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Ontario Council on Articulation and Transfer

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Conseil pour l'articulation et le transfert – Ontario

RESOURCE GUIDE FOR TRANSFER PROFESSIONALS

AN OVERVIEW OF TRANSFER IN ONTARIO

SPRING 2024

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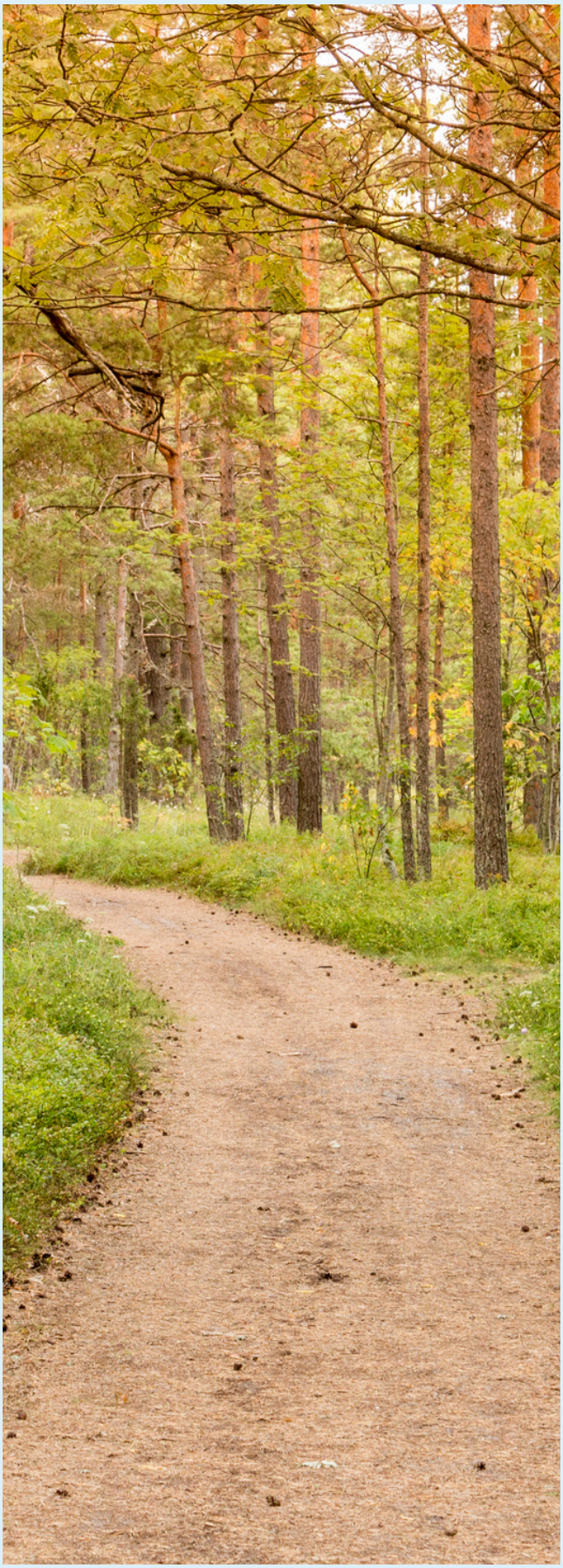
Welcome to ONCAT's Resource Guide for Transfer Professionals!

Ontario's postsecondary transfer and pathway system allows students to transfer between schools and programs more easily. Approximately 9% of postsecondary students in Ontario have been awarded transfer credit (Yip et al., 2024). Professionals working in transfer can therefore have a decisive impact on student success.

Connecting with other transfer professionals is crucial for advancing transfer best practices and strengthening the sector. In addition to providing an overview of Ontario's transfer landscape, this guide contains a wealth of information and resources, and is intended to help foster connections between those working in the student mobility sector.

