

# Block Transfer and Degree Partnerships in the BC Transfer System

*Prepared for BCCAT by Paul Merner & Michael Bennett*

*October 2020*



**BCCAT**

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# BLOCK TRANSFER AND DEGREE PARTNERSHIP PATHWAYS IN THE BC TRANSFER SYSTEM

## Executive Summary

The main purposes of this research are to describe the volume, features and trends characterizing block transfer and degree partnership pathways in the BC Transfer System (BCTS); to determine existing business practices that may impact data on degree pathways; and to identify successful practices that may assist institutions in collecting useful data on how well these pathways are serving their students.

The methodology of this research includes:

- the consolidation of block transfer and degree partnership agreement listings into an analyzable file, and encoding these with Classification of Instructional Programs (CIP) identifiers (CIP codes) for further analysis;
- a quantitative description of student mobility in the BCTS through analysis of CDW student transfer and credit data in relation to these agreements; and,
- a survey of business and data management practices among major BC and Alberta receiving institutions.

The first part of the analysis utilized the Central Data Warehouse (CDW) transfer credits data covering the period 2009-10 to 2018-19. The analysis focused on block type credit and student transfer and discussed both in relation to other types of credit transfer, including assigned and unassigned credit types. The sending and receiving institutions identified in the CDW data were compared to similar information in 1,424 block transfer or degree partnership agreements drawn from the BC Transfer Guide (BCTG).



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Findings include:

- Over the ten-year period, 3,481 students transferred to CDW institutions from BCTS member institutions via block transfer. This represents 3.7% of all student transfers. These students transferred 125,843 credits as block, or 7.4% of the total transferred through all credit types. The average credit transferred through block transfer was 36.1 credits per student, compared to 18.3 for assigned credit, and 15.8 for unassigned credit type.
- Block transfer credits peaked in 2014 at 506 students and 16,575 credits, declining to 201 students and 6,261 credits in 2018. The same general patterns were identified for assigned and unassigned credits and student numbers, although there were lesser percentage declines for these types of transfer.
- The CDW data showed that the vast majority of block transfer students and credits originate from seven institutions within the BCTS, the largest being UBC, SFU and UVIC. While SFU, UBC, UNBC, and UVIC do not submit data to the CDW, these universities are present as sending institutions in the data of institutions that do contribute to the CDW. Among CDW institutions, most students and credits transfer to five receiving institutions, with the largest being UFV. However, it is noted that the significant transfer credit volume received by the four non-CDW universities is not captured in these data, and thus a full system-level view on transfer credit volume is not available.
- Only approximately 27% of transfers occurred with a block transfer or degree partnership agreement between the sending and receiving institution posted on the BCTG.
- Thirty-two percent of the BCTG agreements used in the analysis were in the business and management areas, and 23% were in liberal arts and sciences. However, the latter area represented 61% of the actual block credits transferred in the CDW data, while the former represented only 7% of the credit total.

The analysis of survey responses discusses the transfer related business practices of block transfer receiving institutions in BC and Alberta.

- There was a fair amount of variation in what information on incoming students was collected and recorded. Many of these differences were not impactful, but some were seen to have significant implications for a system-level view of block transfer.
- Most institutions recorded block credit awarded, although many assessed block credit transfers on a course-by-course basis "sometimes" and in a few cases "always or most of the time". There were highly valid reasons behind each approach, and they must be accounted for and accommodated in system-level analysis.
- A majority of survey respondents (63%) reported that they accommodated block transfer without a formal agreement being in place. These accommodations included for instance, assessment of students' credentials.
- Most institutions treated degree partnership transfer the same as block transfer, and most differences found were minor.
- Institutions collected and recorded an array of student- and transfer-related information through their business practices to track BTA and DP usage, although the majority of the respondents indicated they could not or did not track it in the aggregate.

The study then examined data management practices in the context of block and other types of transfer through analysis of CDW data and survey responses. “Credit Assignment” coding was discussed, which is a key element in analyzing transfer information on the CDW. It was found that many institutions recorded credits as more than one Type with respect to a given student transfer, and that some institutions did not record block credit, despite the apparent presence of block transfer agreements.

The study concludes with a discussion of possible strategies for improving institutional and system-level data. Institutional data and information support are discussed, as well as the possibility of creating a comparative base for system reporting. Several data elements that could improve system-level analyses without sacrificing the integrity of institutions’ business practices were discussed. Main recommendations include changing Credit Assignment Type coding conventions and expanding the options for the Transfer Type element to provide an overarching identifier of block transfer for analysis and reporting.

Two final recommendations call for the addition of course and transfer-related data to the Student Transitions Project (STP) to facilitate system-level views of transfer, and the invitation of currently non-participating BCTS members to join and contribute their data and perspectives to this initiative.

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# Introduction

In 1997 and 1998, the BC Council on Admissions & Transfer (BCCAT) led a series of consultations to facilitate BC public and private post-secondary institutions responding to a Ministry of Advanced Education strategic planning initiative to foster block transfer (Finlay, 2007a, 2007b, 2008). In 2009 there were around 800 block transfer agreements (BTAs) listed on the BC Transfer Guide (BCTG) (Finlay, 2009). Today the BCTG contains more than 1,400 pathway agreements, including BTAs and degree partnership (DP) agreements. These agreements facilitate transfer across the BC Transfer System (BCTS).

This paper is focused on two closely related types of transfer:

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.

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'.<sup>1</sup>

Both types of agreements have been the focus of recent study (e.g., Bastedo, 2010; Duklas, 2013; McQuarrie, 2014). This research enhanced understanding of these important transfer mechanisms and led to improvements in their management by BCTS members. A more technically focused paper by Agility Research (2011) led to enhancements of tracking mechanisms within the Central Data Warehouse (CDW). Jacinto's (2018, unpublished) initial research of the CDW data quantified BTA inter-institutional pathways. Further BCCAT-sponsored research (Merner, 2019) contributed to understanding how BTAs are implemented and communicated within BCTS institutions.

However, issues remain. At the micro-level, recording transfers via BTA and DP agreements on transcripts, student record systems and the CDW remains problematic. At the macro-level, issues include the comprehensiveness of the agreements listed the BCTG, the availability and reliability of system-wide data, and, perhaps ultimately, the philosophy and policy perspectives on how different types of transfer mechanisms are perceived and facilitated.

BTAs and DP agreements are among the mechanisms in the BCTS that assist both institutions and learners in promoting and achieving transfer and mobility. It is hoped that quantitatively describing the volumes and flows along these pathways; expanding the boundaries of that view; identifying and contributing to the alignment of management practices; and positing effective common means by which block transfer is recorded and tracked, will provide important benefits to the system as a whole.

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<sup>1</sup> Stainsby, M., & Erskine, R. (2018 update). How to Articulate 2018 (3rd Edition). Requesting and Assessing Credit in the BC Transfer System. BC Council on Admissions & Transfer. (see in particular the Glossary) <https://www.bccat.ca/pubs/Resources/HowToArticulate2018.pdf>



## Objectives

1. To describe the volume, features and trends characterizing block transfer and degree partnership pathways and the data sources including the BC Transfer Guide and CDW, available to analyze in BC.
2. To determine existing business practices that may impact data on degree pathways, and to identify successful practices that may assist institutions in collecting useful data on how well these pathways are serving their students.
3. To consolidate and update block transfer and degree partnership pathways listings from existing sources.
4. To assess institutional philosophies and policies pertaining to the granting of advanced standing and course exemptions in BC and Alberta.
5. To assess institutional business practices pertaining to the recording of students completing or entering via block agreements or dual degree programs in BC and Alberta.
6. To suggest strategies for improving system-level data sources, as well as areas for future research.

## Steps and Methods

### Consolidating and Updating Block Transfer and Degree Partnership Agreement Listings

In order to provide the most up-to-date agreement listings, these data sources were used in the analysis:

- A data set created by Jacinto (2018) containing 2017-18 BTA records from the BCTG, plus additional BTA information obtained from institutions during his research.
- The most current version (2019) of the BTA and DP records in the BCTG.

These files were merged together with the latter as base. The authors then encoded each agreement with Classification of Instructional Program (CIP) category identifiers (CIP codes) for both sending and receiving programs.

### Quantitative Description of Student Mobility

Pertinent CDW data were analysed for a ten-year period (2009-10 to 2018-19) with a focus on the data in the STUDENT\_COURSE\_TRANSFER (SCT) table, and records with a CREDIT\_ASSIGNMENT\_TYPE of "03" (block), "02" (unassigned), and/or "01" (assigned)<sup>2</sup> as well as the data from other tables, which provided context and detail to the study.

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<sup>2</sup> Credit Assignment Type:

01 - Assigned Credit: Credit granted for a specific course when a course from another institution is considered equivalent to one at the receiving institution;

02 - Unassigned Credit: Credit given when a course or program is considered worthy of credit but does not have a specific equivalent at the receiving institution;

03 - Block Transfer Credit: 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 (Ministry of Advanced Education, Skills and Training, 2019).

A unique block transfer or degree partnership instance or pairing was established as a unit of analysis. It was determined as the unique combination of Sending Institution + Student ID + Receiving Institution codes. The totals of unique student counts and credit counts with associated CIP codes were summed via these instances.

As well, from the BCTG data, a similar unique BTA instance was determined, as the combination of a single sending and receiving institution and a specific agreement. The study was able to compare these institution/agreement pairs to the actual student and credit flow volumes in the CDW data from the first part of the analysis.

## **A Survey of Business and Data Management Practices**

An emailed on-line survey was distributed to the BCTS institutions and a sample of post-secondary institutions from Alberta. The intent of the survey was to assess perspectives on business and data management practices around the granting of advanced standing and course exemptions when awarding transfer credit, and other factors that may impact BPA and DP pathways. Sixteen BC institutions were identified for the survey as they had either block transfer receiving activity recorded in the CDW data, and/or a substantial number of receiving BTAs listed in the BCTG. In addition, seven receiving institutions with a large number of BTA and DP agreements were identified through Transfer Alberta. Responses were received from twelve BC and five Albertan institutions, for an overall response rate of 74%. The survey was targeted to registrars and other personnel with deep experience in assessing and recording transfer information for students who were admitted through BTAs and DP agreements.

## **Improving System-Level Data and Future Research**

The study explored the CDW and survey data in an attempt to illuminate how business and data management practices impact the data, and the clarity with which block transfer and degree partnership flows can be revealed as a result. The analysis confirmed the limitations of this data source that were known previously as well as revealing other issues.

# Volumes, Features and Trends of BTA and DP Pathways in the BC Transfer System

## The Data and Their Limitations

The most recent ten full years of CDW data (2009-10 through 2018-19) were analyzed to determine the volume, features and trends of block transfer credit, and their context within other types of credit transfer, including assigned and unassigned credit. The analysis was limited to institutions within the BCTS who either send or receive transfer students and credit, and the flows in the analysis are limited to those between BCTS member institutions<sup>3</sup>. Transfer students and credit flowing to or from institutions outside the BCTS were not considered.

All BC public colleges, institutes, and teaching-intensive universities (TIUs), as well as two research-intensive universities (RIUs), contribute data to the CDW (these are generally referred to as “CDW institutions”). Only these institutions appear in the data as both sending and receiving institutions. SFU, UBC, UNBC, UVIC, Athabasca University, Yukon College, and the private post-secondary members of the BCTS do not contribute data to the CDW. These institutions appear in the CDW data as sending institutions only. What is not seen in the CDW data, however, is the large number of students who transfer in to the four major BC RIUs, because the RIUs do not contribute their own data to the initiative. Their incoming flows of students and credit, and the sources of both, are missing from the picture.

The CDW data include coding that identifies different types of credit transfer as students are admitted to the institution<sup>4</sup>. Where present, the information is sufficiently granular to provide a picture of student and credit flows from sending to participating receiving institutions. The block transfer and degree partnership portions of the BCTG list the agreement pathways by which transfer occurs between sending and receiving institutions, and the CDW data can provide information on the volumes, magnitudes and trends of these flows over time.

Aside from the fact that key receiving institutions are missing from the CDW and some important data are missing, there are other less visible limitations. These include differences in institutional practices, e.g., the timing when transfer credits are assessed, the approach to what information is recorded (i.e., some institutions assess all possible credits while others only assess the credit relevant to the post-transfer program), and differences in the interpretation and coding of information.

