

A photograph of graduates in silhouette against a bright, sunlit sky. Several black graduation caps with gold tassels are floating in the air. The graduates are seen from behind, with their arms raised in celebration. One graduate in the foreground is holding a rolled-up diploma.

Exploring Transfer Student Integration: A Longitudinal Qualitative Study of Ontario Transfer Students

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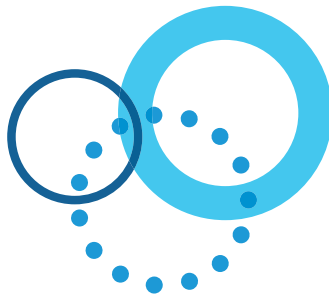


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Overview of the Study

We used a longitudinal qualitative design to examine the active transfer process, interviewing 56 Ontario college and university students during their first year after transferring institutions (fall 2022 and winter 2023). Our fall interviews captured the experiences of students as they navigated the admissions process and entered new institutions and, in some cases, programs that were substantially different. We then completed second interviews in the winter term to examine how the students were faring. At both time points, our interviews focused on three thematic areas. First, we probed for signs of transfer shock or other difficulties noted in the transfer literature. Second, we asked the students about any resources or services that facilitated their transitions. Third, based on their experiences, we asked our participants to share recommendations for facilitating smoother transitions. By following students during their first year of transferring institutions, we examined the *ongoing* impacts of transferring institutions and the factors that shaped their ability to thrive academically and socially.

Rather than experiencing a single “transfer shock,” the academic and social challenges that our participants experienced during transfer were more accurately described as a series of “jolts.” When we interviewed students in the early stages of their transfer journeys, they described various challenges associated with the application and admission process. These challenges followed students into their first semester of study and created a sense of an “uneven footing.” These issues tended to be more administrative in nature, such as arranging documents and navigating conflicts related to transfer credits. While academic difficulties were often resolved by planning ahead and seeking out appropriate resources (e.g., academic advisors), strategies for improving social connections were less obvious. Factors such as transfer students’ (older) age and the necessity, in some cases, to take courses in a sequence different from their peers compromised their ability to form social bonds. Having left friends behind, some of our participants discussed “starting fresh” and continued to struggle to form social connections.

Despite experiencing a series of academic and social jolts through the early and later stages of transfer, none of these challenges derailed their studies. Most students described their new institutions and programs positively. They acknowledged that being a transfer student placed them on a different trajectory than their direct-entry peers. However, these realities did not prevent them from identifying with their programs, and few participants regretted their transfer decision. Our brief concludes with policy implications.

Introduction

Education pathways are increasingly complex, and a sizeable proportion of Ontario students take non-traditional pathways to and through postsecondary education (Zarifa et al., 2020). Recent estimates suggest that approximately 8%—or just over 60,000—of postsecondary students in Ontario have received credit for their previous postsecondary education (ONCAT, n.d.; see also St. Denis et al., 2021). These non-traditional pathways include college-to-college, college-to-university, university-to-university, and university-to-college, as well as swirling between more than two postsecondary institutions.

These trends have given rise to a robust body of research on student mobility (for reviews, see Aurini et al., 2024a; Pizarro Milian & Zarifa, 2021). A consistent thread within this literature falls under the umbrella of “transfer shock.” The term was initially applied to students transferring from two-year institutions to four-year institutions to describe not only “a severe drop in performance upon transfer” but also their inability to recover academically from this transition (Hills, 1965, p. 202; see also Cejda, 1994, 1997; Cejda & Kalyor, 1997). Researchers have also found that transfer results in increased time to completion and lower retention or graduation rates (e.g., Davies & Pizarro Milian, 2020; Finnie et al., 2020).