At the Ontario Council on Articulation and Transfer (ONCAT), we are working to support transfer professionals by hosting communities of practice, including the Transfer Advisor Group (TAG). TAG is a community of transfer professionals from across Ontario that meets regularly to share practices and innovations, help each other identify transfer issues that impact students, and explore possible solutions. TAG hosts networking and learning events and provides online knowledge-sharing activities to hone and expand your skills.

Membership has its privileges! We encourage you to join other transfer professionals across the province in the Transfer Advisor Group. Start the process by filling out this form (https://ow.ly/AoyH50RAkO6) to join the TAG SharePoint site.



WHAT IS TRANSFER?

Two roads diverged in a yellow wood,
And sorry I could not travel both
And be one traveler, long I stood
And looked down one as far as I could
To where it bent in the undergrowth...
– Robert Frost, “The Road Not Taken”

Deciding which road to take is far from simple. For transfer students, their journey often involves complexities and uncertainties, whether they’re switching programs, schools, or embarking on a new academic chapter.

Students consider transfer for many reasons: they may be graduating and are looking to add to their credentials, or they realize their current program is just not a good fit. Life changes may prompt them to explore transfer for economic reasons or personal circumstances, like wanting to move back home or going from full-time to part-time studies. Transfer students are just like direct entry students in the sense that they have academic goals and big decisions to make. But unlike direct entry students, they come with knowledge and experience from their previous school, and as such, have different needs.

Whatever the motivations and previous experiences a transfer student has, it's important they know there are people and resources to help them navigate the process. Transfer professionals require a range of skills and competencies to support students and make the transfer process and transition into a new environment as seamless as possible.

TRANSFER PROFESSIONALS WEAR MANY HATS

Postsecondary professionals who support transfer often perform a wide range of functions, from communicating with students and answering their questions to reviewing and processing transfer credit applications. These functions are not only performed at the admissions stage. Transfer advisors play a pivotal role in helping students navigate the next steps in their new postsecondary home.

Transfer advising refers to activities that support student mobility between postsecondary programs and institutions. Because transfer advising is still an emerging profession in higher education, institutions delegate and manage responsibilities differently. In about half of Ontario postsecondary institutions, transfer occurs in a centralized location, while in the other half transfer is decentralized. Most often, activities related to transfer credit processing occur in the Admissions or Registrar's offices (ONCAT, 2023).

Job titles that encompass transfer-related responsibilities may include Manager, Pathways and Special Projects; Pathway Development Coordinator; Pathways Advisor; Pathways Officer; Senior Admissions Officer; Student Mobility Advisor; Transfer Credit Coordinator; or Transfer Pathways Coordinator. In addition, a wide range of administrative staff and faculty also play a role in transfer, including those in Admissions, the Registrar's office, Academic departments, and the Provost's office.

According to a survey of professionals working in transfer (ONCAT, 2018), respondents from 16 colleges and 15 universities in Ontario identified their top five duties and responsibilities in their roles as:

1. Manual transfer processing
2. Training colleagues
3. One-on-one student advising
4. Admissions
5. Automatic transfer processing

Key competencies included:

1. Problem solving/analysis
2. Policy knowledge
3. Counselling/advising
4. Presentation/facilitation
5. Technical knowledge
6. Leadership

Based on these survey results, we can say that transfer advising is far from boring! In fact, because transfer involves a high degree of complexity working with multiple departments, it provides interesting challenges and offers transfer professionals a satisfying sense of purpose.

TRANSFER: WHAT YOU NEED TO KNOW

It's important to know that transfer students are a unique group. Unlike direct entry students, they come with experience in another postsecondary institution, which make them savvier than first-year students. However, unlike their peers at the same academic level, they are new to the environment and do not have the networks and social capital that they had at their last institution (LaCroix et al., 2024). This may have a negative impact on their sense of belonging and how integrated they feel at their new school. Transfer students deserve to be respected for the knowledge and experience they possess while acknowledging that they are eager for opportunities to connect with others.

If your role involves interacting with both direct entry and transfer students, keep in mind that these students have different needs. While your institution likely offers an orientation for all new students, we suggest also offering orientation sessions specifically for transfer students since they will have different concerns and questions. If this is not yet possible at your institution, you can tailor parts of the general orientation to transfer students by adding information related to transfer and/or providing transfer resources with contact information to receive further support.

