

Transfer Advisor Group Introductory Guide

A General Resource for New Members

December 2021



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Welcome

Welcome to the transfer advising community in Ontario! With over 60,000 students transferring within the province every year, we are working collaboratively across post-secondary institutions to build a seamless transfer system that supports student success. Transfer professionals give students greater freedom and agency in their educational journey by supporting them to make informed decisions, get recognition for previous post-secondary education, transition to a new program, school, or even location, and complete their programs on time. Put simply, transfer professionals can have a decisive impact on students' lives by helping them chart new educational paths.

This document is intended to introduce you to the post-secondary transfer system and provide some basic information on transfer advising in the province. By transfer advising, we refer to activities that support student mobility between post-secondary institutions and recognition for students' previous post-secondary education. Because transfer advising is still an emerging profession in higher education, there are considerable differences in how institutions delegate and manage responsibilities related to the transfer process. Currently, there is no standard office, department, or position that manages transfer across institutions. For this reason, job titles that encompass transfer-related responsibilities may include: Manager, Pathways and Special Projects, Pathway Development Coordinator, Pathways Advisor, Pathways Officer, Senior Admissions Officer, Student Mobility Advisor, Transfer Credit Coordinator, Transfer Pathways Coordinator, etc. In addition, a wide range of administrative staff and faculty play a role in transfer, including those in Admissions departments, Registrar, Transfer departments (if applicable), Academic departments, and the Provost's office.

At the Ontario Council on Articulation and Transfer (ONCAT), we are working to support transfer advising as a profession through several initiatives, including hosting communities of practice, creating knowledge mobilization resources, and developing a course specific to transfer advising—stay tuned! This resource is developed especially for the Transfer Advisor Group (TAG), a community of transfer professionals across Ontario who meet regularly, share promising practices and innovations in the transfer space, and support each other to address transfer issues that may impact students and explore possible solutions. TAG has:

- An online communication hub (Microsoft SharePoint site) where you can connect easily with other members, share resources, and get up to date information;
- Events where you can network, build individual capacity, and share promising practices happening at our institutions; and,
- Other virtual/online knowledge sharing activities to hone your skills and learn from others.

We encourage you to join TAG's online communication hub by getting in touch with us.

This resource was developed by Carolyn Poplak, Manager of Sector Engagement, and Meryl Borato, Knowledge Mobilization Specialist, in collaboration with the Heads of Transfer Advising Committee. Please use and share this resource widely and send us your feedback for future iterations: cpoplak@oncat.ca and mborato@oncat.ca.

The Transfer Advisor Role



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

As the famous lines above express, deciding which road to take on life’s journey is far from simple. One cannot see what the paths look like beyond a certain view, and it is difficult to discern the differences among these roads without choosing one. Nearly every adult has experienced the moment Frost describes, perhaps many times throughout life’s twists and turns. Transfer students are no exception. They may have started down a certain path and changed their minds about the one they’ve chosen, or they may have taken some detours before arriving. Transfer students¹ are just like regular students in the sense that they have aspirations, desires, and big decisions to make. But unlike regular students, they come with knowledge and experience from their previous school, and as such have different needs.

“What does a transfer student need to know, which is a lot different than a high school student? They don’t have a year to figure all that out; they’re leap frogging. They need to know more about the academic calendar and what happens if they get the credit they applied for. Their academic advising appointment may happen before they know which transfer credits have been awarded. They need more support.”
– Andrew Wilson, Director of Transfer and Technology, ONCAT

Transfer Advisors are equipped to support students with these specific needs and help them make the most of their previous education. Transfer Advisors also help students who feel a need to change direction and choose another institution that is better suited to their life path. Transfer Advisors require a range of skills and competencies that allow them to support students and make the transfer credit process and transition to a new environment as smoothly as possible.

¹ONCAT defines a transfer student as any student who is moving from one post-secondary institution to another, regardless of whether they receive recognition for their previous learning. Individual institutions may define transfer students somewhat differently.

Skills and Competencies

According to a survey of professionals working in transfer (ONCAT, 2018), respondents from 16 Colleges and 15 Universities in Ontario identified their top 5 duties and responsibilities in their roles as:

- 1. Manual transfer processing (59%)**
- 2. Training/education to colleagues (56%)**
- 3. One-to-one student advising (53%)**
- 4. Admissions (47%)**
- 5. Automatic transfer processing (41%)**

Key competencies included:

- 1. Problem solving/analysis (91%)**
- 2. Policy knowledge (82%)**
- 3. Counselling/advising (71%)**
- 4. Presentation/facilitation (68%)**
- 5. Technical knowledge (68%)**
- 6. Leadership (65%)**

