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A Review of Qualitative Student Mobility Research in Canada

Janice Aurini, University of Waterloo
Emerson LaCroix, University of Waterloo
Mrittika Dreesha, University of Waterloo
Maria Brisbane, University of Waterloo
Vanessa Iafolla, University of Waterloo

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Abstract

Research on student mobility in higher education continues to be of enduring interest to researchers and policy stakeholders. In this article, we present the qualitative 'twin' to Pizarro Milian and Zarifa's (2021) paper mapping the quantitative research on student transfer in Canada. Drawing on 75 peer-reviewed articles and reports published between 1991 and 2022, we systematically review the major findings and expose data and methodological gaps within the existing Canadian qualitative transfer literature. We present a clear roadmap for filling these gaps, but also flag some of the methodological hurdles that researchers will need to overcome.

Keywords: transfer, student mobility, qualitative methods, postsecondary, higher education

Introduction

There has been enduring interest in student mobility in higher education research. Previous studies have examined the (unfulfilled) promise of students' movement from community college to university (or 'vertical transfer') (e.g., Brint & Karabel, 1991; Dougherty & Kienzi, 2006). Current research has widened its lens to consider empirical patterns and outcomes associated with a variety of transfer pathways and policy directives (e.g., Finne, Dubois, & Miyairi, 2020; St-Denis, Boujija, & Sartor, 2021; Trick, 2016; Zarifa, Hillier, & Sano, 2020). While much of this work has focused on analyzing the antecedents, scope, and outcomes of student mobility, it has also been used to expand our theoretical and empirical toolkit on social stratification and organizations (e.g., Brint & Karabel, 1991; Clark, 1960; Goldrick-Rab, 2006; Grubb, 2020; Schudde, Jabbar, & Hartman, 2020).

The attention paid to the study of student mobility stems from the realities of student pathways within postsecondary and the acknowledgement that "student mobility and progression are hallmarks of twenty-first century student success" (Duklas, Maki, Pesaro, & Brady, 2014, p. 12). Among Canada's 2.1 million postsecondary students, a sizable number of students attend more than one college and university (Statistics Canada, 2022; Zarifa, Sano, & Hillier, 2020). In Ontario, for example, 8%, or over 60,000 students, transfer institutions each year (ONCAT, n/d; Zarifa, Sano, & Hillier, 2020). These transfer pathways include 'vertical transfer' (college-to-university), 'reverse transfer' (university-to-college), 'lateral transfer' (college-to-college or university-to-university), and 'swirlers' who move between several institutions. Non-linear pathways not only have implications for student experiences and outcomes, but also give rise to a unique set of policy, program, and staffing demands within postsecondary institutions.

This paper provides the qualitative complement to the systematic review of quantitative research on student transfer in Canada conducted by Pizarro Milian and Zarifa (2021). We summarize 75 journal articles and institutional research reports that have been published between 1991 and 2022 (see Appendices 1 and 2). The organization of this paper strategically mirrors Pizarro Milian and Zarifa's (2021) review so that in combination, researchers, administrators, and policymakers can readily distill the main quantitative and qualitative findings, data, and methodological limitations. Similar to this paper's quantitative twin (ibid), we use this review to not only identify the major contributions but also to flag the broad areas of inquiry that are needed to further advance our understanding of student mobility in Canada.

Approach

This review on Canadian qualitative research on student transfer was conducted between June 2021 and June 2022. Our review draws on three main sources: 1) academic journal articles, 2) institutional research reports posted on the websites of the Pan-Canadian Consortium on Admissions & Transfers (PCCAT) and similar provincial bodies (e.g., BCCAT, ONCAT), and 3) policy reports posted on the websites of offices of research or similar bodies that examine higher education (e.g., Higher Education Quality Council of Ontario (HEQCO), Seneca's Centre for Research in Student Mobility (CRSM).

This search generated 75 papers comprising 17 peer-reviewed journal articles and 58 institutional and policy research documents (for a summary, see Appendices 1 and 2). We used search terms that captured qualitative research on transfer students in Canada, including a combination of the following: student transfer, transfer student*, student mobility, Canadian, Canada, postsecondary, higher education, college, university, qualitative, interview*, focus group*, ethnography, and field methods. We eliminated most papers that were not grounded in some form of qualitative data collection, such as interviews, focus groups, or content analyses, but did include a handful of 'state of the field' papers that included historical or jurisdictional scans.[1]

Peer-reviewed journal articles were initially found using a variety of databases, including Scholars Portal and JSTOR, using the search terms identified above. Our initial search yielded only 13 articles published between 1991 and 2022. To ensure we did not miss any peer-reviewed papers, we adopted three additional search strategies. First, we used Davies and Rizk's (2018) strategy by searching papers indexed in Google Scholar. Inputting the paper titles, we were able to trace articles that had cited them in subsequent years. We identified 4 additional articles by examining the cited works referenced in the initial 13 articles along with the institutional and policy reports described below.

Second, we employed a graduate student who is an expert on computation methods. We used two separate search queries to find journal articles related to transfers in the Web of Science database. The first query was focused on the topic broadly and returned 1,466 results. Our second query was focused on identifying qualitative research and returned 566 results. We then downloaded the results as plain text files and used the metaknowledge package (McLevey & McIlroy-Young, 2017) to organize the plain text into formatted data tables. We were unable to identify any additional articles with this search method.

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[1] We did include a handful of papers that refer to the inclusion of qualitative data. OUSA papers, for example, are written by students and acknowledge input from students and student groups but provide no methodological details.

Third, we gathered research reports that are posted on the websites of the Pan-Canadian Consortium on Admissions & Transfers (PCCAT) and similar provincial bodies, including the Ontario Council on Articulation and Transfer (ONCAT). These sources included a mixture of papers that focused on one or more institutions (e.g., Decock & Janzen, 2016) as well as broader policy or jurisdictional scans (e.g., BC Council on Admissions and Transfer, 2015). Similar to Pizarro Milian and Zarifa (2021), our review includes contributions from academic researchers (e.g., Andres, 2001), institutional researchers (e.g., Blais & Harper, 2013), and policy analysts (e.g., Missaghian, 2021). These papers tend to draw on data collected in British Columbia and Ontario and include colleges, universities, and Indigenous or First Nations institutes.

Rather than taking a more impressionistic approach, we examined the literature systematically. All articles were sorted into two categories (journal articles and institution reports), read, and summarized, generating approximately one hundred pages of notes. Using an Excel file, the authors then summarized each source by transfer type, publication year, institutions, research questions, main findings, type of data collected, sample size, and the participants (e.g., students, staff). In addition to summarizing these details in the tables and figures presented in this paper, we also coded the papers thematically to systematically pinpoint not only the main areas of focus (e.g., student experiences) but also to identify gaps (e.g., motivations) in the Canadian qualitative literature on student transfer (see Appendix 3).

While our approach was systematic and thorough, our analysis does not include research that is not published or shared. Institutional researchers conduct research on student transfer for their internal purposes and may include confidential information.[2] We also may have missed papers that do not appear through online search engines using the key terms we described above and/or did not report including a qualitative component.[3] The expertise of our research team also limited our ability to read and analyze papers written in French. Consequently, we missed papers written by Francophone researchers. Despite these limitations, we are confident our paper represents a detailed examination of qualitative student mobility research in Canada and is a worthy complement to Pizarro Milian and Zarifa's (2021) quantitative review.

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[2]Some papers included in this review were from conference proceedings and are not found on any searchable database. We often stumbled on these papers more or less by luck or were referred to them by colleagues in this area of research. Similarly, other reports posted on websites (e.g., ONCAT) included content analysis but were not identified in our initial searches. We found them by searching these posted reports manually.
[3]We found several papers that included 'buried' qualitative data that was not identified or searchable (e.g., references to conducting interviews). Consequently, some papers may have been missed.

Findings

Our review of the qualitative literature on student transfer in Canada begins with a breakdown of the major areas and findings in the literature. In the second part of the paper, we move to an examination of the data and the methodological limitations of existing qualitative research on student transfer and make suggestions for broadening our qualitative lens (see Appendix 3). As we report in Figure 1, most research on students is focused on their perceptions and experiences and, to a lesser extent, the barriers or challenges that they experienced.