If you're new to transfer and student mobility, the first place you probably want to start exploring is your institution's transfer policy. Your institutional policy will provide more detailed information about how transfer works at your institution. A transfer policy should outline the institution's admission criteria for transfer students, the procedure for awarding transfer credits, and other rules that have an impact on transfer (e.g., financial aid, co-op, residence). It is also a place where you can advocate for changes that will improve students' experiences transferring to your institution.

TRANSFER COMMUNICATIONS AND ADVISING

From a student's perspective, planning for and executing transfer can be challenging and stressful. Students might struggle to understand the information they find across different institutional websites and resources. As a result, students rely on transfer professionals to help them understand your institution's transfer credit policies and how they apply to their file. Transfer staff play an influential role by meeting with students, explaining transfer credit policies, communicating credit assessment decisions to them, and advocating to faculty and other institutional staff on their behalf. Qualitative studies suggest that one of the biggest challenges transfer students experience in Ontario is not receiving timely communication about transfer credit (Higher Education Strategy Associates, 2020). We are working hard to make this change! Here are a few recommended communication practices for transfer professionals:

EXTERNAL-FACING COMMUNICATIONS

Working with communications staff, ensure that your institution's website speaks to prospective transfer students and reflects up-to-date information about the transfer process, including eligibility requirements, a step-by-step outline of the transfer process, contact information for further questions, and anything else prospective and current transfer students need to know (e.g., residency requirements). If an institution has an automated application process, include a link to the application web portal for current transfer students to check the status of their application. The institution's website is also an excellent place to include information about required documentation. If external-facing communications include social media and/or email marketing, ensure this information is consistent across platforms and ultimately drives students towards a single place to make it easier for your office to keep updated.

TRANSFER CREDIT DECISIONS

If students are required to apply for transfer credits, the application process should be user-friendly and easy to follow. Remember that students are not familiar with institutional language, such as "articulation," "block transfer," "sending institution," "receiving institution," and "advanced standing," and may not recognize common institutional roles and responsibilities. If using these terms is unavoidable, explain their meaning in plain language. At the very least, the system should communicate the status of a student's application once it has been reviewed and provide an estimated timeline for the process to be completed. Decisions should be promptly communicated to the student, along with a rationale for any transfer credit that has not been awarded.

IN-PERSON OR VIRTUAL ADVISING

In addition to websites and more direct digital communication, students find that some form of personalized communication—by phone, in-person, or videoconferencing—is beneficial. One-way communication, no matter how comprehensive, cannot anticipate every possible question or concern a student has. Providing drop-in or open office hours for short consultation appointments can meet this need and save staff time in the long run by informing students of their options before the application process commences.

TRANSFER STUDENT RESOURCES AND REFERRALS POST-TRANSFER

Transfer students undergo a series of “jolts” in their first year of transition. To ensure they are successful, transfer students need support as they acclimate to their new postsecondary environment (LaCroix et al., 2024). Post-transfer support usually involves a mix of orientation/navigation skills, cultural adjustment, academic skills coaching, and social integration (Aurini et al., 2024).

As a transfer professional who interfaces with transfer students, you can play a key role in helping students find the support they need. As you interact with students, make sure they know about available academic clinics, learning and writing centres, transfer student orientation sessions, peer mentoring and networking opportunities, mental health services, and other opportunities and resources specific to your institution. For example, Trent University has started a pilot program of peer supports that guide new transfer students through their transition.

COMMON POINTS OF CONTACT

Recruitment Staff: These administrative staff promote transfer pathways and admissions options to students with previous postsecondary experience. They are knowledgeable about the transfer process at their institutions and work to recruit students to their school. Often, these involve recruitment through established pathways. Depending on the institution, they may support general application and transfer credit inquiries (via in-person, phone, email, etc.). These roles may also balance recruitment with transfer advising and help to connect students with other organizational units at their institution (e.g., admissions, finance, program counselling). Not every recruitment office has staff dedicated to recruiting transfer students. If this is the case, recruitment might take place within the Admissions office.