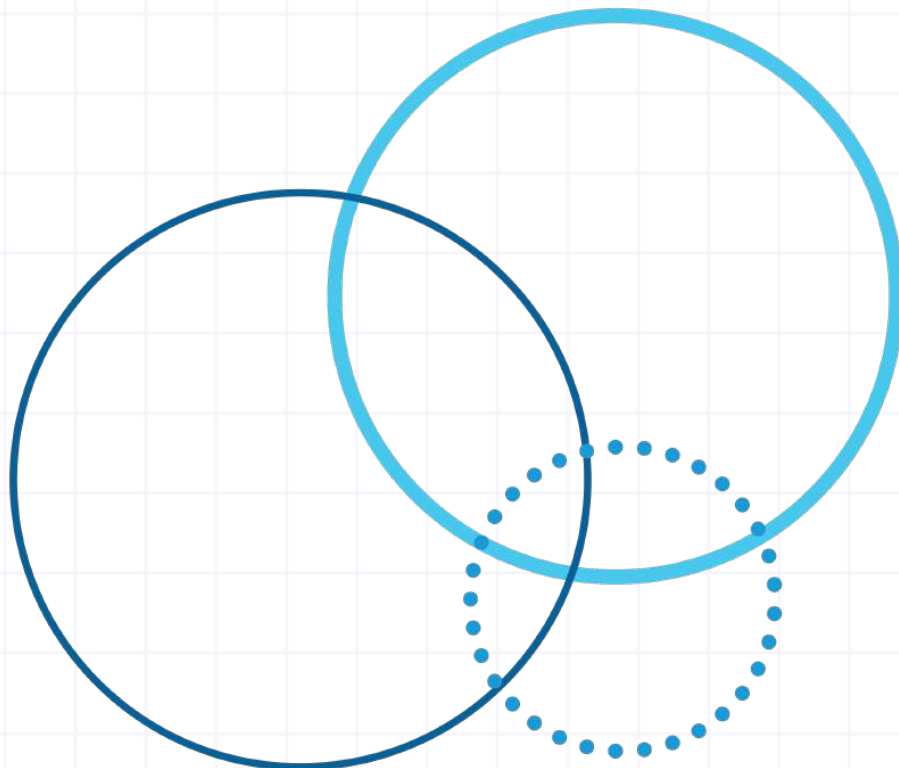
The Transfer Credit Process

While transfer roles vary by institution, all staff and faculty who play even a minor role in transfer would benefit from looking at the transfer credit process holistically. We encourage all staff to review this process at their institution with a critical eye and consider ways to remove unnecessary barriers for all involved. For example, are there ways for offices to work collaboratively and share information like transcripts?

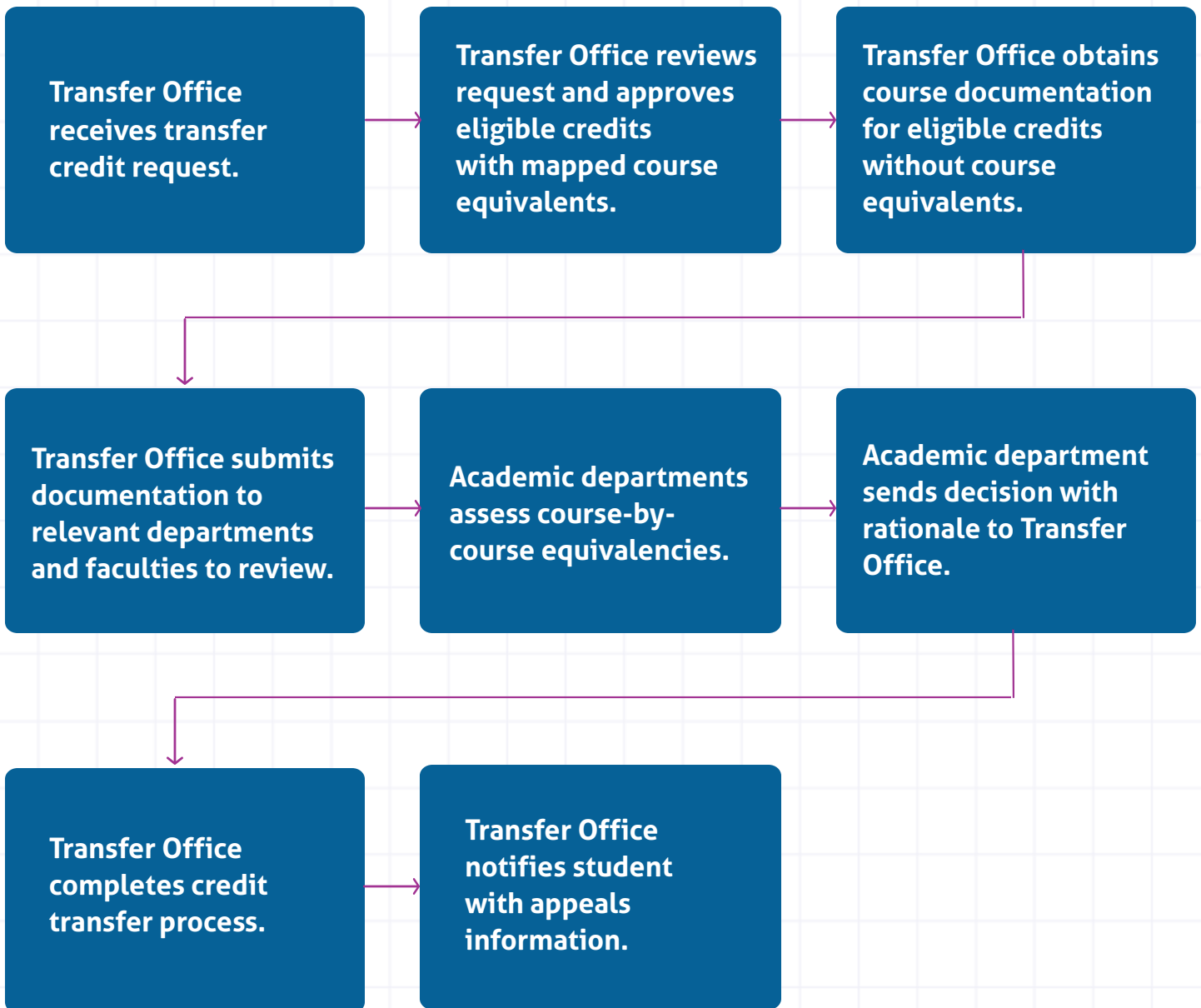
“The ability to question current practices is important. Often things are done a certain way simply because they have always been done that way. Questioning established policies or practices and sparking conversation is how change happens.”