More recently, the term transfer shock has expanded to describe a wider variety of experiences. Difficulty acclimating to new routines, administrative procedures, methods of assessment, and approaches to teaching are some of the challenges noted in the literature (Rhine et al., 2000; see also Cameron, 2005; Gawley and McGowan, 2009; Luckai et al., 2016; Mallette et al., 2015). For some students, these experiences lead to feelings of disappointment with their academic progress. As Walters’ et al. (2021) find, “transferring institutions is, in and of itself, an obstacle to graduation from PSE” (p. 4). “Shocks” are generally seen as something to be managed or reduced through various administrative or organizational practices (e.g., mentorship programs), with the aim of helping students “survive” its effects (Ishitani, 2008; see also Cejda, 1994; Clausen & Wessel, 2015; Hern et al., 2019; Lakin & Cardenas Elliot, 2016; Scott et al., 2017).¹

This paper reports findings from 107 longitudinal interviews with 56 transfer students from two colleges and three universities in Ontario. While quantitative studies have identified the variables that predict transfer students’ educational outcomes,² qualitative research is well suited to unpack the degree to which challenges related to transfer impacted students academically

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- 1 It is important to note that not all transfer students experience setbacks. Some students thrive at their new institutions (see Cameron, 2005; Decock & Janzen, 2016; Gorman et al., 2012; Wintre & Morgan, 2009). Davies and Pizarro Milian (2020) found that college students who transferred to the University of Toronto faced more academic challenges than direct-entry students. To a large extent, these challenges were related to academic preparation and receiving insufficient transfer credits. However, about half of these students were still “on track” after transferring. These varied outcomes raise questions about the role of post-transfer experiences and the policies or programs that students attribute to their ability to successfully integrate into their new institutions.
 - 2 The “overarching [quantitative] trends are difficult to synthesize” (Pizarro Milian & Zarifa, 2021, p. 87). However, these studies generally found that prior academic performance, transfer pathway, demographic characteristics, and immigration status mediate grades, time to completion, credits earned, graduate rates, and the amount of student debt incurred (Brown, 2021; Church, 2005; Davies, 2022; Davies & Pizarro Milian, 2020; Finnie et al., 2020; Walters et al., 2021).

and socially over time.³ By design, our study captures students travelling on all five transfer pathways. Our analysis draws on their pre-transfer, (early) post-transfer, and (later) post-transfer experiences over their first-year transferring institutions.

Rather than a single transfer shock, we use the term “jolts” to describe a series of academic and social challenges experienced during all three stages of transfer. By the second semester, most of the problems identified in the fall were largely addressed, or students found ways to manage or accept them. Social jolts appeared to be more stubborn. However, these challenges did not appear to derail our participants’ progress or overall satisfaction with their new programs or institutions. We outline these findings and provide recommendations for improving student transfer (see the Appendix for a detailed description of the data collection).

Main Findings

Our findings are organized along the key stages of the transfer process—namely, pre-transfer, (early) post-transfer, and (later) post-transfer. While our analysis draws on all 107 interviews with 56 participants, we highlight the transfer stories of three students. Each of these stories is used as a vignette to illustrate the transfer process for a vertical transfer student, a lateral transfer student, and a swirler.⁴ In terms of vertical transfer (college to university), Rebecca began her postsecondary studies in a college nursing program and is currently a university student studying physics. Carmen is a lateral transfer student (university to university) who transferred from one environmental sciences program to a similar program at a different university. Bethany is a swirler who has moved in and out of various programs at different colleges and universities in the province and is now completing a college social work program.

Pre-transfer Phase

Existing research on student mobility usually captures students’ post-transfer experiences after they move to a new institution. We take a longer view and consider the factors or circumstances that sometimes disrupt transfer students’ progress at the pre-transfer stage of their educational journey. According to our participants, this stage was where they experienced several jolts, some of which followed them into their first and second semesters. During this time, transfer students found themselves navigating admission requirements, liaising with various administrative offices, and submitting the required documentation for transfer credits.

Application Process

Transferring institutions can complicate the application process. Transfer applicants need to ensure that appropriate documents, such as transcripts and course outlines, are correctly submitted and that they satisfy admission and transfer credit requirements. When Rebecca was transferring to university, she faced several administrative tasks during the pre-transfer process.

3 The qualitative literature is dominated by studies of one or two institutions and transfer pathways. These accounts also tend to be based snapshots in time (e.g., one focus group or interview) and may not reflect earlier or later stages of transfer journeys.

4 To respect the confidentiality of our participants, pseudonyms have been used for their names, and we do not identify their past or current institutions.

Her experience highlights the potential “piecemeal” aspect of transfer, which can result in varied financial, accommodation, and program eligibility.⁵ From her perspective, her status as a transfer student meant that she had to “jump through a lot more hoops.”