Admissions Staff: Admissions staff support the intra-organizational process of transfer. From start to finish, this work involves receiving applications, processing transfer documents (transcripts, course outlines/syllabi, etc.), and rendering admissions decisions. This process may also involve collaborating with other units such as faculty advisors to ensure the appropriate transfer credits are awarded and that transfer credit databases are regularly updated.

Registrar's Office Staff: Registrar's Office staff update student records and transfer credit decisions and their impacts on program requirements. Depending on the institution, they may oversee staff who deal with transfer credit requests and processes; be accountable for institutional decisions on the academic record (transcripts); and receive appeals from students on transfer credit decisions.

Academic/Program Advisors: Academic advising can be provided by faculty members, as well as professional staff who work in program counselling offices. Depending on the institution, these advisors might work in different organizational units and carry out different tasks. With respect to transfer, these advisors generally provide guidance to students about their academic standing, how to make sense of their transfer credits, and the impact of these credits on their program requirements. They will work with students who have advanced standing to help formulate a plan for credential completion.

Subject Matter Experts: Subject matter experts play an important role in transfer; they are usually faculty members who perform administrative functions for the department (such as a department or program head or an undergraduate program director). Subject matter experts assess whether courses from external postsecondary institutions in their field are equivalent to their department's courses. They are also often involved in developing articulation agreements and pathways and may develop partnerships with faculty at other institutions for transfer and articulation purposes.

COMMON TRANSFER TERMS

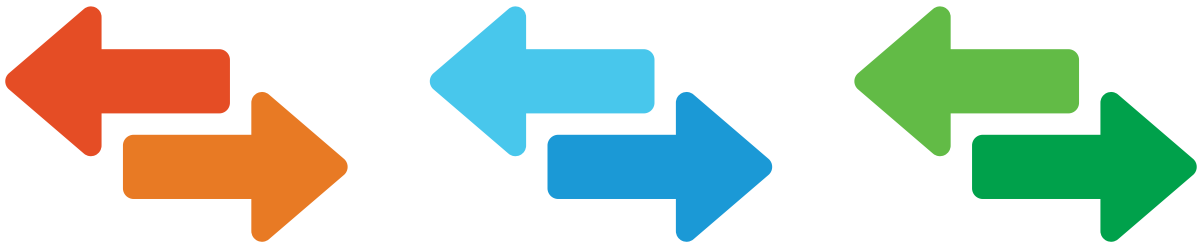
Course equivalency assessment is when a subject matter expert of a discipline (usually a Department Head/Chair or Dean) compares a course at another institution with the course at their institution to determine if they are equal in credit.

An articulation agreement is an official agreement between two or more postsecondary institutions that defines the terms and conditions enabling students to transfer between specific programs, including admissions requirements. Articulation agreements may also determine which courses or programs taken at the sending institution will apply to graduation requirements at the receiving institution.

A transfer pathway is a defined route from one program or institution to another program or institution that specifies eligibility requirements and how transfer credits will be accepted and applied at the receiving institution. Whereas articulation agreements require at least two institutions to form an official agreement, pathways can be developed by a single receiving institution and do not require a formal signed agreement. Pathways and articulation agreements allow staff to assign block transfer credits rather than individual transfer credits assigned to specific courses.

Block credit refers to a collection of course credits equivalent to a specified level at the receiving institution. When a student receives block credit, they do not need to undergo course equivalency assessment, which significantly reduces the completion time of a transfer assessment application. Transfer staff may be involved in developing pathways and articulation agreements with other institutions. This guide does not provide information on how to develop and maintain pathways.