The trends in the volume of the CDW block transfer credit data should be interpreted with caution. The requirements to submit the transfer credit data to the CDW and to populate the data tables and related elements were implemented in 2013, and earlier data appear underreported for certain institutions and years.

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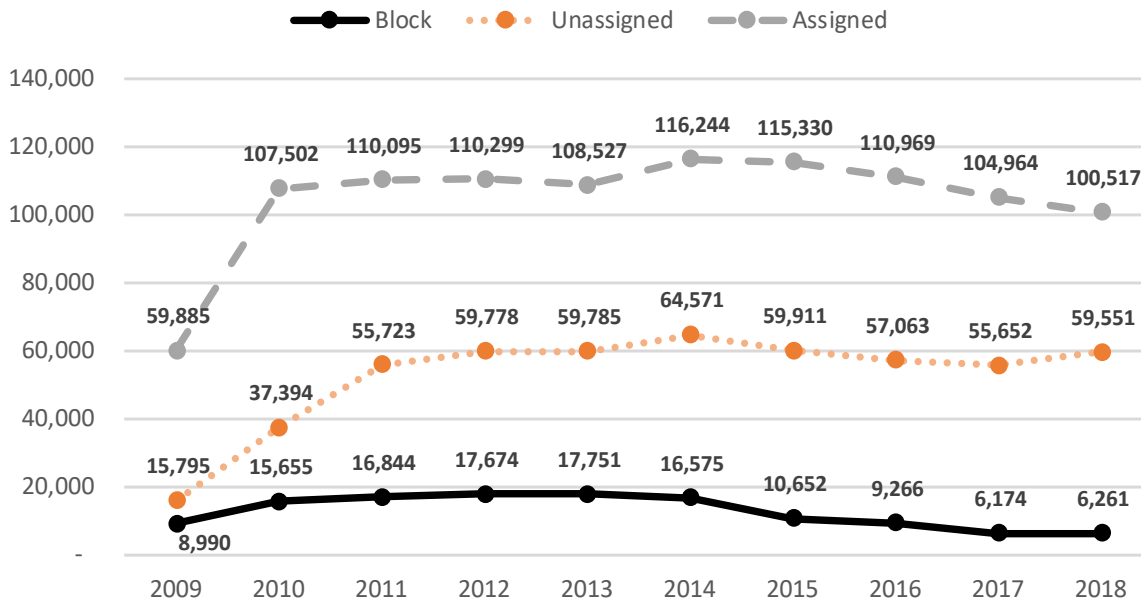
<sup>3</sup> Several receiving institutions identified a sending institution with the code 59000 “British Columbia” for a small number of received transfer credits (approximately 5,000 credits across all institutions and all years). These transfers were included in student and credit totals because they originated from BCTS institutions, but they were excluded from the analyses of sending and receiving institutions since a specific BCTS sending institution could not be identified.

<sup>4</sup> Four CDW receiving institutions did not record or did not report credit assignment type for received transfer credit. This impacted the results of the analysis of the total volume of transfer credits, as well as the distribution of transfer credits by type.

# Students and Credits

Over the period 2009-10 to 2018-19, 1,693,344 credits of all types were transferred to the CDW receiving institutions from the BCTS member institutions. This included 125,843 credits, or 7.4% of the total, of block credits; 525,221 credits or 31.0% of unassigned credits; and 1,042,280 credits or 61.6% of the total of assigned credits.

**FIGURE 1: Total Number of Credits Recorded as Block, Assigned and Unassigned Credit Types 2009-10 to 2018-19 from BCTS Member Institutions to CDW Receiving Institutions**



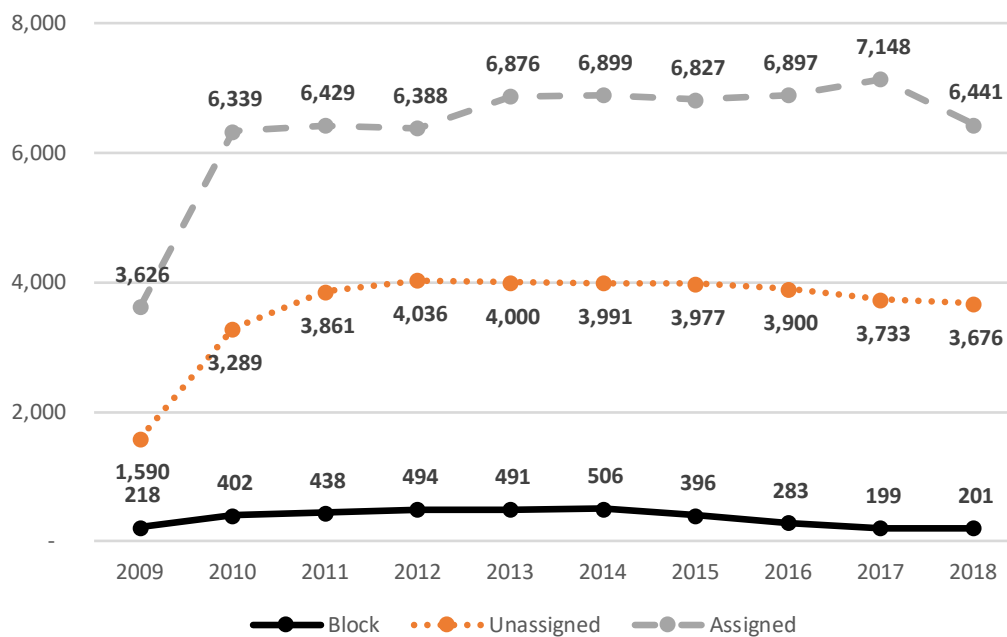
Transfer volumes reached a peak of 17,751 for block credit in 2013-14, and of 64,571 for unassigned credit in 2014-15. The volumes of activity for both assignment types tapered off in subsequent years; in 2018-19 block credit transfer activity was slightly more than a third of the peak, and activity of both types show an uptick in 2018-19. Assigned course credit and unassigned credit volumes showed a similar pattern over the same period, and their percentages in the total credit volume remained relatively similar, while block transfer credit percentage declined from 9.5% of the total transfer credit volume in 2013-14 to 3.8% in 2018-19 (Figure 1).

The data prior to 2013 may be unreliable, although data for the years 2009 to 2013 were retroactively built into reporting. An analysis of the 2009-10 credit volumes revealed smaller credit volumes for most institutions; however, this year was included in the analysis to illustrate the state of the data. Moreover, one large receiving institution reported lesser volumes in 2010, which could be a data recording or data reporting issue. Another institution evidenced a decline after 2015-16 that was significant enough to affect overall trends, and it is unclear if the decline reflected changes in transfer demand, institutional practice, or both. These important caveats call for caution while drawing conclusions on the block transfer credit volumes in the CDW data.

Over the ten-year period from 2009-10 to 2018-19, a total of 63,517 unique students had credit assessed for transfer to CDW institutions from the identifiable<sup>5</sup> BCTS member institutions. These were recorded through 93,776 separate transfer transactions (although some of these transactions for a single transfer student might be recorded using one, two, or all three credit assignment types). 3,481 student transfers (3.7% of the total) were block transfers. The majority of students (57,047 students, or 60.8% of the total number of students) received assigned credit, while transfers recorded as unassigned totaled 33,248 (35.5% of the total number of students).

The analysis also showed that some students transferred more than once and to more than a single institution. A small but notable proportion (approximately 14% of all transfer students in the CDW data) had transfers to more than one CDW receiving institution, and the student may have transfers of credit recorded in more than one year within a single institution. This means that when looked at longitudinally and/or by institution, the student transfer counts are greater than the number of unique transferees in the CDW over the ten-year period.

**FIGURE 2: The Number of Student Transfers Via Block, Assigned and Unassigned Credit Types 2009-10 to 2018-19 from BCTS Member Institutions to CDW Receiving Institutions**

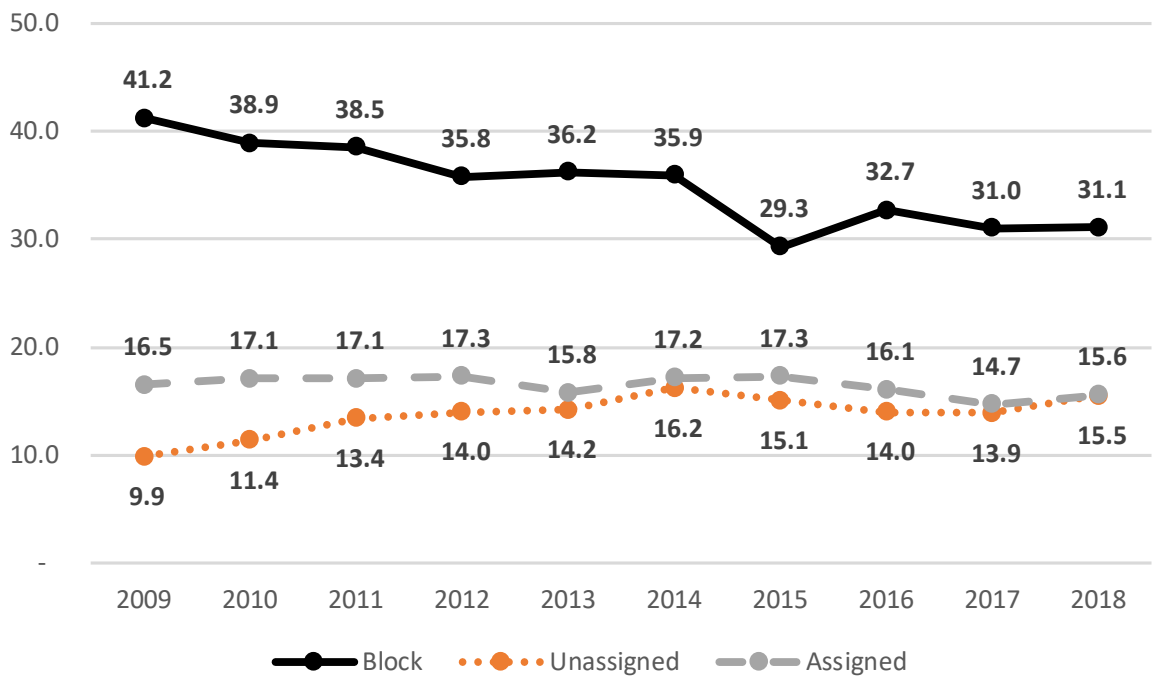


Bearing in mind earlier caveats regarding the data, the number of student transfers between 2009-10 and 2018-19 showed a broadly similar pattern to that of credit transfers discussed above. Student transfers peak in 2014-15 at 506 for students receiving block credit, and there is a peak in 2012-13 at 4,036 for those receiving unassigned credit. However, the peak for those receiving assigned credit is in 2017-18, at 7,148.

<sup>5</sup> A sending PSI can only be identified in the CDW data if the institution has a Postsecondary Student Information System (PSIS) code from the list developed by Statistics Canada (<https://www.statcan.gc.ca/eng/survey/business/5017>). Some newer private members of the BCTS (e.g., Quest University, or Fraser International College) do not have institutional PSIS codes. Sending institutions without a PSIS code can only be seen as "Unknown" sending institutions in the CDW transfer credit data. All transfer credit data from unknown sending institutions were excluded from this analysis.

Students transferring and receiving block credit averaged 36.1 credits per transfer. Due to the “bulk” nature of block transfer, this average is higher than that for unassigned and assigned credit transfers, which averaged 15.8 and 18.3 respectively per student transfer over the period. The overall average for all 63,517 unique students receiving one or more of these types of credit, was 26.7 credits per student.