– Ryan Snowdon, Strategic Enrolment Management Lead, Queen's University

Bear in mind that at some institutions not all transfer students will have to undergo an application process to receive transfer credit. For example, students following a formal pathway agreement between two institutions (e.g., Seneca College and York University) may be admitted and awarded transfer credit automatically by the admissions office. This process can also vary slightly if an institution provides pre-assessments— that is, transfer credit assessments before a student is admitted.



Process Overview



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



Step 1. Admitting Transfer Students

The first step of the transfer credit process occurs when Admissions or Registrar staff determine if a student is eligible for admission as a transfer student. It's important to note that there are different admissions criteria for transfer students and that these criteria vary depending on the receiving institution. As staff review student eligibility for admission, they may also determine if students can be awarded automatic transfer credit via a formal pathway agreement or established course equivalencies. If they are, staff will then document the accepted transfer credits and send an offer of admission to the student that contains this information. If there are no formal pathways or established equivalencies that apply to the student in question, staff will send an offer of admission with instructions for the student to apply to have their transfer credits assessed. However, not all institutions have the capacity to award transfer credit at the admissions stage. In these cases, Admissions or Registrar staff will ask all transfer students who have been admitted to apply for transfer credit assessment.

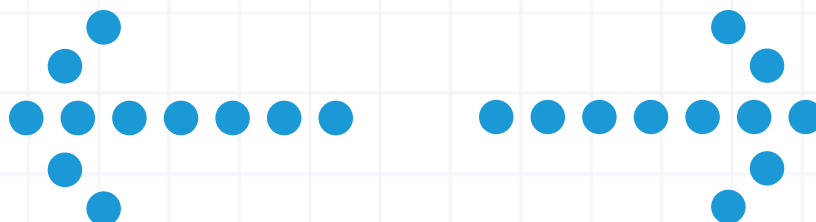
Step 2. Transfer Credit Assessment Application

When the Admissions or Registrar's Office directs a student to apply for transfer credit, transfer personnel receive the application and review it to ensure the student meets basic eligibility criteria and that the application is complete.

DID YOU KNOW?

ONCAT has a [short guide](#) dedicated to *assessing transfer credit and course equivalency* at oncat.ca/resources.

If the application has courses that have not been assessed by the receiving institution before, it must include documentation from these courses such as course outlines/syllabi, transcripts, Prior Learning Assessment (PLAR) records if applicable, and so on. If documents are not provided in English or French, students or staff must have them officially translated. After reviewing the application for completeness, transfer staff communicate with students to request missing information, if applicable, and confirm that the application is complete and under review.



Step 3. Processing Application

Once the application is complete, transfer staff determine which courses have mapped equivalents at their institution and award the student transfer credit, so long as the application meets the eligibility criteria (e.g., minimum GPA). Transfer staff also determine which courses on the student's application need to be assessed by a subject matter expert—usually a faculty member in charge of undergraduate programming/curricula. Once a relevant expert is identified, transfer staff send them the application with all proper documentation (e.g., course outlines, transcripts, translated documents, if applicable).

