

Elements of an Effective Transfer System

*Common and Recommended Elements of an Effective Transfer System and the BC Transfer System.
A BCCAT Special Report prepared by John FitzGibbon, Associate Director, Transfer and Articulation.*

INTRODUCTION

Over the years BCCAT has responded to the changing BC post-secondary environment with reviews of policy and procedures and has made changes where appropriate. For example, *Innovative Transfer Models* published in 1999 reviewed flexible pre-majors, descriptive pathways, and block transfer in applied programs as possible supplemental processes to the existing course-by-course transfer process in the province (BCCAT 1999). As a result of changes to the post-secondary system during the 1990s and 2000s BCCAT revised the *Principles and Guidelines for Transfer* and developed procedures for public, private and out-of-province institutional articulation. The major revision to the BC Transfer System came at the end of the 2000s with the decision to enable all institutions in the BC Transfer System to act as both senders and receivers thereby acknowledging the change in student mobility patterns from linear college to university pathways to more diverse mobility patterns. From 2005 to 2009 BCCAT undertook a major review of the BC Transfer System, *Recalibrating the BC Transfer System* (BCCAT 2006). Many of the recommendations emanating from this process were captured in the discussion paper, *Does BC have an Effective Transfer System* (Finlay 2008), which referred to transfer practices in other jurisdictions and suggested that BCCAT continue to look for greater efficiency and streamlining of the province's transfer and articulation system.

This paper reviews the common and recommended elements of transfer and articulation policy in the US. The BC system of higher education was modeled on that of California and bears many similarities to policies and practices in US states, making such a review a good touchstone and reference.

This paper reviews the common and recommended elements of transfer and articulation policy in the US. The BC system of higher education was modeled on that of California and bears many similarities to policies and practices in US states, making such a review a good touchstone and reference. While higher education systems and cultures vary across the US, there is significant transfer and articulation activity across the country making comparisons worthwhile.

The table below is a compilation of common and recommended articulation and transfer elements in the US culled from the literature. In the sections below, each element has a short explanation and an indication of the relevance of the element to the BC post-secondary context. Many of the common elements are drawn from Smith's 2010 review of transfer and articulation policy change from 2001 to 2010 for the Education Commission of the States and are indicated by one asterisk. These elements are noteworthy in that the numbers of states incorporating the practice in 2010 were listed in the review. Other elements that are common to many states are listed in the 2009 Western Interstate Commission on Higher Education (WICHE) review of best practices in statewide articulation and transfer systems. They are indicated by two asterisks. Recommended elements—denoted by three asterisks—are those of Hezel's 2010 compendium of promising practices in statewide articulation and transfer produced for WICHE.

In reviewing the elements, one should be aware of the differences in post-secondary culture and purposes of states' transfer systems. For example, a number of authors note that transfer and articulation policies can be intended to ease transfer for students intending to move institutions or can be intended to increase the likelihood of transfer. However, few studies compare effectiveness of policies across states in either increasing or easing transfer (Anderson et al, 2006). Elements bolded are suggested as those worthy of more investigation in the BC context and are expanded upon at the end of the table.

COMMON AND/OR RECOMMENDED TRANSFER & ARTICULATION POLICY ELEMENTS

Common and/or Recommended Articulation Element	Number of US States (2010)	Description	BC Transfer System Perspective
Statewide Policy*	36	Legislatures and PSE systems adopt articulation policies at the state level in areas such as education core or associate degree transfer.	BC PSIs are autonomous in governance and have the responsibility of negotiating transfer and articulation. Ignash and Townsend (2001) would classify BC's PSE system as deregulated although the province's government and institutions have established a coordinating agency, set up a system of articulation committees, and adopted a common set of principles and practices.
Cooperative Agreements*	46	Cooperative agreements between postsecondary institutions for course-to-course and block transfer in academic and high-demand career programs.	BC institutions negotiate bi-lateral and multi-lateral agreements including course-to-course transfer, dual credit, dual admission, block transfer, major pathways, and collaborative degree programs.
Transfer Data Reporting*	37	Data collection on transfer and student persistence, integrated student record data systems enabling tracking across the post-secondary system.	The Personal Education Number (PEN) has been in place from 2003 with regular reporting on student mobility. As with US states, the PEN does not extend to private institutions, the apprenticeship system, or to other provinces and reporting on mobility outside the public system is not possible at this time.
Incentives and Rewards*	22	Financial aid, guaranteed transfer, or priority admission to promote vertical transfer.	The BC Transfer System was set up to enable students to transfer credits but not to increase transfer per se so financial incentives may not be appropriate. However, there are no disincentives for students to transfer and a small scholarship is available for transfer students. ¹
Statewide Articulation Guide*	35	Transfer guides online course catalogs, degree audit tools aimed at students, advisors and faculty.	BCCAT maintains an online database of current and archived course equivalencies and block transfer agreements, program matrices, and information relating to non-articulated programming such as Adult Basic Education and ESL. Recent changes included information linking course equivalencies to Flexible Pre-majors. Non articulated case-by-case transfers are not available on the provincial database.
Common Core Transfer*	34	General Education core courses to fulfill graduation requirements. Many states have identified core learning outcomes as alternatives to courses.	BC does not have provincial policy or institutional agreement on what would constitute a common core for Arts and Science although some disciplines (English and Mathematics) have developed common aims or outcomes for first year courses.