**FIGURE 3: The Average Number of Credits per Student for Block, Assigned and Unassigned Credit Transfers 2009-10 to 2018-19 from the BCTS Member Institutions to CDW Receiving Institutions**



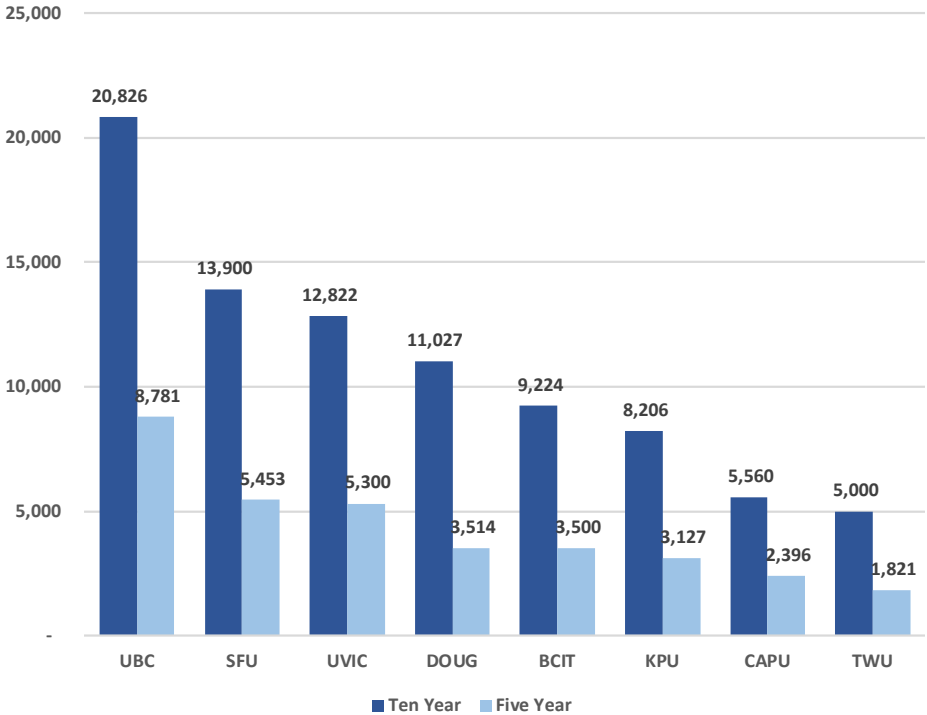
For block transfer, there was a marked decline in average credit transferred per student over the period from 41.2 block credits per transfer in 2009 to 31.1 credits per transfer in 2018 (Figure 3), on top of the decrease in credit volumes seen in Figure 1. The average credit per student was more stable for both assigned and unassigned credit types. The reasons behind the decrease in the average number of credits per block transfer include several possibilities. Some institutions may be articulating more courses as assigned credit that provides more clarity to students and better facilitates internal processes, or the institutions may be recording more transfer credit as unassigned credit. Alternatively, there might be a change in demand for transferring smaller blocks of credits.

## Sending and Receiving Institutions

The following section examines the receiving role of the CDW institutions in relation to the major senders in the BCTS, bearing in mind that the largest RIUs and therefore the likely largest block transfer receivers lie outside these data.



**FIGURE 4: The Total Number of Block Credit from Top 8 BCTS Sending Institutions to CDW Receivers: Ten and Five-Year\* Totals (2009-10 to 2018-19)**

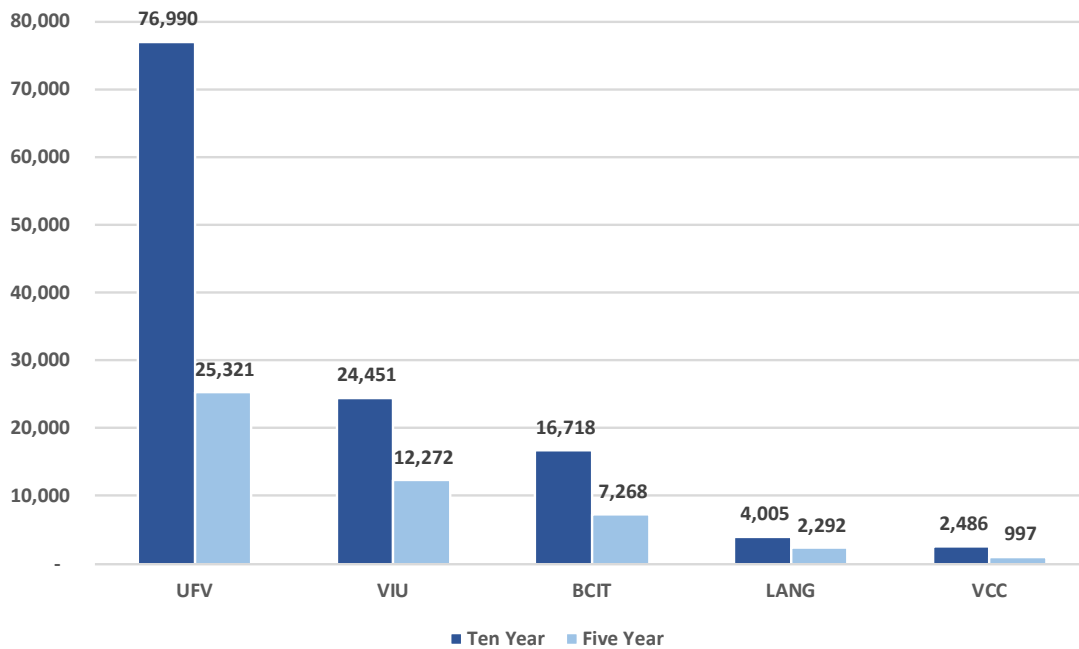


\*Note: five-year total was calculated for years 2014-15 – 2018-19.

UBC was the top sender of block transfer credit among the BCTS institutions, accounting for 20,826 credits or 16.5% of the total (Figure 4). It also had the highest tally over the most recent five years. The top three senders, including SFU and UVIC, accounted for 38% of the block credit sent over the ten-year period. The non-BC public institution BCTS members, including Athabasca University, Yukon College, and the identifiable private BCTS institutions, together accounted for 10,477 block credits over the ten-year period, or eight percent of the total. Trinity Western University (TWU) was by far the largest sender of block transfer credit among this group, accounting for 5,000 credits or just under half of the recorded activity.

The comparison of the proportion of five-year totals to ten-year totals reveals that the block credit totals for each institution in the most recent five years were less than half of the ten-year total, and on average constituted 39% of the ten-year total volume. This seems to indicate a decline in block transfer credit, which could be attributed to lower demand, changes in recording practice, and/or articulating more credits on a course by course basis, even though a BTA might exist.

**FIGURE 5: Block Credit Top 5 CDW Receiving Institutions Ten and Five-Year\* Totals from the BCTS Members (2009-10 to 2018-19)**



\*Notes: Five-year total was calculated for years 2014-15 – 2018-19. Transfer credit assessment practices differ among PSIs, thus making it impossible to make inter-institutional comparisons.

Between 2009-10 and 2018-19 UFV was the top receiver of block transfer credit among the CDW institutions, accounting for 76,990 credits or just over 60% of the total. It also had the highest total over the most recent five years, at more than double that of VIU which was the next highest receiving institution for block credit. These two institutions together received 94% of the BCTS to CDW institution block credit transferred over the ten-year period.

One stark difference was a much smaller five-year volume at UFV (about a third of its ten-year credit volume) than the five-year volumes at VIU, BCIT and LANG (roughly 50% of ten-year volume for each institution). It is possible that a change in recording practices at UFV may be responsible for the recent decline of the block transfer credit volume, rather than a change in demand for block transfer credit assessment. In addition to changing practices within an institution, another issue is markedly different practices in transfer credit assessment among institutions. As an example, many institutions recorded some or all of transferred credit as assigned or unassigned, even where a student may be entering via a block transfer agreement.

## Block Transfer and Degree Partnership Agreements

There were 1,424 unique BTAs and DP agreements between BCTS member institutions listed in the BCTG in 2019 (Figure 6). TRU had the largest number of agreements overall, participating in 468 agreements as the receiving institution, and an additional 47 agreements as the sending institution. RRU followed with 276 agreements as the receiving institution; however, it had no agreements as a sender. Athabasca University had the largest number of receiving agreements among the BCTS member institutions, at 138. Of the 1,424 total, 946 agreements (66% of the total) had a CDW institution as the receiver.

Douglas College and Langara College tied for the largest number of agreements as sending institutions, at 131, and BCIT had 130 such agreements (Figure 6). Camosun College and COTR each had a significant number of sending agreements as well, at 113 and 110 respectively.

**FIGURE 6: The Number of Block Transfer and Degree Partnership Agreements by Sending and Receiving Institution in 2019**

Sending PSIs	Receiving PSIs															BCTS Total
	AU	CAPU	ECUAD	KPU	LANG	OC	RRU	SFU	TRU	UBC	UFV	UNBC	UVIC	VIU	Other BCTS	
BCIT	31	1	1			1	10	11	64	6		3	1	1		130
CAMO	1	2	1			1	39		34	3		10	20	2		113
CAPU	15		1			1	2		19	2	1	5	8	2		56
CMTN	5		3			1	22		5			12	6		2	56
CNC		1	8	2		1	22		29	1		10	9	1		84
COTR	16	6	1	2	4	2	20	1	22	1	5	8	15	4	1	108
DOUG	31	2		1	2	3	16	6	46	2	1	7	14			131
ECUAD					1											1
JIBC													2			2
KPU	2					4	5		24			6	1		1	43
LANG	24	3	1	2		7	32	3	35	6	1	5	6	4	2	131
NEC		4	2					1		2					1	10
NIC		3	4			1	20		10	1	1	6	10	17	1	74
NLC			1			1	9		16			5	6			38
NVIT						1			1	5	1	4				12
OC	1	2					24		22	1	1	4	4	1		60
SELK	3	5	1			4	33		24	1		13	8	3	2	97
TRU		2				3			22	3		8	7	2		47
UBC									2							2
UFV						1	1		13	1		6	8			30
UNBC										1						1
UVIC	2					2			13							17
VCC	6	1				1	3	4	15	1	2		1		7	41
VIU		4				2			37	2	3	7	13			68
YUKO	1	1	1			1	9		15			3	4	1		36
Other BCTS		2	9				9	3			1	2		1	9	36
<b>BCTS Total</b>	<b>138</b>	<b>39</b>	<b>34</b>	<b>7</b>	<b>7</b>	<b>38</b>	<b>276</b>	<b>29</b>	<b>468</b>	<b>39</b>	<b>17</b>	<b>124</b>	<b>143</b>	<b>39</b>	<b>26</b>	<b>1424</b>

Note: the list of institutional abbreviations can be found in Appendix III.

The highest frequencies of sending / receiving agreement pairings were found to involve TRU and RRU. TRU had 468 agreement pairings, including 64 agreements as receiving institution with BCIT, 46 agreements with Douglas College, and 37 agreements with VIU as sending institutions. Athabasca University had the highest number of pairings (138) among the BCTS member institutions, including 31 agreements with each of BCIT and Douglas College, and 24 agreements with Langara College as sending institutions.

## Transfers and Transfer Agreements

Over the period 2009-10 to 2018-19, student transfers were recorded from 30 of 39 BCTS institutions to a CDW institution utilizing block credit transfer, while only 7 of 21 CDW institutions received these transferring students. There were 3,481 student transfers (Figure 2), and 120,843<sup>6</sup> block credits were transferred over the period (Figure 7). These transfers occurred between 30 BCTS institution senders and 7 CDW receivers, and across 125 different pairs of these institutions (Figure 7).