Step 4. Course Equivalency Evaluation

During this time, subject matter experts evaluate equivalencies based on course outlines. Their assessments usually focus on similarities in learning outcomes, content covered, as well as assessment strategies, to determine breadth and depth. Ideally, subject matter experts use a checklist of criteria to assess equivalency and provide a clear rationale with their decision to the transfer staff member. In cases where courses are not equivalent, findings from the MapIt Project suggest that students benefit from receiving an explanation.

Step 5. Communicating the Decision and Academic Advising

After receiving decisions on course equivalencies from subject matter experts, transfer staff record the equivalency decisions in their database, award transfer credits where applicable, and communicate the results to the student with a rationale for any credits that were rejected. During this time, staff also provide academic advising or direct students to an academic advisor to help them determine which courses they need to take to fulfill the requirements of their program.



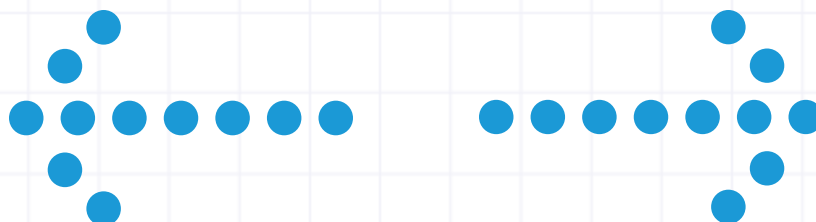
Communicating with Students

One of the biggest challenges that transfer students experience across institutions in Ontario is lack of timely and helpful communication (MapIt Final Report, July 2020). From browsing schools' websites, to inputting information into a web portal, to communicating directly with institutional staff, students generally struggle to obtain the information they need, at the time that they need it, to make informed decisions about their future. While students can use [ONTransfer.ca](https://www.ontransfer.ca) to find information about their transfer options, institutional staff are still largely responsible for making these options a reality. By taking time to meet with students, communicate credit assessment decisions to them, and advocate to faculty and other institutional staff, transfer advisors play an influential role.

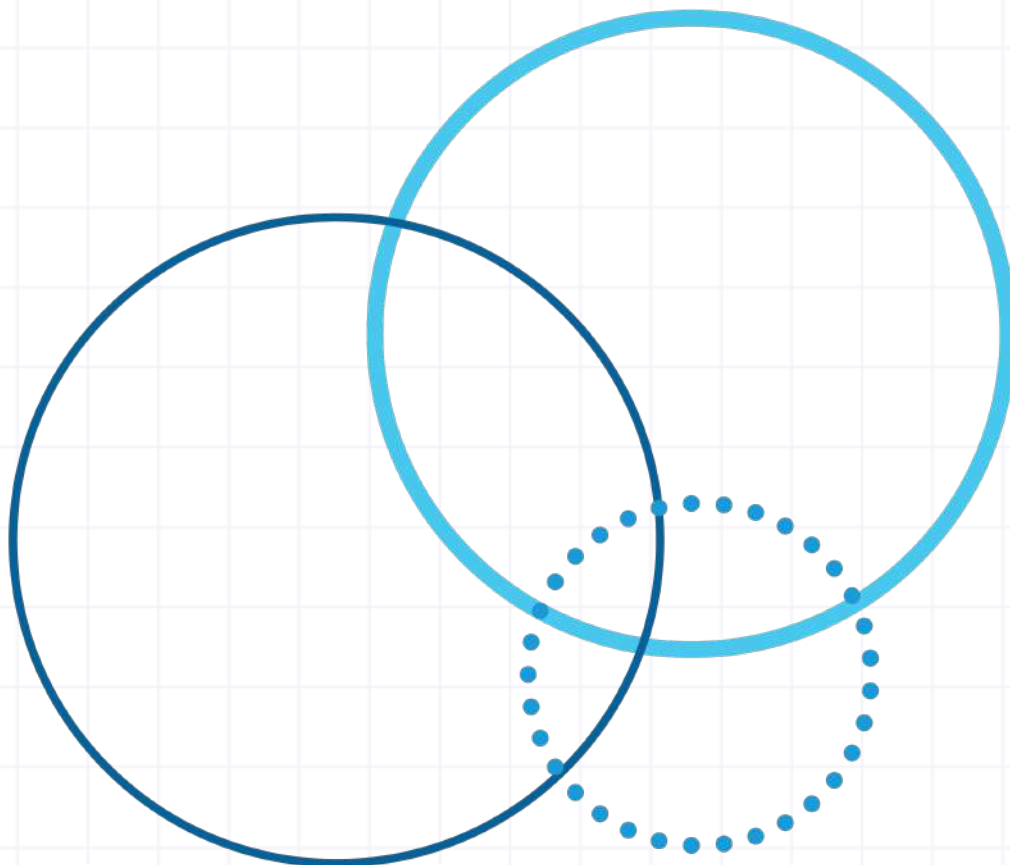
"We talk in a bunch of academic lingo, and it needs to be written for the general public. A lot of the work is translating the credit numbers into their language. Understanding GPA, the system, and the nuances to every institution can be overwhelming for anyone but especially a student." – David Adam Baker, Business Intelligence Analyst and Pathways Coordinator, Fleming College