Trying to figure out what I qualified for was hard because I don’t qualify for any entrance scholarships. And then some schools, I qualified for a residence guarantee, but some schools, I didn’t. And then some schools, I could apply for co-op, but then in some schools, I couldn’t. So, it was just trying to figure out where I fell because I didn’t realize I would be a transfer student. I thought, “You know what, I’m doing a completely different program. I’m starting from year one.” I thought it would be really simple. I didn’t realize that because I [had]...previous schooling, I’m now a “transfer student.” So, I felt like I just had to jump through a lot more hoops.

These challenges intensified when it came time for Rebecca to submit her transcripts. Although she was a college-to-university transfer student, she had taken one elective course at a nearby university during her college program. Her documentation, at least initially, did not seem to “match up.”

Coming from a collaborative program, I had to get transcripts from both my college and the university. I ended up taking an elective through the university, so it was on a university transcript, but not my college transcript. So, then, the transcripts didn’t match up. I was emailing lots of people, and it was a huge process just getting the transcripts to the school, and then also paying lots of money for that.

Rebecca’s transfer story mirrors our other participants and suggests that transfer students have a heavier admission workload compared to direct-entry applicants from high school. As she learned more about the diversity of transfer policies across the postsecondary sector, Rebecca realized that her academic and financial standing at each institution would vary. In response, Rebecca investigated different programs and schools of interest to find out what transferring would “look like” from a student *and* administrative perspective. These pressures culminated when it came time to choose a university, and she was faced with the burden of weighing the costs and benefits (e.g., being eligible for co-op at one university but not another). Rebecca lamented, “If I had known this before, I don’t even think I would have gone to college [after high school]. I would have just taken a year off to try and figure it out.”

Transfer Credits

Discussions about transfer credits featured prominently in our interviews. Transfer credits not only give students advanced standing in their new programs but also serve to validate work completed in the past. Much like the admission process, our participants described the rules

5 Researchers have documented various financial (e.g., living expenses) and psychological (e.g., disappointing others) costs associated with transferring institutions (e.g., Maier & Robson, 2020; Snowdon & Brady, 2014). Participants such as Rebecca illustrate that there are additional costs associated with transfer, some of which are less obvious at the application and admission phases. Scholarship and residence opportunities may be complicated or sealed off from transfer students, and transfer credits or other assessments (e.g., PLAR) may compromise co-op or OSAP funding (see Aurini et al., 2024b).

and procedures around transfer credits as “school specific.” At some institutions, transfer credits are awarded at the application stage and are automatically assessed. At other schools, students find out about their transfer credits once they accept their offer of admission. Yet further, other schools require students to make individual submissions for transfer credit assessments. Bethany’s story illustrates the kind of perseverance and entrepreneurial spirit that increase students’ success in navigating the early stages of transfer. Denied a transfer credit initially, Bethany eventually received recognition for a course she had taken in college.

So, I’ve applied for transfer credits twice. The first one I did when I was in college for business. I was taking an Intro to College Communications course. I had originally taken Intro to Communications or whatnot at my previous university. I passed. I had a good grade there. I tried to get the transfer credit for my college class, so I didn’t have to do it again... And they declined it... Then I applied this year for transfer credits for the same program that I did in business. And that was a relatively painless process, but I just wished that somebody [would realize], like, “Oh, there’s a match. You don’t have to do it.” That would make it a lot easier than having to go in and do it myself.

Our participants described the benefits of being resourceful and persistent, along with learning how to accept (what feels like) long-term delays. Participants such as Carmen described feeling left in limbo while her enrolment status and program standing (i.e., whether she would enter as a first-year or a second-year student) were being adjudicated. Some participants also claimed that the assessment of their transfer credits took so long that it compromised their course selection for their first semester. As Carmen explained, these delays are “very stressful”:

It wasn’t really a great first experience, because it took a very long time for any of them to be processed. It wasn’t really until the end of August that they were all complete. And it was very stressful because I was worrying about if I’d get into all the courses I wanted.

