Inter-Provincial Credit Transfer Forum (IPTF) 2015

Report on the Proceedings

September 21, 2015
Simon Fraser University, Harbour Centre Campus
Vancouver, BC

Acknowledgements

A. Context for IPTF 2015

Description:

IPTF 2015 (Forum) was an inaugural event: an initiative to provide a setting in which representatives of institutions and various provincial councils responsible for facilitating credit transfer could dialogue on issues related to pan-Canadian credit mobility. Approximately 100 educational professionals[1] from British Columbia (BC), Alberta (AB), and Ontario (ON), as well as several other jurisdictions in Canada, were invited to participate in the one-day Forum.

All of the participants had extensive experience in navigating the complex landscape of inter-institutional, inter-sector, and inter-provincial credit transfer and recognition. All participants were volunteer attendees at the Forum sharing a common understanding that, despite many advances in credit transfer over the past decade, there is still much to be done in trans-provincial credit recognition.

Purpose:

The overall goal of the Forum is to move past obstacles to pan-Canadian credit transfer to solutions; actions that institutions and credit transfer organizations in various provinces can take to enhance pan-Canadian credit mobility. The focus is upon short and long term achievable goals and appropriate actions and initiatives. The outcome of the forum will be an action agenda across participating provincial organizations and institutions to achieve efficient and transparent pan-Canadian credit recognition processes and decisions.

Background: Credit Transfer in Canada

In recent years, studies in Canada have begun to examine in greater depth not only the volume, but also the mobility patterns and motivations of a significant number of students who study at multiple post-secondary institutions over the course of their personal and professional lives.[2] Although more systematic research is necessary to provide a comprehensive picture on pan-Canadian student mobility, desires to maximize educational resources, experiences, and outcomes, and minimize costs in terms of time and money, are certainly key motivations for students. A 2012 policy paper on credit transfer and student mobility published by the Ontario College Student Alliance concluded that to gain "…the maximum benefit of our postsecondary education system and the widest possible choice of their learning experience, students must be able to move from one institution to another across provincial and/or territorial boundaries" (p. 24.).[3]

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[1] A list of participants is available at http://www.bccat.ca/about/iptf
[2] Two recent studies by PCCAT have looked at inter-provincial mobility within Canada and intra-provincial mobility in Ontario (http://www1.uwindsor.ca/pccat/system/files/PCCAT_mainreport_final-EN%20Full%20Document%20with%20logos.pdf; http://www1.uwindsor.ca/pccat/system/files/PCCAT_Ontario_supp_final%20Full%20Document%20with%20logos.pdf;) Other Ontario studies (http://www.heqco.ca/SiteCollectionDocuments/TransferExperienceofOntarioCollegeGraduates.pdf; http://www.oncat.ca/files_docs/content/pdf/en/oncat_research_reports/2012-1-Brock-Transfer-students-in-Ontario-how-are-they-faring.pdf; http://www.oncat.ca/files_docs/content/pdf/en/oncat_research_reports/2012-11-FINAL-REPORT-Lakehead-Student-success-after-transfer-college-Lakehead.pdf) focused on success of college transfer students within the province. The Student Transitions Project in BC systematically tracks and studies patterns of student mobility within BC: http://www.aved.gov.bc.ca/student_transitions/documents/PSM_Highlights_2015-02-05.pdf . Related BCCAT-sponsored research has also investigated pathways to credential completion over time, as well as motivations of students in switching institutions along their education journeys. An overview of BCCAT and related BC Transfer System research is available at http://www.bccat.ca/pubs/synthesisofresearch.pdf . Some specific example BCCAT studies include the following: http://www.bccat.ca/pubs/surveyofmovers2013.pdf, http://www.bccat.ca/pubs/readandrev2015.pdf, http://www.bccat.ca/pubs/footsteps.pdf, and http://www.bccat.ca/pubs/timeittakes.pdf.
[3] http://collegestudentalliance.ca/wp-content/uploads/2014/12/Student-Mobility-and-Credit-Transfer-in-Ontario-May-2012-Tamara-Popovic.pdf

As post-secondary participation rates increase and student goals and needs diversify, credit transfer and credential recognition pathways will likely become increasingly important considerations in students' choices of school, province, and country of study. At the same time, many higher education institutions, amid a myriad of student service priorities, face challenges in developing and maintaining robust credit transfer and credential recognition practices and services. Although intra-provincial credit recognition pathways and information services are well-established in BC and Alberta, and have increased significantly in Ontario and elsewhere in Canada over the past few years, students moving beyond provincial borders to continue studies have relatively limited access to information on credit transfer agreements and awards between institutions on a pan-Canadian basis[4]. Many students, whether having planned a structured educational pathway or having to respond to changing circumstances, require flexibility, but encounter barriers to their mobility and portability of credit given differences in understanding and practice across provincial post-secondary systems:

> "It is generally understood that student mobility through credit recognition, transfer and admission to successive education levels is a cost-effective and efficient way to promote access to post-secondary education. When well supported, it also mitigates geographical barriers and carries with it the potential to facilitate a national network for education and workforce preparation and mobility. Unfortunately, differences in transcript practices and credit transfer terminology often cause confusion and misunderstanding for individuals moving across and within provincial boundaries. These differences also affect the institutions that receive them, limiting recognition of previous studies whether between schools or progression through to graduate studies" (Duklas, J. et al., 2014, pp. 19-20).[5]

Students who have completed credentials at an institution in one Canadian jurisdiction can encounter significant challenges in having their credential recognized for the purpose of admissions consideration in another. In particular, credit recognition pathways from certificate and diploma credentials to degrees are difficult to navigate as there is no pan-Canadian agreement on general outcomes for non-degree credentials such as exists for degree level education through the *Ministerial Statement on Quality Assurance of Degree Education in Canada* (2007)[6] issued by the Council of Ministers of Education, Canada (CMEC).

In order to serve students as well as possible, the Canadian post-secondary environment requires a high level of understanding, collaboration, and transparency to map educational pathways across different institutions and jurisdictions in keeping with established principles on credit transfer and credential recognition. Many provincial and pan-Canadian initiatives have developed such principles. Recently, the board of Colleges and Institutes Canada approved principles on transfer, and a committee of presidents from Colleges and Institutes Canada and Universities Canada worked to develop a framework for collaboration that focuses in part on enhancing student mobility pathways[7]. The Conference Board of Canada, through its Quality Network for Universities and its *Skills and Post-Secondary Education*[8] initiative, has referenced the need for principles-based, multi-stakeholder approaches to student mobility. Groups like the newly formed Pan-Canadian Consortium on Admissions and Transfer (PCCAT) are organized for the purpose of facilitating credit transfer and mobility at an operational level.[9] Additionally, many post-secondary institutions have adopted the CMEC protocols on credit transfer [10] and follow transfer practice expectations embedded in the program standards ascribed by many of the provincial and sector quality assurance boards in Canada. In BC, Transfer System member institutions have agreed to

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[4] Many institutions lack detailed information on their websites regarding specific transfer credit recognition for out of province institutions.
[5] Duklas, J. et al. (2014). *ARUCC PCCAT National Transcript Transfer Credit Nomenclature Study.* Association of Registrars of Colleges and Universities of Canada and the Pan-Canadian Consortium on Admissions and Transfer, http://www.arucc.ca/uploads/documents/arucc_pccat_15_jun_2014_english.pdf
[6] http://www.cicic.ca/docs/cmec/Qa-statement-2007.en.pdf
[7] http://www.univcan.ca/wp-content/uploads/2014/09/framework-for-collaboration-aucc-cican-sept-29-2014.pdf
[8] http://www.conferenceboard.ca/spse/default.aspx
[9] http://pccatweb.org/pccat/
[10] http://www.cmec.ca/Publications/Lists/Publications/Attachments/198/Pan-Canadian-Protocol-Transferability-University-Credits.pdf;
    http://www.cmec.ca/Publications/Lists/Publications/Attachments/216/ministerial-statement-credit-transfer-2009.pdf

Principles and Guidelines for Transfer[11], which, as elsewhere, focus on fair and equitable treatment of students while recognizing and respecting institutional autonomy*.

There are now four formal Councils on Admissions (or Articulation) and Transfer with credit transfer infrastructure and databases: Alberta Council on Admissions and Transfer (ACAT)[12], BC Council on Admissions and Transfer (BCCAT)[13], Ontario Council on Articulation and Transfer (ONCAT)[14], and New Brunswick Council on Articulations and Transfer (NBCAT)[15]. Additionally, Campus Manitoba (CMB) is beginning to serve as a credit transfer facilitating body in Manitoba[16], and Saskatchewan has established a working committee comprised of institutional and government staff focusing on credit transfer facilitation (Saskatchewan Credit Transfer and Learning Pathways Committee). Discussions on the formation of a credit transfer network in Nova Scotia have led to the recent launch of a higher education portal, which provides information on education planning and credit transfer[17].