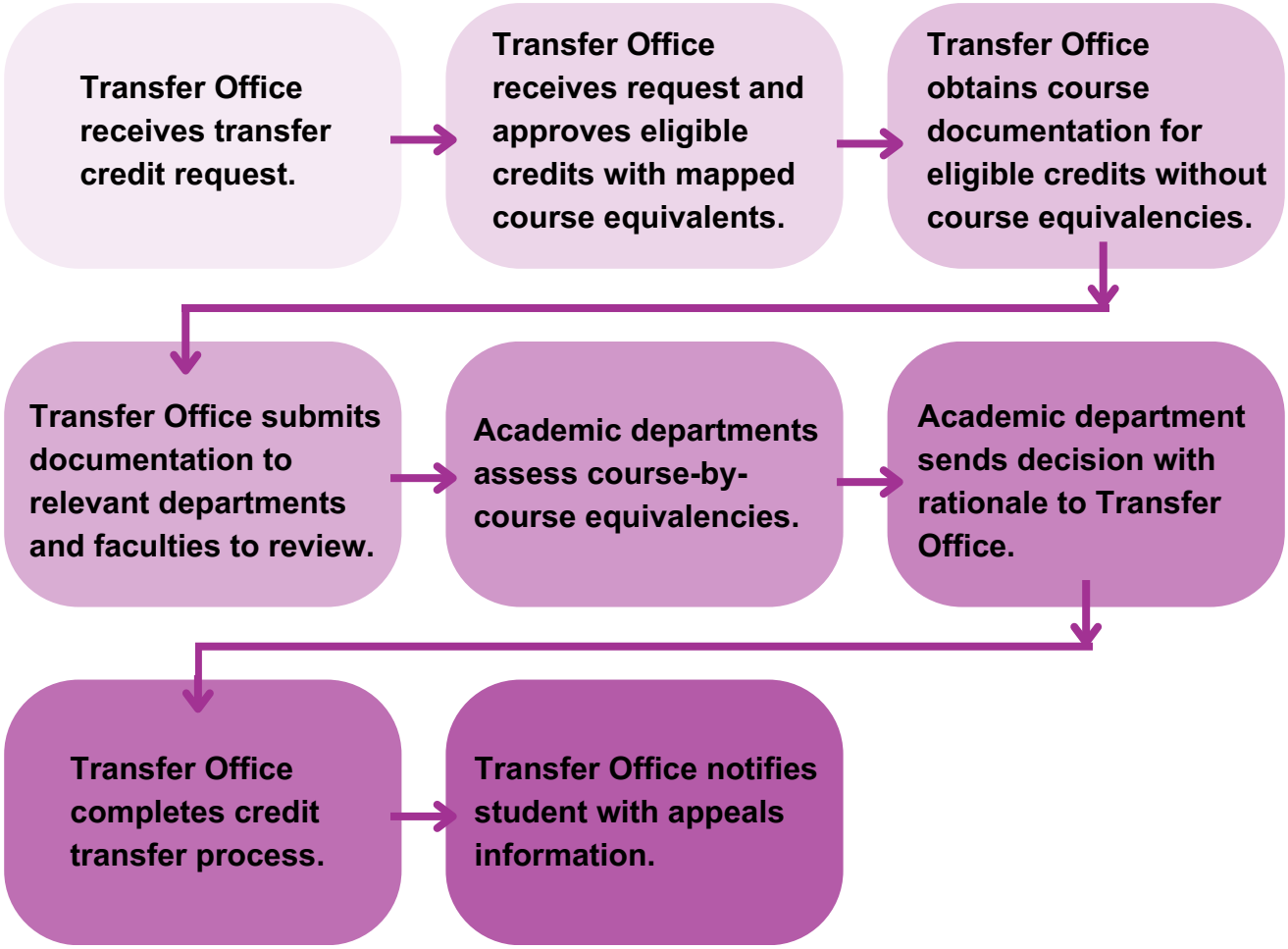
Prior Learning Assessment and Recognition (PLAR) and Recognition of Prior Learning (RPL) are related methods for granting postsecondary credit to students who have acquired learning outside of postsecondary institutions. Students can receive credit for courses offered by the postsecondary institution if they are able to demonstrate they have equivalent knowledge and skills. RPL assessments may involve challenge exams, demonstrations, structured interviews, simulations, and portfolios.