Figure 1

Focus of Canadian Articles and Reports on Transfer Students
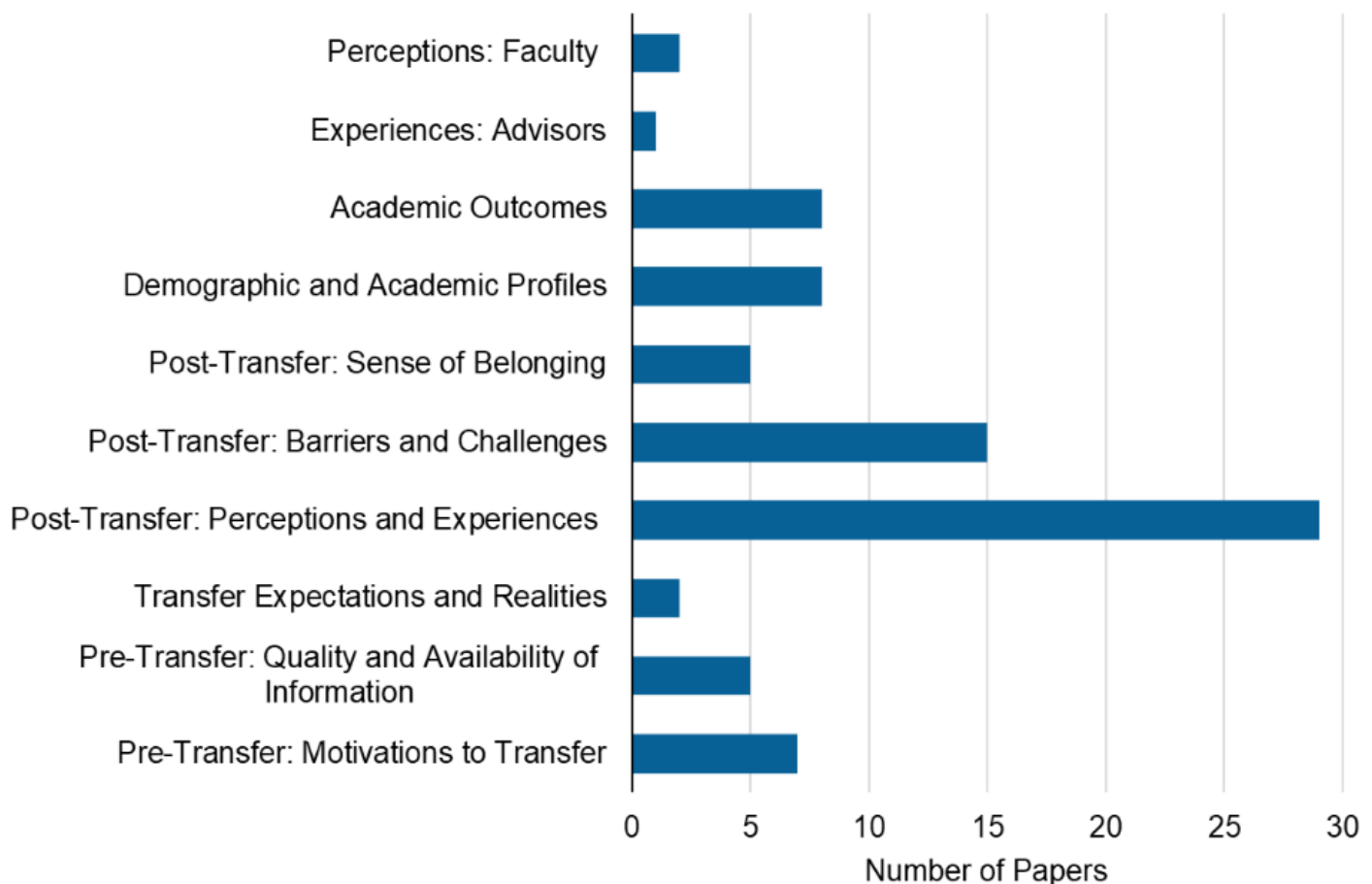
In terms of papers about policies and processes, Figure 2 shows there is a fairly healthy body of literature that we refer to as 'the state of the field' or scoping type of reviews that examine transfer practices across several jurisdictions. A smaller body of literature examines ways to improve pathway experiences and various kinds of supports for students, usually for a particular institution or pathway between a handful of institutions.

Figure 2

Focus of Canadian Articles and Reports on Transfer Policies and Processes
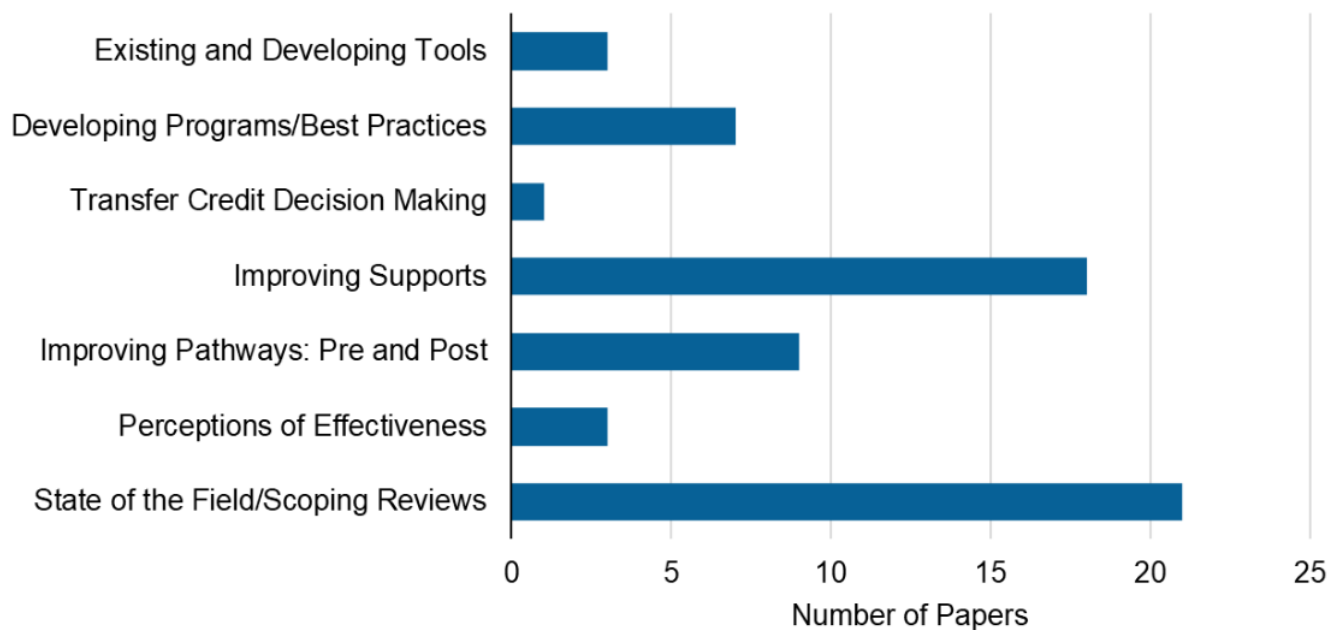
The Pre-Transfer Process

There is a large body of quantitative literature that examines the predictors of transfer pathways (for a comprehensive overview, see Pizarro Milian & Zarifa, 2021). This work includes analyses of college- or university-specific administrative records produced by institutional researchers (e.g., Gerhardt & Masakure, 2016) as well as papers by policy and academic researchers using aggregate transfer student data, such as Statistics Canada Postsecondary Information System (e.g., Finnie et al., 2020; Hillier et al., 2020). While the quantitative research on transfer motivations is well established, we could only find seven papers published between 1991 and 2020 that draw on qualitative Canadian data. This work examines why students transfer, their information-seeking behaviour, and the quality of information that is available (see Appendix 3). While there is a dearth of qualitative research in this area about students, there is a far richer collection of papers that examine how staff (e.g., advisors) perceive the pre-transfer pathways and resources, and their understandings of how to improve the pre- (and post) transfer experience for students.[4]

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[4]Maier and Robson (2020) point to the necessity to dig further qualitatively into the nuances that drive transfer decisions and motivations not captured by quantitative research. And while the literature based on staff perceptions is more robust, most of this body of literature is fairly dated and/or based on one institution, small sample sizes, and/or specific pathways (e.g., Smith & Frank, 2020). Consequently, its results may not have broader applicability.

Transfer Motivations

There is a small body of literature that examines the motivations that drive students' transfer decisions. The earliest Canadian work on this topic finds that college students who had transferred from a university were motivated by career objectives and were studying areas unrelated to their previous postsecondary program. Despite this, many were 'strongly committed' to completing their university programs at some point (Vaala, 1991). Decock and Janzen (2016) also found that student transfer decisions were motivated by career objectives, yet they also valued both their college and university experiences and believed that, in combination, these experiences yield advantages, regardless of the transfer type (college-to-university or university-to-college).