Considerable ongoing inter-provincial collaboration has also been established. BCCAT and ACAT have had a reciprocal transfer system membership protocol and policy for years[18], and both have policy enabling the listing of transfer agreements with non-member institutions in their Transfer Guides[19]. BCCAT has been consulting with ONCAT and ACAT on development of research programs on student mobility and success, and articulation policy and practice, along the lines established in BC[20]. In 2015, CMB initiated development of a transfer credit evaluation system in Manitoba that is modelled on BCCAT's successful technology. BCCAT, CMB, ACAT, and ONCAT are also exploring possibilities for sharing credit transfer technology to enable more efficient processes and transparent information between institutional partners across provincial boundaries.

In 2014 ACAT, BCCAT, NBCAT, and ONCAT signed a Memorandum of Understanding (2014) to "enhance information channels for students, help institutions build additional pathways, and engage in in research and knowledge gathering to develop comprehensive and transparent pan-Canadian credit transfer and student mobility processes. The relationship . . . respect[s] shared principles of trust and open communication, and reflect mutual understanding and appreciation of values and strengths of each organization ..." (p.1)[21]. Along with many post-secondary educators and staff, the Councils have also been active in developing the Pan-Canadian Consortium on Admissions and Transfer, which was incorporated in 2012-13, but has been an informal consortium since 2006[22]. In collaboration with provincial and national organizations such as CMEC and the Association of Registrars of Universities and Colleges of Canada (ARUCC), PCCAT has facilitated important recent research on pan-Canadian student mobility[23] as well as transcription and transfer practices and nomenclature[24].

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[11] http://bccat.ca/system/principles
[12] http://www.acat.gov.ab.ca/
[13] http://www.bccat.ca/about/work
[14] http://www.oncat.ca/
[15] http://nbcat.ca/nbcat/
[16] http://www.ecampusmanitoba.com/
[17] http://mynsfuture.ca/about-mynsfuture
[18] http://www.bccat.ca/pubs/BC-ABprotocol.pdf; http://www.bccat.ca/pubs/AlbertaInstitutions.pdf
[19] http://www.bccat.ca/pubs/nonmemberspolicy.pdf; http://www.acat.gov.ab.ca/pdfs/PPP.pdf
[20] http://www.bccat.ca/pubs/synthesisofresearch.pdf
[21] http://www.bccat.ca/pubs/MOU.pdf
[22] http://pccatweb.org/pccat
[23] *Student Mobility across Canadian Jurisdictions: 2007/08 TO 2009/10* http://www1.uwindsor.ca/pccat/system/files/PCCAT_mainreport_final-EN%20Full%20Document%20with%20logos.pdf
[24] *ARUCC PCCAT Transcript and Transfer Credit Nomenclature Study (2014)* http://www.arucc.ca/projects/documents/arucc_pccat_15_jun_2014_english_000.pdf; *ARUCC PCCAT Transcript Standards and Transfer Credit Nomenclature Project: Phase 2* http://arucc.ca/en/resources/arucc-pccat-project.html

Notwithstanding the many intra- and inter-provincial credit transfer and mobility initiatives underway, there remains a need for greater pan-Canadian collaboration to help ensure students receive fair and consistent recognition for appropriate post-secondary learning within Canada and beyond. Student mobility through the successful transfer of credit as learners move along the post-secondary continuum is an important goal for institutions, organizations, and policy makers focused on enhancing educational access, flexibility, efficiency, and recognition.

B. Program for IPTF 2015

Structure

The Forum was designed to present opportunities for dialogue and to establish direction for follow up actions. To help accomplish these goals, the event was facilitated by Dr. David Marshall, President Emeritus of Nipissing University and Past President Mount Royal University. Staff from BCCAT and ONCAT assisted Dr. Marshall in facilitation and note-taking.

The day was structured in two parts – the first part provided information from national leaders and practitioners in the field while the second part allowed for brainstorming and idea generation among the participants. Through three presentations, participants had the opportunity to identify and discuss national themes in student mobility and hear about promising practices in working inter-provincial partnerships. The Forum also heard about a US partnership that is developing a common set of learning outcomes for general education requirements across ten states[25].

The facilitated final session of the day allowed the participants the opportunity to help develop short and long term action items in relation to four general topic areas:

- **Institutional Relationships across Provincial Borders:**

  The unique histories and structures of provincial post-secondary systems in Canada inform differences in institutional mandates. Greater understanding of the variance in institutional roles, nomenclature, and practices in different provinces could help facilitate pan-Canadian credit transfer.

- **Institutional Relationships at the Sector, Program, and Discipline Levels**

  Diverse institutional, sector, and provincial quality assurance protocols and bodies[26] are operating in each jurisdiction, but coordination is limited. Knowledge of others' curricular development, assessment, and articulation processes and decisions, as well as student preparation and performance, could help institutions make informed decisions on articulation of programs and courses across provinces and sectors.

