BCCAT Your guide through post-secondary education

Special Report

Credit Transfer:
Models and Systems in BC, North America and Beyond

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Part A: Models of Transfer in BC

Articulation-Based Transfer

In the context of post-secondary education, articulation is the word used to describe the process whereby two (or more) institutions reach agreement on whether or how the curriculum of one is equivalent to the curriculum of the other, and on the appropriate credit that a receiving institution assigns to a course or program from a sending institution.

Articulation-based transfer is sometimes known as *formal transfer*, since this is a formally negotiated, inter-institutional agreement. Articulation normally involves a relationship between the two institutions designed to support the formal agreement. In British Columbia these relationships include membership in the BC Transfer System, and participation in the network of articulation committees that brings instructors together from member institutions and in meetings of institutional contact persons, program advisors, registrars and others involved in the articulation process. It implies a commitment to maintaining the agreement, and to establishing and building trust in the articulation process through adherence to common academic standards and to truth, fairness, transparency and communication.

Articulation-based transfer is highly recommended where justified by the volume of student flows.

Formal transfer agreements are recorded in the BC Transfer Guide (bctransferguide.ca), while the norms, expectations and standards of the BC Transfer System are collectively expressed in several BCCAT documents: the *How to Articulate Handbook* (www.bccat.ca/articulation/handbook/index.cfm), which contains the *Principles and Guidelines for Transfer*, the *Articulation Committee Companion* (www.bccat.ca/articulation/companion/index.cfm), and the *New Members Policy* (www.bccat.ca/pubs/newmember.pdf).

Case-by-Case Transfer

Transfer credit can occur independently of any articulation agreement.

Transfer credit can be awarded on a *case-by-case* basis, upon application for credit from a student during the admission process. This process is sometimes referred to as *informal transfer*. Each student's transcript is examined individually – hence the term case-by-case – and this process may involve the student supplying course outlines or calendars from his/her previous institutions.

Once a case-by-case assessment is conducted, many institutions record the results in an internal database and use these transfer credit awards as precedents. Since the receiving institution does not keep track of the curriculum at the sending institution in these cases (as it does through the re-articulation process for BC sending institutions) a transfer credit award recorded in a precedent database is normally time-sensitive: for example it may not be honoured after five years.

Since universities in BC are not sending institutions, students transferring among BC universities are subject to case-by-case assessment of their credits. Some credits may already be in the internal precedents database, and may be honoured automatically, while others may be in the database but not honoured (e.g. because they were taken too long ago, because of a very low grade), and yet others may not have been assessed previously and therefore are not in the database and must be handled individually.

Transfer by Program and Laddering Arrangements

Many transfer agreements in BC are based on the assessment of whole programs rather than on individual courses. Such agreements are developed in order to facilitate easy movement from, typically, a college diploma program to a degree program at another institution, and are therefore frequently described as "laddered" opportunities. Many variants exist in BC and most are recorded in the BC Transfer Guide, although some are found on institutional websites.

- Block Transfer refers to credit awarded for successful completion of a whole program to be applied to a related degree program. The BC Transfer Guide currently contains over 800 formal block transfer agreements (BTAs). Constructing and negotiating BTAs is described in detail in the *How to Articulate Handbook*.

Many agreements in BC are based on the assessment of whole programs.

- Flexible Pre-Major: This term describes a BCCAT initiative whereby individual disciplines, through their articulation committees, are encouraged to develop a set of flexible requirements prerequisite to the major that provides the kind of flexibility that college students need in order to have some choice of degree destination. For an example, see the Music Pre-Major Agreement: www.bctransferguide.ca/program/music/index.cfm
- Bridging programs provide students with the opportunity to continue to a degree program by teaching content that is typically not covered in a diploma program, but required for a degree program.
- Dual credit programs are most often the result of collaboration between secondary schools and their local colleges whereby students earn secondary and post-secondary credit in their final year of high school.