¹ See Ike Barber Transfer Scholarships at: <http://www.ikbbc.ca/web/transfer>

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Common Course Numbering*	18	Course numbers at community colleges and four-year universities are identical.	BC's course equivalency database acts as a reasonable alternative to common course numbering although the system requires that agreements in the database are kept current and outdated ones are maintained for students who wish to obtain credit for a course no longer offered or articulated.
Specific performance goals tied to funding**		Applied to two- and four- year institutions linking funding to performance outcomes.	Since BC's system was set up to enable students to transfer rather than to promote transfer, performance goals related to transfer may not be as relevant as goals related to the efficiency of credential completion.
Statewide transfer and articulation agency or committee**		Representatives from two- and four-year institutions and governing boards may have legislated and fiduciary responsibilities.	BCCAT is a committee appointed by the Minister of Advanced Education and has no legislative authority. Representation on the 19 member Council includes the major elements of the public and private post-secondary system including faculty and administrators with responsibilities related to academic programming, admissions, and credit transfer.
Designated Transfer Advising Service Centres**		At both sending and receiving institutions.	BCCAT offers provincial-level information on transfer and individual institutions maintain academic advising services.
System wide Principles***		Ignash and Townsend (2000) compiled seven principles from their review of US practice and Indiana and Missouri have statewide principles for transfer and articulation.	Principles and guidelines for transfer and articulation were formulated and approved by universities and colleges in 1976 and 1977. BC Principles of Articulation and Transfer were adopted by the Council in 1993 with Supplemental Principles and Guidelines for Flexible and Innovative Transfer as well as Guidelines for Block Transfer approved in 1999. The current set of Principles and Guidelines was approved by Council in May 2010.
Program Major Pathways***		A number of states including California and Alabama, have developed or supported "major pathways in high demand disciplines or disciplines subject to accreditation or licensing" (Hezel 2010, p. 7).	BC articulation committees have developed Flexible Pre-Major (FPM) agreements in a number of disciplines allowing students at a sending institution to take lower division courses that will satisfy the degree requirements at a number of receiving institutions. The articulation committees developed the structure and content of the FPMs but operation of them is conditional on institutional agreement to participate. It is not possible to track the number of transfers facilitated by these agreements.

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Faculty Involvement***		A number of states including Utah, Wyoming, and Arizona have disciplinary committees or task forces that meet to discuss statewide transfer and articulation policies. Faculty may also be represented on state boards or agencies.	The foundation of the BC Transfer System is the 68 faculty-led articulation committees, which meet on an annual basis to discuss institutional programming in enough detail to ensure that there is equivalency across institutions and credit transfer is possible. They also create the connections and information sharing within disciplines and across institutions that facilitates those agreements being maintained during the rest of the year. Faculty are also represented on the provincial council and its standing sub-committees, which deal with provincial-level policies and practices.
Guaranteed Admission***		Some US states, e.g., Florida and Nevada, have implemented guaranteed admission for graduates of two-year colleges who have met all of the transfer benchmarks such as completion of general education or common core courses.	A number of BC institutions have agreed on dual admission and joint-degree programs that guarantee student progression towards a degree. Gelin and Paterson-Weir point out that, “as a system, BC has never offered guaranteed admission and transfer students take their chances within a competitive admissions environment” (2011, p.2).
Alternate Pathways to Degree Completion***		In the US this can mean “reverse transfer” or pathways from career-oriented programs to a university degree (Trick, 2013).	BC has explored block transfer and development of associate degrees as pathways to degree completion and a number of institutions offer Bachelor’s Degrees in General Studies, Technology, or Business Management that enable career-oriented credential holders to access a degree without repetition of learning.
Communication***		Providing information on transfer and articulation for students, faculty, and staff through online forums, transfer conferences, presentations at career fairs, etc.	BCCAT attends career and post-secondary transition fairs, hosts a transfer conference, and attends meetings of system partners. The BCCAT website features space for discipline-based committees to interact and plan and hosts online forums on a variety of topics.
Articulation and Transfer Web Presence***		Developing a strong web presence for disseminating and sharing information on transfer and articulation.	BCCAT web services include planning tools for secondary students, a course and program equivalency database, and a website hosting provincial research, policy, and data on post-secondary mobility.

