



ARUCC PCCAT TRANSCRIPT & TRANSFER CREDIT STUDY PHASE TWO: CONSULTATION FINDINGS

A review of the Phase Two survey results

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Study findings conducted for the Association of Registrars of the Universities and Colleges of Canada (ARUCC) and the Pan-Canadian Consortium on Admissions and Transfer (PCCAT), October 2015

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Phase Two: Consultation Feedback

Overview

The consultation in Phase 2 of the *ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study* (the “Study”) built on the national survey and consultation from Phase 1. It consisted of a review of websites and foundational literature, stakeholder interviews and workshops (both virtual and in-person) with more than 200 experts from across Canada who are involved in registrarial and pathway development and support (see Appendix A for a high level overview), and distribution of an online, flexible survey instrument accessed by 195 of these student mobility professionals. Appendix B provides a list of the survey questions. A Consultation Document appended the survey in Phase 2.¹

The flexible survey approach ensured more than one expert in either transcript or transfer at any given institution or organization could respond to those specific parts of the survey for which they held the greatest knowledge. A pilot database of transcript standards was launched within the survey environment; it was tested by 56 (56/195, 29%) of the respondents. A cross-Canada Joint Steering Committee ensured leadership guidance throughout the process and the findings were analyzed and assessed by a pan-Canadian committee of strategic advisors who represented leaders from various types of institutions and organizations.

The target group for both the research and the new national Guide include registrarial and pathway practitioners and policy developers within postsecondary institutions and allied organizations. Each of the councils on articulation/admissions and transfer and the Saskatchewan Credit Transfer and Learners Pathways Committee participated in the stakeholder interview process along with representatives from other allied organizations. The research team, led by Joanne Duklas of Duklas Cornerstone Consulting, reviewed standards and transfer-related terminology available in Guides and glossaries across North America. The various approaches deepened the consultation and the assessment of findings from both Phases. The outcomes resulted in the final ***ARUCC PCCAT Transcript and Transfer Guide (the “Guide”)***.

Provided below is an overview of the findings from Phase 2 with a particular focus on the second national survey conducted in the spring of 2015 for the study.

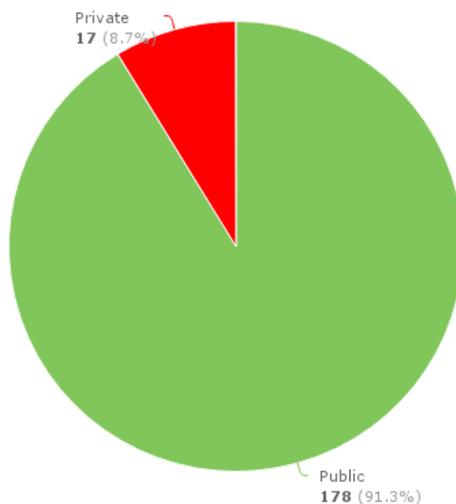
Demographics of Consultation Group

As with Phase 1, registrarial and pathway practitioners and policy developers from postsecondary institutions and allied organizations constituted the primary consultation group. Typically, public sector respondents participated although the private sector postsecondary providers were invited. Figure 1 provides the public versus private breakdown for the Phase 2 survey respondents which was similar to the Phase 1 Survey. Of these, 79% (154) represented an institution and 21% (41) represented an allied organization. For those that represented an institution and chose to further self-identify (n=150), 73% (110) work within a central registrarial area (admissions, recruitment, Registrar’s Office, enrolment services), 6% (9) in central administration, 7% (10) in a transfer or pathway office, 3% (4) in either a student success/student affairs or graduate studies area, 3% (5) as faculty or responded on behalf of a Faculty (not including graduate studies), and 8% (12) specified “Other.” In the “Other” category,

¹ The Consultation Document is available online in the “ARUCC PCCAT Study” section of the Guide.

comments indicated that respondents collaborated when submitting a response with other people from across institutional departments. This collaborative approach may have also occurred in the other categories. Examples included collaboration between areas such as the Centre for Teaching and Learning and the central registrarial office.

Figure 1: Phase 2 Survey Respondents – Public versus Private



As with Phase 1, Figure 2 demonstrates the colleges and the universities were the largest participants in the survey; however, CEGEPs are regulated through one Quebec government body. One government representative responded for this sector.² The “Other” category in Figure 2 included areas such as Faculty participants within institutions, student associations, seminaries and polytechnics, and provincial application centres.