TRANSFER CREDIT PROCESSING

Awarding transfer credit can be a complex process with many steps. Ideally, your institution should initiate a transfer credit assessment on behalf of a transfer student at the admissions stage because some assessments can take time to perform. Research also suggests that students integrate more successfully when their transfer credits are assessed at the admissions stage (Aurini et al., 2024).

Below, we provide a generalized overview of what transfer credit processing entails at most institutions, with information about each step. We encourage you to review your institution's specific transfer credit process and go through it from a student's perspective. Which steps are necessary? Which steps can be combined or simplified? Are there opportunities to optimize the process, such as sharing student information across departments? Talk to others about how to improve it!



This generalized map is based on findings from ONCAT's MapIt Project, conducted in partnership with Higher Education Strategy Associates.

STEP 1: ADMITTING TRANSFER STUDENTS

- **Eligibility for admission:** The transfer credit process begins when Admissions or Registrar staff determine if a student is eligible for admission as a transfer student. Admissions criteria may vary according to the receiving institution.

- **Automatic transfer credit assessment**: If your institution provides transfer credit assessment at the admissions stage, staff will also determine whether students can be awarded transfer credit. There are primarily two ways a student receives transfer credit: via a block of credits that come through an articulation agreement/pathway or via course credits. If students have block credit that can be awarded immediately without undergoing assessment, transfer staff award these students their credits and send them an offer of admission specifying how these credits have been applied at the receiving institution. If the credits need to be assessed, staff follow the next steps below.

- **Manual transfer credit assessment (post-admission):** If your institution does not provide transfer credit assessment at the admissions stage, staff will send an offer of admission with instructions for the student to apply to have their transfer credits assessed once they accept an offer.

STEP 2: TRANSFER CREDIT APPLICATION

- If your institution does not automatically assess transfer credits, students must apply to have them assessed. Most students who are not following a transfer pathway or articulation agreement (see common transfer terms) will need to have courses from their previous institution assessed for equivalency. In this case, their application must include documentation, such as course outlines/syllabi, transcripts, and anything else your institution requires. If documents are not provided in English or French, students or staff must have them translated.

- After reviewing the application, staff communicate with students to request missing information, if applicable, and confirm that the application has been received. Staff should also communicate how soon students can expect to receive a decision (suggested timing for full assessment is two to four weeks).

STEP 3: AWARDING TRANSFER CREDITS

- **Existing course equivalencies or block credit:** At this stage, staff determine which courses have existing course equivalents at their institution and award transfer credit, ensuring they meet the eligibility criteria (e.g., minimum GPA or grade). In other cases, transfer students may be eligible to receive block credit by the receiving institution via a transfer pathway or articulation agreement (see transfer terminology).

- **Referral to course equivalency assessment:** Transfer staff also determine which courses on the student's application need to be assessed by a subject matter expert—usually a faculty member in charge of undergraduate programming or curricula (e.g., Chair/Head or Dean). Once a relevant expert is identified, transfer staff send them the application with all proper documentation (e.g., course outlines, transcripts, translated documents, if applicable). If the student's file does not need course equivalency assessment, you can skip step four and move to step five. For guidance on conducting course equivalency assessment, see ONCAT's "Fair, Consistent, and Transparent."

STEP 4: COURSE EQUIVALENCY EVALUATION

- During this time, subject matter experts evaluate equivalencies based on course outlines. Their assessments usually focus on similarities in learning outcomes, content covered, and assessment strategies to determine breadth and depth.

- Ideally, subject matter experts use a checklist of criteria to assess equivalency and provide a clear rationale for their decision to transfer staff. In cases where courses are not found to have equivalency and are thus not accepted as transfer credit, students benefit from receiving an explanation.

STEP 5: COMMUNICATING THE DECISION AND ACADEMIC ADVISING

- After receiving decisions on course equivalencies from subject matter experts, transfer staff record the equivalency decisions in their database, award transfer credits where applicable, and communicate the results to the student with a rationale for any rejected credits.