- **Research and Data to Support Inter-Provincial Mobility Research and an Action Plan**

  Student mobility research provides institutions with valuable information on where, what, and why students are transferring credit. As in BC, student mobility and credit transfer research programs could be developed in other jurisdictions to help focus credit transfer activities on a pan-Canadian basis.

- **Advice to "Councils" on Collaborative Credit Transfer Initiatives to Support Institutions**

  Four formal provincial councils on transfer exist in Canada, and several other jurisdictions are developing related bodies. Although the context and mandates of these groups vary, inter-provincial sharing of credit transfer practices and agreement information may streamline institutional credit transfer assessment.

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[25] http://www.wiche.edu/passport/home
[26] Examples include: Campus Alberta Quality Council (AB), Degree Quality Assessment Board (BC), Saskatchewan Higher Education Quality Assurance Board (SK), Postsecondary Education Quality Assessment Board (ON), Ontario Colleges Quality Assessment Service (ON), Ontario Universities Council on Quality Assurance (ON), Maritime Provinces Higher Education Commission (Maritimes)

Agenda

In addition to this report, presentation materials, notes, and video compilations for each of the main presentations, panel discussions, and inter-active sessions are available at http://www.bccat.ca/about/iptf.

INTER-PROVINCIAL TRANSFER FORUM

9:00 **Welcome**
Robert Fleming, Executive Director and Council Co-Chair, BCCAT

9:05 **Aboriginal Peoples Greeting**
Elder Margaret George

9:10 **Opening Address**
Honourable Andrew Wilkinson, BC Minister of Advanced Education

9:20 **Introduction: Purpose and Process**
Roger Barnsley, President Emeritus, Thompson Rivers University & Co-Chair, BCCAT
Dave Marshall, Past President, Mount Royal University & President Emeritus, Nipissing University

9:30 **Overcoming Barriers & Building Trust to Facilitate Pan-Canadian Credit Transfer**
Moderator: Dave Marshall
Kate Ross, Associate VP Enrolment Services & Registrar, University of British Columbia
Katherine Sutherland, Interim VP Open Learning & Associate VP Academic, Thompson Rivers University
Joy McKinnon, VP Academic, Seneca College
Charmaine Hack, Registrar, Ryerson University
Susan Bansgrove, VP Academic, Grande Prairie Regional College
Tony Norrad, Associate Registrar, MacEwan University

11:00 **Case Studies: Dual Admission and Degree Program Pathways**
Moderator: Robin Fisher, Chair, ACAT
Brad O'Hara, VP Academic, Langara College and Jill Scott, Vice-Provost, Teaching & Learning, Queen's University
Kathy Denton, President, Douglas College and Louise Legris, Director, Admissions, Simon Fraser University
Darrell Bethune, Dean, College of the Rockies and Heather Mirau, Integrated Planning Director, University of Lethbridge

1:30 **Interstate Passport: A U.S. Multi-Partner Competency-Based Interstate Credit Transfer Model**
Moderator: Roger Barnsley
Presentation: Bob Turner, Western Interstate Commission for Higher Education

2:30 **Working Groups Session: Strategies to Strengthen Inter-Provincial Credit Transfer in Canada**
Moderator: Dave Marshall

4:30 **Where to from Here? Key Issues, Next Steps, and Closing Remarks**
Provincial transfer leaders with facilitator, Dave Marshall
Robert Fleming, Executive Director and Council Co-Chair, BCCAT

C. Facilitator's Report for IPTF 2015

To help foster dialogue throughout the Forum and in order to create a more fulsome record of discussions for both those in attendance and those not, Dr. Dave Marshall provided facilitation and a report. Dr. Marshall's facilitation report is reproduced below in two sections: a summary of what he heard generally during the discussions and a summary of key observations and possible next steps.

Summary of What I Heard

It was a pleasure to participate as the facilitator in this inaugural forum. Like many participants, my own work history is littered with the remnants of both credit recognition initiative failures and some ground -breaking successes. And like all participants I brought my own lenses and biases to the forum conversation. These biases inform my perspective on what should realistically be done, and the obstacles to any advances. For example, from my years as a president of two unique institutions I appreciated both the hidden (sometimes) credit recognition challenges that students can experience, as well as institutional reticence to accept credit. My subjective view of what I heard is unavoidably filtered through my history.

Overcoming Barriers and Building Trust to Facilitate Pan-Canadian Credit Transfer

It is very difficult to discuss "solutions" without first identifying the obstacles. The participants in this panel were all administrators well experienced in the challenges of credit transfer at all levels. The following barriers stood out for me from their presentations and the follow up questions and responses.