² There are Quebec regulations that govern activities within all CEGEPs in the areas of transcription, transfer, and prior learning assessment and recognition.

Figure 2: Institutional Type of Survey Respondents

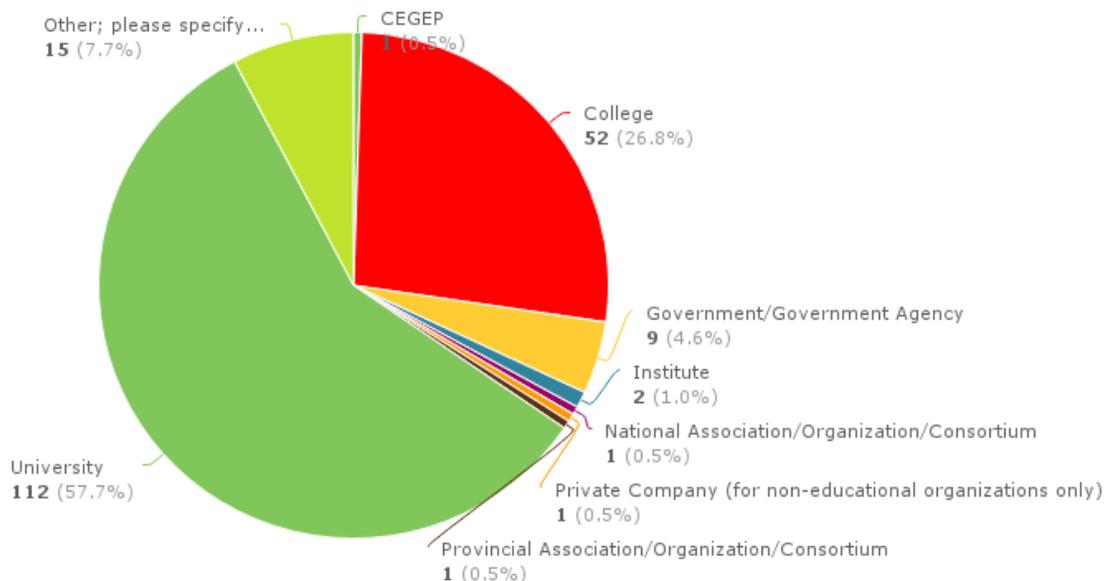


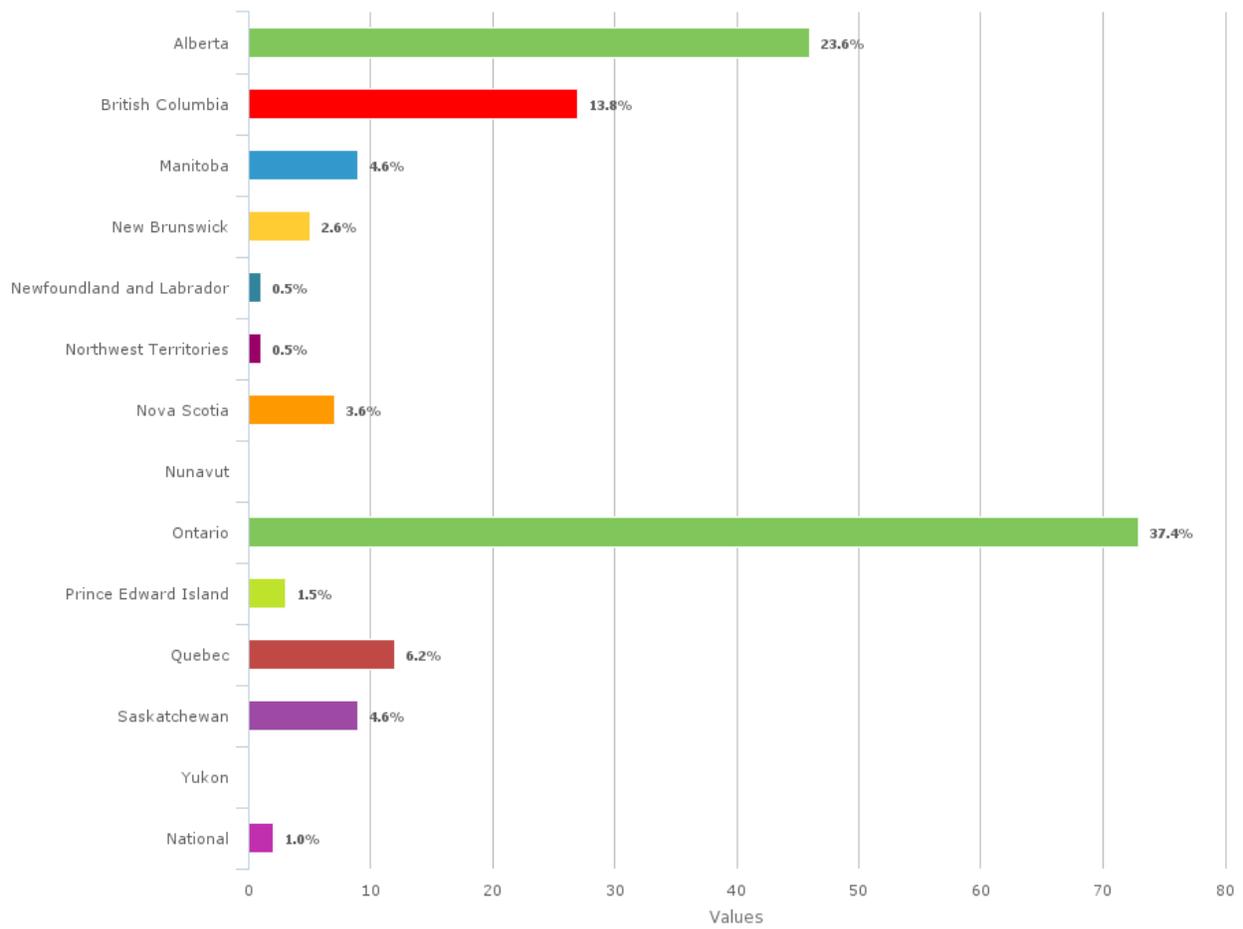
Figure 3 provides the regional breakdown of participants. The largest number were from Ontario, Alberta, and British Columbia; the findings indicate that almost every Canadian region participated in this consultation. Figure 4 provides the organizational type by province.³ The number and types of institutions and organizations vary by province; while respondents were not asked to identify their organization,⁴ these results appear to suggest a reasonable proportional representation within each region occurred (note the comment regarding Quebec CEGEPs above).⁵