Laterality

An award of transfer credit can be the result of a process that is bilateral (an agreement between two institutions – the most common type of articulation in BC), unilateral (established by a receiving institution, such as in a case-by-case assessment initiated by a student request) or multilateral. Examples of multi-lateral credit include one to many (each college's associate degree transfers to many receiving institutions), many to one (a receiving institution, for example, can declare that it will award credit for all business management diplomas offered by BC institutions) or many to many (the Business Management Transfer Guide was an example of a multilateral transfer guide based on equivalence of courses across all participating institutions). In the first two cases, the onus is in the receiving institution to assess and maintain a transfer agreement. In the multilateral model the assessment and maintenance is best accomplished by a committee of subject experts; this feature also makes it challenging to maintain.

Receiving Transfer Credit versus Applying Transfer Credit

Students at all institutions must fulfill both graduation requirements (e.g. number of credits, average grades, literacy, numeracy or language proficiency) and degree requirements (stipulated courses for the major and/or minor, faculty requirements) in order to graduate with their chosen credential. While many BC students will use credits earned at another institution to fulfill some of these requirements, an award of transfer credit does not *guarantee* that the credit is always usable or applicable to fulfilling credential requirements. However, if transfer students have planned well, checked the requirements of their intended program, ensured that all courses they take transfer appropriately, and maintained an acceptable grade point average, they can normally transfer with little or no difficulty. Each year, thousands of BC students transfer successfully and continue towards their academic goal with no, or minimal, loss of time, credit, or money. Many students, of course, do not plan effectively, or do not initially register with the intention of transferring at a later date.

Part B: Models of Transfer in Other Jurisdictions

Credit transfer and transfer systems, in the sense those terms are understood in BC, exist in well-developed forms only in North America. Jurisdictions such as Australia, and more recently Europe, are working on developing transfer credit models that suit their own contexts. For example, Australia has a national agreement about transfer credit for TAFE (Technical and Further Education) diplomas (www.universitiesaustralia.edu.au/content.asp?page=/policies_programs/teaching_learning/credit_transfer/scheme/index.htm) and some universities have articulated individual courses. The European Credit Transfer and Accumulation System (ECTS, see www.ec.europa.eu/education/lifelong-learning-policy/doc48_en.htm) is based on workload (one year is considered to be 1500 to 1800 hours of study and is assigned 60 credits) and recognition of that workload (and assessment of equivalence through detailed descriptions laid out in a diploma supplement) by participating institutions.

Most North American transfer systems are built on the basic model of bilateral course-to-course articulation.

In other North American jurisdictions, credit transfer works much as it does in BC – that is, most transfer systems are built on the basic model of bilateral course-to-course articulation. However, some states have developed statewide transfer models to improve mobility and transferability and, in some cases, to encourage or even compel universities to be more accepting of transfer students or more liberal in their award of transfer credit. Such models have been implemented as a result of legislation, sometimes over the objections of institutions. What follows is a brief description of these state-wide transfer models, with links to further information.

General Education Transfer Model

In the United States it is common for degree-granting institutions to require students to complete a General Education Core Curriculum as part of the degree. This "Gen Ed" requirement is in place for all students, no matter what degree they are taking. It normally consists of from one to one-half years of coursework within a prescribed set of topics, fields or outcomes. For example, the Arizona General Education Curriculum (AGEC) consists of a requirement for 35-37 credits which include: Freshman Composition, Mathematics, Arts & Humanities, Social & Behavioral Sciences, Physical and Biological Sciences, Options (these will vary by community college and AGEC completed), and Special Requirements (intensive writing and critical

inquiry, Ethnic /Race/Gender Awareness, and Global/International or Historical Awareness). Students are encouraged to complete their AGEC at a college and then transfer to a university, where they are deemed to have fulfilled the Gen Ed requirement of their degree. Similarly, the Illinois Articulation Initiative (IAI) is a statewide transfer agreement, which is transferable among more than 100 participating college or universities in Illinois. All colleges and universities participating in the IAI agree to accept a "package" of IAI general education courses in lieu of their own comparable lower-division general education requirements. The IAI General Education transfers as a package. Course-to-course transfer is not guaranteed.