Here are a few recommended communication practices for transfer advising:

- **External-facing communications:** Working with communications staff, ensure that the institutional website speaks to prospective transfer students and reflects up-to-date information about the transfer process, including eligibility requirements, a step-by-step outline of the transfer process, contact information for further questions, and anything else prospective and current transfer students need to know. For example, if an institution has an automated application process, include a link to the application web portal for current transfer students to check the status of their application. The webpage is also a good place to include information about required documentation. If external-facing communications also include social media and/or email marketing, ensure that this information is consistent across platforms and ultimately drives students towards a single place to make it easier for the department to manage.



- **Transfer credit application and decision:** Ideally online, the transfer credit application system should be user-friendly and easy to follow from a student perspective. Remember that most students are not familiar with institutional language, such as “articulation,” “block transfer,” “sending institution,” “receiving institution,” and “advanced standing,” and may not recognize common institutional roles and responsibilities. If using these terms are unavoidable, explain their meaning in a quick phrase. At the very least, the system should communicate with the student about their application after it has been received to assess if it is complete or missing required documentation. After the application is complete, provide students with an estimated timeline. Once a decision has been reached, provide this decision to the student, along with a rationale for any transfer credit that has not been awarded.
- **In-person or virtual advising:** In addition to digital external and internal communications, students find that some form of personalized communication—by phone, in-person, or videoconferencing—is very useful. One-way communication, no matter how comprehensive, cannot anticipate every possible question or concern that a student has. Providing drop-in or open office hours for short consultation appointments can meet this need and save staff time in the long run by informing students of their options before the application process commences.



Articulation Agreements and Transfer Pathways

When assessing student applications for transfer credit, transfer advisors will encounter students who are following defined pathways and articulation agreements between institutions. It is therefore important for transfer professionals to familiarize themselves with these transfer terms and policies.

An articulation agreement is an official agreement between two or more post-secondary institutions that defines the terms and conditions enabling students to transfer between specific programs, including admissions requirements. Bilateral agreements refer to those between two institutions and multi-lateral agreements to those among more than two institutions. Articulation agreements may also determine which courses or programs taken at the sending institution will apply to graduation requirements at the receiving institution.

Your institution may have an articulation agreement policy that outlines the overarching requirements in developing an agreement of this kind. The policy supports the development and implementation of articulation agreements and ensures that applicants, students, and graduates have access to accurate information on the learning opportunities provided in these agreements. It further supports the ongoing maintenance and quality assurance of such agreements to ensure the information is current and the elements of the agreement still apply. For more information, see this [sample articulation agreement policy at George Brown College](#).

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

Pathways and articulation agreements allow transfer assessors to assign **block transfer credit** rather than individual transfer credits assigned to specific courses. Block transfer refers to a collection of course credits that are equivalent to a specified level at the receiving institution, sometimes called "advanced standing." Block transfer does not require course equivalency assessment, which significantly reduces the completion time of a transfer assessment application.

For more information, please visit the [glossary](#) located on ONTransfer.ca website.

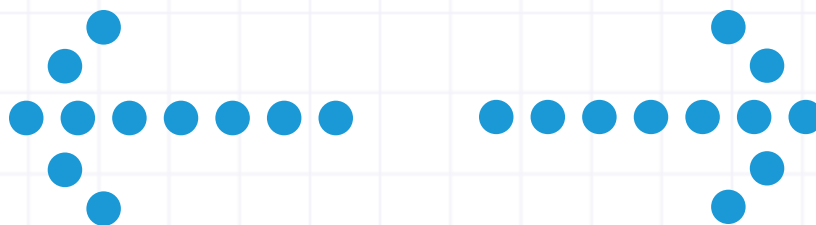
Institutional Departments Related to Transfer

To be effective, transfer advisors must liaise with several different people and departments both inside and outside their institutions. Below is a list of academic and non-academic roles that are common points of contact with transfer professionals. This section is based on elements from the [How to Articulate](#) (HTA) Handbook produced by the British Columbia Council on Admissions & Transfer (BCCAT). ONCAT acknowledges and thanks BCCAT for the publication of the HTA and permission to use some of its content in the publication of this resource.

Students: Depending on the institution, students may be required to submit all relevant documentation to support transfer credit assessment (outlines/syllabi); may initiate transfer credit requests once admitted and/or accepted into a program; once admitted, may appeal transfer credit decisions; work with academic/program advisors and/or pathway offices to plan further.