Despite these setbacks, the students in our sample managed to resolve various hiccups (or jolts) as they happened. None of our participants reported starting their programs with any significant disadvantages. Students also took responsibility for some of the challenges associated with the pre-transfer process (e.g., applying late). Our participants also described turning to institutional support, such as the Registrar’s Office or program advisors. In most cases, questions or issues were resolved relatively quickly. When thinking retrospectively about her transfer experience, for example, Carmen acknowledged that, overall, she felt supported along the way and recognized that “there were more things that I could have done” to facilitate the admission process. Carmen also explained that during the admissions process, she primarily relied on her school’s website because “they were very clear on their website,” and any additional questions were resolved “just by talking to people” at the Registrar’s Office. Overall, minor jolts during the pre-enrolment phase did not derail our participants as they began to transition into their new institutions.

(Early) and (Later) Post-transfer Phases

Gaining admission to a new academic program and institution gives rise to a second wave of minor jolts. Overall, our participants spoke positively about their new programs and had no regrets about their decision to transfer. However, during the early post-transfer phase, students (understandably) experienced some challenges in finding their academic and social footing at their new institutions. While the number and impact of most jolts tended to wane, some academic and social challenges followed them into their second semester (later post-transfer).

(Early) Post-transfer Academic Integration

In their first semester of transfer, some students described needing to “iron out” a few issues that largely revolved around getting their course schedules worked out and familiarizing themselves with new systems or processes at their new institutions. Transfer credits allowed many of our participants to obtain advanced standing in their new programs. For some students, this presented challenges. Rebecca was awarded advanced standing in the co-op stream of her physics program. When she was admitted into the second semester of the first year, she was surprised to learn that she had been auto-enrolled into the university’s professional development course for co-op students.

The point of the course is to prepare you for applying to co-op and your first co-op job. But it doesn’t really apply to me, as I didn’t think I would be starting co-op this year. And I hadn’t chosen that course when I was choosing my fall courses. So, I didn’t know I was enrolled in it until I started getting emails from the teacher saying that I had missed assignments.

When Rebecca reached out to her academic advisor, she was told that she would need to submit a waiver to change her co-op sequence and push the co-op back by one semester. She found the process stressful, given that she was still enrolled in the professional development course. While she was assured that it would be rectified by the following semester, she worried that it would have “implications for this semester because I’m still enrolled in the professional development course.” Rebecca found herself emailing different individuals across campus to try to sort out this mix-up. Throughout this process, she became accustomed to the university, finding herself asking questions such as “Who did I send an email to?” and “Did I send it two days ago? Is it too soon to follow up?” By the second semester (later post-transfer), everything had been sorted out, and Rebecca referred to this situation as a minor “hiccup.”

Some students also found it challenging, at least initially, to become accustomed to the day-to-day academic differences between their previous institutions and their new ones. These differences point to the quick adjustments that transfer students need to make when they get started. For example, Carmen had to adjust to different online learning systems, such as Blackboard or Desire2Learn (D2L). As she described it, “They have a different kind of program they use for class information. So, I’m kind of new to that.” Carmen noted that this small change in learning platform was one of her biggest adjustments, and it even resulted in her coming to school on a day that “class that wasn’t actually happening.”

(Later) Post-transfer Academic Integration

Most of our participants reported feeling “settled” by the winter semester. Transfer students’ varied “starting points,” however, continued to complicate their pathways in the later stages of post-transfer. For example, catching up on prerequisites and the realities of being out of sequence with their classmates complicated course selection. In some cases, these issues prevented students from participating in other opportunities (e.g., co-op), made satisfying program requirements more challenging (e.g., practicum hours), and potentially lengthened completion times (see Aurini et al., 2024b).

In addition to these challenges, issues related to transferring credits followed students into their second term. While some institutions award all transfer credits up front (either prior to or soon after admission), others require students to submit individual requests for credit evaluations on a course-by-course basis. At the time of our second interview, Bethany was still submitting requests to be credited for required program courses. As a swirler, she had been through several rounds of credit transfer assessments at different institutions. Rather than her school automatically awarding college credits for past university work, the onus was on Bethany to demonstrate the connections between her previous schooling and her new program and put forward proposed transfer credits for the college to review. This work included outlining the specific courses (or course codes) for which she was seeking transfer credits, demonstrating how past credits satisfied course requirements (typically by way of course outlines of previously completed courses),⁶ and finding courses to replace them should she be awarded the transfer credits.