Examples:
Arizona – www.aztransfer.com/TransferBasics
Illinois – www.itransfer.org/iai/Others/faq.aspx?section=students

In BC, and in Canada, the notion of a General Education Core Curriculum is not normally an integral part of degrees.

Associate Degree Transfer Model

Some states have developed their academic associate degrees (ADs) as primary transfer vehicles. In some jurisdictions applied and vocational associate degrees (e.g. associate degree in business or in automotive technology) are also used as transfer vehicles for applied science degrees. Normally, this involves a form of block transfer, whereby students with a completed AD can transfer directly into the third year of a degree. This can vary from jurisdiction to jurisdiction – in some the AD can transfer to any public university, in others, the AD articulates for credit to specific programs at at specific institutions. As in other block transfer agreements, students without a completed AD revert to course-to-course transfer. The most common agreements involving ADs are 2+2 agreements (2 years of community college study followed by 2 years of university courses). In most jurisdictions where the academic AD is used as a primary transfer vehicle, the AD is designed to incorporate the General Education Core Curriculum, thereby killing two birds with one stone.

Example: City University of New York (CUNY) - www.tipps.cuny.edu/A.S.Degree_Transfer.htm

Common Course Numbering Systems

Some states have developed common course numbering systems with the objective of simplifying transfer. This can take two forms. The first and more extreme form involves the development of a common course inventory – the idea that "English 101 should be English 101 no matter where it is taken." In Florida, all participating institutions (all public, some private) must use course outlines from the central repository for first and second year courses. While such a system can ease transfer the main complaints about it have been the difficulty of making changes to a common course outline and the loss of autonomy and control over courses for institutions.

A second variation, adopted in Texas, is described as "a voluntary, co-operative effort among Texas community colleges and universities to facilitate transfer of freshman- and sophomore-level general academic coursework.

Some states have developed common course numbering systems with the objective of simplifying transfer.

The Texas Common Course Numbering System (TCCNS) "provides a shared, uniform set of course designations for students and their advisors to use in determining both course equivalency and degree applicability of transfer credit on a statewide basis. When students transfer between two participating TCCNS institutions, a course taken at the sending institution transfers as the course carrying, or cross-referenced with, the same TCCNS designation at the receiving institution."

Examples:
Florida – www.scns.fldoe.org/scns/public/pb_index.jsp
Texas – www.tccns.org/default.asp

Outcomes-Based Transfer

Several jurisdictions have utilized the idea of basing articulation decisions on courses outcomes, rather than on inputs (such as topics, assignments, or text books). In Oregon such a move was state-mandated and the Oregon University System website contains a description of this initiative. "The Joint Boards Articulation Commission (JBAC) is working to improve the transferability of lower division General Education throughout the state through a collaboratively-developed framework that is based on commonly agreed-upon learning outcomes and course criteria. Not only would this model improve the transferability of coursework among community colleges and universities, it could strengthen the statewide commitment to General Education without compromising the uniqueness of individual institutions' General Education curricula. Both faculty and students would benefit from such a framework. By adhering to general principles rather than a rigid template, faculty would have the freedom to design General Education courses that take advantage of their individual expertise and that reflect significant new insights. Students would benefit from faculty innovation in the classroom, while retaining assurance of the transferability of their coursework." Outcomes have been developed in broad areas such as Writing, Oral Communications, and Social Science.

Example: Oregon – www.ous.edu/news_and_information/forums.php

Degree Partnerships

Degree partnership is a term used to describe a variety of models that provide a guarantee to students who maintain adequate grades in a college program of continuation of degree studies at another institution. This "guarantee" that space will be available for degree completion at another institution separates degree partnerships from other models of transfer between institutions.

Degree partnership models vary considerably in terms of form and complexity, from a simple guarantee by a university that qualified college students will be admitted into the university,

For more on Degree Partnerships in BC, see www.bccat.ca/degree.

to joint admission with a single application and/or concurrent enrolment. In Canada, this model has been most frequently utilized in Ontario.