**FIGURE 7: Credit Transfers Recorded as Block Transfer by Institution Pairs (2009-10 to 2018-19)**

BCTS Sending Institution	CDW Receiving Institution							Total	% Total
	BCIT	COTR	LANG	RRU	UFV	VCC	VIU		
AU			48	6	151	24	135	<b>364</b>	0.3%
BCIT			48	30	8,024	126	996	<b>9,224</b>	7.6%
CAMO	252	37	126		1,326	60	1,002	<b>2,803</b>	2.3%
CAPU	689	107	192		3,590	175	807	<b>5,560</b>	4.6%
CMTN					415			<b>415</b>	0.3%
CNC	159				825		183	<b>1,167</b>	1.0%
COTR			144				696	<b>840</b>	0.7%
COLC					42			<b>42</b>	0.0%
COQC	11				40		21	<b>72</b>	0.1%
DOUG	1,345		1,053		7,334	831	464	<b>11,027</b>	9.1%
ECUAD	59		54		619		294	<b>1,026</b>	0.8%
JIBC					230		72	<b>302</b>	0.2%
KPU	775	55	141		6,737	330	168	<b>8,206</b>	6.8%
LANG	905			30	2,640	394	364	<b>4,333</b>	3.6%
NVIT					3,627			<b>3,627</b>	3.0%
NIC	37	52	42		434		1,106	<b>1,671</b>	1.4%
NLC	551	97			266		60	<b>974</b>	0.8%
OC			48		1,087	27	150	<b>1,312</b>	1.1%
RRU	103		48		181		370	<b>702</b>	0.6%
SEL		348			847	75	878	<b>2,148</b>	1.8%
SFU	3,196		432	12	8,112	69	2,055	<b>13,876</b>	11.5%
TRU	336	52		6	2,495	90	734	<b>3,713</b>	3.1%
TWU	57				4,646	3	294	<b>5,000</b>	4.1%
UBC	4,014		1,044	42	10,573	240	4,913	<b>20,826</b>	17.2%
UNBC	50			6	1,180	3	719	<b>1,958</b>	1.6%
UFV	465	52	144			18	204	<b>883</b>	0.7%
UVIC	1,711		144	111	4,727		6,129	<b>12,822</b>	10.6%

<sup>6</sup> As noted above in the Section "Students and Credits", no specific BCTS sending institution could be determined for approximately 5,000 BCTS credits transferred, and those transfer credits were excluded from the analyses in this section for this reason. The exclusion of these credits explains the differences in the total number of transfer credits by type between the previous and current sections.

VCC	560	52	84		2,760		227	<b>3,683</b>	3.0%
VIU			213	36	1,907	6		<b>2,162</b>	1.8%
YUKO					30	15	60	<b>105</b>	0.1%
<b>Total Credits Transferred</b>	<b>15,275</b>	<b>852</b>	<b>4,005</b>	<b>279</b>	<b>74,845</b>	<b>2,486</b>	<b>23,101</b>	<b>120,843</b>	100.0%
<b>Total Credits Percent</b>	<b>13%</b>	<b>1%</b>	<b>3%</b>	<b>0%</b>	<b>62%</b>	<b>2%</b>	<b>19%</b>	<b>100%</b>	
<b>Count of Institution Pairs</b>	19	9	17	9	28	17	26	125	

Figure 7 demonstrates the transfer destinations of credits and students from the major sending institutions, and conversely the institutional origin of student credits transferring to the major CDW receiving institutions. UFV was the largest destination institution for block credit (receiving 62% of all block credits) and accounted for the majority of credit flows from most of the largest sending institutions, including UBC, SFU, BCIT and Douglas College. VIU was the next largest receiving destination credit with 19% of all block credits and received the majority of student credits from UVIC. BCIT was both a significant sender (7.6% of all sent block credits) and receiver of credits (receiving 13% of all block credits). BCIT received substantial amounts of credit transfers from UBC and SFU, while its students and credits primarily transferred to UFV among CDW institutions.

**FIGURE 8: Credit Transfers Recorded as Block Transfer by Institution Pairs (2009-10 to 2018-19) with an Agreement Present in the BCTG**

BCTS Sending Institution	CDW Receiving Institution							Total
	BCIT	COTR	LANG	RRU	UFV	VCC	VIU	
BCIT				30			996	<b>1,026</b>
CAMO					3,590		1,002	<b>4,592</b>
CAPU							807	<b>807</b>
CNC							183	<b>183</b>
COTR			144				696	<b>840</b>
DOUG			1,053		7,334			<b>8,387</b>
ECUAD			54					<b>54</b>
LANG				30	2,640		364	<b>3,034</b>
NVIT					3,627			<b>3,627</b>
NIC					434		1,106	<b>1,540</b>
OC					1,087		150	<b>1,237</b>
SEL		348					878	<b>1,226</b>
TRU							734	<b>734</b>
VCC	560				2,760			<b>3,320</b>
VIU					1,907			<b>1,907</b>
YUKO						15		<b>15</b>
<b>Total Credits for Institutional Pairs with Agreement</b>	<b>560</b>	<b>348</b>	<b>1,251</b>	<b>60</b>	<b>23,379</b>	<b>15</b>	<b>6,916</b>	<b>32,529</b>
<b>Total Credits Transferred</b>	15,275	852	4,005	279	74,845	2,486	23,101	120,843
<b>% for Institutional Pairs with Agreement</b>	<b>4%</b>	<b>41%</b>	<b>31%</b>	<b>22%</b>	<b>31%</b>	<b>1%</b>	<b>30%</b>	<b>27%</b>
<b>Count of Institution Pairs</b>	<b>1</b>	<b>1</b>	<b>3</b>	<b>2</b>	<b>8</b>	<b>1</b>	<b>10</b>	<b>26</b>

**Figure 8** displays the number of block transfer credits between sending and receiving institution pairs, where at least one BTA or DP agreement was in place between the pair in the BCTG in 2019 (**Figure 6**). In the presence of at least one transfer agreement between the paired institutions, credit transfers occurred in 26 pairs of a possible 125 (or 21% of the total pairs) and 32,528 credits were transferred (approximately 27% of the 120,843 credits of all credits transferred). UFV received the majority of these block transfer credits (about 72%, 23,379 out of 32,529 credits with agreements), and had 8 agreements, while VIU had 10 pairing and 21% of the volume of all transfer credits (6,916 out of 32,529 credits with agreements).<sup>7</sup>

The unassigned credit transfers and their institutional pairings were of potential interest. We had learned from the survey responses (see below) and the analysis of CDW data that block transfer credit was often recorded as unassigned credit, either alongside or instead of block credit. Between 2009-10 and 2018-19, 521,121 credits were transferred as unassigned, where a sending institution could be ascertained. With these unassigned credit transfers, the same 30 BCTS sending institutions were present as with block transfer, but the number of receiving institutions increased from seven to twelve, and the number of different institution pairs increased from 125 to 291, i.e. more than doubled. The additional five institutions evidenced only unassigned or assigned credits, and no block credit, although some of these PSIs had substantial numbers of BTAs in place with sending institutions.

For unassigned credit, 280,274 credits were transferred through these pairs, accounting for approximately 54% of the 521,121 unassigned credits transferred (**Figure 9**). There were 77 pairings of a sending and a receiving institution with at least one BCTG block transfer or degree partnership agreement in place for institutions transferring unassigned credits between the pair. That constituted 26% of all 291 possible pairings, somewhat more than the 21% (26 of 125 pairings possible), for block transfer credit (**Figures 7 and 8**).

TRU is by far the largest receiving institution of unassigned credit volumes, receiving 234,031 (45%) of the total 521,121 unassigned credits. Other PSIs receiving large volumes of unassigned credits are KPU, UFV and VIU, each receiving about 14% of the total number of unassigned credits. The largest volume sending institutions for unassigned credit are Douglas (11% of total), UBC (10%), and SFU, Langara and BCIT (with 9% of the total each).

About 27%, or 32,529 of 120,843 block credits were transferred between institutions where any agreement is present on the BCTG (**Figures 7 and 8**). What could explain the remaining 73% of block credits? The volume of unassigned credits transferred between institutions with at least one agreement on the BCTG was almost twice as high, at 53.8%, or 280,274 of 521,121 unassigned credits (**Figure 9**). Also, four PSIs received large proportions of their unassigned credits when at least one BTA or DP agreement could be found in the BCTG, and did not have any block credits: ECUAD, KPU, OC, and TRU. It is possible that these institutions record all transfer credits as unassigned credit, if the credits cannot be transferred as assigned credit.

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<sup>7</sup> The study attempted to but could not ascertain the contribution of specific (or any) agreements in the flows between institutional pairs. For example, UBC was the sending institution for over 52,000 credits but its two sending agreements in the BCTG are in areas of study not related to these flows.



**FIGURE 9:** The Number of Unassigned Transfer Credits by Receiving PSI (2009-10 to 2018-19) for Institutional Pairs with and without an Agreement Present in the BCTG

Receiving PSI	Total Credits Transferred	Total Credits for Institutional Pairs with Agreement	% Credits with Agreement	Total Count of Institutional Pairs	Count of Institutional Pairs with Agreement
BCIT	27,306	191	0.7%	28	1
COTR	453	66	14.6%	22	1
ECUAD	18,933	13,560	71.6%	26	11
KPU	72,123	21,794	30.2%	27	4
LANG	13,089	987	7.5%	29	3
NIC	777		0.0%	19	
NVIT	6,279		0.0%	19	
OC	3,158	1,905	60.3%	26	19
RRU	1,517	55	3.6%	10	1
TRU	234,031	180,173	77.0%	29	18
UFV	72,057	23,599	32.8%	28	8
VCC					
VIU	71,398	37,944	53.1%	28	11
<b>Total</b>	<b>521,121</b>	<b>280,274</b>	<b>53.8%</b>	<b>291</b>	<b>77</b>

For example, TRU received a large volume of unassigned credits (**Figure 10**), and it also has the highest number of BCTG agreements as receiving institution (**Figure 6**). More than 180,000, or about two-thirds (77%) of the total number of unassigned credits received by TRU transferred in the presence of a BTA or DP agreement. Similarly, ECUAD, KPU, and OC did not have any block credit but received a substantial volume of unassigned credit, large proportions of which occurred in cases where BTA or DP agreements existed in the BCTG. Survey responses (section below) also indicated that credits that were transferred under a block agreement may be recorded as assigned and unassigned types. Thus, it might be assumed that a substantial portion of received unassigned credits may be the result of transfer happening through BTA or DP agreements.

It may be a bit more puzzling however that only about a quarter of block transfers in the CDW occurred through a recorded agreement, although Jacinto (2018, p. 6) found an even lower percentage (15.3%) of such activity. One reason Jacinto posited was that many more agreements might exist than were posted to the BCTG. A subsequent study explored this notion through a survey, which found that 70% of the responding post-secondary institutions had negotiated agreements with BC institutions that were not posted to the BCTG. Perhaps the most cogent reason given was that “internal communication, workload or priorities affect the institution’s ability to submit information to the BCTG” (Merner, 2019, p. 26). Finally in this context as well, it may be that some PSIs have a broader definition of “block” and are coding types of transfers (including those mentioned above) as block credit although they do not meet the strict definition of block transfer.

## The Subject Areas of BTAs and DP Agreements

The BTA and DP agreements identified in the BCTG were assigned a code based on their CIP classification. The largest number of the 2019 BCTG agreements were found in business, management, accounting and marketing (32%), followed by category “Liberal Arts and Sciences, General Studies, and Humanities” (23%) (Figure 10). “Other” program areas include psychology, social science, education, and criminology. Only a few agreements were present in each of these areas.

**FIGURE 10:** The Receiving Program Subject Area (CIP Cluster): The Percentage of BTA and DP Agreements in the BCTG (2019) and the Percentage of Transferred Credits in the CDW Transfer Credit Data (2009/10 – 2018/19)

Subject Area (CIP Cluster)	% of BT and DP Agreements in BCTG	% of Transferred Credits in CDW Data
Business, management, accounting, marketing	32%	7%
Liberal arts and sciences, general studies, humanities	23%	61%
Public administration and social services	10%	3%
Natural resources, conservation, environmental	9%	2%
Visual and performing arts	5%	2%
Health professions and related	5%	3%
Multidisciplinary / interdisciplinary studies	4%	1%
Communication and journalism	3%	1%
Family and consumer sciences, human sciences, legal, security and protective services	3%	5%
Engineering, technologies, computer science	2%	4%
Education	2%	5%
Other	2%	6%
<b>Total/ Overall Average</b>	<b>100</b>	<b>100</b>

There was a notable difference between the CIP cluster percentages of transferred block credits in the CDW data, and the percentages of the BCTG agreements in these CIP clusters. Most transferred credits in the CDW data were in liberal arts and sciences (61%), while only 23% of BTA and DP agreements were in this cluster. As well, most agreements were in the business, management, accounting and marketing cluster (32%), while only 7% of CDW transfer credits were found in this area. The difference in the business-related area may look surprising, and it may indicate that many business students are completing in-situ and not transferring, or that significant numbers are transferring to the RIUs while these credit flows are not visible in the CDW data.<sup>8</sup>

The distribution of unassigned credits (not shown) was also different from the distribution of BCTG agreements, with arts and sciences accounting for 36% of credit transfers, business-related programs accounting for 20%, and health programs accounting for 13% of credits transferred, based on the CIP code of the initial post-transfer program in the receiving institution.