- The administrative burden of credit transfer work is considerable and is often performed "off the side of the desk" with limited staff time to devote to block or course by course credit equivalency analysis.
- A lack of online, automated processes through transfer credit evaluation systems and credit equivalency databases can cause an undue amount of work at the institutional level. The credit transfer databases in B.C. and Alberta are significantly ahead of other provinces in scope and should facilitate recognition of credits from these provinces. However, this is hindered by the absence of any federal educational jurisdiction and misunderstanding of different provincial approaches to post-secondary education.
- There does not appear to be a good business model for institutions (vs. students) to embrace credit transfer. Funding models can mean that credit received at another institution may result in less grant money for the recognizing institution. Institutions or sectors that require integrated program curriculum and tuition exacerbate this challenge.
- Credit hours are still the prime currency of transfer rather than outcomes.
- Faculty are less enthusiastic about credit transfer than administrators, governments or councils. Curriculum or course outlines are often viewed as proprietary, even as intellectual property. This argument is sometimes used to avoid participation in formal articulation exercises.
- Everyone can get quickly worked up about the injustices of credit transfer, but the work of institutions and councils needs to be guided by what is both achievable and appropriate.

The following suggested solutions stood out for me in the discussion and questions.

- Involve faculty at all levels. While students may be reticent to advocate for themselves on credit transfer issues, faculty usually support efforts to ensure equitable treatment of students. In addition, education

on the use of outcomes and clarification of course curriculum ownership is necessary. (The interstate passport model emphasized the value of this approach).

- Nationally, focus first upon block transfer pathways. This may allow institutions to look at relevant similar programs and hopefully limit the administrative burden.
- Similarly, focus upon national, block transfer within sectors before tackling inter-sector credit mobility.
- Support and facilitate development of outcomes-based curriculum and course outlines.
- Focus upon the commonalities of the public sector to establish national public sector credit transfer relations. There was a noticeable absence in all of the day's discussion of the challenge of credit recognition between the private and public institutions. The ongoing challenge of credit recognition from Canadian private universities that aren't viewed as universities by traditional measures, are examples of complications with the private post-secondary sector. 'Trust' in these cases is a different kind of trust than would be dealt with in public sector articulations.
- Involve stakeholders in the discussion who are not as knowledgeable on the issue as the participants in this forum. To some extent the event was "preaching to the converted," so was a good forum to extract informed suggestions for action that we can build upon, but the set of participants needs to be broader to change some prevailing attitudes.

Case Studies: Dual Admission and Degree Program Pathways

The case studies showed what could be done at the institution level to overcome barriers to credit articulation relationships, both within a province and inter-provincially. The following are some lessons and ideas that I took from the three case study presentations.

- Program to program articulations are the best starting point.
- Having well-established within province articulation (e.g., ACAT and BCCAT) can help trans-provincial articulation. That is, if a BC university will recognize an institution's credit, why wouldn't an Ontario university do the same?
- Establish a set of guiding principles from the start. This seems particularly important in establishing institution-to-institution program articulations. The best example provided was the understanding from the start that both institutions' admission standards would be respected.
- Articulations have to be of benefit to both partners. For example, universities show much more interest in working out credit transfer agreements when there are empty seats at third or fourth year.
- Academic administration relationships (e.g., dean to dean, or chair to chair) are critical.
- Respect for institutional autonomy is vital as credit transfer only occurs if it happens at the institutional, departmental, and faculty level.

A number of important questions arose from the presentations and discussion.

- Are these inter-institutional partnerships really worth the effort? The transfer student numbers may not be large, so the initial and ongoing institutional efforts to sustain these partnerships must be assessed.
- While there may be outstanding individual partnership efforts, can they inform an easily replicated national model? As a result of its associate degree pathway partnership with Langara, will Queens now also accept the same credit transfer from similar college programs?
- Can a database of institutional articulation agreements and partnerships be established nationally given the various data management systems at the provincial and institutional levels?

The group discussion time was designed to build on both the experiences of the participants and the previous sessions to generate action items for both institutions and the provincial councils. The tables were organized to facilitate cross-sector and cross-provincial perspectives. Four discussion topics were chosen to provide some parameters to the discussion, although it was assumed—correctly as it turned out—that participants would use the group discussion to talk about any aspect of the action agenda they wished. The note takers did an exceptional job of documenting the ideas presented at each group. For my own summary of the group discussion I have scanned all of the notes and extracted action ideas around four themes.

Institutional Relations refers to the trans-provincial credit transfer challenges inherent as a result of the different provincial histories and approaches to sectors, governance models, and other factors such as funding and demographics.

The following are short term action items:
- Develop a database of existing trans-provincial articulations.
- Ask the developers of existing articulation agreements to mentor others that want to try the same.
- Develop a set of nationally accepted principles and recommended practices for credit transfer.
- Describe the inter-provincial differences at the institutional and program levels.

