer System currently participate.

Block Transfer and Block Transfer Agreements

BCCAT definition of block transfer. The BCCAT *How to Articulate Handbook* includes the following definition of block transfer: “Block transfer is the process whereby a block 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.” An End Note specifies further:

“Not all programs use credits. A 'block of credits' can be interpreted as a semester, or a year, the awarding of advanced standing, or any other form of learning recognition” (bccat.ca/articulation/handbook/block.cfm).

Other definitions. The Canadian Information Centre for International Credentials (CICIC) defines block transfer in its *Guide to terminology usage* as “the transfer and granting of credit for a group of completed courses from one institution to another without requiring course-by-course assessments” (CICIC, 2009, p.6 cicic.ca/docs/guide/guide2003.en.pdf). The Alberta Council on Admissions and Transfer (ACAT) defines block transfer in its Glossary of Transfer Terms as “a group of courses, such as a completed certificate or diploma program that are accepted for transfer credit into a degree program” (ACAT Homepage, 2010 http://www.acat.gov.ab.ca/new_format_include/new_glossary.asp).

The common meaning of *block* in the context of block transfer is a set or section taken as a unit; block transfer, therefore, implies the transfer of some previously agreed upon block or unit of courses. Once the individual assessment has occurred in developing the agreement, course-by-course assessment during the admissions process for a student entering under a clearly predefined BTA should generally not be necessary, as the above CICIC definition specifically states.

Application of block transfer. The BCCAT *How to Articulate Handbook* indicates that most BTAs deal with a professional or applied program, usually a diploma program, and typically refer to a specific program at the receiving institution as well as at the sending institution. A BTA does not guarantee admission unless such a provision is built into the agreement (bccat.ca/articulation/handbook/block.cfm).

Various models of block transfer are discussed in the handbook: 2+2 model, bridging model, 2+3 (or more) model, and others (bccat.ca/articulation/handbook/block.cfm). According to a strict reading of the BCCAT definition, then, the transfer of a block of credits represents the ideal. In practice, however, such a transfer takes many forms along with underlying terms and conditions and does not necessarily represent the transfer of a predefined unit of coursework.

Negotiation and completion of BTAs. According to the BCCAT *How to Articulate Handbook*, “BTAs are negotiated between institutions with exact details being worked out between departments.” *Principles and Guidelines for Transfer* (which includes *Supplemental Principles and Guidelines for Flexible or Innovative Transfer* and *Guidelines for Block Transfer Agreements* as well as a *Checklist for Negotiating a Non-Standard Articulation Agreement*, are appendices in the articulation handbook and assist with such negotiations. (Appendices A & B)

The BCCAT *How to Articulate Handbook* notes that assessment of the block to be transferred may identify deficiencies and that “receiving institutions may stipulate how and when students

must acquire the missing content.” The handbook goes on to state that “it is vital that the exact terms of all block transfer agreements are clear and transparent for students and advisors so that they understand *before transfer* exactly what the agreements entail for them.” Once a year, information on the agreement is sent upon request to BCCAT, either on the *Block Transfer Form* (Appendix C) for new block transfer agreements or arrangements or, as is often reportedly the case, by email for entry in the *BC Transfer Guide*. Sending and receiving institutions maintain their own records of the Block Transfer Agreements. The *How to Articulate Handbook* explains that there may not be enough space in the *Block Transfer Guide* for all the conditions of the agreement. Complete information on the terms of the agreement for a block transfer, therefore, is often only found in the institutions’ internal records.

Block Transfer Guide

Description of the *Block Transfer Guide*. At the close of the year 2009, 876 BTAs were listed in the *Block Transfer Guide*, a subsection of the *BC Transfer Guide*. A link on the main page of the former takes the user to a list of sending institutions of which 23 are public and three are private. The majority of programs listed for sending institutions are diploma programs; some certificate programs and bridge programs are also listed, as well as seven Associate Degree programs.

Access to receiving institutions (currently 13 are found in the *Block Transfer Guide*) can only be gained by scrolling through the sending institutions and programs. The *Block Transfer Guide* takes the form of a table with five columns: under each sending institution are columns for [Sending] Program, Receiving Institution, [Receiving] Program, Credit, and Conditions. The sending institution and program are named specifically, as is the receiving institution. In the column that identifies the receiving program, in most cases a specific credential is indicated, although one institution lists “any program”, despite the fact that the conditions column contradicts this by specifying which programs at the institution are in fact applicable for this BTA. The credit column of the grid indicates the number of credits or years or maximum credits accepted; this often reads “up to ___ credits.” The conditions column is the least specific. The words “Individual assessment” appear frequently; sometimes a referral to a university calendar or specific information is given, although no hyperlinks are provided to institution or program websites. No agreement effective dates are indicated in the *Block Transfer Guide*.