Recruitment/Liaise Staff: These administrative staff promote transfer pathways and admissions options to students with previous post-secondary experience; awareness of general and specific transfer admission requirements and can convey to various audiences; some specialized hybrid roles exist that combine the recruitment and assessment functions so that "on-the-spot" assessment and admission can occur; depending on institution, may support general application and transfer credit inquiries through various media (in-person, phone, email, etc.); may liaise between students and institutions about established/formal articulated/transfer pathways.

Admissions Staff: Admissions staff receive applications, documentation (transcripts, course outlines/syllabi, etc.) and transfer requests. Depending on the institution, admissions assessment and transfer credit may be separate roles. In general, these staff oversee electronic or manual review of student transcripts and documents for transfer credit; ensure that appropriate transfer credit is awarded and properly recorded; may determine how much credit should be given and at what level; identify and initiate course assessment requests and send to appropriate department/program; may maintain course equivalency tables; may support general application, and transfer credit inquiries through various media (in-person, phone, email, etc.).



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

Academic/Program Advisors: A mix of both faculty and staff, academic or program advisors advise students on transfer credit decisions and their impact on program requirements. If attached to a specific program or department, they may provide advice related to the remaining course and program requirements; discuss student goals and educational planning required for a particular profession; and liaise between departments and students, advocating on behalf of the student.

Department/Program Chair or Head: These faculty typically act as the articulation representative for the department on pathway development. They also contact other institutions regarding possible articulation opportunities or take the lead in arranging block transfer agreements. Individual faculty may evaluate course assessment requests related to their own discipline, subject, or program; may award transfer credit (depending on the institution); typically, will determine whether equivalency credit should be granted; and may determine how much credit should be given and at what level (depending on the institution).

Academic Pathway/Provost Offices: May liaise with external institutions to develop and maintain articulation agreements and/or the development of transfer pathways; work with academic programs to develop and maintain pathways; depending on the institution, may provide front-line services to support student transfer to and from the institution; may be in direct contact with ONCAT to support student mobility information and provide institution-level data to support transfer in Ontario.



The Transfer Advising Network in Ontario

The Ontario Council on Articulation and Transfer (ONCAT)

Founded in 2011, the Ontario Council on Articulation and Transfer (ONCAT) was created to develop a system of mobility for students by building academic pathways and course equivalencies through its network of Ontario's 45 colleges and universities, as well as Indigenous Institutes. With more than 60,000 students transferring every year in Ontario alone², ONCAT helps to remove barriers for students, making their post-secondary education more seamless and affordable. ONCAT provides support to students looking to transfer through its website ONTransfer.ca. ONCAT aims to increase opportunities and the ease of mobility for students in Ontario's post-secondary education system.

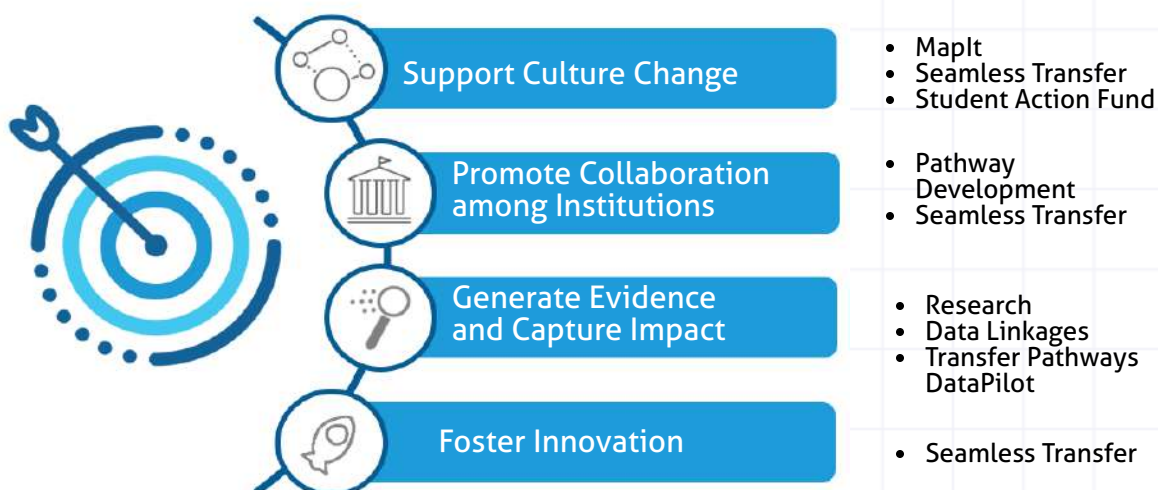


Research
& Action Projects

As part of our broader efforts to enhance transfer pathways—and reduce barriers faced by transfer students—ONCAT staff routinely perform policy analysis and research. Often, this work includes scans of policies or other innovations in jurisdictions with differentially structured transfer systems. This work informs various activities, ranging from the funding of pilot projects to the advice that we provide to system stakeholders and other strategic initiatives.