The following are long term goals:
- Existing successful trans-provincial articulation examples could be reframed from 'one-off' examples to generic models for national adoption, perhaps endorsed by the various national bodies.
- A one year or 30 credit block could be designed to provide generic transfer between institutions within or across sectors. BC's associate degree curriculum framework might inform the curricular basis for this generic year.

In general, most participants felt that the institutions themselves can overcome the obstacles to trans-provincial credit mobility at the institutional level. Continued communication, research on what is working and not working, and better understanding of the provincial differences will all help the motivated institutions develop relationships that can be modeled elsewhere.

Program/Course Articulation refers to the challenges to credit mobility from various program related issues such as different professional approval bodies, various approaches to quality assurance, curricular assessment, and equivalency approval processes.

The following are short term action items:
- Develop learning outcomes for a portable first year that could be considered for national transferability. The CMEC-approved degree outcome framework could provide a starting point for developing a set of outcomes.
- Link existing provincial databases on credit equivalency both at the system and institutional level.
- Continue the development and maintenance of the *ARUCC PCCAT Transcript Standards and Transfer Credit Nomenclature Guide.*

The following are long term goals:
- Continue learning outcomes initiatives to reduce reliance on the credit hour as the sole currency for transfer.

- Document the various quality assessment processes in different provinces. Work with all institutions to gain acceptance of quality assurance processes in other provinces.
- Adopt a framework for the development of a nationally portable two years of study.
- Expand from course credit articulation to program articulation.
- Establish a national 'body' to lead and prod national credit mobility.

The Research Discussion was concerned with missing data. What is it that we need to know to move the national credit transfer discussion forward? It is fair to say that every group raised a number of research concerns. For example, the *institution* group suggested more research on best practices, the *program* group wanted more research on quality assurance programs as well as on current student mobility in Canada. In general, research was the one common theme between all groups, no matter what their assigned theme.

The following are short term action items:
- Document inter-provincial system differences on key post-secondary elements: funding, sector mandates, quality assurance, governance, and so on. Consensus was that until everyone understands the inter-provincial differences that affect credit mobility it will be difficult to develop national solutions.
- Leverage existing provincial databases (e.g., B.C. could be used as the model for other provinces and then as a foundation for a national database).
- While some provinces (e.g., B.C. and AB) have an understanding of mobility within the province, comprehensive data on the current level mobility of students between provinces is lacking.
- Find out what students say are the obstacles to trans-provincial credit mobility.
- Conduct a meta-analysis of existing research on credit mobility in Canada.

The following are long term goals:
- Create an open, consolidated, up-to-date national credit transfer database.
- Include credit transfer equivalency based on learning outcomes in databases.
- Establish a pan-Canadian coordination mechanism or group for the provincial councils on transfer.
- Support development of student identification numbers across jurisdictions to facilitate research.

There are four formal Councils in Canada that provide leadership in credit transfer within their provinces. While the current forum brought together institutions and the councils, one of the major goals of the forum was to generate an action agenda for the four councils and other provincial level bodies concerned with credit transfer. There was consensus in all discussion groups that a national initiative is needed in this area. To a certain degree the action items in each of the discussion groups can provide the agenda for the councils in the short and the long term. However, the discussion groups focusing on the councils identified the following agenda.

- Develop a national culture of transfer based upon the current status of councils, memoranda, and initiatives.
- Develop templates that could be used by any institution to implement trans-provincial articulation.
- Prepare a lexicon of language, common terms, and references that can be shared and used nationally.
- Work on a national database of articulations and credit equivalencies.
- Prepare a database of best practices across the country.
- Prepare a national advocacy strategy.
- Organize national forums and conferences on selected topics and agendas identified by the participants in this forum.

Summary of Key Observations:

I have several observations on the IPTF 2015 itself, possible next steps, and the notion of a culture of transfer.

Participation: From a facilitator perspective I found the level of participant engagement high and the discussion productive. I was especially impressed by the participants' willingness to focus upon solutions and future agendas rather than simply to blame other sectors, provinces, or institutions. This forum was a unique event, bringing together representatives of institutions across Canada with the credit transfer bodies. It needs to be repeated often that, in the final analysis, credit transfer occurs at the institutional level, so right away the notion of bringing the councils and the institutions together meant some measure of success. In addition, the participation of a large number of representatives at the registrar and senior academic administrator level demonstrated commitment to the topic. However, there were both provinces/territories and institutions not represented. Alberta and B.C. are considerably ahead of every other province in all aspects (e.g., data gathering, transfer guides, principles, etc.) of credit mobility, and Ontario is working hard to catch up. A truly national exercise would require broader participation. For example, is there no mobility between Quebec and the rest of the country? Would Alberta or B.C. be willing to 'adopt' the territories for credit transfer and quality assurance? In addition, it was mentioned several times how important faculty are to the implementation of transfer agreements, and how it was a relationship between academic administrators (e.g., chair, dean) that both initiated and led to successful articulation. And many talked about 'learning outcomes' as a key to future success. A future event should find a way to involve faculty and others in relevant institutional roles in the discussions.