Other transfer guides and related resources in the *BC Transfer Guide*. Besides the *Block Transfer Guide*, some of the other sections accessed on the *BC Transfer Guide* homepage under the heading Other Transfer Guides include information related to block transfer. With reference to the section on Associate Degrees (bctransferguide.ca/associate/)--which do not

figure as part of the 876 BTAs other than the above-mentioned seven-- it may be noted that the Associate Degrees developed successfully out of the initiative on block transfer in the late 1990s. These generally represent a 2+2 model, by which a block of two years is accepted as 60 credits with 60 credits yet to be completed. *Program Specific Transfer Guides* (bctransferguide.ca/program/) contains both career and transfer information, including some direct links to BTAs, as under Tourism Management, found also in the *Block Transfer Guide*. Some information specific to block transfer is found through a careful search under Resources in the *Institution Specific Transfer Notes* (bctransferguide.ca/notes/).

Transfer guides from other provinces. Other provinces have produced transfer guides for post-secondary students. An easily navigable search from the ACAT homepage (ACAT Homepage, 2010 acat.gov.ab.ca), for example, takes the user, transferring either to or from an institution, to a page with selection by courses, by programs, or by courses and programs both; a hyperlink leads the user to the transfer agreement. The *Ontario College University Transfer Guide* (OCUTG) (OCUTG Homepage, 2010 ocutg.on.ca/search/servlet/search?display=e=searchindex) lists a number of search options, for example, by institution or by regional destination, and within these designations, from college to university or from university to college, or by keyword or institution transfer policy. Due to historical reasons, course-by-course transfer agreements have yet to be developed on a province-wide scale in Ontario (Constantineau, 2009, pp.2-4). A search on OCUTG, as is the case with the ACAT search for transfer agreements, leads by a hyperlink directly to the program transfer agreement with full details readily available to the user.

BCCAT website. The BCCAT website (bccat.ca) has a wealth of information meant primarily for use by the non-student population. There is information about block transfer and links to further resources that pertain to block transfer. A link to the BC Transfer Guide reads: "BCTRANSFERGUIDE.CA Course transfer details at BC post-secondary institutions" and takes the user directly to Course Search by sending or receiving institution on the *BC Transfer Guide* homepage. While the number of single course transfer agreements greatly exceeds the number of other types of transfer arrangements and warrants high visibility and ease of navigation, more direct navigation to block transfer arrangements and information would improve user access.

STUDENT MOBILITY AND BLOCK TRANSFER

Student Mobility Trends

Canada-wide mobility. Statistics Canada reports on mobility and migration in its population and demography statistics, though does not report on mobility pertaining specifically to students (Constantineau, 2009, p.1; Junor & Usher, 2008, p.7). The country's "movers" number 40.9 percent of Canada's overall and 46.6 percent of BC's total population as of the 2006 Census (Statistics Canada, 2010). Overall demographic growth for BC reported by Statistics Canada during 2009 might also be noted: British Columbia had a higher population growth rate than any other province in the third quarter of 2009, and that gain was also the largest interprovincial migration gain for the quarter (Statistics Canada, 2009, September 29 and 2009, December 23). Thus a significant degree of movement of the general population occurs in Canada, and more recently, from other parts of Canada into BC.

Student transfer paths. Students today move along a variety of pathways; they and post-secondary institution professionals no longer necessarily view the path as *upward* to universities, once the only receiving institutions. The literal meaning of *transfer* is to "carry across": students transfer credit from one institution to another. In his keynote address to the 2008 Association of Registrars of the Universities of Canada (ARUCC), Ken Steele (2008) notes that the distinction between colleges and universities is blurring in Canada. In discussing current policy issues on quality assurance in Canada, CICIC (2010, Fact Sheet No. 5, section 6), cites "diminished distinction between some universities and colleges..." and "increased student and graduate mobility."

Student mobility in British Columbia. Research conducted by BCCAT in partnership with the Student Transitions Project, as cited in BCCAT's most recent annual report (bccat.ca/pubs/ar08-09.pdf), indicates that over a multi-year period 40 percent of those who enrolled in post-secondary education in BC attended more than one institution, attending an average of 1.6 institutions over the five-year period. Results from the Student Transitions Project (www.aved.gov.bc.ca/student_transitions/documents/stp_highlights_dec09.pdf) indicate that "roughly 26,000 of the continuing registrants moved between B.C. public post-secondary institutions from 2006/07 to 2007/08, moving in multiple directions and along various pathways. These student "movers" represent 13% of all students who registered in both years."

Credit Transfer

Student mobility and credit transfer. A paper by Junor and Usher produced for the Canadian Council on Learning, *Student Mobility & Credit Transfer: A National and Global Survey* studies the joint issues of student mobility, in Canada and internationally, and credit transfer. The authors state that credit transfer systems “provide the lubricant to ensure seamless academic mobility” (2008, p.2), and that a well-established credit transfer system “can help further lifelong learning, improve and widen post-secondary participation rates, eliminate unnecessary student tuition and educational costs (mitigating borrowing for some students) and reduce post-secondary non-completion rates” (Junor & Usher, p. 19).

British Columbia is cited as having a systematic, province-wide credit transfer process with a transfer guide that lists course-by-course and program/block transfer of credits that are available to students. Students have a greater ability to transfer their credits in BC as well as in Alberta, the report states, than elsewhere in Canada (Junor & Usher, 2008, pp.24-25).