Regional Articulation

In many American states, colleges articulate mainly with their closest university – the one to which the vast majority of their students will transfer. Rather than try to articulate with all the receiving institutions in the state, the college works intensively with its partnering university on what is often called a "transfer articulation agreement". The agreement, while based on, or including course-to- course articulations, often features 2+2 blocks, associate degree agreements, General Education common cores, and/or other features that facilitate a close working relationship and smooth student transitions. East Tennessee State University (ETSU) advises students about its transfer articulation agreements thus:

> *So what does that mean to you? In practical terms, it means that you can take your first two years at a community college, earning an Associate's degree. If you have followed an articulation agreement, then those hours will transfer seamlessly to ETSU. You will enter your major as a junior without loss of credits and with no courses to duplicate at ETSU. You will be well on your way toward earning that Bachelor's degree.*

Agreements such as this often rely heavily on advisors to walk students through the course selection process and are predicated on encouraging students to complete the transfer program before applying to the university. Such regional emphasis does not preclude transfer credit to other institutions, but it is understood that students who transfer elsewhere do so on a case-by-case basis.

Example: East Tennesee State University – www.etsu.edu/articulation

The Pre-Major

In BC, fulfilling pre-major requirements may be the most problematic aspect of transfer.

Several jurisdictions have addressed the issue of the pre-major – that is, the first and second year courses pre-requisite to entering a major at the third year level. North Carolina, along with a common course numbering system has mandated the pre-major for many disciplines (see link below). Some jurisdictions have attempted to address this issue on a more voluntary basis, with conspicuously less success. No jurisdiction to date has seriously discussed or developed a standardized pre-major across institutions.

Example: The University of North Carolina – www.northcarolina.edu/aa/articulation/index.htm

Using Technology to Address Applicability

Judicious applications of technology can make it easier for students to plan a transfer route. For example, a user-friendly degree-audit system at the receiving institution, combined with transfer tables that integrate with this system enable students to see not only how their courses will transfer, but how the courses they have taken to date *apply* to their chosen major or program, and what courses or requirements are still outstanding. While expensive to implement and to maintain, this technological solution — although still unavailable in BC — has been in place in many American institutions for years. For example, the overview page for Washington State University's Cougar System (TRACS) states:

> *Welcome to Washington State University's Cougar TRACS (Transfer Credit System). This web site is provided to help you plan your transfer to WSU:*
>
> *1) You can view the requirements for any degree program offered at WSU. The Degree Program Requirements Report specifies the university, general education, and specific course requirements for a selected degree.*
>
> *2) You may also enter your transfer course work from other schools, then view a custom Degree Program Requirements Report for any WSU degree program. The custom report shows how the course work you've already taken applies to the requirements for a selected degree.*
>
> *For your convenience, you may return to this web site at any time to add transfer course work or change your personal information. You may explore as many degree programs as you wish*

See Washington State University's Cougar Tracs at https://webapps.wsu.edu/ais/myinfoservices/darwintracs.

Transfer Advising Centres

Another model that recognizes the vital role of planning is the establishment of centres, at either sending institutions or receiving institutions, specifically tailored to the advising needs of transfer students. Voluntary or mandatory advising and orientation sessions are frequent features of such centres.

Examples:
University of Utah – www.transfer.utah.edu
Ivy Tech Community College in Indiana – www.ivytech.edu/indianapolis/transfer/index.html

Conclusion

Many jurisdictions have implemented new models of transfer, building on the bedrock of course-to-course articulation, in attempts to address mobility issues and ease transfer for students. The BC post-secondary system has in the past considered proposals for new models of transfer. System-wide consultations have resulted in the conclusion that the BC Transfer System, while working well for the most part, can be improved. Consistent advice from the system can be summarized as: any new model must be suitable for a BC/Canadian context, must weigh cost/benefit considerations, and must balance student needs with institutional resources.

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