Program: The forum may have tried to cover too much ground for a single day, but then again there is probably a lot of ground to make up in this area. Any good forum provides a mixture of new information and information sharing and this forum provided both through the panels, the Passport presentation, and the group exercise. While this breadth was appropriate for a first event of this sort, in the future it might be appropriate to design separate forums seeking solutions on focused issues.

Facilities and Support: The facility, the organization, and the support for this forum were outstanding. The commitment made by BCCAT (backed up by ACAT and ONCAT) to provide staff and resources was critical to the day's success.

Forum Goals: In general IPTF 2015 was an exciting event, well organized and well attended. It reached the objective of establishing agendas for future national initiatives in credit transfer.

<u>*Suggested Next Steps*</u>

The action items identified by the various groups will guide the development of next steps. However, the panel presentations of the Council representatives at the end of the day summarized quite well some achievable actions in the short to middle term. Rob Fleming's "Four Action Areas" and contributions from the other panelists are incorporated within the next and final section of the *Report on Proceedings* and are more thoughtful than anything I could provide. However, I think that two areas for future action items stood out for me—the need for idea sharing 'forums' of some sort, and the need for better research. Perhaps the two could be combined into a series of CAT and/or PCCAT sponsored, focused forums. For example:

- A 'juried' poster session day on existing articulations across the country. These sessions could provide the start for the 'template' notion that was raised at this forum.

- A 'learning outcomes' event. If indeed the development of outcomes-based syllabi is one of the keys to credit transfer then a way needs to be found to bring faculty and other academic leaders into the fold. I know that there are many 'learning outcome' conferences, but one that focuses upon how they relate to transfer might be necessary.
- A forum that deals with interprovincial post-secondary differences in the areas that affect credit transfer. It was mentioned several times at this forum that various provincial differences are obstacles that have to be understood in order to move forward with trans-provincial credit mobility.
- A forum where existing research on credit transfer could be shared and collated.
- A national "quality assurance" forum that could start the process of one province accepting another province's quality assessment—the "trust" issue.

Final Comments: A Culture of Transfer

There was fulsome discussion at this forum, perhaps as much as could be expected in a one-day forum. But there were some issues left mostly unsaid or unexplored. Looking to the future, I think there are several topic areas that will need to be discussed in much greater detail if we truly want to build a national culture of credit transfer at all institutions and with all provinces. A few of the important topic areas are indicated below.

In relation to institutional mandates and purposes, differences between rural and urban institutions and private and public institutions merit consideration. In relation to public policy and institutional roles, differences in provincial government expectations, funding models, and metrics merit consideration. In relation to institutional autonomy, differences in understanding of governance practices and curriculum ownership merit consideration. In relation to demographics and enrolment, differences in student supply and demand effects, and of actual mobility patterns and volumes within and across jurisdictions, merit consideration. In relation to institutional workload and efficiency, differences in approach to reciprocity of credit recognition and learning outcomes assessment merit consideration. Perhaps most important, understanding and recognition of necessary and appropriate differences in learning environments and outcomes—such as in Aboriginal educational institution, curriculum, and student contexts—merit consideration.

Above all, our expectations must be realistic if we are to be successful in better supporting credit transfer and mobility for the diverse range of learners we collectively serve. Thank you to all participants for your commitment to this goal, and to the organizers for the opportunity to be involved in this seminal and most important forum.

Dr. Dave Marshall

D. Considerations from the Councils: IPTF 2015 Key Themes and Proposed Next Steps

The closing panel for IPTF 2015 was comprised of the executive director or equivalent of each of the four formal councils and the two organizations in Manitoba and Saskatchewan filling similar roles in their jurisdictions. In this facilitated session, the panelists were asked to reflect on the discussions throughout the day and to comment on key themes and possible areas of action. The goal in identifying these items is to initiate development of a coordinated pan-Canadian agenda and action plan across jurisdictions and institutions.

Key Themes

Over the course of the day, many topics, themes, and principles were addressed and discussed. In no particular order, the following represents several of the key considerations emphasized by participants as necessary to inform a successful pan-Canadian credit transfer agenda and action plan.