Barriers to mobility. Barriers to student transfer may exist in all jurisdictions, however. The above-mentioned paper lists three main barriers (Junor & Usher, 2008, p.4):

- insufficient information for students on mobility opportunities
- inadequate financial resources
- absence of credit recognition, including absence of recognition of prerequisite course requirements

In their discussion of credit transferability in Canada, Junor and Usher provide a clear explanation of the third main barrier, absence of credit recognition, particularly when caused by the lack of recognition of prerequisite courses (2008, pp. 21-22), that is, core courses that the receiving institution stipulates must be taken before a credential may be earned. They describe this barrier as a problem more difficult to manage than recognition of credits in general, and one that affects all jurisdictions in Canada (Junor & Usher, pp.22, 31).

A review of student mobility as it relates specifically to BTAs in BC should take into account two of these potential barriers: availability of information on block transfer and the ease of transferability of blocks of credit, including the recognition of prerequisite course requirements that directly affects the effectiveness and efficiency of block transfer arrangements.

Users of the *Block Transfer Guide* and the *Block Transfer Guide User Survey*

User statistics as maintained by BCCAT. The *Block Transfer Guide* is intended to provide information to students about block transfer opportunities, such as program/block transfer arrangements between institutions. Other users, such as academic advisors, guidance counsellors, teachers, and parents also consult the *Block Transfer Guide*.

The following user statistics from January to the end of November 2009 compare the number of visits to the *Block Transfer Guide* with visits to the *BC Transfer Guide* as a whole. Visits to the *Block Transfer Guide* represent three percent of visits to the *BC Transfer Guide* (though a user of the *Block Transfer Guide* could visit more than once while at the *BC Transfer Guide*, but this multiple use only counts as one visit). With over 115,000 course transfer agreements listed in the *BC Transfer Guide*, it's understandable that the use of the *Block Transfer Guide* which lists less than 900 agreements is significantly lower; however, it's also likely the user percentage of the latter would be higher if more information and a greater ease of access and use regarding block transfer were available province-wide.

	<i>Block Transfer Guide</i>	<i>BC Transfer Guide</i>
January	1373	45,774
February	1231	34,770
March	1508	49,196
April	1090	44,539
May	1222	39,659
June	1557	50,116
July	1527	54,019
August	1278	46,737
September	1352	48,424
October	1702	47,566
November	<u>1611</u>	<u>62,839</u>
	15,451	523,639

Developing and posting the *Block Transfer Guide User Survey*. Survey questions were developed by the contractor to learn:

- who the *Block Transfer Guide* users were
- what plans they might have for transfer and the kind of block they would use
- what their knowledge of block transfer was prior to coming to the *Block Transfer Guide*
- how they had acquired this knowledge
- how satisfied they were with their use of the *Block Transfer Guide*
- what their next steps might be in looking into block transfer options

It was recognized, and confirmed in discussion with BCCAT staff, that most students would likely come to the *Block Transfer Guide* seeking information prior to rather than after transferring under a BTA. Consequently, they would be unable to provide insights into credit transfer satisfaction or success upon entering an institution with a BTA; questions on outcomes of block transfer and credit transfer would, therefore, serve no purpose.

The web-based survey was posted on the homepage of the *Block Transfer Guide* for three months, from September 1 to November 30, 2009. A total of 54 users completed the survey, that is, 1.2 percent of total users of the *Block Transfer Guide* for the three months. (See Appendix D: *Block Transfer Guide User Survey: Survey Results*)

General observations. Given the low response rate, the survey findings will not be analyzed in depth. The main findings are listed below:

- The majority of respondents were using the *Block Transfer Guide* for the first time, finding it mainly through an Internet search and often unaware of block transfer or BTAs prior to coming to the site.
- Over half of the survey respondents (29 out of 54) were students: post-secondary students in BC, those in another province, and those returning after a break of more than a year. Another 18 respondents indicated they were not currently students but were looking into possible block transfer opportunities, while seven respondents indicated “other”, though of these, three appeared to be students as well.
- Two thirds of the respondents indicated they were planning to transfer to a post-secondary institution in BC.
- One user was an advisor in a BC post-secondary institution who expressed hope for a Canadian transfer database.
- More than half found what they were looking for; some said there was not enough information or that they had trouble finding out-of-province and out-of-country transfer information.
- All but six users were either “Satisfied” or “Highly satisfied” with the user-friendliness of the guide.
- More than half were looking for block transfer credit for a diploma.
- A majority of respondents said they would follow up with further action after using the *Block Transfer Guide*.

BC POST-SECONDARY INSTITUTIONS AND BLOCK TRANSFER

A Look at Post-Secondary Institution Websites

Importance of the Internet. The Internet is the undisputed prime source for fast information, and increasingly, the medium for interactive participation and discussion. Institution websites, therefore, are critical to providing and maintaining current, useful, and clear information for students, staff, and faculty, as well as for prospective students and other interested parties who will become *more* interested and satisfied if the information is presented to draw the user in.