³ One government official responded for all the CEGEPs in Quebec; the “Other” category included organizations such as government, provincial organizations, and unspecified.

⁴ This data was provided in the Phase 1 survey and report.

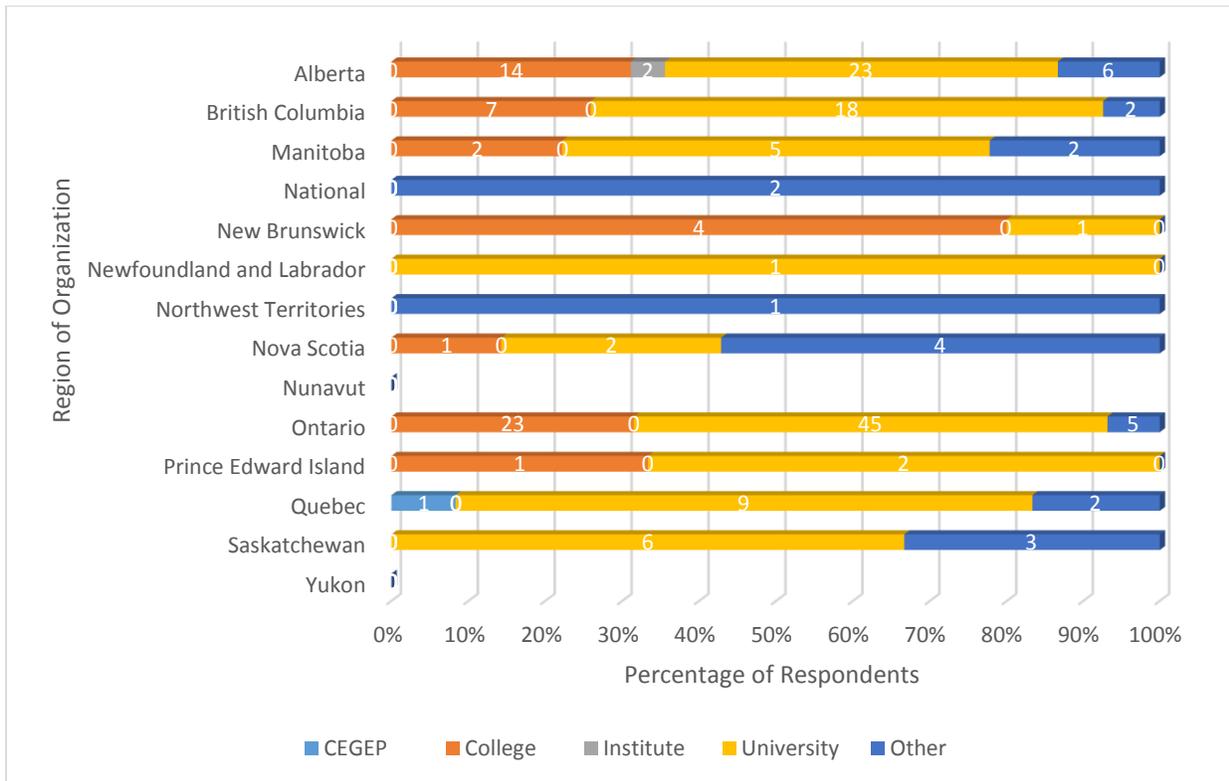
⁵ As with the Phase 1 survey, the Phase 2 survey deliberately allowed more than one response per institution or allied organization. This is because transcript and transfer expertise may not necessarily situate with one person or office at an organization. As the goal was to ensure maximum flexibility and opportunity for participation in the exercise, restricting access was deliberately avoided.