These studies suggest that students are not always 'pushed out' of one institution and/or 'pulled into' another (Maier & Robson, 2020; see also Lang, 2009). Instead, the decision to transfer, along with the initial choice of institution and program, are sometimes part of a series of calculated decisions made by students—decisions made with cost, geography, personal tendencies, and prior academic experience in mind (Andres, 2001). For others, a college-to-university pathway is a less expensive pathway or 'work around' for students who initially did not qualify for university after high school (ibid; Lang & Lopez, 2014; Lang, 2018). Reflecting on the wisdom of their personal networks who went straight from high school to university, others see the college-to-university pathway as a way to 'ease into' postsecondary (Andres, 2001; Lang & Lopez, 2014; Smith & Frank, 2020). The ability to obtain transfer credits at college is a big benefit for students who had always intended to enroll in a degree program at some point (e.g., Decock & Janzen, 2016). These students drew on their previous academic and work experience to find programs and learning environments that are aligned with their interests and personal needs (ibid). As Wintre and Morgan (2009) found, transferring is part of a 'mature' decision-making process.

Maier and Robson's (2020) more recent work also emphasizes that student motivations for leaving a program may be different from their motivations to enter their current program. While career objectives factored into some students' decisions to leave a program, so did academic and personal (e.g., mental health) struggles. They also highlight that 'messier' student pathways may begin long before students transfer. Most of their participants reported 'more steps' in their academic journey, including 'victory laps' in high school, gap years, or taking time off at their initial postsecondary institution before deciding to transfer. Andres (2001) similarly found that it was common for students to transfer to university after being out of school for a period of time; many planned to attend university after completing their college program very early in their academic journey.

Information about Transfer

The second body of literature examines the quality of information regarding the transfer process and investigates how sending and receiving institutions can improve the transfer process and experience (e.g., Baxter, 2022; Blanchard et al., 2013; Duklas, 2019; Fisher et al., 2012; Hunt & Maracle, 2018). The findings on this topic tell a mixed story. Wintre and Morgan (2009) found that students routinely consulted with both their parents and postsecondary institutions before, during, and after transferring institutions. Others have found that students do not necessarily seek out information about transferring from their institutions, and those who do often rely on family and friends for advice (Arnold, 2011).

Research on the quality of information highlights how the lack of effective communication and coordination among program administrators, academic advisors, and students creates confusion and frustration about the transfer process. Students sometimes have difficulty getting information about the transfer process, the number of transfer credits they would receive, and what to expect with their new program (e.g., Graham et al., 2018). Not only is critical information sometimes missing, hard to find, confusing, or not provided in a timely manner, but some students report receiving inconsistent advice (e.g., Barnett & Coppins, 2021; Decock & Janzen, 2016; Gerhardt et al., 2012; Gorman, Phelps, & Carley, 2012; Kettle et al., 2018; Mallette et al., 2015; Montague et al., 2022; Percival et al., 2015).

In contrast, a handful of other studies illustrate more successful examples of student transfer and students' general satisfaction with the transfer process and their new institution (e.g., Cameron, 2005; Green et al., 2020; Ray et al., 2019; Usher & Jarvey, 2012; Vaala, 1993; Wintre & Morgan, 2009). Lang and Lopez (2014), for example, found that most students used a variety of services, such as tutoring and counselling, and were generally satisfied with them. Green et al. (2020) similarly found that students who turned to institutional resources (e.g., websites, staff) were generally satisfied, particularly if they received the transfer credits they were expecting and were notified about these assessments prior to registering.

The lessons that can be gleaned from both strands of literature demonstrate the importance of providing students with a transparent set of guidelines, communicating transfer credit decisions prior to registration, streamlining processes, and having trained support staff who are able to provide consistent and timely information (e.g., Barnett & Coppins, 2021; Gerhardt et al., 2012; Kettle et al., 2021; Usher & Jarvey, 2012). This research also suggests that high levels of collaboration and coordination among institutions can greatly improve the transfer process for students and staff (e.g., Hurlihey, 2012; Shook, Norman, & Guyatt, 2016). As Andres (2001, p. 65) argues, smooth transitions demand "ongoing dialogue and articulation of teaching and learning practices at both sending and receiving institutions."

Consequences of Transfer

The quantitative literature on the consequences of student transfer is largely focused on grades, graduation rates, and labour market outcomes (Pizarro Milian & Zarifa, 2021). The qualitative counterpart of this strand of literature instead examines students' perceptions and experiences, including both the positive and negative aspects of transferring and the type of institutional policies or practices that might improve transfer students' success. A smaller subset of this literature examines faculty and staff perceptions, including whether they believe transfer students are academically prepared.

Perceptions and Experiences

Almost half of the qualitative literature on student transfer examines students' perceptions and experiences after transferring. The first strand of this literature examines students' adjustments at their new institutions and programs. The findings from this work are mixed. Some students have difficulty adjusting to not only new administrative procedures (e.g., Malette et al., 2015) but also new academic requirements, models of assessment, and new teaching and learning environments (e.g., Blais & Harper, 2013; Gawley & McGowan, 2006; Gerhardt & Ackerman, 2014; Green et al., 2020; Woodhead & Oh, 2016). Students sometimes experience transfer 'shock' when there is a significant gap between their past academic work and their new program (e.g., Luckai et al., 2016; Mallette et al., 2015; Percival et al., 2015).[5] In some cases, students self-report a drop in grades when moving from college to university and are anxious about university expectations and their ability to connect with their professors. Others express disappointment, citing dropped grades and feeling like they are 'starting all over again' (Gawley & McGowan, 2006).

This literature also examines students' sense of belonging and fostering a culture of mobility at their new institution (e.g., Penner et al., 2017). Montague et al. (2022) describe how some students find it difficult to make connections with professors and new peers. Others also report that transfer students have difficulty integrating into their new education setting, even among those who are academically successful at their new institution (Percival et al., 2015; Percival et al., 2016). However, not all transfers are fraught with difficulties; moreover, many issues can be resolved relatively early in the process. Cameron (2005) found that while students experienced initial challenges, overall they were satisfied with their decision and would recommend their new program to a friend. Others also found that students thought they had made a 'good decision' to transfer (Maier & Robson, 2020), with some students reporting an improved 'fit' with their current institution (Wintre & Morgan, 2009). Others report similarly positive outcomes and point to specific policies and practices that eased students' transitions (e.g., Coffrey, Lindsay, & Sproul, 2012). Gorman, Phelps, and Carley (2012),

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[5]Interestingly, despite repeated references to 'transfer shock,' there is scant Canadian qualitative data on the gap between transfer expectations and realities.

for example, found that college-to-university transfer students were happy overall with their postsecondary pathway and saw both forms of education as valuable to their education and career objectives (see also Decock & Janzen, 2016).

A smaller sub-set of this literature examines faculty and staff perceptions and experiences with the transfer process and its students. Bowker (2021) found that faculty tend to see transfer students as academically less prepared. O'Donnell et al.'s (2018, p. 7) examination of college faculty regarding the readiness of students for internal transfer programs found that "several respondents were concerned that pathway students lacked the writing, research, and referencing skills as well as the theoretical foundation for degree-level study." Missaghian (2021) also found that while university faculty were willing to grant transfer credits for similar courses, they expressed doubts about whether college students had been sufficiently exposed to demanding material and assignments (e.g., essays). Several expressed a desire for students to take required courses associated with the major to ensure that they would be exposed to the rigours of their program at their institution.

Transfer Policies and Practices

The final body of qualitative research is focused on examining transfer policies, services, and resources. This literature sometimes includes frank discussions about the challenges students experience navigating 'frustrating and confusing' institutional policies (Gerhardt et al., 2012). Rather than the repeat material covered earlier, we will review the other dimension of this literature that examines the following types of questions from the administrative side of student transfer: How should sending and receiving institutions improve the transfer experience? What are the most effective policies, services, and resources?

Providing timely, accurate, and clearly communicated information emerged as a central theme before, during, and after the transfer (e.g., Blanchard et al., 2013). Some studies reported long gaps in communication, leaving students unsure about which credits would transfer and how long it would take them to graduate (e.g., Blais & Harper, 2013). To facilitate credit conversion, the BC Council on Admissions & Transfer (2015) found that staff members involved in admissions and the registrars' offices advocated for earlier credit assessment—at the offer stage rather than after students formally register (see also Barnett & Coppins, 2021; Speers, Stockdale, & Martin, 2012). Practical suggestions also included having postsecondary institutions communicate information in one centralized online location to make it easier for prospective transfer students to make an informed decision based on the process and how many credits will be applied. Block agreements that define a predetermined number of credits that will be granted were cited as not only generating efficiencies for institutions (e.g., McQuarrie, 2020) but also streamlining the process for students.