In addition to research-specific activities, we work directly with our many stakeholders to support not only research that improves transfer system planning, but also pathway development projects and institutional processes that meet the needs of students.

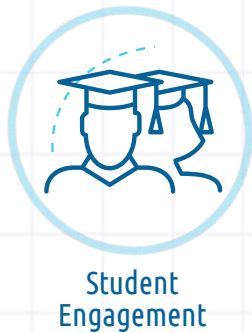
Highlights of our funding strategies is included below:



Have a great idea?

For more information on funding opportunities for action projects please visit this [page](#).

²This number does not account for students outside of Ontario or Canada.



ONCAT values the insights and experience of transfer students navigating the complex educational landscape. In addition to [ONTransfer.ca](https://www.ontransfer.ca), we fund two unique opportunities for transfer students. They include:

1. **Transfer Student Action Fund:** This is an ongoing funding opportunity for transfer students. We welcome ideas and projects that can help other transfer students in real time and can also serve as models for other schools to learn from. We fund projects that focus on community building (e.g., orientations, stress busters, social activities, etc.), tools and resources (e.g., peer-to-peer mentoring, developing school-specific 'how-to/what you need to know' guides) and awareness raising (e.g., transfer awareness campaigns, advocacy activities). These opportunities are ongoing, and information can be found [here](#).

2. **Community Animators in Transfer (CATs):** ONCAT is always on the lookout for transfer student storytellers. The goal of CATs is to create, capture, and share the stories and testimonials of students who have transferred so that others know they are not alone. Calls for CATs generally goes out in the spring/summer of each year.



In addition to larger sector events (such as our pathways conference), ONCAT supports system change by bringing key stakeholders together to network, share information, and learn about key content areas within the transfer space. We host a variety of learning collaboratives, content-specific workshops, and general information series. For a list of our events, please visit [this page](#).



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



ONCAT generates a substantial amount of knowledge both through our own research activities and the action projects that we fund. We are committed to communicating lessons and information to our direct stakeholders as well as the broader transfer community. Examples of these activities may include tool kits and guides, training/education, the development of policy documents and other related resources.

Heads of Transfer Advising (HOTA)

The Heads of Transfer Advising (HOTA) group oversees the work of TAG. Originally developed as a mentorship group to advise TAG members, HOTA advises ONCAT on how to better serve a mature transfer system by building the capacity and efficacy of transfer advising both across the system and at individual institutions. Members contribute their experience and expertise to the development of the Certificate in Transfer Advising (CAT) as well as guiding and overseeing TAG (regional and central) related content, activities, and deliverables. Members also serve as key communication vehicles within their institutions to disseminate the pivotal work on transfer research and policy that ONCAT leads.



Heather O'Leary - Co-Chair

Manager, Admissions Pathway
University of Waterloo
heather.oleary@uwaterloo.ca



Victoria Baker - Co-Chair

Manager, Academic Pathways
Seneca College
victoria.baker@senecacollege.ca



David Adam Baker - Committee Member

Business Intelligence Analyst &
Pathway Coordinator
Fleming College
david.baker@flemingcollege.ca



Sharon Estok - Committee Member

Senior Manager,
Pathways and Partnership
Centennial College
sestok@centennialcollege.ca



Ryan Snowdon - Committee Member

Strategic Enrolment
Management Lead
Queen's University
snowdon@queensu.ca



Judy Tavares - Committee Member

Manager,
Student Transfer Services
Humber College
Judy.Tavares@humber.ca



Scott Walker - Committee Member

Associate Registrar
Admissions & Pathways
Conestoga College
swalker1@conestogac.on.ca

Sheila Lafrance - Committee Member

Post-Secondary Coordinator
Iohahi:io Akwesasne Education
and Training Institute
sheila.lafrance@ambe.ca



[ONTransfer.ca](https://ontransfer.ca) is an online service provided by ONCAT to connect current and future learners in Ontario to transfer opportunities at publicly funded colleges, universities, and Indigenous Institutes. The information displayed is collected by ONCAT through collaboration with each post-secondary institution. It provides information on:

- **Institutional transfer profiles** including policies, procedures, and contact information
- **Overview of Transfer** in Ontario
- **Course transfers** detailing individual course-to-course equivalency decisions from one institution to another
- **Program transfers** detailing program-based transfer decisions (block, articulation, system pathways) from another institution

ONTransfer.ca institutional information is collected through multiple processes using SharePoint Online technology and through access to an administrative portal on ONTransfer.ca. Each year the ONTransfer.ca team collects institutional transfer profiles, course information from the academic calendar, online course offerings each term on behalf of [eCampusOntario](https://ecampusontario.ca), and, new this year, a course syllabi/description index to support retrieval of required documentation for course assessment. The online service is constantly being improved to support learners and institutions in Ontario. Ongoing collaboration and data initiatives with Ontario institutions allow for informative search results and assistance in student mobility.