<sup>8</sup> The research-intensive universities do not appear as receiving institutions in the CDW data; however, a significant number of BTA and degree partnership agreements involve an RIU as the receiving institution (Appendix III).

# Business and Data Management Practices

## Credit Assignment Coding in the CDW Data

The CDW institutions, and presumably others that use a common Student Information System (SIS) such as Banner or Colleague, manage transfer credit assignment through course, program, and other codes that are attached to the student's record, as the students transfer into the receiving institution (student -> program -> course). In the case of assigned credit, the course codes are those for actual courses as represented on the institution's registration system or SIS.

However, because values for unassigned and block credit values cannot be assigned to any single actual course, institutions use "dummy" course codes to act as credit accumulators instead. The amounts of credit are then attached to the incoming student's record. These course codes may be quite generic (e.g. BLOCK 1XX) or they may indicate broad areas of study, disciplines etc. (e.g. AARTS 1XX, PSYC 2XX), and a given institution may employ a mix of codes. These dummy course codes are usually associated with a program record, which depending on institutional practice may itself be a dummy. They may also be the actual codes of the program to which the student is transferring. Course records and program records themselves carry attributes that aid in the analysis: for instance, course records have course statuses, credits and course level codes, and program records have CIP and program entry requirement (PER) codes among other attributes.<sup>9</sup>

CDW institutions create their files for submitting data into CDW (submission files) through a series of scripts that extract raw data from Banner or Colleague and "transform" or encode it (if necessary), according to the CDW Definitions and Standards documentation. For instance, one institution using Colleague records particular values in the elements that identify transfer students and their transferred courses (STC\_CURRENT\_STATUS and STC\_CRED\_TYPE). The data extraction and transformation routine scans for these values and uses them as keys to extract a set of data, transform its values to those required by the CDW definitions, and port the data to the destination table of the CDW (STUDENT\_COURSE\_TRANSFER). One component of this routine ports the appropriately transformed data to the element that allows the identification of various types of credit (assigned, unassigned and block credit) transferred to the receiving institution (CREDIT\_ASSIGNMENT\_TYPE).

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<sup>9</sup> CDW receiving institutions may have amounts of transfer credit that cannot be associated with a concurrent or subsequent student program enrolment. It is common that an institution will have amounts of unassigned credit with this characteristic, amounting to perhaps 20% of institutional totals, and two institutions have significant amounts of block credit without an associated program. The interpretation of these credit aggregates is unclear, although it is possible that they represent credits assessed for an admission that was not completed.

**FIGURE 11:** Recording Credit Assignment Type at CDW Receiving Institutions: The Numbers of Students Transferring (2008-09 – 2018-19), and the Number of BTAs as Receiving Institution

Institution	Unique Students Transferring	Block	Unassigned	Assigned	Number of BTAs Receiving
BCIT	9,141	430	3,022	7,145	3
COTR	397	17	92	367	4
ECUAD	1,014	-	922	844	34
KPU	10,604	-	6,824	10,333	7
LANG	6,027	97	1,866	5,639	7
OC	1,518	-	540	1,436	38
RRU	276	15	237	30	276
TRU	10,392	-	8,592	8,906	468
UFV	9,102	2,142	6,188	8,391	17
VCC	1,446	277	-	1,242	3
VIU	6,568	502	4,440	5,753	39

The receiving institutions in **Figure 11** either have substantial numbers of student transfers coded as block credit and at least one BTA (seven PSIs), or substantial numbers of transfers coded as unassigned credit, and significant numbers of BTAs (four PSIs). The institutions in this latter category have no student transfers coded as block, a substantial number of unassigned credits, and large or very large numbers of BTAs. One might assume that at least some of this unassigned-coded transfer activity is due to block transfer into some of these institutions, and indeed the survey data indicate that three of them might record block transfer credit for incoming students. The fourth institution records transfers on a course-by-course basis exclusively for both BTA and DP agreements.

The survey responses implied that institutions may record a single student’s credit transfer using more than one credit assignment type, including combinations of block, unassigned, and possibly assigned credit. Of the 3,481 students whose credit was recorded as block in the CDW, only 29% had this type as their sole recorded credit, while 20% had unassigned or assigned credit recorded as well, and 51% received block and both assigned and unassigned credit as they transferred to receiving institutions (**Figure 12**).

Varying practices of coding credit assignment type are evident in the data of the CDW receiving institutions above (**Figure 12**). Seven of these institutions coded explicitly for block credit transfer for some student transfers, and also used a combination of block transfer and other codes (unassigned and assigned) for the majority of student credit transfers. These data affirm the patterns of coding noted in the survey data. Interestingly, the survey respondents from three of the four receiving institutions that did not have students with block credit in the CDW data, stated in the survey that their institution recorded block transfer credits on transfer students’ transcripts.

**FIGURE 12:** Recording Credit Assignment Type at the CDW Receiving Institutions: The Number of Student Transfers with Various Combinations (2008-09 – 2018-19)

Institution	Unique Students	The Combination of Credit Assignment Types				
		03 Only	03 and 01 not 02	03 and 02 not 01	03 and 02 and 01	02 or 01 and not 03
BCIT	9,141	270	102	8	50	8,711
COTR	397	13	2	-	2	380
ECUAD	1,014	-	-	-	-	1,014
KPU	10,604	-	-	-	-	10,604
LANG	6,027	29	42	2	24	5,930
OC	1,518	-	-	-	-	1,518
RRU	276	12	-	3	-	261
TRU	10,392	-	-	-	-	10,392
UFV	9,102	280	213	99	1,550	6,960
VCC	1,446	204	73	-	-	1,169
VIU	6,568	207	99	40	156	6,066

**FIGURE 13:** The Average Number of Credits per Student by Credit Assignment Type at the CDW Receiving Institutions (2008-09 – 2018-19)

Institution	Block	Unassigned	Assigned
BCIT	38.9	9.1	7.5
COTR	50.1	4.9	8.6
ECUAD		20.5	16.1
KPU		10.6	23.7
LANG	41.3	7.0	11.2
OC		5.9	13.4
RRU	18.6	6.4	4.6
TRU		27.3	20.3
UFV	35.9	12.1	27.6
VCC	9.0		5.8
VIU	48.7	16.3	17.2

The CDW receiving institutions that code block credit tended to have higher averages of transfer credit per student in this type, and lower averages in unassigned and assigned credit (**Figure 13**). Those institutions that do not code block credit had higher averages of credits per transfer student in unassigned and assigned credit types. The survey responses showed that many of the latter institutions assessed transfer credit on a course-by-course basis, even when a student was transferring through a block transfer agreement.

## Course Level

The analysis of the course level coding for the CDW block transfer receiving institutions indicates that of the seven receiving institutions who code block credit, only three institutions reported a course level for the courses that carry this credit, and a small number of transfers. In all but a handful of cases block transfer was reported as Level 1 or first-year courses. In many cases it was possible to derive the course level from the course code itself (e.g., BLOCK 1XX for a first-year course, PSYC 2XX for a second-year course), and it was found that the majority of credits – 96% of the total number of credits from 2009-10 to 2018-19 are recorded at the first-year level. The course level coding was similarly spotty for unassigned credit. Where it was possible to derive a level from the course coding itself, 65% of credits were recorded as first-year, 21% as second-year, and 11% of credits as third-year course credits.

These findings generally correlate with the average number of credits transferred by students, seen previously. These are 36.1 for block, and 15.8 for unassigned, which would roughly indicate transfer of a year's course credit, or transfer of a certificate level program.

## Transfer Type

The STUDENT\_COURSE\_ACHIEVEMENT table of the CDW, unfortunately, could not provide a useful perspective on types of transfer activity. The table contains such elements as ACHIEVEMENT\_STATUS and TRANSFER\_TYPE, which together could provide an indication of the type of transfer credit awarded. The course achievement is coded as "T" for transfer along with several transfer type coding options, including an Inter-institution Articulation Agreement coding that could be used for DP agreements. Only three institutions currently populate these elements in the CDW, and the most common value was "unknown"; thus, no additional insights could be gained from these elements of the CDW data.

To summarize, the preceding analyses of data management practices among CDW institutions show that there are significant differences in how institutions record student transfer related data. These differences may obscure tracking of transfer credit flows. The analysis also shows that there are elements such as course level and transfer type that could assist in understanding these flows, but the elements are currently underused.



# Business and Data Management Practices - Survey of Receiving Institutions

## Characteristics of the Institutions Surveyed

A survey was conducted of institutions that regularly receive students transferring via BTAs or DP agreements. The survey investigated the institutions' business and data management practices around these types of transfer. Criteria for selection into the survey frame included evidence of block transfer activity in the CDW data, or the institution having a substantial number (five or more) receiving block transfer or degree program agreements listed in the BC or Alberta Transfer Guides.

Based on these criteria, six RIUs, the five TIUs, four colleges and one institute were selected for the survey among BC public PSIs. In addition, seven major Albertan receiving institutions were included in the survey, based on the assumption that the Alberta Transfer System is similar to BCTS, and that useful perspectives could be obtained from their experience. BC responses were received from three RIUs, all five TIUs, the institute, and three colleges; these were augmented by responses from five Albertan post-secondary institutions – for a total of 17 of 23, or 74%, of respondents (one per institution). In addition, these responses were supplemented with the data from two other BC public RIUs that had participated in a precursor study (Merner, 2019). Data were thus available on many variables of interest for five of the six research universities and 19 institutions overall.

The institutions for which the survey data were available appeared representative of their provincial sectors and provided a variety of approaches and perspectives to block transfer itself. The BC institutions are partners in 1,156 block transfer or degree partnership agreements as receiving institutions. Although a comparable number of agreements was not available for the Albertan institutions, the group included the majority of the main Albertan receiving institutions (the list of participating institutions is Appendix II). The BC institutions ranged from very small to very large receiving institutions. The number of their receiving agreements ranged from less than 10 at several institutions to a high of over 400 agreements at one institution. While all institutions responding to our survey were receiving institutions in block transfer agreements, only 14 of the 17 institutions were receiving institutions in degree partnership agreements.

## Incoming Students and Transcripts

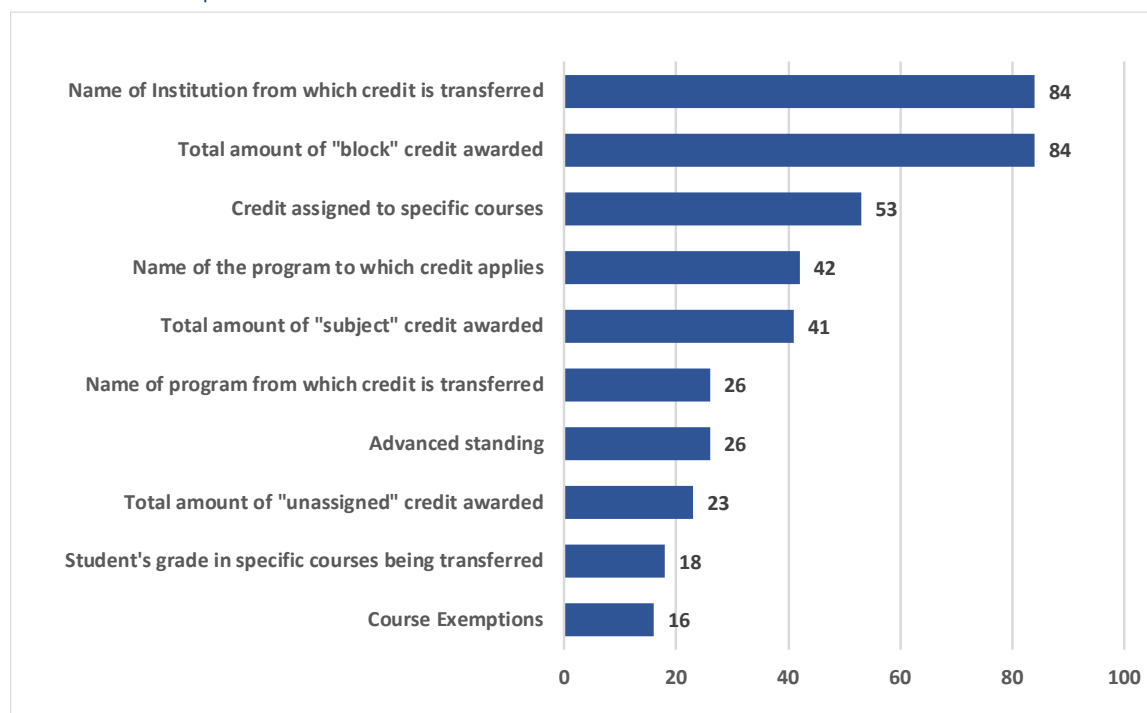
Previous research (Merner, 2019) indicated that the Registrar's Office plays a prominent role in implementing BTAs, including communicating, assessing, and recording information. Faculty members and department chairs may also take part in the process at some institutions, particularly in assessing incoming transfer students' credit eligibility. 84% of the respondents to the current survey reported that the Registrar's Office had the *primary* responsibility for assessing and awarding block transfer and degree partnership credit. About 70% of respondents indicated that the Registrar's Office assessed degree partnership transfer credit as well. This responsibility is most commonly vested in a team or department in the Registrar's Office such as Admissions, Advising, etc., while several institutions had Transfer Offices or teams with similar functions.