There’s a couple of courses that I have taken in the past that I was hoping I would transfer into, like the course that I’m taking now. For example, I took ethics in business school, and I thought it would transfer to the ethics course I’m taking this semester, but it didn’t. And so, there’s no real explanation as to why or why not, or what is transferable credit from which schools.

For Bethany, delayed or denied transfer credits left her feeling that her first year at her new institution was repetitive. This sentiment was shared by several of our participants who did not have some of their past courses awarded at their new institution. Participants described not only having to repeat courses but were also left wondering why their credits had not been transferred. According to our participants, their new schools did not provide explanations or rationales when they refused transfer credits. These jolts serve as a point of frustration, are evidence of system inefficiencies, and ultimately create more work for students.

(Early) Post-Transfer Social Integration

Challenges related to social integration are a prominent feature in the transfer shock literature. This theme was echoed by our interviewees. Social jolts were apparent in the early post-transfer stages and continued well into the students’ second semester. The first year of a

⁶ In extreme examples, some students were left negotiating single transfer credits over the course of a full academic year. Often, this was due to students not having old course outlines saved and readily available. This resulted in students having to chase down instructors or department administrators from their previous institutions to obtain these outlines.

program is an important time for building social connections and social capital. Essentially, transfer students *leave* programs and existing networks. When they enter new programs, they must build social connections all over again. Being out of sequence or being awarded advanced standing means that our participants did not easily fit into a conventional “semester 1” or “semester 2” cohort. Rather, their course schedules were blended with a variety of courses at different semester or year levels. This staggered sequence prevented students from interacting with the same peers across their timetables. As Rebecca explained, transfer students experience a general sense of being different from their peers.

There’s a general thing of just being from a different kind of cohort as other first years. I don’t know the same people. We don’t have the same experiences from high school.

Out of sequence with her peers for her entire first year, Rebecca lamented that “it’s a little sad because I don’t know anyone in my program.” Although transfer credits eliminated the need to retake courses, having advanced standing prevented her from forming social bonds with her peers because “I’m not in all the same classes.”

So, even if people in my program are in chemistry together, I don’t really see them. And they might be in genetics, but I have a transfer credit for genetics, so I’m not in it. So, I get their group chat messages, but I can’t really relate to any of their problems.

Our participants described missing some of the comradery that develops among direct entry students who share the same high school to postsecondary pathway. At the time of our last interview, Rebecca was hopeful that these social challenges would lessen in the upper years of her program. Not having any upper-year transfer credits meant that she would eventually be more in sequence with her peers.

(Later) Post-transfer Social Integration

While both college and university students experienced social jolts, the intensity and impact of these jolts varied among the interviewees. The pathway or program structure, living arrangements, and the ability to leverage their unique status shaped the degree to which participants were able to forge social connections. In terms of program structure, some participants benefitted from having their semesters structured in a manner that facilitated networking. However, these arrangements did not always provide students with a reliable mechanism for making friends. Bethany, for example, described how these social connections can break if the cohort structure changes. While she had formed strong social connections during the first semester of her program, when her program shuffled the class cohort, she needed to make friends all over again. Bethany stated that this exacerbated “everyone’s biggest fear” of “making friends in the class” when they begin a program.⁷

It completely flipped on us this year. So, I had a group of, like, 25 [peers]. We were the smallest group last semester, and there’s only, like, seven of us that showed up consistently. We all were really close. And we all knew everything. And then, this

7 These strategies mirror those in existing research on transfer shock and addressing social integration challenges (e.g., Montague et al., 2022; Percival et al., 2015; Percival et al., 2016).

semester, I'm with people that I've never met. I think I have two people from my last semester that have come over with me into this one. So, they really just split everybody up. And it was really nerve-wracking the first week back because it's like, it's like going back to the first day of school again, right, and not very fun.

Living on campus provides students with another (albeit unreliable) source of social support. Rather than commuting daily to class, Rebecca noted that staying in residence was a strategic decision, allowing her to feel more socially integrated. Rather than “wasting her time” driving between home and school, staying in residence afforded Rebecca the opportunity to participate in collegial activities. For example, Rebecca joined a soccer team through her residence as well as a number of clubs. All these activities allowed her to form friendships and help her feel part of the campus community.