- During this time, staff also refer students to academic advising to help them determine which courses they need to take to fulfill the requirements of their program.

ONTARIO COUNCIL ON ARTICULATION AND TRANSFER (ONCAT)

Established in 2011, the **Ontario Council on Articulation and Transfer (ONCAT)** plays a pivotal role in supporting learner mobility, working to reduce barriers for students seeking to transfer among the province's public colleges, universities, and Indigenous Institutes.

We do this a vital partner and convener of the postsecondary education and training sectors, maximizing opportunities for institutional collaboration to create academic pathways, facilitating recognition of prior learning, and supporting learner transitions and entry into the labour market. ONCAT is a not-for-profit organization funded by the Government of Ontario. To learn more, visit www.oncat.ca.

RESEARCH AND CAPACITY-BUILDING PROJECTS

As part of our broader efforts to enhance transfer pathways and reduce barriers transfer students face, ONCAT staff conduct research and policy analysis. Often, this work includes scans of policies or other innovations in jurisdictions with differentially structured transfer systems. This work informs various activities, from funding pilot projects to advising stakeholders. In addition to research-specific activities, we work directly with our many stakeholders to support research that improves transfer system planning, pathway development projects, and institutional processes that meet the needs of students.

For more information on funding opportunities, please visit www.oncat.ca.

EVENTS AND WEBINARS

In addition to larger sector events (such as our Student Mobility & Pathways conference), ONCAT supports system change by bringing key stakeholders together to network, share information, and learn about key content areas within the transfer space. We host a variety of learning collaboratives, content-specific workshops, and general information series.

FACILITATED GROUPS

At ONCAT, we recognize the diversity of stakeholders in Ontario's postsecondary system. To ensure credit transfer and student mobility are developed in a way that serves and represents all these various parties, we bring together stakeholders in facilitated groups and communities of practice. Some groups are ongoing, and some are ad hoc initiatives to support the development of resources and other activities in the transfer space.

KNOWLEDGE MOBILIZATION

ONCAT generates substantial knowledge through our research activities and the capacity-building projects we fund. We are committed to communicating lessons and information to our partners and the broader transfer community. Examples of these activities include toolkits and guides, training/education, the development of policy documents and other related resources.

ONCAT'S PROFESSIONAL DEVELOPMENT COURSE

The Essentials in Transfer and Student Mobility course is the first of its kind in Canada. This free online course helps both new and seasoned transfer professionals build knowledge, nurture expertise, and elevate practices. The course is offered by ONCAT and developed by Christine Arnold, author of *Learning Outcomes, Academic Credit and Student Mobility*.

Course modules include:

- **Transfer Advising as a Profession**
- **Credit Transfer Histories and Currencies**
- **Communities and Networks**
- **Credit and PLAR Assessments**
- **Communications and Advising**

Find out more information on www.oncat.ca

HEADS OF TRANSFER ADVISING (HOTA)

The Heads of Transfer Advising (HOTA) advise ONCAT on improving the mature transfer system by enhancing transfer advising capacity and effectiveness both system-wide and at individual institutions. Members contribute their experience and expertise to developing ONCAT's professional development course and advising on educational and professional development resources, events, and activities. Members also serve as crucial communication vehicles within their institutions to disseminate the pivotal work on transfer research and policy that ONCAT leads.

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ONTRANSFER.CA

ONTransfer.ca is a free tool that helps learners navigate Ontario's transfer and pathway system, allowing them to explore and identify all their postsecondary options. Developed and maintained by ONCAT, ONTransfer.ca features over 27,000 transfer pathways and 255,000 course equivalencies and serves more than 175,000 students annually.

ONTransfer.ca offers pathway and course equivalency searches so students can easily determine whether they can transfer programs or individual courses, how many previously earned credits can be transferred, or how long it will take to complete a program.

In addition to identifying transfer and pathway options, students can discover different entry points into a program or school or learn about combining certificates, diplomas, and degrees.