The remaining respondents indicated that the Department Chair was responsible for assessing block transfer credit, and in three responding institutions assessment was consultatively shared between the academic departments and the Registrar's Office. The latter played a predominant role at the BC universities, both RIUs and TIUs. This responsibility was more shared or distributed in all other types of institution. Regardless of where the transfer was assessed, it was almost invariably recorded on the Student Information System (SIS) by the Registrar's Office. Only one Albertan institution recorded it in a unit outside the Registrar's Office (Evaluations). 76% of respondents replied that written protocols were used to ensure consistent recording of information across similar types of transfer.

The majority of institutions distinguished block transfer from other types of transfer when recording the transfer credit. 65% of the respondents mentioned that their PSI recorded block transfer information on the incoming student's record, and about a third of these also applied other types of coding to distinguish block transfer from other credit types. The remaining 35% of respondents recorded all types of transfer in the same way, not distinguishing block transfer from other mechanisms. Four of the five BC TIU respondents mentioned recording block transfer this way.

The respondents indicated various types of information that was recorded on an incoming students' transcript for students admitted with transfer credit through a BTA or DP agreement (**Figure 14**).

**FIGURE 14:** The Percent of Respondents who Indicated Recording Various Types of Information on an Incoming Student's Transcript



The most commonly recorded item of information (reported by 84% of respondents) was the name of the institution from which credit is transferred. All responding BC institutions in the sample recorded this information. However, only two of the five responding Albertan institutions did so.

Similarly, all but one of the BC institutions recorded the total amount of block transfer credit, with the other assessing credit on a course-by-course basis. Three of the five Albertan institutions recorded the total amount of block transfer credit, although it was unclear from the data what practice was followed by the two other AB PSIs. Eighty-four percent of respondents recorded the total amount of block credit.

Block credit was recorded as specific courses in 53% of institutions. This is commonly done where specific course prerequisites must be assessed at the receiving institution. All but one of the TIU respondents indicated they followed this practice, while only one of the colleges/institutes did so. Three (18%) of all respondents recorded the grade in specific courses transferred, and all these responses were received from BC TIUs. In 41% of reporting institutions unassigned credit was awarded in a specific subject area (e.g., "6 credits of PHYS XXX"), and that transfer credit could be applied to elective courses in that subject area. This practice was most commonly indicated by respondents from BC TIUs, and it was least commonly found in the colleges/institute responses, and in the responses from the Albertan institutions.

The name of the program to which credit applies was recorded on transcripts at 42% of receiving institutions, while the name of the program from which credit is transferred is recorded in only 26%. BC TIUs and AB respondents did not record the name of either the sending or receiving program.

About a quarter (26%) of responding institutions recorded advanced standing in lieu of block transfer in certain circumstances. The five respondents who reported doing so were all from BC institutions. Recording advanced standing was most common in degree programs. Advanced standing was recorded on the transcript in combination with an award of block credit at some institutions, although the specifics of its use were not clear. It would seem from the survey responses that advanced standing was not used frequently in lieu of block credit, and indeed only one of the RUI respondents mentioned using advanced standing in any context at all.

Less than a quarter of institutions (23%) stated in the survey that they recorded block transfer as unassigned credit (three BC TIUs, and one BC RIU responses). When queried on the circumstances of using unassigned credit in lieu of block transfer, the respondents identified the following situations:

- where an equivalent does not exist;
- where courses are transferred outside the block credit agreement;
- when specified as part of the block credit agreement; and
- block transfer is considered unassigned credit.

The first three of these responses suggest that recording unassigned credit is largely in addition to recording block credit, i.e. in certain circumstances, unassigned credit is recorded for courses not specified in the agreement itself. The last statement may be more a philosophical perspective than an actual coding practice, as the respondent represented an institution with notable amount of block credit in the CDW.<sup>10</sup>

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<sup>10</sup> We compared some institutions' response to the questions on recording unassigned credit to their actual coding in the CDW. Eight CDW institutions indicated they did not record unassigned credit in the context of block transfer, and for three of these no unassigned credit was indeed found in the CDW data. For the remainder, we might assume that all unassigned credit in the CDW data was recorded in the context of course-to-course transfer – however one large receiving institution with a large number of agreements and considerable receiving activity had all of their transfer credit coded either as unassigned or assigned credit in the CDW. Ten CDW institutions indicated in the survey that they recorded block transfer credit for incoming students, however four of these showed no block credit volume in the CDW. Three of the four reported unassigned credit, while one had no assigned or unassigned credit. This contradiction is discussed in the section on Coding for Credit Assignment Type below.

Recording course exemptions in the context of block transfer was rarely mentioned. Only three (18%) of the respondents indicated such practice, all of them BC PSIs. At one BC institution, the practice was used “very rarely” while another PSI applied exemptions to specific course, subject area or program requirements. It appears that the practice of recording exemptions was unlikely to significantly skew overall block transfer credit flows.

Respondents were asked which course equivalents were recorded on the student’s transcript at the institution, when a student transfers using a block transfer agreement. Fifty percent of respondents indicated that the type of course equivalents recorded varied depending on the content of the transfer agreement. This was not a surprise, as some agreements may specify equivalents while other agreements would not. 28% of respondents indicated that it is “only the courses from the previous institution which are being transferred” that appeared in the transcript. The remaining responses were evenly split between recording all course equivalents (11%) or none (also 11%) with two institutions in each category.

53% of respondents indicated that “sometimes” BTA transfers were assessed on a course-to-course basis. This finding occurred across a range of institutional sectors. Perhaps most interestingly, an additional 29% (i.e., five respondents) reported doing course-to-course assessment of BTA transfer credits “always or most of the time”. One of these responses came from Alberta, three responses came from what could be described as specialized institutions, and one was from a large RIU. Of the institutions that assessed block transfer credit on a course-by-course basis, whether “sometimes” or “always or most of the time”, 86% did so in order to check prerequisite compliance for subsequent courses. Seventy-nine percent of these responses also mentioned assessing block transfer credits in this manner to check future graduation eligibility including via automated systems, while 64% did so to provide clarity to students or as an advising resource. Other reasons for assessing block transfer credit on a course by course basis included a student not fulfilling the block transfer agreement requirements, or to identify “not-to-take” equivalent courses.<sup>11</sup> Only three of 17 responding institutions (18% of respondents) indicated that they never assessed credit on a course-by-course basis for students transferring credit through a block transfer agreement. These institutions were all BC colleges or institutes.

When asked whether they accommodated block transfer credit without a formal block transfer agreement being in place, 12 of 19 institutions, or 63% of all respondents, indicated they did so. Eighty-three percent of these institutions would rely on the incoming student’s credential (i.e., they would use the incoming student’s credential to determine whether to award transfer credit and/ or how much credit to award) while half of the respondents might reference past practice and/or an agreement from a similar area (e.g., an agreement pertaining to a related program option). In many cases more than one of these resources might be used. The survey also asked what role or area would be responsible for assessment when there was no formal block credit transfer agreement. In 80% of responses that indicated this practice, the program chair, dean or faculty within the appropriate discipline would be involved; and in half of these cases, the registrar’s office would also play a role. In 20% of the responses for this group the registrar’s office had the sole responsibility for assessing and transferring block transfer credit without a formal agreement.

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<sup>11</sup> The fact that institutions may assess block transfer credit on a course by course basis does not necessarily mean that credit transfer is recorded as course-by-course or as assigned credit. These responses were correlated to actual practice at the CDW institutions, and in more than half the cases substantial amounts of block transfer credit were identified, including a large receiving institution that “always” assesses on a course by course basis. However, it is also the case that others of this group show no block transfer credit, including two of those who “always” assess in this manner.

# Recording Degree Partnerships in Comparison to Block Transfer Agreements

Three of the BC institutions surveyed participated in block transfer agreements but not degree partnerships. Of the remaining 14 respondents, two recorded DP transfer information somewhat differently than the BTA information, while half (seven institutions) recorded the same information for both types of transfer. Four of the five responding Alberta institutions similarly recorded somewhat different information for the two pathway types.

The respondents provided detail on the differences in recorded information for credit from BTAs and from DPs. Specific examples included:

- the degree partnership is referenced as a transcript notation;
- unassigned credit and subject credit may be recorded for block transfer but not for transfer credit through a degree partnership;
- credit is assigned to specific courses for credits transferred through a degree partnership but not for credits transferred through a block transfer agreement (although block credit is still recorded for the former);
- total amount of block credit awarded is recorded for a transfer through a block transfer agreement but not for credit transferred through a degree partnership;
- total amount of subject credit awarded is recorded for a transfer through a block transfer agreement but not for credit transferred through a degree partnership;
- credit is assigned to specific courses when credit is transferred through a block transfer agreement but not for credit transferred through a degree partnership, and vice versa;
- credit is assigned to specific courses transferred through a degree partnership but not for credits transferred through a block transfer agreement; and,
- the student's GPA is recorded for all transferred credits when these credits are transferred through a degree partnership, but not when credits are transferred through a block transfer agreement.

However, the differences in practice *within* these institutions in recording credit from block transfer agreements, when compared to how credit from transfers through degree partnerships is recorded, is considerably less than the variations in practice *between* the participating institutions.

## Tracking Block Transfer Use

The study also explores whether institutions can track block transfer use. As in earlier studies (Merner, 2019; Jacinto, 2018), the large majority of respondents (84%) declared that they could not track the use of block transfer. Only two BC institutions and one AB institution could track students and/or credits transferring in, as well as identifying the sending and receiving programs. Previous research similarly found that a few institutions may be able to track students and credits transferring in via BTAs, but cannot identify the students preparing to transfer out (Merner, 2019).