- *Putting students first* – Participants expressed a strong consensus that facilitating pan-Canadian credit transfer and student mobility is the 'right' thing to do and that successful solutions will need to incorporate the student perspective.

- *Keeping approaches as simple as possible* – Participants emphasized that sustainable long-term solutions will have to be straightforward. Credit transfer approaches and administration cannot get 'bogged down' in unnecessary detail.

- *Integrating faculty in all planning and initiatives* – Participants stressed that transfer decisions are based in educational programs and faculties. Successful approaches to credit transfer require faculty input all stages of development from inception through to implementation.

- *Expanding beyond credit hours and incorporating learning outcomes* – Participants indicated a strong desire to expand transfer credit assessment practices beyond inputs and credit hour equivalencies. Rooting transfer processes in learning outcomes could streamline processes and focus on learning.

- *Practical business related issues* – Participants acknowledged that a lot of practical issues need to be resolved to create a pan-Canadian system that works. Institutions and transfer organizations need to commit resources to credit transfer and to develop business plans to ensure ongoing support.

- *Differences in systems across the country* – Participants recognized that differences in the culture and structure of post-secondary systems across Canada must be understood and respected. We will require a flexible framework of solutions that jurisdictions can adopt to meet their own situations, reflecting different historical development of colleges, institutes, and universities, and of governmental policies.

Possible Areas of Action

In addition to key themes, four action areas were reinforced through the discussions and by the panelists in the closing session. These shorter term initiatives could be incorporated within a pan-Canadian agenda and action plan for credit transfer and student mobility.

1. **Pan-Canadian Post-Secondary Contexts and Practices Resource** – Participants recognized that limited understanding of the diversity of post-secondary contexts and practices across Canada could compromise credit transfer processes and decision-making at an institutional level. To address gaps in understanding, a shared resource that provides information on the similarities and differences of provincial post-secondary systems in areas such as institutional nomenclature, governance, and mandates; quality assurance bodies and processes; and transfer practices, data, and tools could be developed and disseminated through council and PCCAT websites. Such a resource could include illustrative and best practice resources, including course outline templates and transfer (course, block, and dual admission) agreement models and precedents—allowing us more easily to build upon the decisions of others.

2. **Research Plan** – Participants identified the need to have a strong national research plan to help make informed decisions. A national research forum could be developed to review existing research and develop a common plan to address gaps and better inform next steps on credit transfer. Such an approach could seek to replicate transfer student mobility and success research across jurisdictions to develop a national picture informing institutions and the public on mobility opportunities and priorities. The councils could work with PCCAT and other willing partners to focus expertise and resources on a pan-Canadian research plan for credit transfer and student mobility.

3. **Sharing Information on Transfer Agreements –** Participants recognized that technology now makes it possible for provinces to share agreements (both block and course to course) across Canada. Over time, it may also be possible to evolve our electronic systems to a common platform that would facilitate information sharing. This would require the establishment of technology sharing agreements, as well as a measure of transfer credit policy and practice alignment across the jurisdictions. Such an approach would leverage costs and efficiencies and facilitate transfer credit data exchange, including the aggregation of credit transfer agreement information across provinces and schools so that we are less isolated by region and students have access to more comprehensive information.

4. **First Year Curriculum Cores / Transfer Credentials –** Participants expressed interest in developing first year curriculum cores / transfer credentials at a pan-Canadian level. As a first step, an initiative of this sort would likely explore project alignment possibilities across a number of provincial initiatives looking at core curricula, outcomes, competencies, etc. Such an approach might include pan-Canadian articulation or program pathway committees and analysis of general education components of degree programs and pre-major competencies in subject areas.

More broadly, participants acknowledged that the absence of federal authority and structures to guide the credit transfer work across provinces has created a governance gap that should be addressed. A federated pan-Canadian system of governance would facilitate greater alignment across jurisdictions, institutions, and councils. Although multiple approaches deserve consideration and subsequent validation, one possibility would be to re-vision the Pan-Canadian Consortium on Admissions and Transfer to be a Council of 'CATs' to help link provincial activities across Canada.

Next Steps

Conference organizers would like to build on the enthusiasm and energy from participants at IPTF 2015. To that end, we propose to consult with provincial councils, PCCAT, and interested institutions for the purpose of creating a forum where we can refine the ideas that have been identified. These would include but not limited to the four action areas referenced above.

We expect to be in a position to announce positive plans on how to move forward in creating a workable pan-Canadian agenda and action plan for credit transfer and student mobility sometime in spring, 2016. Communication on this initiative will occur primarily through provincial transfer system networks in each jurisdiction, coordinated by the provincial councils and related organizations, as appropriate.

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