Figure 3: Respondent's Region



The material in this document results from research and consultation conducted as part of the ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study (September, 2015).

Figure 4: Respondent's Organizational Type by Region



Respondents had the option to respond to the entire survey and skip through or not be presented with questions for those areas that did not relate to their area of expertise. This was in keeping with the goal to allow full access and flexibility to the survey, an approach matched when conducting workshops or notifying interest groups across Canada about the opportunity to participate in the consultation. The majority of the respondents, 87% (156/179), chose to explore the questions across both transcript standards and student mobility, and 13% (23) responded only to student mobility questions.⁶

The Phase 1 research process coupled with the evidence gathering process in Phase 2 provided data informed by a significant number of experts from across Canada. The findings represent the core foundation of the standards and nomenclature embedded in the ARUCC PCCAT Transcript and Transfer Guide.

⁶ Due to the intentional flexibility of the survey, all respondents did not respond to all questions. As this was a required question, if someone did not answer, proceeding further was not allowed; therefore; sixteen respondents did not move beyond the survey from this point. The “n” count is provided for each question.

Section 2: Toward a 2015 ARUCC Transcript Guide

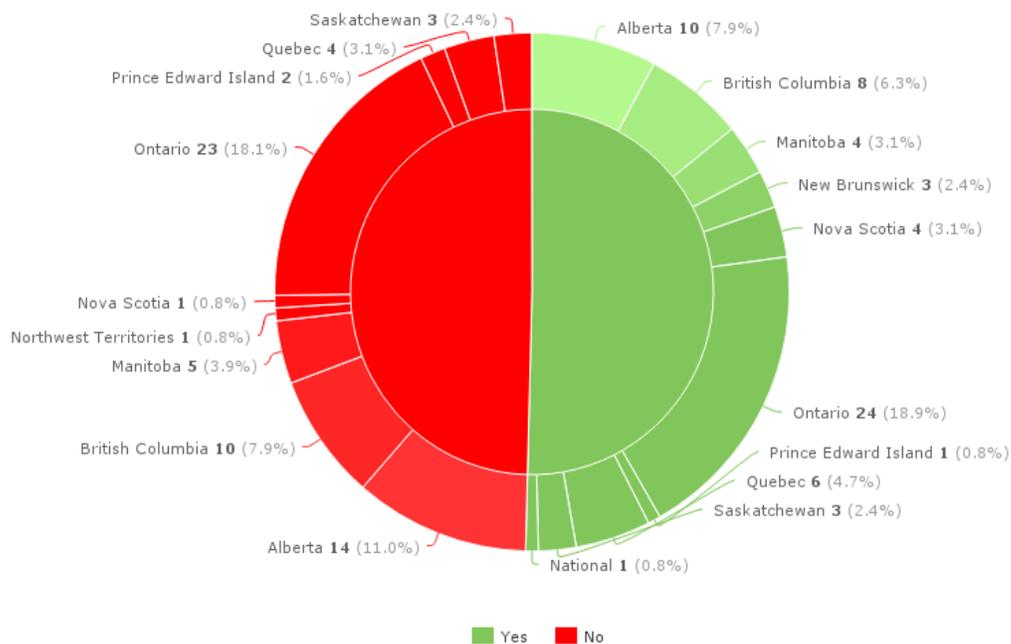
Subsection 2.1: The Role of the Transcript

Phase 1 suggested strong support for the core principles outlined in the 2003 ARUCC Transcript Guide which highlights its enduring contribution. Further, there appeared to be strong support for defining the kind of information that should populate a transcript. Having noted these two points, Phase 1 findings suggested divided opinion regarding what elements should constitute the Official Academic Transcript; therefore, further clarification was sought in Phase 2.