Variations naturally abound; just as the institutions themselves vary in many ways, so too do their websites. The focus here is on block transfer with regard to:

- accessibility and visibility of information on block transfer opportunities and arrangements
- links to other pages or websites
- amount of detail given on credit transfer and recognition
- direct access to BTAs
- use of terminology as it relates to block transfer
- consistency with the *Block Transfer Guide*

Website navigational pathways. With respect to transfer options and information, especially pertaining to particular programs, there is a considerable range of clarity and presentation. Several excellent examples of program sites with clear, well-presented and useful information on block transfer are presented below:

cotr.bc.ca/HumanKin/cotr_web.asp?IDNumber=158 (accessed December 21, 2009)

This is the Human Kinetics program page of College of the Rockies (COTR). There's clear information and a link to transfer credit information with a further link to the *BC Transfer Guide* and to COTR transfer agreements, from which there are more links, including one to the COTR grid of the *Block Transfer Guide*. The navigational pathways are easy to follow and lead to relevant information.

unbc.ca/esm/transition_laddering_agreements.html (accessed December 21, 2009)

This is the University of Northern British Columbia (UNBC) program outlining the Technologist Diploma Transfer Agreements for diploma programs, such as Forest Technology, which transfer to UNBC's Ecosystem Science and Management Program.

Transfer agreements for which there are links have explicit transfer information on credit transfer and credits yet to be completed.

camosun.ca/learn/programs/nursing/index.html (accessed December 21, 2009)

This is the Nursing homepage of the Camosun College Baccalaureate of Science Degree in Nursing (BSN) offered in partnership with University of Victoria: two years and four months at Camosun and what remains of the four-year program completed at UVic. There is a link to Education and Transfer Opportunities and one to the University of Victoria School of Nursing homepage.

camosun.ca/learn/programs/envr/ (accessed December 21, 2009)

This homepage for Camosun's Environmental Technology Diploma links this block transfer to Royal Roads University and its B.Sc. in Environmental Science homepage. There is also a link to Camosun's Academic Advising homepage.

Navigation from institution homepages to transfer information and opportunities varies too, as a comparison within BC and also with other Canadian post-secondary websites reveals. Alberta's SAIT Polytechnic homepage (SAIT Polytechnic Homepage, 2010) shows a clear link for students coming to that institution to the SAIT Transfer Options page (sait.ca/pages/cometosait/transferoptions/index.shtml, accessed December 29, 2009), including further links to information and to a Transfer Options fan page on Facebook. Royal Roads University (Royal Roads University Homepage, 2010) shows the heading Transfer Agreements, listed with other headings beside an interactive recruiter blog, (royalroads.ca/admissions/transfer-agreements, accessed January 5, 2010), once the prospective student has clicked on Info Sessions or Admissions on the homepage. The Transfer Agreements heading takes the user easily to the agreements themselves.

Navigation on some BC institution homepages, either for prospective students coming in who may be interested in transferring credit earned at that institution at a later date, or for students seeking information on transferring credit already earned, is not as user friendly or clear. In some cases, no obvious links lead to further information.

Block transfer terminology. References to "block transfer agreement", "letter of understanding", "transfer agreement", or "articulation agreement", are all found on various websites. Many, but not all, are included as BTAs in the *Block Transfer Guide*; such variation in terminology causes confusion as to whether the institution regards these agreements as *block* transfer agreements.

Access to BTAs. As seen above, sometimes details of the actual agreements are available; on other sites, there is little information or little that is easily accessed on the terms and conditions of the agreements.

Level of consistency between institution websites and the *Block Transfer Guide*. Cross checks reveal some notable inconsistencies. BTAs found on institution websites are not all identified in the *Block Transfer Guide*. Some transfer programs, such as the first year of prescribed coursework leading to a second year at another post-secondary institution, are not listed in the *Block Transfer Guide*. Some institutions, listed in the *Block Transfer Guide* as *senders* only, nonetheless show block transfer arrangements on their website as *receiving* institutions. One receiving institution with program transfer arrangements on its website does not appear in the *Block Transfer Guide* at all.

These inconsistencies were seen by the contractor in the summer and fall of 2009, following the annual update of the *Block Transfer Guide* in June 2009.

Talks with Professionals on Block Transfer and BTAs

Why the talks? The contractor talked to people in a variety of positions and institutions to become more familiar with the major issues related to block transfer and the BTAs. A total of 21 individuals from 14 BC institutions were contacted, including registrars, admissions officers, advisors and faculty. A few names of institutional contact persons (ICPs) and articulation chairs experienced in transfer issues or in some way involved with block transfer arrangements were given to the contractor. Other individuals were contacted as well; however, being summer, some potential contacts were not available.

Support for BCCAT and support for block transfer and BTAs. Those contacted, willingly and generously set time aside to meet or talk by telephone with the contractor, perhaps due in part to the overall support they expressed for BCCAT and its leadership role in BC and across the country. The discussions were insightful and raised questions which were introduced into the block transfer survey. There was overall support for block transfer and BTAs. One registrar, for example, who during her own course of studies had transferred under a BTA, said how much easier a seamless block transfer was for students. She stated firmly that BTAs were “critical” to their institution. Another registrar said that BTAs were “absolutely worthwhile,” especially for students entering their institution from private institutions. A department head described BTAs as “a lifeline,” and another faculty member said that BTAs enabled “the greatest ease of transfer for students” to their department.

Uncertainties and concerns. While there was strong support, the discussions also suggested fairly pervasive uncertainties as to how aware staff and students are of BTAs, where and how to find them, and what they “actually” mean as opposed to course-by-course agreements. One person was “curious” as to whether a BTA was “really” a BTA at other institutions, another said she was “nervous” about labeling the agreements as *block* (in that nothing was as smooth as it appeared), while another questioned the usefulness of the *Block Transfer Guide*. A number of individuals questioned the transparency of the block transfer agreements, especially with regard to prerequisites, and indicated that prerequisites posed a challenge to smooth block transfer.