One of the most valuable features of ONTransfer.ca is the ability to access additional support and guidance; learners can contact the ONTransfer team to request assistance or ask general questions, and for more institution-specific information, students can find out how to connect with transfer advisors at each school. The ability to follow up with someone and ask specific questions goes a long way in helping students feel confident when making important academic decisions.

ONTransfer.ca: Powered by Institutional Information

ONCAT collects information from member institutions to share on ONTransfer.ca. This includes:

- **Institutional transfer profiles** including policies, procedures, and contact information;
- **Course calendars** that provide a list of courses offered with short descriptions at Ontario institutions each year;
- **Course transfers** detailing individual course-to-course equivalency decisions from one institution to another; and,
- **Program transfers** detailing program-based transfer decisions (block, articulation, system pathways) from another institution.
- **NEW! Pathways to Ontario can be provincial, national, and international.**

ONTransfer.ca institutional information is collected through multiple processes using SharePoint Online technology and through access to an administrative portal on ONTransfer.ca. The ONTransfer.ca team also collects online course offerings on behalf of eCampusOntario and updates a course syllabi/description index to help students access required documentation for course assessment. ONCAT works to continually improve the online service to support learners and institutions in Ontario. Ongoing collaboration and data initiatives with Ontario institutions allow for informative search results and assistance in student mobility.

What are the benefits of sharing? Staying connected with data and information on ONTransfer.ca allows you to see and compare your institution with other sources. For example, the ONTransfer team provides monthly pathway reports that allow you to see what pathways exist between other institutions. Or, in the case of course equivalencies, we provide a reciprocity report that provides you potential course equivalencies that could be developed without a student application!

Join the ONTransfer SharePoint Community. If you are involved in academic pathway development, recruitment, admissions and transfer credit assessment, or technological support, the ONTransfer.ca team wants to connect with you. We encourage all institutions to become active members in our SharePoint Online community. Connect with the ONTransfer team (data@oncat.ca) for more information.

ONTransfer.ca High School and Campus Outreach. We value the opportunity to connect in person with students, transfer advisors, and faculty to talk about how ONTransfer.ca helps students make informed decisions and reach their academic and professional goals. If your school is interested in having the ONTransfer.ca team visit your campus to do outreach and answer questions, please email ontransfer@ontransfer.ca.

ONCAT.CA RESOURCES

Be sure to visit ONCAT.ca's “Resources” section to access an abundance of information and support materials, including ONCAT’s Digital Resource Kit for Transfer Professionals. This downloadable kit contains brochures, instructional videos, artwork for student outreach, and much more. These resources are updated and enhanced regularly, so please bookmark this page and refer to it when you need information or support. If there are additional resource materials that would be helpful to you or other transfer professionals, please get in touch with Meryl Borato, Knowledge Mobilization Manager (mborato@oncat.ca), to discuss.

ORGANIZATIONS

ARUCC: Association of Registrars of the Universities and Colleges of Canada
PCCAT: Pan-Canadian Consortium on Admissions and Transfer
NISTS: National Institute for the Study of Transfer Students
AACRAO: American Association of Collegiate Registrars and Admissions Officers
NACADA: National Academic Advising Association

BLOGS AND NEWSLETTERS

ONCAT’s Newsletter
Academica‘s Top Ten in Higher Education
Higher Education Strategy Associates – One Thought Blog

TECHNICAL INFORMATION

Quality Assurance Framework: Describes various credentials, typical duration, admission requirements, qualification awarded, etc.
ONTransfer.ca Administrator Site: How-to site for ONTransfer.ca administrators including links to additional resources (OQF, Quality Assurance Boards, ARUCC, etc.)

TRANSFER ADVISING NETWORKS IN ONTARIO

Transfer is a team sport! There are several organizations and associations that support the work of transfer in Ontario, including the Ontario Council on Articulation and Transfer (ONCAT). We encourage you to sign up for our mailing list on our website, reach out and say hi, and come to one of our professional development events.

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