Should the role of the Transcript be redefined?

There were 127 respondents to this question in the Phase 2 survey. Figure 5 indicates the *intra-regional* diversity of opinion amongst the experts consulted in this study and the 50 / 50 split; hence, the value of probing for further clarity. In addition, the regional workshops in both Phase 1 and 2 explored these questions to ensure the future Guide reflected the full expertise and insights from the Canadian postsecondary experts consulted for this project.

Figure 5: Regional Indicator regarding Redefining the Role of the Transcript – Should it be redefined? (n=127)



Thirty-eight respondents (38, 30%) provided further remarks crossing both categories which reflected the following themes:

- **The academic experience is broader than courses, credits, grades, and credentials. The transcript should evolve to reflect this changing landscape.** The transcript should include learning outcomes and competencies achieved by students. Some holders of this view

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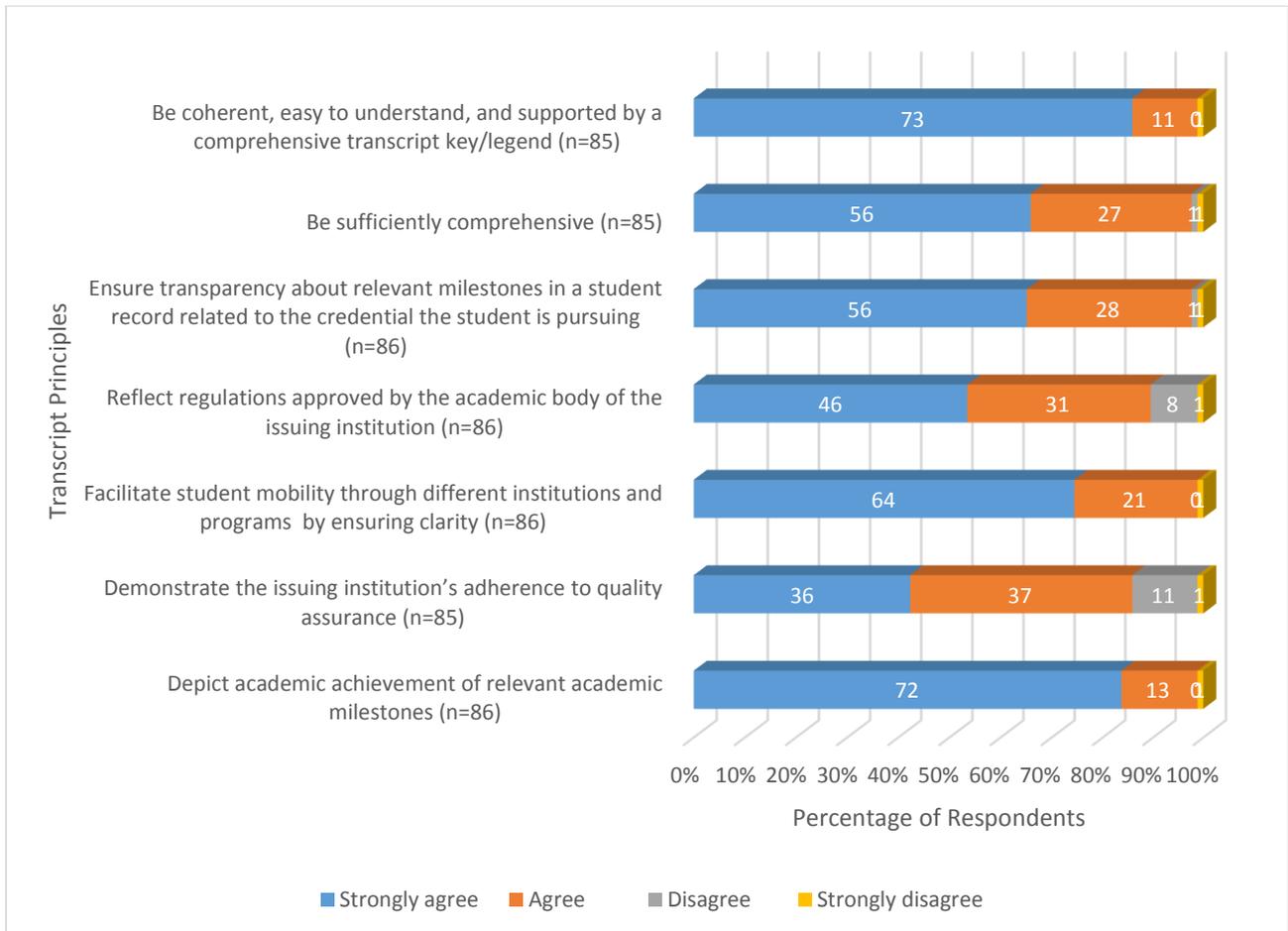
- argued that traditional methods of measuring achievement (credits, grades, grade point averages, etc.) may become obsolete in the future; therefore, transcripts should show *how* students achieve and not just *what* they achieve.
- **The transcript should strictly use institutional recognized and approved courses, credits, grades, and credentials, etc. to measure student learning and academic history.** This group suggested that expanding the transcript’s scope increases complexity and impedes third party interpretation. Further, they argued that increased scope undermines the fundamental principles of clarity and conciseness.
 - **Postsecondary institutions should re-imagine the transcript, rather than create a new definition, to prioritize student mobility.** A “passport to learning” ethos could underpin this re-imagined transcript, which necessitates inter-institutional recognition of prior learning and education from the student’s home institution.
 - **Postsecondary institutions must standardize the transcript (especially those areas detailing transfer credit, academic sanctions, and the expunging of records).**
 - **A new definition of the transcript must account for the purpose of the transcript.** Its form should be flexible, as well as account for the transcript’s intended audience and what the transcript verifies and validates.
 - **The transcript should keep step with technological advances.** It should allow for links to research work, fieldwork, internships, publications of the students, etc.