Desired changes. A few individuals expressed an interest in hearing more about whether anything further could be done by BCCAT to assist BC’s institutions to pursue articulation outside of the province. Overall, a consistent and strong voice came through the various discussions in support of the following:

- block transfer and BTAs
- clearer BTA terms
- a more up-to-date *Block Transfer Guide*
- better promotion of BTAs within their institutions and by BCCAT

Block Transfer Professionals Survey

Developing and posting the *Block Transfer Professionals Survey*. Following a review of secondary sources and the information-gathering meetings, a survey to elicit information on block transfer and BTAs from representatives of BC Transfer System institutions was developed. The 22-question survey contained the following sections:

- Section 1: Understanding and accessibility of block transfer and BTAs
- Section 2: Creation, implementation, and maintenance of BTAs
- Section 3: Use of BTAs and institutional resources
- Section 4: Benefits and challenges of BTAs
- Section 5: *BC Transfer Guide* website re block transfer and BTAs
- Section 6: Additional comments

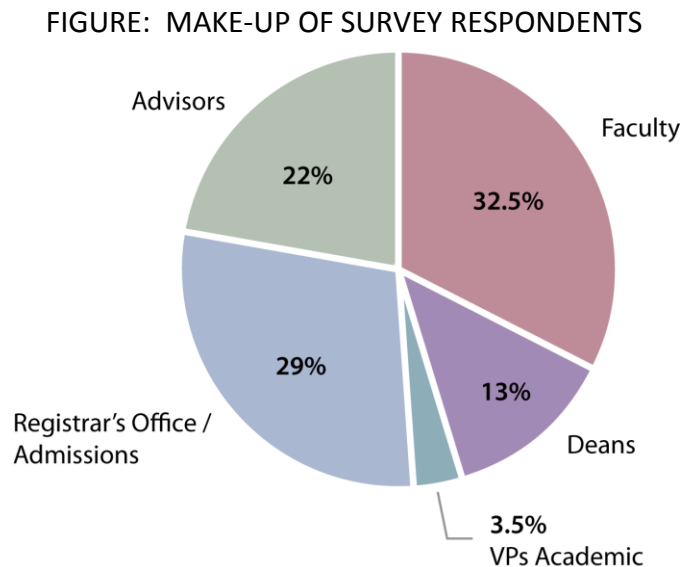
With the technical support of BCCAT, the web-based survey was posted on October 6, 2009 and remained online for six weeks until November 13, 2009. The survey targeted professionals presumed to be familiar with articulation and was sent out to articulation chairs and system liaison persons (SLPs), members of the BC Academic Advising Association (BCADA), BC Associate Registrars & Managers Association (BCARMA), and BC Registrars Association (BCRA), and to

ICPs, as well as to the BCCAT Transfer & Articulation Committee members. Survey recipients were requested to forward the survey to others in their institutions with BTA experience. For the respondents' ease of reference, a list of BTAs was attached to the email notification of the survey.

Completed surveys. BCCAT staff estimated that the recipients numbered 300 to 400; of these, 114 returned completed surveys. (See *Block Transfer Professionals Survey: Survey Results by Excel spreadsheet, Appendix E.*)

In addition to answering multiple choice questions, for which there are tables in the Excel spreadsheet showing both the number of respondents and percent of the total respondents who selected each option, respondents added a total of 281 individual comments. Where comments are cited in this report, minor typos have been corrected and a few clarifications in square brackets have been added. The first number after each quotation corresponds to the survey question number and the second to the specific response number under that question, as found in the Excel worksheet listing all the individual comments (labelled Comments) of the spreadsheet cited above.

Make-up of respondents. Advisors, Faculty, Deans, VPs Academic, Registrars and staff from the Registrar's Offices and Admissions comprise the various sectors that responded to the survey. The pie chart below shows an approximation of respondents by position.



Survey findings: general observations on consistency. Despite the varied professional positions, as seen above, there was considerable consistency across the sectors, with only certain differences of opinion that will be noted below. For six of the 20 multiple choice questions, for example, all sectors (that is, the greatest number of respondents in all sectors) selected the same option. Survey findings also showed a consistency throughout the six-week period within which the surveys came in; for example, 60 surveys returned after the first two weeks showed responses that corresponded to a great extent to 87 returned by the end of week four, and to the 114 returned by the end of week six. Finally, as will also be noted below, the survey findings corroborated the contractor’s preliminary findings gained through in-person and telephone conversations with professionals.

Survey findings by key emergent issues.

Both an understanding and a questioning of the meaning of block transfer and BTAs were indicated by respondents. Eighty-three percent of respondents indicated they had a “High” understanding of the BCCAT definition of block transfer; moreover, in each sector, the majority indicated a “High” understanding.