Due to the number of mobile students each year, ONCAT began developing a virtual transfer fair for learners and institutions in 2020. To support inquiries, knowledge sharing, along with a dedicated platform, [ONTransferfair.ca](https://ontransferfair.ca) is the culmination of this development and is intended to be offered annually as a shared event for post-secondary student mobility.



If you support transfer students through academic pathway development, recruitment, admissions and transfer credit assessment, or technological supports, the ONTransfer.ca team wants to connect with you! We strongly encourage all institution transfer colleagues to become an active member in our SharePoint Online community. Connect with Sienna Stock, ONTransfer.ca Service Manager (sstock@oncat.ca) for more information.

Other Resources

Organizations

RESOURCE	LINK	NOTES
ARUCC	www.arucc.ca/en/	Association of Registrars of the Universities and Colleges of Canada
PCCAT	www.pccat.ca	Pan-Canadian Consortium on Admissions and Transfer
NISTS	www.nists.org	National Institute for the Study of Transfer Students
AACRAO	www.aacrao.org	American Association of Collegiate Registrars and Admissions Officers
NACADA	www.nacada.ksu.edu/	National Academic Advising Association
CACUSS	www.cacuss.ca/index.html	Canadian Association of College and University Student Services
OAPP	See OAPP Facebook Page	Ontario Academic Advising

Blogs and Newsletters

ONCAT's Newsletter	www.oncat.ca	ONCAT's official newsletter
Top Ten in Higher Education	www.academica.ca	Academica's blog on top stories, trends, and opinions affecting post-secondary education in Canada
HESA - One Thought Blog	www.higheredstrategy.com	Higher Education Strategy Associates. Subscribe to HESA One Thought Blog to stay 'in the know' about PSE
Ken Steele	www.eduvation.ca/subscribe	Mostly daily subscription that provides more college/university insights

Technical Information

RESOURCE	LINK	NOTES
Quality Assurance Framework	www.tcu.gov.on.ca/pepg/programs/oqf/	Describes various credentials, typical duration, admission requirements, qualification awarded, etc.
ONTransfer.ca SharePoint Site	If you would like to request access to this SharePoint site, please email sstock@oncat.ca	Collaborative and how-to site for ONTransfer.ca administrators (Pathways, C2C, eCampus, Virtual Fair, etc.) including ONCAT links and additional resources.

Career Advising

500 Jobs Profile	www.ontario.ca/page/labour-market	Lists a variety of jobs with the ability to filter on Annual Income, estimated Growth Rate for 2017-2021, and an estimate on the Total openings from 2017-2021
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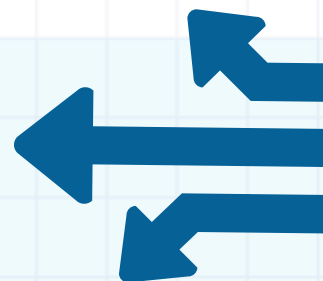
Document Retrieval

Transcripts for Private Career Colleges no longer in Operation	Send Email to TCAF-TCU@ontario.ca Subject Line: must say "Diploma/Transcript Request" Body: must include identifying details Name at time of graduation Year of graduation Program studied Credential received (if applicable) Birthdate
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Transfer pathways should provide access to high quality academic programming through curricular alignment to meet the needs and interests of transfer students and prepare them for future education and labour market success.

What Are 'In-Demand' Transfer Pathways?

Transfer pathways between institutions should reflect student priorities and behaviours, as well as the current and emerging needs of Ontario's communities and workforce. The 'in-demand' pathways approach goes above and beyond a 'high demand'/quantity-based approach by recognizing the multi-faced nature of student mobilities in Ontario post-secondary education. In-demand pathways will include evidence of at least one of the following:



1. Student Demand

These pathways include student interest, participation, and prevalence of informal pathways. Student demand may also address population needs present with under-represented learners, like the increasing prevalence of mature learners re-entering post-secondary education.

2. Institutional Demand

These pathways focus on an institution's strategic needs and specific interests, such as targeted program and/or content areas.



3. Regional / Labour Market Demand



These pathways may fluctuate based on a variety of factors, such as labour market needs and trends or changes to professional requirements requested by accreditation bodies.

4. Provincial / System Demand

These pathways may originate from provincial policy directives and may prioritize specific initiatives that may align with institution and regional demand.



Whether responding to student, institutional, regional, or provincial demand, an in-demand pathway is designed to create real benefits for students that reduce curricular duplication, increase access to educational opportunities, and/or support future student success.



<https://oncat.ca/en/resources>



Established in 2011, the Ontario Council on Articulation and Transfer (ONCAT) was created to enhance academic pathways and reduce barriers for students looking to transfer among Ontario's public colleges, universities, and Indigenous Institutes.