Figure 6 outlines the level of agreement of a larger grouping of respondents when queried about specific transcript principles. These are not necessarily mutually exclusive from some of the themes noted above. For example, 71% (60 / 84) of respondents agreed or strongly agreed with the statement below.

“Student achievement outcomes from programs reviewed by institutional academic governing bodies that are subject to academic quality assurance review should be the only items reflected on the transcript.”

The findings amplify the importance of connecting the official academic transcript to academic governance and quality assurance practices.

Figure 6: Level of Agreement with specific Transcript Principles



Subsection 2.2: Specific Transcript Components

In the interest of piloting transcript standards, Phase 2 included a draft version of transcript standards to determine support for specific data elements on the Transcript. Fifty-six respondents examined the pilot database and, of those, 8 people responded to more than one of the questions about the database for a total of 64 responses. Of those 79% (44) indicated no refinement was needed, 27% (15) suggested specific refinements to the transcript standards, 7% (4) suggested refinements to the student record system data input standards, and 2% (1) suggested an addition to the standards. Fifteen respondents provided additional comments which included recommendations regarding the search utility capacity of the database, the need for definitional clarity regarding the various transcript standards (i.e., what do some of the terms mean?), additional standard suggestions, and refinements or changes to the actual standards (for example, respondents suggested items be changed to essential (i.e., “course in progress,” “term grade point averages,” institutional contact information, “program, major, minor,” “student provincial identifier code,” and “withdrawal from an institution”), ensuring some elements be changed to discretionary (e.g., “class average”), and so forth. The national strategic advisory committee

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supporting the project reviewed and assessed the transcript standards for the new ARUCC PCCAT Guide in light of the various findings.