Yet, in the comments there was a questioning as to what “real” or “genuine” block transfer was, and confusion was expressed as to why some agreements were block and not others:

But in practice we seem to be using the phrase “block transfer” too widely, to apply to situations where “block transfer” as such does not really exist. For example, see all of the so-called block transfer agreements in which student course work is “subject to individual assessment”. In cases like this, has the essential meaning of block transfer been lost? (2, 5)

I offer a diploma in criminology with block transfer to RRU. However that diploma also transfers directly to SFU 3rd year criminology but is not referenced as “block transfer”. This leads to some confusion with myself and students. (2, 4)

Responses to questions elsewhere in the survey returned to what a BTA “actually” meant, for example:

There remains confusion throughout the institution on what a BTA is, how it works and how it should be defined and marketed. (4, 6)

Overall support for Block Transfer Agreements was expressed, with caveats. The second highest level of agreement was for Question #15; 69 percent of respondents and the majority in each sector affirmed BTAs were an effective supplement to course-by-course credit transfer.

15. Are BTAs an effective supplement to course-by-course credit transfer for students?			
	Yes	No	Unsure
Percentage of total respondents: (Number of respondents)	69% (79)	18% (20)	13% (15)

“Absolutely!” (15, 4) one person responded. Others said how much simpler block transfer was for students and for the institution. There was an indication throughout the survey responses that institutions wanted to have more such arrangements, both within and outside of BC. Forty-one percent of respondents felt that block transfer programs could increase enrolment, and forty-one percent indicated a “High” desire to establish BTAs with institutions in other provinces. “We are fully dependent on them” (14, 17), one said.

However, respondents also expressed misgivings that pertained to the nature of *block* and to the effectiveness per se of block transfer:

There does not appear to be much difference between the two [BTAs and course-by-course transfer] in practice. The same process occurs regardless of type. (15, 5)

Within the block we still break out courses on a course by course basis. (15, 11)

Do not want to answer yes or no to this question. BTAs do not supply students with all the information they require as to whether or not they have met pre-requisites for upper division work or what specific credit they are being awarded. It indicates they receive 30 or 60 credits... I would like to see a link set up in the block transfer form [guide] attached to the program granting the block credit taking the student to the home page of the institution’s program. The program can provide whatever information for the students they wish for.... (15, 10)

Accessibility of BTAs was “Low”. While faculty and deans rated accessibility of their institutions’ BTAs as “Medium”, the other sectors indicated “Low”. Some respondents indicated they could access BTAs at the registrar’s office or on their institution’s website, but most of the comments on accessibility of BTAs expressed concerns:

Not highly advertized or published. (4, 3)

Difficult to track down. (4, 9)

I don’t have the foggiest idea, actually. (4, 15)

Our BTAs are not located at the Registrar’s office—I think they should [be]- thus I am not aware of the contents. (5, 7)

Not available on our institution's website. Reference rarely made to it. (4, 14)

Use of BTAs was rated "Low", and respondents were generally unaware of the tracking of block transfer students and their success. Some comments suggested that the use of BTAs was lower than it once was. Others said they were planning to have more BTAs, while another commented that "...at least they WOULD be used by students if they were more readily available and transparent." (10, 9) Some programs, however, were making consistent use of BTAs:

100% of our students transfer to a specific receiving institution for the last 18 months of the program. We receive a small number of students from other institutions who share the same curriculum. (10, 1)

There was uncertainty as to whether students entering through block transfer were tracked: an overall 43 percent indicated they were "Unsure", although the greatest number of respondents from the Registrar's Office/Admissions sector answered "No" to tracking of students entering under BTAs. Likewise, 44 percent of overall respondents were unsure regarding the success of students who transferred; this response came from all sectors. Notably, only one individual out of all survey respondents indicated "Low" in response to the success of students, and additional comments indicated that anecdotal evidence suggested the success rate of transfer students was not a concern.

Resources were reported stretched and processes unclear. Workload issues came through in the survey responses. Respondents reported doing block transfer work off the side of their desk or that they didn't have time; one said that "...resources at the individual institutions are sometimes slim to none..." (22, 2) Some institutions said they had a designated person to coordinate block transfer credit, sometimes as part of the job portfolio; more answered that they did not. Others said the load was shared by several.

Even more concern was expressed about processes. Sometimes the process was "difficult for students," (12, 2) or it was "way too slow" (8, 11) or "all very ad hoc." (8, 6) Inadequate processes and lack of communication were mentioned by one respondent who expressed strong dissatisfaction that changes were made and BTAs removed from the *Block Transfer Guide* by the institution without program consultation:

... The impact of such failures of communication...can be crippling and is difficult and time-consuming to repair. (8, 12)

Concerns were expressed that BTAs are not always clear or kept up-to-date. Across all sectors, the general view was that two to six months was a reasonable length of time for two institutions to complete a BTA. Less than that did not seem feasible to many, while more than that might be necessary if the agreement was complex or other factors prevailed. There was a

suggestion by several respondents that the creation of BTAs used to be higher. A response to a question on the clarity of terms and conditions of the BTAs came in at an overall “Medium” level; faculty, however, indicated “High”.

As it is a combination of admission requirements on our side and the block transfer, sometimes it [the BTA] needs clarification with regards to GPA and prerequisites. (5, 6)

Comments indicated concerns regarding the maintenance of the BTAs, although some satisfaction was expressed as well.