Advice also included providing students with a rationale for why certain courses are not awarded transfer credits (e.g., Gerhardt et al., 2012).

The second strand of the literature focuses on preparing students for the academic expectations and approaches to teaching and learning at their new institutions (e.g., Gerhardt & Ackerman, 2014; Luckai et al., 2016; Mallette et al., 2015). This preparation may include providing resources to help ease students into their new institutions, such as mandatory writing courses and connecting students with academic services such as one-to-one academic advising. Beyond the academic elements, institutions should also help students navigate institutional policies and services (e.g., where to find resources on campus), in addition to facilitating their connections to the campus through program-specific orientation sessions (e.g., Montague et al., 2022).

Broadly, this literature finds that effective transfer policies include: a) connecting students with formal (e.g., trained academic advisors) and informal (e.g., past transfer students, mentors) supports, providing students with clear academic expectations and how their new institution and program may vary from their previous ones (e.g., differences in assessment and pedagogical models), and facilitating students' social transition to their new institution (e.g., orientation sessions to help students build social connections) (e.g., Luckai et al., 2016).

The final strand of this literature includes a collection of what we refer to as the 'state of the field' type of overviews. These papers include historical overviews of Ontario student mobility (e.g., Andres & Dawson, 1998), content analyses, and jurisdictional scans of provincial counterparts (e.g., Camman, 2015; McQuarrie, 2020; Young, Piche, & Jones, 2017). A handful of papers include analyses of various types of tools that are available, should be available, or need to be developed to identify gaps in data, track students, and/or serve as online or web-based supports (e.g., Centre for Policy and Research in Indigenous Learning, 2019; Mulligan et al., 2017; Peters & Parkin, 2017).

# Barriers to the Advancement of Qualitative Transfer Research

The qualitative arm of student transfer research has yielded practical insights that have helped improve processes, practices, and services. There are, however, significant data and methodological limitations in the qualitative transfer research in Canada.

Data Limitations

Our review exposed an overall lack of sufficient qualitative data on student mobility in Canada. As shown in Figure 3, the period between 2012 and 2019 represents the 'heyday' of qualitative research on student transfer, followed by a recent decline. Through an extensive and multipronged search, we could only identify 75 journal articles and institutional reports published over three decades, almost half of which are ten or more years old. While many of the broad lessons are still valuable, it is questionable whether data collected a decade or more earlier still accurately reflects current student, policy, or institutional transfer realities.

Figure 3

Annual Breakdown of Canadian Qualitative Transfer Publications
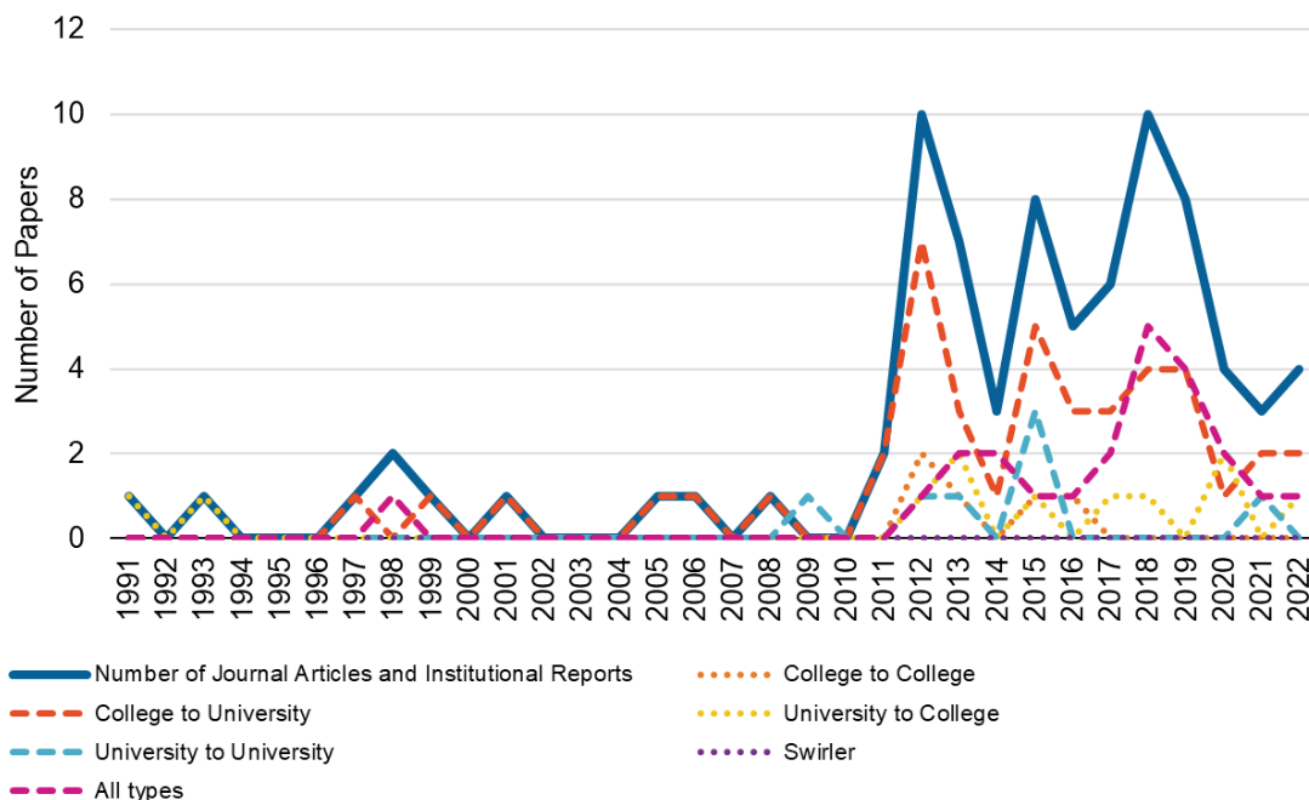
Importantly too, we could only identify 17 peer-reviewed articles. While we found significantly more institutional reports, they often (understandably) reflect specific institutional priorities or pathways (e.g., Harvell et al., 2018; Lakehead University & Fanshawe College, 2022; Laurentian University & Collège La Cité, 2017; Mallette et al., 2015) rather than providing a broader analysis that contributes to the wider examination of student mobility in Canada.

However, some of these limitations also extend to the journal articles we examined. Most are limited to one or two postsecondary institutions (e.g., Andres, 2001; Hurlihey, 2012) and, in some cases, focused on students in one program or pathway, such as nursing or engineering (e.g., Cameron, 2005; Montague et al., 2022). While some of the 'state of the field' content analyses provide a snapshot of transfer policies and practices across the sector, it lacks the human touch that other qualitative methods can bring to bear on this field of study. Widening the scope of qualitative research to include students and staff from multiple postsecondary institutions would provide a more fulsome and analytical lens to student mobility research that stretches outside the (potential) unique circumstances of a particular program, institution, or pathway.

The focus of data collection on only one type of transfer is another limitation. Table 1 tallies the existing research by transfer pathway. Most qualitative research on student transfer is focused on 'vertical transfer' (college-to-university). There are a handful of articles that examine university-to-college transfer; however, college-to-college and university-to-university transfer are almost entirely absent in the Canadian literature, and there are no published articles that have a dedicated focus on swirlers.

Table 1

Canadian Qualitative Research Papers on Student Transfer by Transfer Pathway Type[a]

	College to College	College to University	University to College	University to University	Swirler	All Transfer Types [b]
Journal articles	0	11	3	1	0	2
Institutional Reports	4	30	9	2	0	19
Total	4	41	12	3	0	21

[a]Some studies include more than one transfer type.
[b]All Transfer Types—also includes data collection on 'any' type of transfer discussed by staff.

The focus on college-to-university transfer—almost to the exclusion of other transfer types—limits our ability to generate a fulsome picture of student mobility. In Ontario, for example, 2.03% of transfers are college-to-university; however, there are comparable levels of

university-to-college (2.15%), university-to-university (1.73%), and college-to-college (1.52%) transfers (Zarifa, Sano, & Hillier, 2020).[6] Ignoring the lion's share of students who take transfer pathways other than college-to-university leaves a large empirical gap in the qualitative literature.