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Institutional Contacts***		A transfer and articulation contact person in each post-secondary institution is common practice across the US.	Each of the member institutions of the BC Transfer System have designated an Institutional Contact Person (ICP) and a Transfer Credit Contact (TCC) as contacts with BCCAT for transfer and articulation issues and practices.
Transfer Policy Evaluation***		Evaluation of transfer policy effectiveness.	Roksa and Keith (2008) point out that the form of evaluation of transfer policy effectiveness depends on the purpose of the transfer system. A system set up to increase rates of transfer will measure different things than a system set up to enable students to transfer without loss of credit or repetition of courses.
Student Bill of Rights***		Colorado has a Bill of Rights for general education and pre-requisites and Florida guarantees transfer.	In 2011, BCCAT worked with members of the BC Transfer System to ensure that transfer credit appeal processes were available to students. The credit for courses listed in the BC Transfer Guide are guaranteed for students.
Student Input***		Alabama features an 800 number and anonymous email address for students to make complaints while Missouri has an appeals process.	Students can access BCCAT through the public telephone and email services. Where possible, students have been represented on Council and sub-committees and student focus groups have been included in BCCAT research studies.

Sources: *Smith, 2010; **WICHE, 2009; *** Hezel, 2010.

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COMMON CORE TRANSFER

Agreeing on a common education core for arts and science degrees in BC may be difficult and not generally supported, although Douglas College has developed a one-year transfer certificate consisting of common courses in arts and sciences and has proposed wider adoption. Further collaboration on identifying common learning outcomes within programs may also be worthwhile. A number of institutions and programs in BC have requested accreditation from US-based accrediting agencies, a process that includes identifying learning outcomes at the institution, program, and course level. Increasingly programs are feeling pressure to demonstrate their importance to employment-related competencies and may choose to do so through identification of learning outcomes in arts and science disciplinary areas. Utah, Minnesota, and Indiana are three US states that have attempted to determine whether there is consensus on the competencies addressed in degree programs (Chase, 2010). Identifying learning outcomes at the degree level could form the basis for agreement on credit transfer across jurisdictions as has been tried in Europe.

PROGRAM MAJOR PATHWAYS

The process of developing Flexible Pre-Majors has been useful for articulation committees in examining and perhaps agreeing in on lower level requirements for the degree in their discipline. However, it has been difficult to gauge their usefulness for students as these agreements are not well advertised to institutions or to students and completion of a major pathway is not necessarily noted by the sending institution or recognized by the receiving institution. FPMs have acted in large part as advising tools for academic advisors. However, a review of the relationship between articulation committee representatives and the decision making

bodies in their institutions may be worthwhile given the difficulties that some disciplines have had in implementing their FPMs. In addition, a more in-depth look at those states that have adopted or supported major pathways such as Colorado, New Mexico, Alabama, and California may be useful. A state like Colorado, with its significant institutional autonomy, might offer some examples of successful implementation.

ALTERNATE PATHWAYS TO DEGREE COMPLETION

Recently BCCAT explored the issues related to transfer in trades to academic programming and reviewed practice in a number of other jurisdictions (McQuarrie, 2012). Given the increasing interest in pan-Canadian transfer and mobility, it may be worthwhile to explore other areas where pathways to baccalaureate degrees have been developed outside of Arts and Science. One potential topic for exploration might be laddering agreements from certificate and diploma programs to degrees in specific career areas. Another is the role that the professions play in encouraging national transfer and labour mobility. While transfer is limited at the post-secondary level across provincial borders, many professions operate on a national level, either by developing national competency maps for the profession or requiring an examination that is national in scope. Professions where more investigation may be fruitful might be engineers, accountants, nurses, and technologists/technicians. The role of accreditation bodies in supporting mobility is also significant.