I knew what a BTA was, I’m not aware we do anything to maintain them. (3, 4)

Agreements are not reviewed by depts once they have been created—sometimes they don’t even know they have one! Articulation staff at our institution has not been a priority. (8, 7)

Agreements being worked on are outlining the above information more clearly. (5, 1)

A thorough transfer matrix exists and is maintained. (5, 3)

Transfer by BTA from one institution to another was viewed as both problematic and smooth.

The greatest number of individual comments came in response to Question #17:

17. The Block Transfer Guide (<http://bctransferguide.ca/block/>) states: “The advantage of block transfer is that the entire program will transfer, even if some of the individual courses do not have transfer agreements”. Has the fact that some individual courses do not transfer course by course within a specific BTA caused objections or problems at your institution?

	Yes	No	Unsure
Percentage of total respondents: (Number of respondents)	28% (32)	40% (46)	32% (36)

The comments tended to clarify or expand on the problems such as additional credits needed for completion, prerequisite courses, and student reactions. As this question generated considerable response, a number of the comments are cited:

Students may still have to complete additional bridging curriculum to complete degree requirements—sometimes that may mean in excess of 120 credits for a degree, but we create flexible options whenever possible. (17, 2)

This is a huge stumbling block—our registrar does not recognize block transfers in that they still do course-by-course evaluations for a student entering with a block program. (17, 4)

Pre-requisite issues occur. (17, 5)

Students receive block transfer into a third year program, but do not have the individual pre-reqs needed for 3rd and 4th year classes. They must then request waivers in order to register for these courses. (17, 6)

Students can be very adamant that some of these courses have covered the content of a UT course in question. Especially if it is in an area that is required for degree completion, they do not appreciate having to “retake the course” Finance is a huge issue. Colleges, technical institutes, should take into consideration the requirement from the 1st and 2nd year universities that their students are normally transferring to and verify if they are covering this information with the student[’s] and the program[’s] best interest. (17, 11)

In cases where all of the courses do not transfer, students are upset that they must complete additional courses in order to complete a degree. (17, 15)

In my experience discussion with incoming students has always been adequate to contextualize and alleviate any such concerns. (17, 16)

A respondent to an earlier question on out-of-province block transfer arrangements indicated that some students transferred to certain institutions in Alberta because they were aware of the transfer agreement, the sending institution had clear information about the transfer agreements, and the arrangements worked well, adding, “...it is easy for students to navigate efficiently from one institution to another.” (9, 4)

While difficulties having to do with prerequisite courses, as discussed earlier, were made apparent by some respondents, honouring of the BTAs by receiving institutions did not appear to pose problems. While 53 percent of respondents were “Unsure”, only five percent (six respondents) rated this “Low”, that is, problematic.

Suggestions were made for improvements to the *Block Transfer Guide*. Forty-three percent of survey respondents were “Unsure” about the currency of the *Block Transfer Guide*. Some suggested that the guide be updated more frequently than once a year: “departments need to review and remove a few agreements;” (19, 3) “some are missing.” (19, 5) One respondent commented, “I think we have more BTAs than are listed in the transfer guide.” (19, 13) One respondent suggested that many of the BTAs

need to be revisited and the actual documents somehow [be made] available for both students and institutions to easily access e.g. like an official course outline. (22, 21)

Ratings on user-friendliness and transparency of the guide were “Medium” across all sectors, though comments suggested a variation of opinion: from easy to difficult to use and from being transparent to oversimplifying the current status of an existing BTA. One respondent suggested that it would be helpful to be able to search by receiving institution.

The *Program Specific Guides* were rated across all sectors as “Medium”, but again the respondents offered various opinions. One respondent felt this area was not used by student advisors or by the registrar’s office and required more attention, and another said that perhaps it should be renamed.

Additional suggestions. Additional comments provided at the end of the survey strengthened and corroborated earlier comments given under specific questions, as well as comments made by individuals in the background discussions with the contractor. The additional comments underline the key issues that emerge from this survey of professionals:

- a questioning of the meaning of block transfer and of “individual assessment required” as it appears in the Block Transfer Guide
- overall support for block transfer and BTAs, both in and out of province, though a desire for greater acceptance of “true” block transfer across all sectors within institutions
- a need for ease of accessibility to BTAs, both the documents and the agreement terms
- a need for clear BTA terms and effective dates
- a need for up-to-date information on the BTAs
- a need for standardized, clear processes and communication within and across institutions
- improvements to the *Block Transfer Guide*, particularly with regard to currency, addition of relevant hyperlinks, and ease of navigation

CONCLUSIONS

Conclusions, drawn with respect to block transfer and the use of BTAs in BC post-secondary institutions, consider the following sources of information:

- BCCAT resources and other secondary data available on block transfer, the definition of block transfer, and institutional practice
 - secondary literature on BTAs in the context of student mobility and credit transfer
 - institution websites and those maintained by BCCAT with regard to accessibility, visibility, terminology, consistency, and currency
 - preliminary discussions with institutional representatives familiar with block transfer of students and the use of BTAs within their institutions
 - primary data provided by this contractor's two 2009 surveys: one posted for users of the *Block Transfer Guide* and one for BC post-secondary institution professionals presumed to have experience with block transfer and their institution's BTAs
1. British Columbia post-secondary institutions want to expand seamless block credit transfer within BC and inter-provincially.
 2. Current BTAs that work well provide clear transfer options, are promoted and understood, and are supported by clear terms and effective communication channels.
 3. Flexibility applied to the definition and models of block transfer has led to confusion as to what block transfer *really* means and what BTAs signify.
 4. Difficulties in accessing and understanding BTAs and their specific terms and conditions detract from the effectiveness and use of block transfer.
 5. Low use of BTAs by students results in missed opportunities and possibly financial hardship, though system-wide data on the success and the satisfaction level of block transfer students is not available.
 6. Lack of clear, up-to-date information and processes regarding BTAs increases confusion and already heavy workloads of faculty and staff.
 7. Changes made to improve the effectiveness of BTAs would improve portability of transfer and enhance student opportunities.