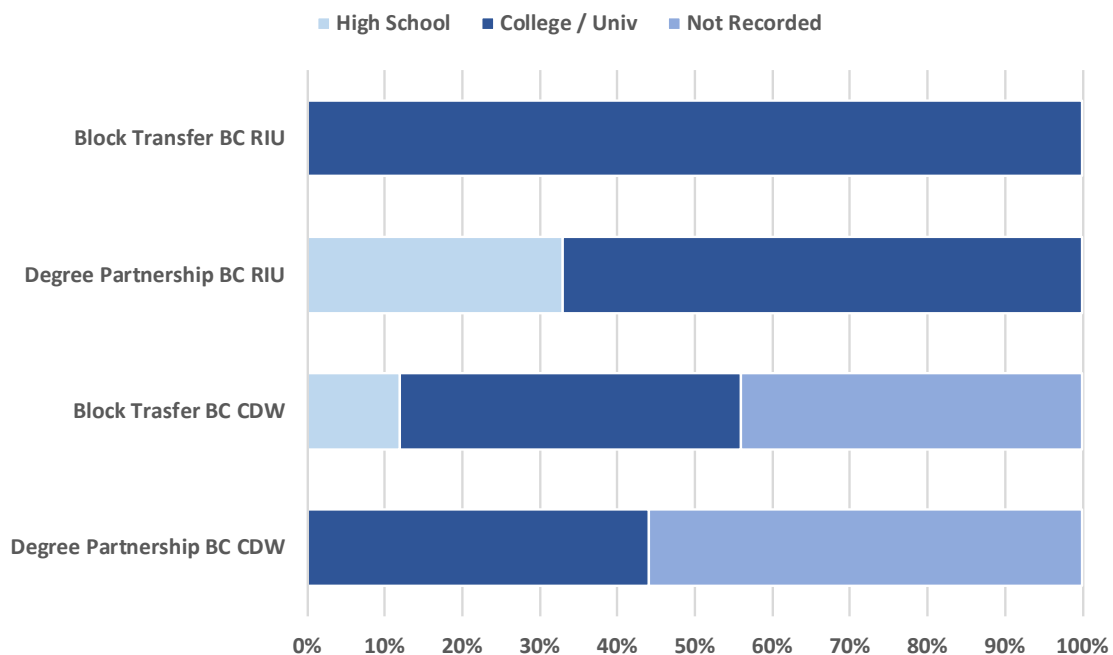
The current study confirms that the quantification of actual flows of students and credits via block and other transfer mechanisms can only be achieved within the context of the receiving institution's data and perspectives. Only the receiving institution holds the data about what credits have actually transferred via the BTA and DP pathways, and only its data hold the information about the linkage from the sending institution, through the transfer student, to the receiving institution, and towards educational outcomes. All institutions have the ability to track incoming students,

their credits and associated transfer information, by combining the information recorded on the incoming student transcript, and other data elements stored on the institution’s SIS. The institutions can focus, refine and regularize business and data management practices for this purpose, should institutions be motivated to quantify credit flows and to track students’ progress. An institution’s business practices will to a large extent determine what information is collected, how, by whom, and in what context. Data management practices, including coding, organizing, validation and retrieval mechanisms, could allow framing this collected information in ways to better understand student and credit flows, patterns and interrelationships.

## Basis of Admission

Institutions may determine and encode a “basis of admission” for transfer and/or direct entry students, and they may use this information in internal or external reporting. The BC RIUs are asked to report the basis of admission on their Student Transitions Project (STP) submissions. The survey asked institutions how they recorded the basis of admission for both block transfer and degree partnership transfer. **Figure 15** summarizes the responses by sector.

**FIGURE 15:** The Percent of Survey Respondents by the Method of Recording the Basis of Admission: Block Transfer versus Degree Partnership



All RIU respondents in the conducted survey coded the basis of admission as “college or university” for students entering via a BTA, while all but one coded the same basis for those entering via DP’s. The exception coded the DP students as “high school” admits, and while the reason for the divergence between BTA and DP was not clear in this case, the institution had a higher volume of DP transfer agreements.

Many of the BC CDW institutions in our sample did not record the basis of admission, and reporting this information to the CDW or STP is voluntary. Most of the institutions that recorded the basis of admission, including the majority of TIUs, recorded it as “college or university” for block transfer students. The only institution that recorded the basis of admission for block transfer as “high school” was a smaller transfer credit volume TIU.

We compared the actual reporting to the CDW and STP on the basis of admission to the survey responses. The only institutions reporting the basis of admission were the research universities. Although most of the TIUs recorded this basis of admission information internally, the information was not reported to the CDW or STP.

In a similar vein, institutions may record students as “direct entry” or “transfer” on their systems for admissions purposes. Students may be considered “direct entry” if they are coming from the secondary education system, even though they may transfer substantial postsecondary credit. The survey asked respondents what the “transfer” versus “direct entry” credit threshold was at their institutions. Among the responding BC institutions, the most common threshold for transfer status was 24 post-secondary credits, or a full-time year of study (40% of responses, including two RIUs and two of the five TIUs). Other thresholds were nine, 15 or 21 post-secondary credits; and other responses included “any post-secondary”, “case-by-case” to record incoming students as transfer students, and “open registration” (i.e., no threshold). Among the five Albertan respondents, two considered students with any post-secondary experience to be transfer students, and two had thresholds of 12 and 24 post-secondary credits respectively.

Although there is some agreement, at least in BC, around a threshold of 24 post-secondary credits, practices vary substantially. While this variability would not impair use of these admissions categories for internal reporting of block and other transfer volumes, it would make such designations an unsuitable vehicle for system-level analysis.

*Institutions may determine and encode a "basis of admission" for transfer and/or direct entry students, and they may use this information in internal or external reporting. The survey asked institutions how they recorded the basis of admission for both block transfer and degree partnership transfer.*

# Possible Strategies for Improving Institutional and System-Level Data

The results of the current study reinforced and expanded on the findings of previous research into BC system and institutional data capabilities, in order to enhance understanding of BTA and DP transfer mechanisms. Since the availability, quality and consistency of institutional data are fundamental to developing system-level perspectives, the data are discussed first.

## Institutional Data and Information Support

The survey respondents in this and previous studies spoke to an inability to track block transfer students as these students enter and progress through their institution. All respondents were very aware of the existence of data that describe a transfer student and their origins, credits and attributes at an individual level, and provided insight into their institutional data practices. However, very few respondents believed that there was institutional capability to summarize or track these features to explore BTA and DP use. Despite these impressions, institutions had a reasonably rich array of data that can be used. The institutional information on block transfer is a superset of the data available in the CDW. The survey indicated that the creation of and adherence to standardized procedures for data capture were largely in place, as well as accompanying mechanisms for data validation and maintenance. This base could support the framing of queries and diagnostics that support business practices, process quality and student needs.

The receiving PSIs had data available on students entering an institution through block transfer agreements, and their progress after admission. However, the data for the students preparing to transfer from a sending institution were unavailable. Previous research (Merner, 2019) described this shortcoming and suggested measures to provide better information, including mechanisms to actively identify transfer pathway students, and track progress once identified.

## Creating a Comparative Base

Institutions have created their transfer-related business practices and updated them over time to better serve students and departments in an effective and efficient manner. The institutional data management practices have also changed over time, reflecting institutional business practices, and internal and external reporting needs. The data comparability issues identified in this study may have been caused by the vagueness of the block transfer definition in the CDW Data Definitions and Standards document. The document provides a comprehensive set of coding options, but it has never intended to be prescriptive about choices and dependencies. As well, if there was ever any accompanying guiding documentation on the block transfer definition, it has been lost to collective memory. Those doing data entry, and others maintaining extraction and reporting procedures, are making careful and reasoned decisions, but they are doing so largely in reference to established institutional practice rather than inter-institutional comparability.

There does not appear to be a consensus about the best way to portray block transfer in the CDW data, and institutions have found different ways to best support student transfer in their institutional practices. A contributing factor is the dearth of detailed exploratory studies of block transfer-related data; BCCAT and this paper are attempting to provide such a perspective, so that institutions might see how their practices compare with others in the same system.



# Recommended Practices

The following recommended practices are based on the survey responses and the analysis of the CDW data.

## Advanced Standing

Advanced standing is not commonly awarded in the BCTS, and not at all in Alberta. When used, it is most commonly found in relation to degree partnerships. In at least some of the responding institutions, it was used as an annotation on the student's transcript, in combination with an award of block credit. This would be the preferred practice for data transparency, since it shows the amount of credit awarded.

## Basis of Admission

Although basis of admission is not a commonly reported CDW element, the BC public RIUs report BASIS\_OF\_ADMISSION on the STP. The basis of admission could provide a useful referent for system-level analysis if it were captured by all institutions and defined consistently. When basis of admission is recorded, most institutions code the basis of admission as college/university for both transfers through BTAs and transfers through DPs. Standardizing on this practice could improve the consistency of the data, and visibility for these transfer types.

## Credit Assignment Type

Both the survey responses and the CDW data indicated that institutions did not follow a unified practice in coding for CREDIT\_ASSIGNMENT\_TYPE. Indeed, most institutions recorded some credit as assigned or unassigned credits instead of block transfer credit as the agreement or student's situation warrants, and some institutions did not use block transfer credit type completely. Enhancing the clarity of information to students in relation to pathways and credentialing has been named as a major driver for using course transfer credit. These objectives must be respected. However, one way to provide more consistent recognition of block transfer might be to adjust the way that credit assignment type is coded. For example, if a block transfer agreement is used by a student to transfer but the assessment of the student's transfer credit is recorded as assigned or unassigned courses, the credit assignment type could be coded as block rather than as assigned or unassigned. The block credit definition for block credit assignment type in the CDW Data Definitions and Standards document could be clarified to only include credit transferred through an existing BTA or DP agreement, and not for transfer of a block of credits that is unrelated to any agreement.

Moreover, four CDW receiving institutions did not record or did not report credit assignment type in their CDW submissions, while receiving significant transfer credit flows. The reasons for not using the credit assignment type are unknown, as is the possibility of retroactively reporting credit assignment type for transfer credits received in the prior years. Using one or more of the three credit assignment types at all CDW receiving intuitions would greatly enhance the system-level view of transfer credit flows within the BCTS.

Another possible aide to making block transfer more visible would be to employ separate coding that would overarch the three credit assignment types. It should be possible to extend the values available under SCA\_TRANSFER\_TYPE to explicitly indicate block transfer as a separate category of agreement, whether the agreement is posted to the BCTG or not.

## Transfer Type

Only three institutions populated the SCA\_TRANSFER\_TYPE element (see above), and the most common value was "unknown". However, this element, in combination with SCA\_ACHIEVEMENT\_STATUS and credit information from

CREDIT\_ACHIEVED and other related fields, could provide useful views of transfer credit and the types of agreements that enable transfer.

### Course/ Requirement Exemptions

The study results revealed that recording course exemptions in the context of block transfer was fairly rare. It appears that the practice of recording exemptions is unlikely to skew reported block transfer credit flows. Indeed, most institutions have moved to granting transfer credit or PLAR credit instead of exemptions. These would be preferred practices from both the student support and the data integrity perspectives, as they provide the needed clarity on the student record for all future uses.

### Toward a System-Level View

The CDW data used in this analysis were of sufficient scope and detail to provide a reasonably detailed picture of the volumes, trends and features of block transfer and other types of transfer across BCTS member institutions. However, the absence of the reported data from UBC, SFU, UVIC and UNBC is a major limitation, as the CDW data cannot provide the receiving transfer perspective of these major institutions. Also, although these and BC's other public institutions provide data to the STP, the STP data do not yet contain the critical course- and course transfer-related elements needed to support a comprehensive and detailed view of types of transfer across the system. Until these elements are added to the STP, a complete view of the transfer system could not be possible, because the absence of the transfer student and credit volumes from the four major RIUs in the CDW is too impactful to be overlooked. Therefore, the central recommendation of this study is to add course- and course transfer-related data to the STP, and to do so with sufficient historical depth that the volumes and trends of all types of transfer can be traced as the system has evolved.

Although these suggested additions would constitute a tremendous step in understanding transfers at all BC public PSIs, it would still leave some BCTS member institutions only partially visible. For a complete BCTS perspective, the recommendation would be to invite the remaining BCTS members – Athabasca University, Yukon College and the private institution members – to provide full histories of STP data for their institutions, including course- and transfer-related data as described above.

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# APPENDIX I. Glossary

**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. (1)

**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. (1)

**Collaborative Program / Agreement** - There are four main types of collaborative programs:

- (i) Joint Degree Program - awards one joint qualification and is completed in the same time period as it would have taken to complete an individual program;
- (ii) Multiple Degree Program - awards more than two individual qualifications at equivalent levels and takes longer to complete than an individual program;
- (iii) Double Degree Program awards two individual qualifications at equivalent levels and takes longer to complete than an individual program (e.g., Dual Degrees, Double Degrees); and a,
- (iv) Combined Degree Program - awards two individual qualifications at consecutive levels (e.g. Bachelor/Master, Master/Doctoral) and takes longer than one degree but is shorter than if the two degrees were taken separately. (2)

## Credit Assignment Type

01 - Assigned Credit: Credit granted for a specific course when a course from another institution is considered equivalent to one at the receiving institution

02 - Unassigned Credit: Credit given when a course or program is considered worthy of credit but does not have a specific equivalent at the receiving institution

03 - Block Transfer Credit: 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 (5)

**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'. (1)

**Dual Admission Agreement** - Credit that may be applied to a credential at more than one institution, sometimes between secondary school and college programs or between college and university programs (3) It may involve a dual environment in which the student is concurrently enrolled in a high school and post-secondary institution, or consecutive enrolment in which the student completes high school and subsequently is provided credit for learning when they are admitted to the specified post-secondary institution (2).