Moreover, while there are a substantial number of papers that we categorize as examining 'all types' of transfer, these papers tend to consist of qualitative data based on staff, faculty, or administrators' general perceptions of student mobility rather than a targeted analysis of different transfer pathways (for an exception, see Lang, 2009). None of the studies we found systematically compare or contrast the pre-, during, or post-transfer processes or experiences of students who are travelling on different transfer pathways.

Similar to its quantitative counterpart, the qualitative literature also does not capture students early on in their educational careers (for an exception, see Lang, 2009). As noted by Pizarro Milian and Zarifa (2021, p. 88), educational research in the United States "has long examined the shadows cast by children's primary schools, neighbourhood contexts, and family backgrounds" (e.g., Alexander et al., 2014). A better understanding of student transfer demands stretching our analyses back into the later stages of high school to find out how we can improve the process by which students make their initial postsecondary choices. For some students, their first postsecondary choice and subsequent transfer is part of a series of steps, some of which are premeditated. Deepening our understanding of how students strategically utilize pathways to and through various postsecondary pathways has the potential to justify the further development of articulated pathways to limit potential credit losses during transfer (e.g., the 2 + 2 model) and the creation of "course equivalency and block transfer agreement information" onto widely available databases (e.g., ONTransfer.ca) (Pizarro Milian & Munro, 2020, p. 38). In short, we should reconceptualize 'transfer' as part of the (educational) life course rather than something that happens once students arrive at postsecondary. Not only is this approach more empirically honest, but it has the potential to embed student transfer within a transparent and thoughtfully articulated pathway that students could envision in high school, when they are making their initial postsecondary plans.

At the same time, not all transfers are strategic. As Lang (2009) found, the decision to transfer is sometimes 'coincidental' (see also Lang & Lopez, 2014). Students may also have "problems choosing an institution and program of study, without enough critical background to understand the implications" of their choices (Fisher et al., 2012, p. 16). Rigorous qualitative

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[6]These figures represent Southern Ontario transfer rates. In a subsequent report, Sano, Hillier, and Zarifa (2020) state that while these figures generally hold for Northern students, the overall level of transfer is slightly higher, "largely attributable to more university-to-university transfers and swirlers in northern institutions" (p. 3).

data has the potential to improve college and university retention and reduce the number of students who take *unplanned* and, in some cases, *unwanted* non-linear pathways, sometimes at great personal and financial cost. Some researchers have found that transfer students tend to have lower graduation rates and are less likely to complete their degrees in a timely manner (e.g., Davies & Pizarro Milian, 2020; Drewes et al., 2016; Pizarro Milian & Munro, 2020). Other studies have also found that transfer students earned fewer credits and pursued less ambitious credentials (e.g., Stewart & Martinello, 2015). For postsecondary institutions, administrators recognize costs and inefficiencies associated with poor retention and completion rates and the resources needed to manage students who take non-traditional pathways to and through their institutions (e.g., bridging programs, student advising). These types of examinations could include not only understanding why students leave but also how improved college and university communication, recruitment, and admission strategies might generate better initial matches between students, institutions, and programs in the first place.

These data limitations point to four key recommendations that dovetail with our methodological limitations detailed below. First, our review points to **large gaps in the qualitative study of student transfer** in Ontario. Student motivations, information-seeking behaviour, and their initial postsecondary decision-making are just a few areas that are either relatively dated, sparsely covered, or both. The focus on college-to-university transfer—almost to the exclusion of other pathways—points to the need for a more serious inquiry about other forms of transfer. Rather than speculating about the origins of these omissions, bodies such as ONCAT and BCCAT could encourage research that is more strategically focused on the un(der)examined dimensions of transfer research. These holes could also be filled over time by encouraging more projects that include the methods we propose below.[7]

Second, **there is a pressing need for multi-institutional and comparative qualitative research** that includes different combinations of institutions, transfer pathways, and data (including, when appropriate, quantitative data). While colleges and universities will still need to engage in smaller-scale research projects that speak to their specific institutional priorities or reporting requirements, multi-institutional and comparative qualitative research can address broader questions about student mobility in Canada. These analyses could include a variety of institutional configurations (e.g., a larger number of colleges or universities or a combination of the two), qualitative data (e.g., interviews, focus groups, content analyses), participants (e.g., deans, advisors, students), pathways (e.g., college-to-college, university-to-university), locations (e.g., rural vs urban, provincial differences), and time points (e.g., students who are considering transferring). Multi-site and comparative qualitative methods

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[7]Although there are some notable exceptions (e.g., Arnold, 2014; Coffey, Lindsay, & Sproul, 2012; Fisher et al., 2012; Usher & Jarvey, 2012), the qualitative research is largely based on examinations of one or two institutions. Several other papers have very small (e.g., Harvell et al., 2018; Percival et al., 2015) and/or unspecified sampling techniques and sample sizes (e.g., Gawley & McGowan, 2006) and suffer from a lack of methodological detail about how the authors went about their data collection (e.g., Duklas, 2019; Eilser, 2015; Lennon et al., 2016; Mallette et al., 2015; Shook, Norman, & Guyatt, 2016).

are well established and allow researchers to produce some level of generalization beyond any particular institution, program, or pathway. These methods use a standardized set of qualitative research methods and questions to examine cross-site comparisons and the emergence of major findings and themes that are common across sites as well as exposing key differences (e.g., Herriott & Firestone, 1983; Ragin, 1987).

Third, most of the literature is fixated on students' pre- and post-transfer decision-making and experiences. **Student mobility research in Canada would be strengthened by building a longitudinal qualitative research stream**. Longitudinal qualitative research would capture students at the 'choice' (high school), 'decision' (selecting postsecondary), and 'postsecondary entry' phases to examine students' pathways to and through postsecondary and, in some cases, as they exit or enter other postsecondary institutions. By design, longitudinal research takes time into consideration and examines not only change or stability, but also how something unfolds and the contextual factors that inform these events, experiences, or perceptions. By charting student pathways over time, we can begin to qualitatively unpack not only the timing and nature of events but also what people were doing, thinking, or experiencing during critical transition points (Neale, 2021; Saldana, 2003). Done well, it can move the research frame from a 'snapshot' to a 'movie' by providing "access to the 'interior logic' of lives, discerning how change is created, negotiated, lived, and experienced" over time (Neale, 2020, p. 9).

By examining transfer as a social process that stretches long before students enter postsecondary, longitudinal qualitative research can also examine how factors such as students' personal and family characteristics (e.g., social class), social and cultural capital (e.g., personal networks, comfort asking professionals for advice), and educational resources (e.g., access to qualified guidance counsellors) shape postsecondary decision-making and pathways and the degree to which postsecondary choices align with students' aspirations, interests, abilities, and temperaments (for an exemplary example, see Missaghian, 2020). Moreover, it would capture a variety of pathways as students move into, stay, or transfer out of various postsecondary institutions and pathways.

Fourth, **an arm of qualitative research on student mobility should examine transfer prevention**. To date, the research community has taken for granted the reality of student mobility and seeks to understand or improve some aspects of it. Qualitative researchers have yet to rigorously examine ways to reduce it. This strikes us as a glaring omission. While some transfers are premeditated or seen as another step toward some education or career goal, for other students, transferring represents an unplanned disruption; it can have economic, psychological, and social repercussions.[8] Preventative qualitative research has a singular

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[8] While the concept of 'shock' has been applied *after* students transfer, researchers should also capture students who are similarly distressed when their initial institution or program falls short of their expectations.

focus on improving the (initial) student-postsecondary fit: What information and resources do students need to make their initial postsecondary choices? How can we help students plan their postsecondary pathways efficiently and reduce the likelihood of unplanned or unwanted transfers?[9]

Both longitudinal and preventative approaches would seek to develop empirically grounded guidelines that aim to help students optimize their pathways (whether multiple steps are part of it or not) and match their postsecondary plans with their career goals, interests, and temperaments. These analyses are amenable to a variety of qualitative (e.g., interviews, focus groups, and field methods) and mixed methods approaches (e.g., including a student questionnaire) to develop and rigorously evaluate guidelines that reduce the likelihood of students engaging in unplanned or unwanted transfers.[10] At the 'choice' phase, qualitative researchers could generate powerful insights into not only the type of information they need to improve the student-postsecondary fit but also the best ways to communicate this information. Among students who are in postsecondary, qualitative research could also examine these questions retrospectively (e.g., What do you know now that you had wished you had known at the search and choice phases?).