When I was in college, I was living with my grandparents, so I wasn't really immersed in the school. I wanted more of a change to make friends and do stuff outside of class. And I live a 30-minute drive away. So, I figured if people were meeting outside of class, I wouldn't want to drive back and forth a lot, so I probably wouldn't go. Now I'm kind of forced to do stuff that I otherwise wouldn't have.

For other transfer students in our sample, however, residence was not a viable option, nor was it guaranteed, since they were no longer considered “new” or “first-year” students. The success of these students in overcoming social jolts rested on their ability to navigate new social situations. For Bethany, her experience of swirling between institutions and programs proved to be an asset. She spoke about having to find the “right” people. Unlike some of our participants, she believed that being older than many of her peers gave her a social edge. She could easily spot other transfer students and find peers with different priorities than direct-entry students.

We all kind of come together, and we're like, “Hey, what's up,” and most of us are transfer, and some of us are just, you know, coming back to school after a really long time. . . . Everyone who's kind of, like, older or mature, we're kind of easy to recognize because . . . we care more about our studies, but less about the social aspect.

Not only did being older allow Bethany to bond with other transfer students, but other students also valued her stock of “know-how” earned through her past postsecondary experiences. Bethany acknowledged that she and her transfer peers might have slightly different priorities than their direct-entry counterparts (e.g., no longer wanting to “party”). Overall, she saw her age and maturity as assets.

I've been recognized as one of the older individuals in the course by my peers, and everyone's kind of like, “Oh, go to Bethany, she knows! She knows how to answer these questions.” I'm kind of, you know, everyone comes to me. They're like, “How do I do APA citation?” Or like, “Oh, what did you kind of say on this assignment?” Or, “How did you word it?” And some people are asking me a lot of questions, coming to me, like I have all the answers, which is nice . . . to feel wanted.

Despite the success of some of our participants, being out of sequence with their peers, age, and maturity slows transfer students' ability to develop social connections, at least during their first year of study at their new institutions. Among our interviewees, there was a strong

desire to connect with other transfer students who shared a similar postsecondary “story” and set of priorities.

Conclusion and Recommendations

In this brief, we examine the three critical stages of the transfer process—namely, pre-transfer, (early) post-transfer, and (later) post-transfer. We find that students experience a series of jolts—or disruptions—during the transfer process. By looking at the different stages of the transfer process, we distill many jolts that students experience through the active transfer process. During the application and admission stages, transfer students can experience several administrative challenges and conflicts over their transfer credits. Transfer students must learn about the rules at each institution they are considering and weigh the costs and benefits associated with each institution (e.g., residency, co-op eligibility). However, the students in our sample were resourceful and comfortable seeking various kinds of support from their new institutions.

More enduring than academic jolts are social jolts, as our participants continued to face social integration challenges in their second semester of studies (see also Montague et al., 2022; Percival et al., 2015; Percival et al., 2016). Our participants, however, discussed using strategies for improving social connections, and none claimed to feel like social outliers. Rather, our participants acknowledged that social challenges existed—perhaps for longer than they would like—but these challenges did not have them second guessing their transfer decision. While some of our participants were still finding their way, our findings support existing claims that transfer students require unique approaches and institutional practices to assist in their social integration (see Chamley-Wiik et al., 2021; Ishitani & Flood, 2018; Lakin & Cardenas Elliott, 2016).

Together, our findings further nuance the existing literature by identifying the challenges that students experience along the way and how these issues “wax and wane” through the first year of transfer. It is important to note that neither academic nor social challenges appear to compromise their pathways. Our participants did not report, nor did we detect, that they were at risk of not completing their programs. Rather, the transfer students in this study appeared nimble and entrepreneurial. Despite noting various challenges, they were able to seek out solutions as problems occurred and shared positive experiences and views of their transfer experiences. Overall, the transfer experiences outlined in this brief support ongoing “stories of transfer,” in which students are happy with their transfer decisions and how they fit into their new institutions and programs (see Cameron, 2005; Gorman et al., 2012; Maier & Robson, 2020; Wintre & Morgan, 2009).