**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. (1)

**Guaranteed Admission Agreement** – Similar to a dual credit agreement but usually formed between a college and a university. Specifies a number of eligible transfer courses, usually with a minimum GPA, which will guarantee entrance to select university programs with full credit for college coursework. (adapted from NIC/UVIC)

**Joint / integrated program agreement** - A program offered co-operatively by university and college partners. May integrate two or more distinct programs also offered independently by partner institutions. Students study at both institutions either sequentially or concurrently. Graduates receive one or more credentials from partner institutions, for example, a student might receive both diploma in media arts and a degree in communications. (3)

**Program Transfer Agreement** – A Program Transfer agreement enables students who have completed a credential at a college or university to gain credit for that credential at another institution. (adapted from 3)

**2+ 2 Agreement** – A block transfer agreement in which 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. Variations may include the specification of particular courses, or that specified standards or additional prerequisites (e.g. grade 12 Math) have been met; or, that the receiving institution accepts a two-year diploma for entry into a two-year degree completion program, i.e. as among criteria for admission. (adapted from 1)

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3. Transfer Ontario's more general glossary: [https://www.ontransfer.ca/index\\_en.php?page=glossary](https://www.ontransfer.ca/index_en.php?page=glossary)
4. The Canadian Information Centre for International Credentials – searchable database of terminology: [https://www.cicic.ca/1620/do\\_an\\_advanced\\_search\\_in\\_the\\_terminology\\_guides.canada](https://www.cicic.ca/1620/do_an_advanced_search_in_the_terminology_guides.canada)
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# APPENDIX II.

## Survey of Block Transfer and Degree Partnership Receiving Institutions: List of Responding Institutions

Athabasca University  
British Columbia Institute of Technology  
Capilano University  
College of the Rockies  
Emily Carr University of Art + Design  
Kwantlen Polytechnic University  
Northern Alberta Institute of Technology  
Okanagan College  
Thompson Rivers University  
University of Alberta  
University of British Columbia  
University of Calgary  
University of the Fraser Valley  
University of Lethbridge  
University of Victoria  
Vancouver Community College  
Vancouver Island University

**Supplemental data from a previous study (Merner, 2019) was used to amend the survey from the following institutions:**

Royal Roads University  
University of Northern British Columbia

# APPENDIX III.

## List of BC Transfer System (BCTS) Institutions, and BTA/ DP Sending and Receiving PSIs in the CDW data and BC Transfer Guide (BCTG)

BCTS Post-Secondary Institution	Abbreviation	Sending PSI		Receiving PSI	
		in CDW Data	in BCTG	in CDW Data	in BCTG
<b>BC Public Colleges</b>					
Camosun College	CAMO				
Coast Mountain College	CMTN				
College of New Caledonia	CNC				
College of the Rockies	COTR				
Douglas College	DOUG				
Langara College	LANG				
North Island College	NIC				
Northern Lights College	NLC				
Okanagan College	OC				
Selkirk College	SELK				
Vancouver Community College	VCC				
<b>BC Public Institutes</b>					
British Columbia Institute of Technology	BCIT				
Justice Institute of British Columbia	JIBC				
Nicola Valley Institute of Technology	NVIT				
<b>BC Public Teaching Intensive Universities</b>					
Capilano University	CAPU				
Emily Carr University of Art + Design	ECUAD				
Kwantlen Polytechnic University	KPU				
University of the Fraser Valley	UFV				
Vancouver Island University	VIU				
<b>BC Public Research-Intensive Universities</b>					
Royal Roads University	RRU				
Simon Fraser University	SFU				
Thompson Rivers University	TRU				
University of British Columbia	UBC				
University of Northern British Columbia	UNBC				
University of Victoria	UVIC				
<b>BCTS Private and Non-BC Institutions</b>					
Acsenda School of Management	ASM				
Alexander College	ALEX				
Athabasca University	AU				
Columbia College	COLC				
Coquitlam College	COQC				
Corpus Christi College	CCC				
Fairleigh Dickinson University	FDU				
Fraser International College	FIC				
Trinity Western University	TWU				
Yorkville University	YVU				
Yukon College	YUKO				

# APPENDIX IV. The Survey Instrument

## Block Transfer Agreements and Degree Partnerships Survey

The British Columbia Council on Admission and Transfer (BCCAT) has contracted Paul Merner ([mernerpaul@gmail.com](mailto:mernerpaul@gmail.com)) to conduct a study on admitting and transcribing students via block transfer agreements and degree partnerships. Both of these transfer mechanisms are important to students and institutions, and they play a major role in the BC Transfer System. The questionnaire will briefly touch on various aspects of admitting students via these agreements, and the information recorded during the process. Your assistance in helping us understand these important issues and improving students' experiences is greatly appreciated.

This survey seeks to capture information on admitting and transcribing students via block transfer agreements and degree partnerships as a support for post-secondary admissions and transfer and beyond. It is anticipated that the final peer-reviewed study may be published on the BCCAT website in 2020.

### Definitions:

**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.

**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 Enrollment.

**Time to Completion:** Approximately 10 minutes

**Recommended Respondents:** staff familiar with the processing and recording of students' transfer information, as students transition into your institution via Block Transfer and Degree Partnership. If you feel there is someone better suited to provide such information for your institution, please feel free to forward this request to your colleague. One response per institution is requested; however, you are welcome to collaborate to compile responses.

**Participation:** Your participation in the study is completely voluntary and you may choose to stop participating at any time. If you choose to formally withdraw from the study, via a notice of withdrawal all associated data collected will be destroyed. Your completion of the survey implies informed consent to participate.

**Confidentiality and Privacy:** The final data set for the project will be anonymous; it will be clear which type of post-secondary institution or organization participants represent and from which geographical region. Your institution will remain anonymous in publication, but will be known to the researcher should you provide this information. Survey responses will be stored securely in Canada; following completion of the study they will be destroyed.



**Questions:** Paul Merner at [mernerpaul@gmail.com](mailto:mernerpaul@gmail.com) or 250-508-1507, or Dr. Anna Tikina at [atikina@bccat.ca](mailto:atikina@bccat.ca).

1. Please tell us your position title and institution. This information will be used for analytic purposes, and neither individual titles or institutions will be identified in the published study.

Institution

Position title

## Student Achievement and Transcribing

2. When a student transfers to your institution using a block transfer agreement or via a degree partnership, what area has the primary responsibility for assessing and awarding transfer credit for the incoming student?

	<b>Block Transfer</b>	<b>Degree Partnership</b>
Registrar's office		
Program or department chair		
Faculty members or instructional staff		
Responsibility varies with agreement		
Responsibility varies with the student's circumstances		
Other		

3. Are the same positions responsible for both assessment and recording of transfer information to the Student system? If not, what position(s) are responsible for entering incoming block transfer and degree partnership transfer information to the Student system?

4. Do you have written protocols that are referenced in order to ensure consistent recording of information across similar instances of transfer? (Yes/No)

5. What types of agreements does your institution have?

- Block Transfer Agreements only
- Degree Partnerships only
- Both Block Transfer Agreements and Degree Partnerships
- Neither Block Transfer Agreements nor Degree Partnerships
- Don't know

## Block Transfer Agreements Focus

**Thinking for the moment of block transfers that are NOT also degree partnerships, please answer the following questions regarding incoming students.**

6. When a student transfers to your institution, do you distinguish block transfer from other types of transfer in terms of how it is recorded? Please indicate all that apply:

- Yes, the information we record on the incoming student's record at our institution is different for block transfer than for other types of transfer
- Yes, we apply other types of coding to distinguish block transfer from other transfer types
- No, all types of transfer are recorded in the same way

7. When a student transfers to your institution using a block transfer agreement, what information is recorded on the incoming student's transcript? Recognizing that circumstances might vary with different block transfer agreements, please indicate all that apply:

- Name of institution from which credit is being transferred
- Name of program from which credit is being transferred
- Name of program to which the credit applies
- Total amount of "block" credit awarded
- Total amount of "unassigned" credit awarded
- Total amount of subject credit awarded (e.g. ENGL 15 credits)
- Credit assigned to specific courses (e.g. MATH 100 6 credits)
- Student's grade in specific courses being transferred
- Student's GPA for all transferred credits
- Advanced standing (e.g. student is admitted to third year of a four year program)
- Course/ requirement exemptions (student is exempted from taking specified course(s) at your institution)
- Other (please specify)

8. When a student transfers to your institution using a block transfer agreement, which course equivalents are recorded on the student's transcript at your institution?

- All courses taken at the previous institution
- Only the courses from the previous institution which are being transferred
- Only the courses from the previous institution which transfer as part of the block transfer agreement
- It depends on the block transfer agreement

\*9. Are there circumstances in which transfer credit is assessed on a course-by-course basis even though the student was transferring under a block transfer agreement?

- Yes, always or most of the time
- Yes, sometimes
- No

10. What are the reasons for assessing block transfer agreements on a course-by-course basis? Please indicate all that apply:

- Pre-requisite compliance
- Graduation compliance
- Graduation audit software
- Advising resource
- Provide clarity for students
- Other (please specify)

11. Are different types of Block Transfer (e.g. Associate Degree, Diploma transfer, Bridging Program, Career Credential, Descriptive Pathways, 1x1, 2x2 etc.) treated differently in terms of the transfer information recorded?

- Yes
- No

\*12. Does your institution accommodate block transfer without a formal agreement being in place?

- Yes
- No

13. On what basis would the decision to accommodate block transfer without a formal agreement be made? Please indicate all that apply:

- Appropriate student credential
- Past practice
- Reference to similar agreements
- Other (please specify)

14. What position(s) in your institution have the authority to approve these credits as being accepted without a formal block transfer agreement?

15. When a student transfers to your institution using a degree partnership agreement, is the recording of transfer information the same as via other forms of block transfer?

- Yes
- No
- We do not receive students via degree partnerships

16. When a student transfers to your institution using a degree partnership agreement, what information is recorded on the incoming student's transcript? Recognizing that circumstances might vary with different degree partnership agreements, please indicate all that apply:

- Name of institution from which credit is being transferred
- Name of program from which credit is being transferred
- Name of program to which the credit applies
- Total amount of "block" credit awarded
- Total amount of "unassigned" credit awarded
- Total amount of subject credit awarded (e.g. ENGL 15 credits)
- Credit assigned to specific courses (e.g. MATH 100 6 credits)
- Student's grade in specific courses being transferred
- Student's GPA for all transferred credits

- Advanced standing (e.g. student is admitted to third year of a four year program)
- Course/ requirement exemptions (student is exempted from taking specified course(s) at your institution)
- Other (please specify)

17. When a student transfers to your institution using a degree partnership agreement, which course equivalents are recorded on the student's transcript at your institution?

- All courses taken at the previous institution
- Only the courses from the previous institution which are being transferred
- Only the courses from the previous institution which transfer as part of the degree partnership agreement
- It depends on the degree partnership agreement

## General

18. When a student transfers to your institution using a degree partnership agreement, what do you record as "basis of admission"?

- High School
- College/ University
- Other coding
- We do not record "basis of admission"

19. When a student transfers to your institution using a block transfer agreement, what do you record as "basis of admission"?

- High School
- College/ University
- Other coding
- We do not record "basis of admission"

20. Students may be considered "direct entry" from secondary education, even though they may transfer substantial postsecondary credit. How is the "transfer" vs "direct entry" threshold determined at your institution (e.g., 24 credits or more)?

\*21. Can block transfer activity metrics be reported by your institution?

- Yes
- No

22. Which of the following aspects of block transfer can you report upon? Please indicate all that apply:

- Number of students using block transfer agreements to transfer out
- Number of students using block transfer agreements to transfer in
- Number of credits transferred out via block transfer agreements
- Number of credits transferred in via block transfer agreements
- Number of programs participating in block transfer agreements as senders
- Number of programs participating in block transfer agreements as receivers

23. If you have any final comments about recording block transfer or degree programs at your institution, please provide them here.





**BCCAT**

*Your guide through post-secondary education.*