Methodological Limitations

Similar to the quantitative hurdles outlined by Pizarro and Zarifa (2021), qualitative research on student transfer is similarly siloed. However, unlike its quantitative counterpart, there are no standardized data sets that can be similarly linked. Yet, there is reason to be optimistic. Bodies such as ONCAT have developed impressive partnerships across the postsecondary sector and can act as a mediator between government ministries, colleges, universities, and researchers. These bodies can leverage their unique position within the ecosystem of postsecondary to initiate ambitious research agendas that fill in the gaps outlined above but also to provide a more comprehensive picture of student mobility in Canada.

Because the first data limitation (e.g., a lack of data on other transfer pathways) can be addressed using existing research practices, we will turn our discussion to some of the methodological challenges of conducting multi-institutional, comparative, and longitudinal research.

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[9]By focusing on generating better student-postsecondary matches or fit, this orientation is different from recruitment efforts (e.g., generating a high-quality pool of applicants) or student retention efforts (e.g., efforts to improve student success) (e.g., Childs, Finnie, & Martinello, 2017).
[10] To help premeditated transfer decision-making or reduce potential unplanned transfers, the emphasis of college and university marketing would also need to shift away from 'selling' an institution to helping students make informed choices that align with their personal characteristics, preferences, and career objectives (e.g., Missaghian & Pizarro Milian, 2018).

There are several design issues that must be addressed. First, whether led by one or several researchers across institutions, **data collection and analysis must be structured in a manner that allows for comparability across sites**. Standardized definitions (e.g., who counts as a transfer student?), data collection tools (e.g., interview schedules), sampling decisions, and plans for data analysis must be developed and coordinated in a manner that still allow for the unique aspects of any given site to be captured. Researchers will usually be required to get Research Ethics Board (REB) approval at every institution involved, and the researcher(s) will be tasked with maintaining a consistent protocol across sites when addressing individual REB comments or changes.[11]

Second, **researchers must be able to generate sufficient sample sizes at each institution**. The term 'saturation' is routinely invoked in the context of qualitative research to justify the termination of data collection. However, saturation does not mean that the researcher has 'heard it all' (Morse, 2015). Instead, it is the point at which a researcher is able to saturate every theme (or 'node') with a substantial amount of data, not a handful of cherry-picked quotes.[12] The only solution to this problem is to generate large enough samples at each research site to allow researchers to fully saturate emergent themes with sufficient data (see Aurini, Heath, & Howells, 2022).[13]

Third, **these types of projects will produce large amounts of data that will require a team to analyze and write up**.[14] Intercoder reliability is already a well-known challenge when conducting qualitative team-based data analysis; it refers to an "agreement between different coders regarding how the same data should be coded" (O'Connor & Joffe, 2020, p. 2). While guidelines vary, coding consistently will require developing a codebook with clear guidelines and having the entire data analysis team code a portion of the collected data together (e.g., the same set of interviews, the same segment of a focus group), along with routine 'check-ins' to make sure the coding remains consistent over time. Multi-institutional projects may also give rise to a different set of hurdles. The context of each college and university will vary

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[11]Our years of experience conducting these kinds of projects mirror Robson and Maier's (2018) description of the REB process.
[12]Another way to think about saturation is the 'information power' of the sample (e.g., Malterud, Siersma, & Guassora, 2015). Qualitative researchers who want to make bolder statements about 'transfer' require much larger samples than those with narrowly defined aims (e.g., an institution-specific initiative).
[13]The following guidelines are for each site: In general, Morse (1994), Denzin and Lincoln (2005), and Creswell (2013) recommend approximately 20–50 participants for interview studies. A focus group that is more structured and has a homogenous sample usually requires fewer participants (three to six) compared to one that includes a more open ended and heterogenous sample (four to eight) (e.g., Malterud, Siersma, & Guassora, 2015). However, these are simply guidelines that may need to be adjusted. Some researchers recommend conducting pre-specified rounds of data analysis (e.g., every five interviews) to determine whether subsequent rounds of data collection are necessary based on the degree to which themes are backed up by a substantial amount of evidence (e.g., Vasileious et al., 2018).
[14]Standardized research protocols (e.g., interview schedules) and sufficient training will reduce variation at the data collection phase of the project.

and may present challenges to the research team to develop a codebook and sampling strategy that adequately captures the nuances that underpin the data that has been collected (see Aurini, Heath, & Howells, 2022).[15]

Fourth, **these types of research projects also give rise to practical issues**. They will require a healthy budget, along with enough 'lead-in' time to negotiate access; formulate partnerships with colleges, universities, or other researchers; secure REB approval at multiple institutions; and build and train teams of research assistants. Managing data collection across sites and/or time requires a substantial amount of effort to track down participants and arrange data collection activities (e.g., scheduling interviews). By design, these kinds of projects also generate massive amounts of data that must be managed, cleaned (e.g., preparing transcripts), analyzed, and written up.

In terms of longitudinal qualitative research, compared to the data-linking options available to quantitative researchers (see Pizarro Milian & Zarifa, 2021), most qualitative researchers have a more contracted window to track students.[16] However, a longitudinal qualitative study that follows students from the later stages of high school into postsecondary is entirely feasible. This work would naturally capture students who take both planned and unplanned non-linear pathways that have 'more steps' including victory laps and transfers from and to various types of postsecondary institutions. These studies would require researchers to collect data from at least two or three time points to examine how students make decisions about which postsecondary institutions to apply to, the factors that inform their ultimate choice, and the consequences of their decision once they arrive at postsecondary (for an example of this approach, see Missaghian, 2020, 2021).

Finally, our review also points to the **methodological need to increase the trustworthiness and transferability of transfer research.** While there are some notable exceptions, the research tends to be based on small sample sizes, convenience samples, and/or analyses based on one or two institutions. Part of these challenges is rooted in the nature of conducting qualitative research more generally: recruiting, data collection, and data analysis are often difficult and time-consuming. However, transfer researchers have a key advantage not available to many other qualitative researchers. Transfer students are not a hidden population and are often captured by current administrative reporting mechanisms at universities and colleges.[17] Registrars' offices can often identify and generate a list of transfer

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[15]As Herriott and Firestone (1983, p. 17) aptly observed, site-specific reporting "enhances description but tends to mask over similarities and differences across sites," while cross-site reporting "facilitates generalization, but often at the expense of site-specific context."

[16] Researchers will have to spend time tracking down participants and minimizing attrition. Small incentives could be built into the budget to entice participants to stay engaged in the research process. Among students, a small token of $10–$20 helped to maintain high levels of participation at subsequent stages of data collection (Aurini et al., forthcoming).

[17] In our experience (see Aurini et al., forthcoming), registrars' offices not only have transfer students' names and email addresses but can also send these students a recruitment email. By using active consent, researchers can access students without requiring institutions to share their information.

students at their institution and contact them by email. During the recruitment phases, researchers can also use a set of pre-screening questions to stratify their sample by transfer type and other characteristics that are important to the study aims. Part of this pre-screening could include identifying students' previous postsecondary institution to ensure the sample captures a mixture of college-to-college, university-to-university, and university-to-college pathways, in addition to college-to-university.

Conclusion

Enrolment patterns are becoming increasingly complex, and a sizable proportion of Ontario students take non-traditional pathways to secure credentials (e.g., Mehta & Davies, 2018; Zarifa, Sano, & Hillier, 2020). Quantitative researchers have documented the decision to transfer between institutions and programs, how students weigh a variety of potential rewards and risks, and how they juggle a myriad of institutional channels at their home and destination institutions. Researchers have also identified the characteristics of students who transfer (e.g., Lee, Chan, & Chuang, 2009), the proportion of students who transfer (ONCAT, n/d), regional differences (Sano, Hillier, & Zarifa, 2020), transfer students' performance (e.g., Gerhardt & Masakure, 2016), and the proportion of students who engage in different types of transfer pathways (e.g., Finnie et al., 2020; Hillier, Sano, & Zarifa, 2020; Zarifa, Sano & Hillier, 2020).

Pizarro Milian and Zarifa's (2021) examination flagged several critical gaps in the quantitative literature on student transfer. Our review suggests that qualitative research requires significantly more catch-up. While quantitative research can empirically map who and how students transfer and their outcomes, qualitative research is arguably in the strongest position to understand the nuances of educational pathways; what aspects of a policy, service, or process impact students positively and negatively and why; what students need (e.g., orientations) to facilitate their educational decision-making and transitions; gaps that should be filled (e.g., information, services); and other aspects of transfer that are not captured by current surveys and questionnaires. Ontario is equipped with the policy-level buy-in (e.g., ONCAT) and has a plethora of capable researchers—both internal and external to colleges and universities—to qualitatively unpack the nuances of student mobility.