Our findings also yield important implications for policymakers and transfer administrators. By tracking students over their first year of study, we were able to identify the specific jolts they experienced and when those jolts were most salient. First, turbulence during the admissions process may encourage institutions to revisit their transfer materials and processes. While there is a developing digital infrastructure in Ontario to supply students with transfer credit information before they transfer (e.g., [ONTransfer.ca](https://www.ontransfer.ca)), some students need more guidance through the credit transfer process once they are at their new institution. In particular, we found distinctions between institutions with respect to the transfer credit process and rules around co-op, housing, scholarship, or other program-related eligibility. Some of our participants needed to act as

quasi-admission counsellors to identify transfer credits and other opportunities. These considerations are important for administrators to reflect on as they look to improve the feasibility and transparency of the transfer process. Second, our study suggests that more needs to be done early on to socially integrate transfer students and help them develop social connections. These efforts should be tailored to the unique needs of transfer students, rather than generalized to all “first-year” students entering from high school. While their advanced standing or program structure may force them to be out of sequence for the entirety of their degree or diploma, they desire opportunities to connect with students who share their experiences and priorities. Finally, our larger study suggests that more work comparing students travelling through different pathways could be beneficial. Our existing work shows that there is a dearth of empirical research focusing on particular mobility pathways (e.g., university to college and swirlers; see Aurini et al., 2024b). The findings of this study lay the conceptual foundation to further tease out the experiences and outcomes of students across these lesser-studied pathways and work to improve mobility outcomes in the sector.

Appendix: Data Sources, Sample, and Analytical Approach

In November 2021, ONCAT facilitated a virtual meeting with the research team and representatives from several colleges and universities. This study reports the findings from longitudinal interviews conducted with transfer students from the five postsecondary institutions in Ontario (two colleges and three universities) that opted into the study. These institutions were Fleming College, Humber College, Nipissing University, Trent University, and the University of Waterloo.⁸ The research team subsequently set up one-on-one consultations with all interested institutions to plan the data collection activities.

Sample and Recruitment

The parameters of the sample were made in consultation with the participating postsecondary institutions. Transfer students were defined as domestic undergraduate or diploma-seeking students who had previous Canadian postsecondary experience and who had engaged in one of the transfer pathways. Receiving transfer credits was not a condition of eligibility. Transfer credits are initiated pre- or post-enrolment by either the student or institution, and the equivalent credit may or may not be awarded toward a degree or diploma at the receiving institution.⁹

To recruit students, the Registrar's Office at each institution identified currently enrolled transfer students based on these criteria and sent them an email of information inviting them to participate in the study. Two to three emails were sent by the registrar's office at each institution for each portion of the data collection. For the longitudinal interview portion of the study, we recruited students in the early fall of 2022 to capture students at the beginning stages of transferring to a new institution. Active consent was used, and interested students contacted the research team directly.¹⁰

Sample Size by Transfer Type

We conducted semi-structured interviews with transfer students in fall 2022 and winter 2023 to follow them during their first year at their new institutions. We restricted our sample to students who had recently transferred institutions to allow us to track their experiences in real time as they confronted the realities of their transfer decision; this approach allowed us to capture any signs of "transfer shock" and learn about the services or policies that were shaping their transitions in positive or negative ways. We were also able to detect whether the challenges identified in the fall had been resolved later in the school year, whether any new challenges were emerging, and the resources that shaped these experiences in positive or negative ways.

The Registrar's Office at each participating institution emailed our recruitment script and letter of information in early fall 2022. The first interviews were conducted shortly afterward, as

8 The original sample included six institutions. However, one institution yielded no participants.

9 International students or students who had transferred from a non-Canadian institution and those enrolled in micro-credential, continuing education, or post-graduate credentials were not included within the scope of this study, based on the advice the research team received from the participating institutions.

10 This recruitment approach eliminated the need for the research team to access student records or other personal information (e.g., name, email).

the students were just starting at their new institution. The second interviews were conducted in winter 2023 to track the students as they navigated institutional processes. Interviews were conducted remotely on Zoom in consideration of a variety of factors, including COVID-19, geography, cost, and (lessening) the burden on participants.

The length of the interviews varied depending on the degree to which the participants elaborated on or wanted to share other details about the transfer experience. However, most interviews ranged from 45 minutes to 1.5 hours.

In total, the research team conducted 107 interviews with 56 transfer students. A total of 32 current university students and 24 current college students participated; of these, there were 12 transfer students from Fleming College, 12 from Humber College, 2 from Nipissing University, 18 from Trent University, and 12 from the University of Waterloo. We had some attrition, and nine students did not participate in a second interview.