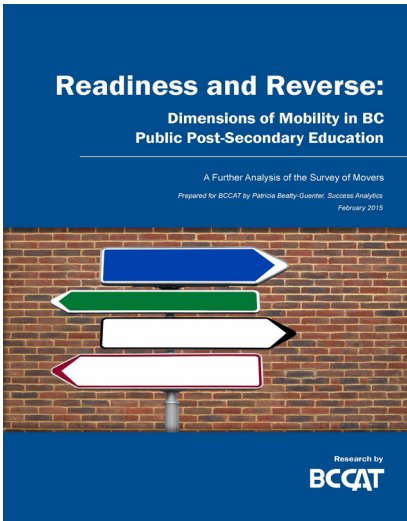
An emerging trend is the transfer of academic credit to trades and other non-degree programs (e.g., completing a certificate or other credential after an undergraduate degree). A worthwhile exercise may be to explore “credential completion pathways” that go in both directions.

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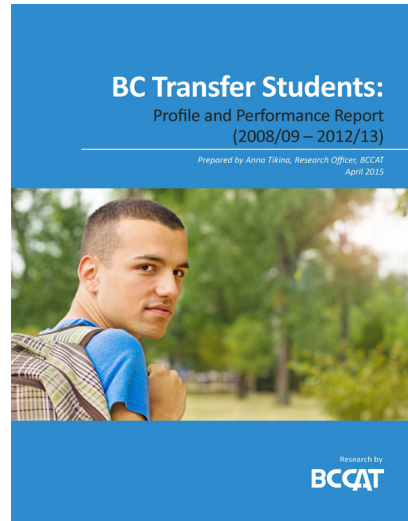
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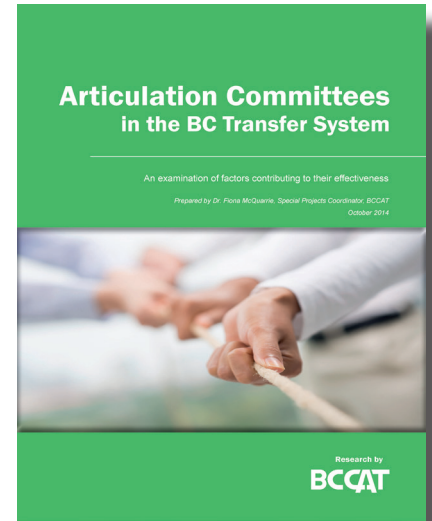
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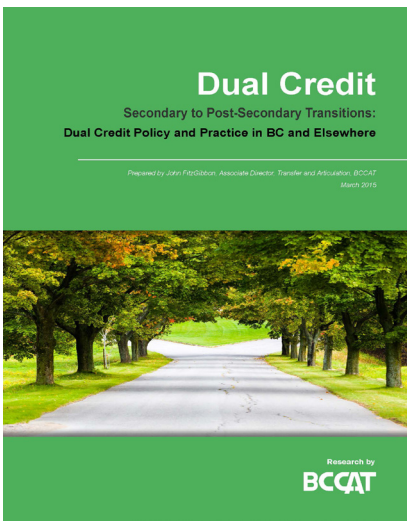
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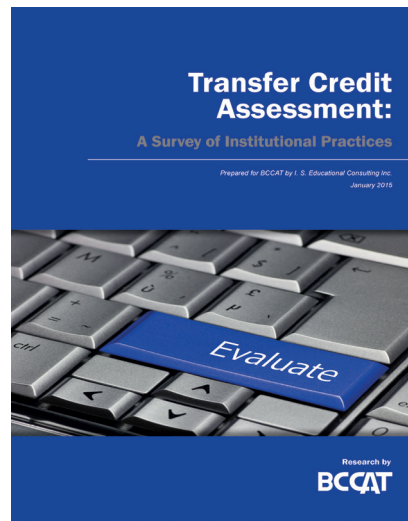
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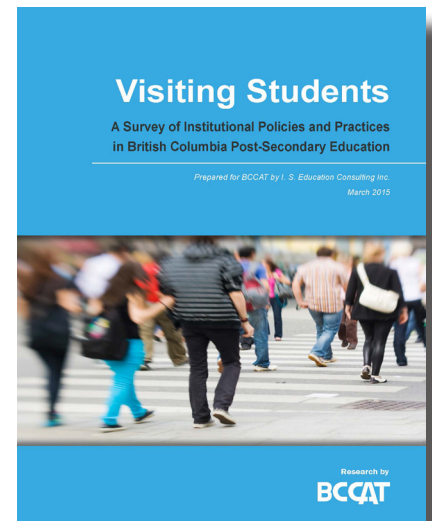
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