It is important to reiterate the multi-constituent benefits of enhancing qualitative approaches to student transfer in Canada. Colleges and universities, higher education professionals, students, and government all serve to benefit from smoother and more attuned transfer systems. Through more rigorous research designs and attention to the methodological foundations of qualitative research, we are optimistic about our collective capacity to fill these structural holes and improve our qualitative understandings of student mobility in Canada.

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Appendix

Appendix 1: *Canadian Qualitative Research on Student Transfer: Institutional Reports – Qualitative Data Collected, Sample Size & Institutions*

	Institutional Reports	Interviews	Focus Groups	Institutions
1	Andres (1999)	47 students	n/a	Douglas College Simon Fraser University
2	Andres (1998)	37 students	n/a	Douglas College students who have transferred from another college
3	Andres and Dawn (1998)	Historical overview. Discussing conversations with PSE specialists in BC.		British Columbia
4	Andres, Qayyum and Dawson (1997)	47 students	n/a	Douglas College Simon Fraser University
5	Arnold and Woodhead (2015)	40 students participated in interviews and focus groups		Centennial College
6	Arnold (2014)	n/a	100 staff	13 institutions – 6 colleges and 7 universities
7	Arnold (2012)	n/a	100 staff	13 institutions – 6 colleges and 7 universities
8	Barnett, N.R.G. and E. Coppins (2021)	n/a. Consultations with students.		Ontario
9	Baxter, D. (2022)	Informal key informant interviews with staff. Sample size not specified.		Lakehead University

	Institutional Reports	Interviews	Focus Groups	Institutions
10	BCCAT (2015)	Content Analysis of policies governing transfer		21 institutions
11	Blais, C., & Harper, M. (2013)	Notes one focus group. Sample size not specified.		Laurentian University
12	Blanchard, S., O'Farrell, J., Taylor, D., Nimijean, R., Legakis, P., & Philippe, S. (2013)	n/a	55 students 7 staff	Carleton University
13	Camman (2015)	Overview of transfer policies in Ontario		
14	Carlton University (2013)	7 staff Interviews with 10 institutions	55 students	Carlton University
15	Center for Policy and Research in Indigenous Learning (2019)	n/a	38 staff	16 institutions – 1 Indigenous institute, 7 universities and 8 colleges
16	Coffey, S., Lindsay, G., & Sproul, S. (2012)	n/a	110 students	University of Ontario Institute of Technology; Durham College; Georgian College
17	Confederation College (2013)	n/a	17 students	Confederation College
18	Confederation College (2012)	n/a	11 students	Confederation College; Lakehead University

	Institutional Reports	Interviews	Focus Groups	Institutions
19	Cookson Consulting Group Inc (2018)	Not specified. Notes focus groups and interviews.		Heads of Business for Ontario Colleges
20	Cowin (2013)	Content Analysis		BCCAT research studies
21	Decock, H., & Janzen, K. (2016)	n/a	18 students	Seneca College York University
22	Duklas (2019)	Not specified. States 270 people participated in interviews and regional meetings.		Not specified.
23	Durham College (2018)	Analysis of 281 articulation agreements. 14 interviews with 2-3 staff from each institution (6 colleges and 8 universities)		Canadore College, Nipissing University, Durham College, UOIT, Seneca College, York University
24	Durham College (2013	n/a	7 students	Durham College
25	Eilser (2015)	Not specified. Notes interviews conducted by consultant.		Wilfrid Laurier
26	Fisher, D., Nay, E., Wilson, M., Wood, L. (2012)	155 students	n/a	OCAD University
27	Gerhardt, K., Arai, B., Carroll, M., & Ackerman, M. (2012).	15 students 15 staff	25 students	Laurier University
28	Gorman, G., Phelps, C., & Carley, R. (2012).	17 students	n/a	Conestoga College Institute of Technology

	Institutional Reports	Interviews	Focus Groups	Institutions
29	Graham, L., Arnold, C., Smith, F., Sukhai, M., Anyinam, C., Vanderlee, R., McCloy, U., Williams, K., Coffey, S., Vogel, E., Muirhead, B., Zitzelsberger, H., Balogh, R., & DaSilva, C. (2018).	Not specified. Notes interviews with 10 key informants.		UOIT, Durham College, Memorial University (Newfoundland), The National Educational Association of Disabled Students, Nipissing University, Seneca College, York University
30	Green, P., McCloy, U., Sheikh, S., & Smith, R. (2020).	n/a	33 students	York University Seneca College
31	Harvell, Percival, Shah and Stokes (2018)	n/a	4 Focus groups with students and staff Number of participants not specified.	
32	Hunt, S. & Maracle, A. (2018)	Drew on project consultants. Methods not specified.		Six Nations Polytechnic (SNP) in collaboration with: Brock University McMaster University, University of Guelph, University of Waterloo Western University Wilfrid Laurier University
33	Kettle et al. (2018)	Consultations with students. Number of participants not specified.		Ontario

	Institutional Reports	Interviews	Focus Groups	Institutions
34	Lakehead University and Fanshawe College (2022)	Discussions between faculty, staff and students. Number of participants not specified.		Lakehead University Fanshawe College
35	Lakehead University (2018)	Narratives from instructors and administrators. Number of participants not specified.		Lakehead University
36	Laurentian University & Collège La Cité (2017)	Consultations with staff. Number of participants not specified.		Laurentian University & La Cité Collégiale
37	Lennon et al. (2016)	Interviews with 'Critical Friends'. Number of participants not specified.		Ontario colleges and universities.
38	Luckai, N. et al. (2016)	12 interviews with faculty and staff	29 students	Lakehead University
39	Mallette, Robson and Thompson (2022)	10 staff 1 student	n/a	McMaster
40	Mallette, C., Cutrara, K. P., Rogers, M., & Umana, C. (2015)	n/a	11 focus groups with student and faculty. Number of participants not specified.	York University, Georgian College, Seneca College
41	McQuarrie (2020)	Content analysis from 39 websites.		British Columbia
42	Missaghian, R. (2021)	12 interviews with faculty	n/a	7 institutions
43	Missaghian, R. (2021)	Content analysis of 17 course outlines.		Colleges
44	Mulligan et al. (2017)	n/a	31 staff	Queen's University

	Institutional Reports	Interviews	Focus Groups	Institutions
45	O'Donnel, Miller and Fowler (2017)	13 staff	n/a	Humber College
46	Penner, Howieson and DiTullio (2017)	10 staff		Algoma University, Canadore College, Cambrian College, Collège Boréal, La Cité Collégiale, Lakehead University, Lambton College, Northern College, University of Sudbury
47	Peters and Parkin (2017)	n/a	45 staff 26 students	Centennial College, Collège Boréal, George Brown College, Humber College, La Cité Collégiale, Ryerson University, Seneca College, University of Toronto, York University
48	Ray, Landry, Miron and Toombs (2019)	n/a	3 focus groups	Lakehead University Canadore College
49	Shook, C., Norman, C., & Guyatt, J. (2016).	Notes interviewing staff. Sample size not specified.		University of Toronto
50	Six Nations Polytechnic (2019)	Not specified.		20 universities and 24 colleges
51	Smith, Gholami et al. (2019)	14 staff 8 students	n/a	Queen's University
52	Smith, Mulligan et al. (2019)	15 staff	n/a	Colleges
53	Smith and Frank (2020)	8 students	n/a	Queen's University Concordia University McGill University

	Institutional Reports	Interviews	Focus Groups	Institutions
54	Speers, Stockdale and Martin (2012)	Consultations with students.		Ontario
55	Trick (2013)	Jurisdictional Scan: 14 jurisdictions outside of Ontario		
56	Usher, A. & Jarvey, P. (2012).	232 students	n/a	23 colleges
57	Woodhead and Oh (2016)	27 students participated in focus groups or interviews		Centennial College
58	Young, Piche and Jones (2017)	Content analysis		

"Staff" refers to employees who help administer transfer institutions, deans, associate deans, and faculty.