TABLE 1
Qualitative Interview Sample

	Fall: Interview 1	Winter: Interview 2	Spring: Interview 3
Fleming College	12	11	2
Humber College	12	9	1
Nipissing University	2	1	1
Trent University	18	16	2
University of Waterloo	12	8	
TOTAL	56	45	6

Our original design included final interviews at the end of school year. However, when we spoke to students during the winter term, we found that these interviews did not reveal new insights. By then, the majority of our sample had become acclimatized to their new institutions. Importantly, they identified with their new programs, rather than seeing themselves as “transfer” students. We followed up in the spring semester with a general inquiry email. Participants could sign up for a final interview or contribute some final thoughts via email. Relatively few desired a final interview—hence, the significant drop in the number of students who participated in the final follow-up interview.

Interview Schedules

Interview 1

The interview schedule captured students' backgrounds, transfer processes, post-transfer integration, and recommendations.

Background Questions. We asked participants a variety of questions about their initial transition from high school to their first institution, including the considerations that guided their choice and the factors that shaped their decision to move to the subsequent institutions.

Process Questions. We asked students to describe their transitions to their new institutions, including the resources or services that they accessed and what went well (or not) with the process of transferring.

Post-transfer Integration Questions. These questions probed students' experiences at their new institutions and programs and the factors that helped or limited their integration and satisfaction with the transfer process. We also asked questions related to the level of support they received and any resources or services that eased or would have eased their transition.

Recommendation Questions. While we touched on recommendations throughout the interviews, we further probed the students to provide us with their recommendations to improve the transfer process experience- both at the pre-and post-transfer stages.

Interview 2

The second interview built on the information provided by the earlier interview. Prior to conducting the second interview, the interviewer reviewed the participant's transcript to gain an understanding of the transfer "story." During the second interview, we wanted to probe further to determine if issues had been resolved and the factors that had shaped their outcomes.

Review of Data. Given that it had been several months since the first interview, we reminded the participants about the purpose of the research. We briefly summarized what they told us during the first interview and asked the participants for updates.

Post-transfer Integration Questions. We wanted to determine whether participants felt integrated into their new institutions and programs. We asked how they had been feeling about their new programs since their last interview and about the aspects that shaped their responses. We also asked about the perceived level of support at their new institutions.

Forecasting Integration Questions. To conclude, we asked the participants to think about the next semester, and the remainder of their degrees or diplomas. We asked whether they perceived any challenges going forward. We framed this discussion around the experiences they had discussed so far to ensure we could build connections to events or developments that had occurred along the way.

Approach to Data Analysis

We used [Otter.ai](#) to generate the transcripts. To examine the active transfer process, we adopted a manual coding strategy. Both of each participant's interviews were examined in concert and documented in a form we developed in Word. After summarizing their overall

academic history and transfer decision-making, we divided the analysis into the following four main categories: (a) fall 2022; (b) winter 2023; (c) what helped ease transitions; and (d) advice or recommendations. Both fall 2022 and winter 2023 focused on their perceptions and experiences related to transfer, including the positive or negative aspects of transferring institutions. Next, we conducted more deductive coding to examine whether they identified themes discussed extensively in the literature. Since some of the issues addressed in the literature were already captured under the fall 2022 category (e.g., credit loss), our discussion focused on aspects related to their ongoing experiences of transferring institutions, such as a drop in grades and difficulty with new modes of assessment (or various dimensions of “transfer shock”).

On the Use of Vignettes

Vignettes are useful for a variety of purposes in social research. While often used as an elicitation tool for data collection (Finch, 1987), they are also useful for presenting data and research findings. As Reay et al. (2019) stated, the vignette approach is an “amalgam of show and tell” (p. 207). As a narrative-driven mode of data presentation, we adopted the vignette approach to not only “tell” our audience about the challenges students face at different stages of the transfer process but to also “show” how the experiences detailed by our participants map onto these challenges.

Research Ethics

Research ethics applications were completed at all participating institutions. REB approval was granted at all institutions prior to data collection. To maintain students’ confidentiality, we changed their names and have not identified their current or previous institutions.

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