RECOMMENDATIONS

Supported by the findings and conclusions of this evaluation project, the following recommendations aim to improve the effectiveness of BTAs in the BC Transfer System:

- 1. Ensure that all BTAs provide clear, specific details on credit transfer, and encourage institutions to negotiate more block transfer in the strict sense, that is, the granting of a block of credits for a block of courses.**

Increase the effectiveness and efficiency of block transfer by eliminating or reducing where possible the need to assess course-by-course within the block. Ensure that any remaining bridging or prerequisite or other course requirements are specified clearly in the BTAs.

- 2. Consider a change of name from Block Transfer Agreement to Program Transfer Agreement and from *Block Transfer Guide* to *Program Transfer Guide*.**

Eliminate the confusion resulting from the BTAs which are not block in the strict sense, though this may necessitate a review of the name and overlap of the existing *Program Specific Transfer Guides*; otherwise, clarify that these agreements are part of block transfer and that they are entered in the *Block Transfer Guide* regardless of institutional terminology used (e.g., transfer agreement, articulation agreement).

- 3. Revise the current Block Transfer Form, with full consideration given to the development of an electronic form, and ensure that the form requires definitive details on agreement terms and dates for renewal or cancellation of the agreement.**

Require this standard form for all institutions and that the specifics from the form such as admission requirements, credit transfer and credit yet to be achieved, be entered into the *Block Transfer Guide*, or that the completed form itself be provided as a hyperlink; moreover, that completed forms be stored online in a centrally agreed upon, accessible location.

- 4. Improve the currency of the *Block Transfer Guide*: request a review of all BTAs currently listed as well as verification that agreements currently in use are entered in the *Block Transfer Guide*.**

Ensure that institutions submit all changes, including any program name changes, revisions, and cancellations, in addition to newly created BTAs.

- 5. Provide greater accessibility, visibility, and ease of navigation related to block transfer information on BCCAT-managed websites.**

Increase visibility of the *Block Transfer Guide*, and consolidate and make more obvious to users information on block transfer and BTAs such as that currently appearing under

the headings Other Transfer Guides and Resources of the *BC Transfer Guide*. Increase usefulness and navigation in the *Block Transfer Guide* through links to relevant institution and program website pages.

6. Encourage institutions to review their homepages and program pages for clear BTA accessibility and navigation links as well as for consistency with the *Block Transfer Guide*.

7. Define more clearly the roles and responsibilities of the institutional contact persons (ICPs) and transfer credit contacts (TCCs), and encourage each institution to have a designated position specifically responsible for block transfer arrangements and processes, known throughout the institution, and filled by a person who is knowledgeable about block transfer.

8. Facilitate a review of existing resource materials and processes in place for the creation, implementation, and maintenance of BTAs.

Aim to meet the following objectives: that faculty are familiar with negotiation and assessment procedures, agreed upon timelines, and protocol for new BTAs, and that faculty aim to recognize prerequisite coursework wherever possible; that appropriate communication and consultation assists in facilitating clearly defined procedures for BTA creation and maintenance; that advisors have fast access to reliable and current BTA information, and that articulation staff have less need to assess course-by-course. Use the recently established Joint Annual Meeting (JAM) of articulation committee chairs, system liaison persons (SLPs) and ICPs as a forum to improve processes and promote greater communication relevant to block transfer.

9. Determine the next steps to facilitate negotiations of out-of-province block transfer arrangements.

Develop further initiatives and ways to support and encourage institutional commitment for intra- as well as interprovincial student mobility.

10. Encourage institutions to develop a method of identifying students admitted through a BTA, thereby enabling the collection and analysis of block transfer information to improve the effectiveness of BTAs.

Use the Student Transitions Project to track the movement of credits, including through BTAs, by aggregate credit volume per student, and the success rate of students to improve the overall effectiveness of BTAs.

APPENDICES

Appendix A: *Principles and Guidelines for Transfer*

bccat.ca/articulation/principles.cfm

Appendix B: *How to Articulate Handbook – Appendix D: Checklist for Negotiating a Non-Standard Articulation Agreement*

bccat.ca/articulation/handbook/appendixd.cfm

Appendix C: Block Transfer Form (from *How to Articulate Handbook -- Appendix E*)

bccat.ca/pubs/newblockagreement.pdf

Appendix D: *Block Transfer Guide User Survey: Survey Results* (Excel attachment)

Appendix E: *Block Transfer Professionals Survey: Survey Results* (Excel attachment)

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