Appendix 2: *Canadian Qualitative Research on Student Transfer: Journal Articles –*
Qualitative Data Collected, Sample Size & Institutions

	Journal Articles	Interviews	Focus Groups	Institutions & Participants
1	Andres, L. (2001).	47 students	n/a	British Columbia students from two institutions (one college, one university) who had transferred
2	Arnold, C. H. (2011).	50 students	n/a	College of Applied Arts and Technology and Institute of Technology and Advanced Learning students who expressed intention to transfer to university
3	Bowker, L. (2021).	10 faculty	n/a	University of Ottawa faculty
4	Cameron, C. (2005).	13 students	n/a	Ontario nursing students who transitioned from college to university (collaborative baccalaureate program)
5	Gawley, T. & R.A. McGowan. 2006.	Notes conducting interviews and focus groups. Sample size not specified. 3 focus groups containing 4 to 7 participants.		"Southern Ontario" students who transferred from college to university.
6	Gerhardt & Ackerman (2014)	n/a	31 students	"Southern Ontario" students who transfer from college to university
7	Hurlihey, V. (2012).	Content Analysis		Seneca-Woodsworth partnership
8	Lang, D.A. (2018).	200 students	n/a	College students who expressed intention to transfer to university.
9	Lang, D.A. and V. Lopez. (2014).	200 students	n/a	College students who expressed intention to transfer to university.

	Journal Articles	Interviews	Focus Groups	Institutions & Participants
10	Lang, D. A. (2009)	140 students	n/a	High school students tracked through postsecondary.
11	Maier, R.& K. Robson. (2020).	20 students	n/a	Ontario students who transferred from university to college.
12	Montague, J., Tsui, J., Haghiri,-Vijeh, R., Connell, M. (2022).	13 students	n/a	Nursing students who transferred from college to university in a "large metropolitan city".
13	Percival, J., DiGiuseppe, M., Goodman, B., LeSage, A., Hinch, R., Samis, J., ... De LaRocha, A. (2015).	n/a	2 students 2 staff	Student and advisor experiences with a college-university pathway program.
14	Percival, J. et al. (2016).	n/a	8 students 5 staff	Student and advisor experiences with moving from college to university.
15	Vaala, L.D. (1991).	12 students	n/a	Alberta students who transfer from university to college.
16	Vaala, L.D. (1993).	18 students	n/a	Alberta students who transfer from university to college.
17	Wintre Gallander, M. and A. Morgan. (2009).	96 students	n/a	Students who transferred to university from another postsecondary institution.

Appendix 3: *Canadian Qualitative Research on Student Transfer: Key Themes in the Literature*

Students: Perceptions and Experiences

	Key Questions	Representative Papers
Motivations-pre	What motivates a student to transfer?	Arnold, 2011; Decock and Janzen, 2016; Lang, 2018; Maier and Robson, 2020; Smith and Frank, 2020; Wintre and Morgan, 2009; Vaala, 1991
Information-pre	How do students seek information about transfer processes? What is the quality of that information?	Andres, 2001; Arnold, 2011; Arnold, 2014; Cookson Consulting, 2018; Green et al., 2020
Perceptions and Experiences -post	What are the expectations and experiences of transfer students? How do we improve students' experiences? What are the advantages and disadvantages of transfer?	Andres, 1998; Andres, 1999; Andres, Qayyum and Dawson, 1997; Andres, 2001; Arnold, 2012; Arnold, 2014; Blais and Harper, 2013; Cameron, 2005; Coffey, Lindsay and Sproul, 2012; Confederation College, 2012; Cookson Consulting, 2018; Durham College, 2013; Fisher et al., 2012; Gawley and McGowan, 2006; Gehardt et al., 2012; Gehardt and Ackerman, 2014; Havell et al., 2018; Maier and Robson, 2020; Malette et al., 2015; Malette, Robson and Thompson, 2022 Montague et al., 2022; Percival et al, 2015; Ray et al., 2019; Six Nations Polytechnic, 2019; Smith and Frank, 2020; Wintre and Morgan, 2009; Woodhead and Oh, 2016; Usher and Jarvey, 2012; Vaala, 1993
Expectations	What are students' expectations? Do they align with the realities of transfer?	Arnold and Woodhead, 2015; Woodhead and Oh, 2016
Belonging - post	What are students' sense of belonging? How do we improve it? What is the culture of mobility? How do we improve it?	Blais and Harper, 2013; Malette et al., 2015; Montague et al., 2022; Penner, Howieson and DiTullio, 2017; Penner, Howieson and Foster, 2018

Students: Academic Profiles

	Key Questions	Representative Papers
Demographic/ Academic profiles - post	What are the profiles of transfer students? How do they compare to non-transfer students in terms of academic performance and graduation rates? How do transfer experiences vary by demographic characteristics? What pathways are taken?	Carlton University, 2013; Graham et al., 2018; Green et al., 2020; Gorman, Phelps and Carley, 2012; Havell et al., 2018; Lennon et al., 2016; Malette, Robson and Thompson, 2022; Ray et al., 2019
Academic outcomes - Student success - post	How successful are transfer students? What facilitates academic success among transfer students? What are the determinants of academic success?	Andres, 1998; Andres, 1999; Andres, Qayyum and Dawson, 1997; Blais and Harper, 2013; Centre for Policy and Research in Indigenous Learning, 2019; Durham College, 2013; Durham College, 2018; Shook, Norman and Guyatt, 2016

Postsecondary/Faculty/Staff

	Key Questions	Representative Papers
Experiences - post	What are the experiences of academic advisors?	Percival et al, 2015
Perceptions - post	What do faculty members think about the transfer process and/or its students? How prepared are students?	Bowker, 2021: O'Donnell, Miller and Fowler, 2017; Missaghian, 2021

Policies and Processes

	Key Questions	Representative Papers
State of Field/Scoping Reviews	What is the current landscape of transfer? What agreements exist? What rationales inform the creation of articulation agreements? What are the (potential) benefits of 'X' initiative? What gaps exist?	Andres and Dawson, 1998; Arnold, 2012; Barnett et al., 2021; BCCAT, 2015; Camman, 2015; Carter, Coyle and Leslie, 2011; Cowin, 2013; Duklas, 2019; Durham College, 2018; Hurlihey, 2014; Kirby, 2008; Lakehead University, 2018; Laurentian University & Collège La Cité, 2017; Lennon et al., 2016; Massaeu and Duklas, 2018; Missaghian, 2021; O'Donnell, Miller and Fowler, 2018; Penner, Howieson and Foster, 2018; Smith et al., 2019; Smith, Mulligan et al., 2019; Smith, Gholami et al., 2019; Trick, 2013; Young, Piche and Jones, 2017
Perceptions of Effectiveness	How effective is 'x' (e.g., articulation agreements)?	BCCAT, 2015; Cookson Consulting, 2018; Center for Policy and Research in Indigenous Learning, 2019
Improving pathways – pre and post	What are the best ways to enhance existing transfer pathways? How might sending and receiving institutions improve the transfer experience?	Andres, 1998; Andres, 1999; Andres, Qayyum and Dawson, 1997; Arnold, 2014; Barnett and Coppins, 2021; Blanchard et al., 2013; Carlton University, 2013; Decock and Janzen, 2016; Green et al., 2020; Hunt and Maracle, 2018; Kettle et al., 2021; Lukai et al., 2016; Speers, Stockdale and Martin, 2012
Improving supports and services - post	How do we develop resources and support services for transfer students? What are the best policies, programs and services?	Andres, 1998; Andres, 1999; Andres, Qayyum and Dawson, 1997; BCCAT, 2015; Blais and Harper, 2013; Blanchard et al., 2013; Carlton University, 2013; Confederation College, 2012; Fisher et al., 2012; Durham College, 2013; Gehardt et al., 2012; Green et al., 2020; Graham et al., 2018; Gorman, Phelps and Carley, 2012; Luckai et al., 2016; Malette et al., 2015; Mallette and Robson, 2022; Six Nations Polytechnic, 2019; Speers, Stockdale and Martin, 2012
Transfer credit decision making	How are decisions made about transfer credit processes?	McQuarrie, 2020

Policies and Processes

	Key Questions	Representative Papers
Developing Programs/Best Practices	How can we best develop 'X' program between two or more institutions? Are these initiatives feasible? What principles should we adopt to make decisions about investing in pathways?	Arnold, 2014; Baxter, 2022; Eisler and Clement, 2015; Lennon et al., 2016; Lukai et al., 2016; Smith, Gholami et al., 2019; Smith and Frank, 2020
Existing and Developing Tools	What tools exist (e.g., tracking)? Does 'x' tool support student transfer (e.g., web-based tool)? What evaluation tools should be developed?	Center for Policy and Research in Indigenous Learning, 2019; Mulligan et al., 2017; Peters and Parkin, 2017

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