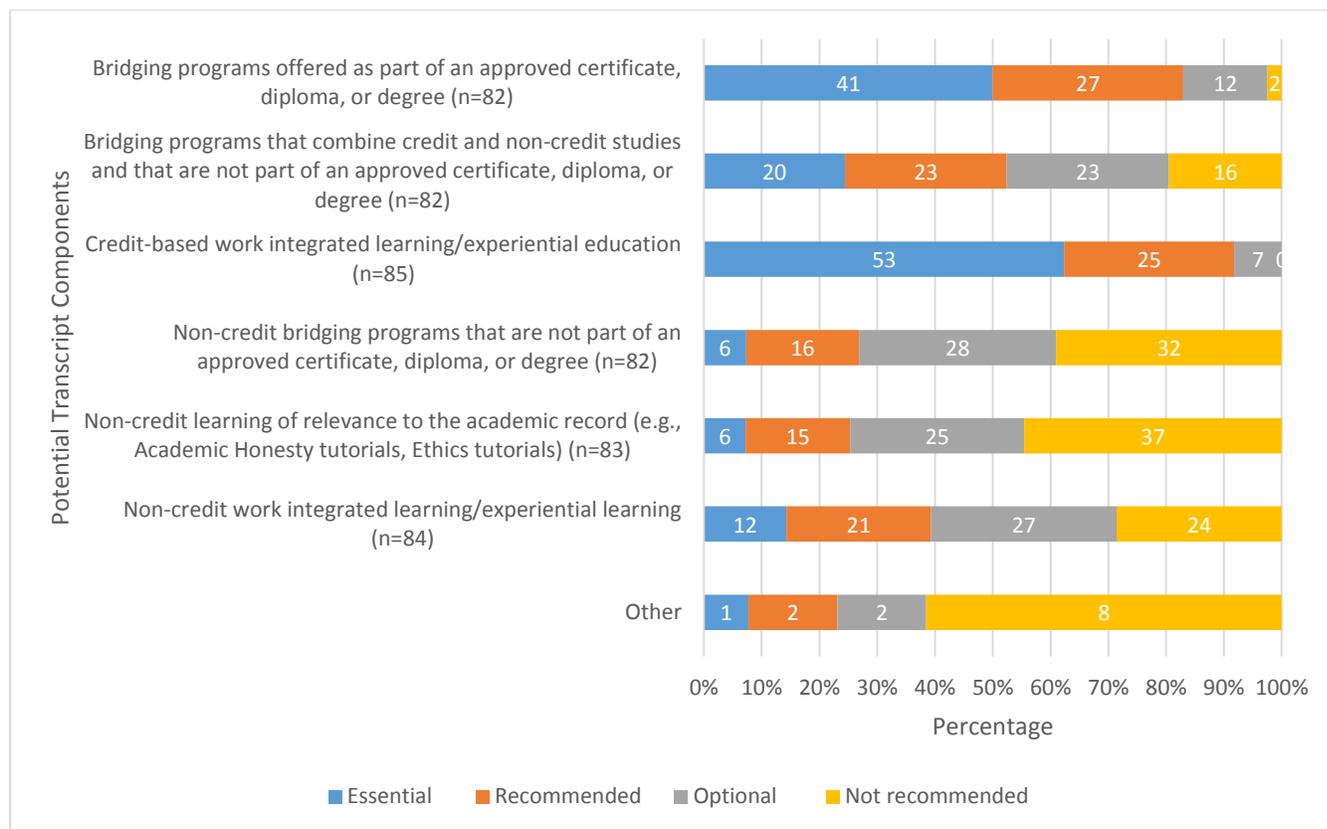
As an illustrative example of an outcome from the review of the data, the literature, and further stakeholder outreach, work integrated learning (co-curricular versus curricular) represents a new section within the standards. Transcription recommendations include transcript standards for various forms of experiential learning in and outside the classroom.⁷ Mode of delivery represents another example. Eighty five percent (85%, 63) out of 74 respondents indicated strong support for not identifying mode of delivery on a transcript. Rationales for this position indicated firm support for recognizing achievement of learning outcomes regardless of course delivery (online, in-person, hybrid, etc.). Concern was also noted about the potential for misinterpretation or bias towards the student if mode of delivery was noted.

Figure 7 outlines additional areas where respondents offered their expertise regarding the role of non-credit offerings on the transcript. The findings validate the importance of including non-credit offerings that are part of an approved certificate, diploma, or degree, the point being that programs that are approved and reviewed by institutional academic governing bodies and validated as part of a program or educational framework⁸ should be reflected on the official transcript. Having noted this, further consultation and findings stressed the importance of clearly identifying non-credit as distinct from credit bearing work. For those non-credit options that are not part of an approved academic educational framework, respondents and further study of other jurisdictions indicate that creating a record of achievement separate from the transcript is a preferred best practice. In such cases, it is advisable to clearly indicate the alternate record is not the official academic transcript. Non-credit record examples include a co-curricular record, a continuing education record, a micro credential of some kind, etc. Samples are provided in the “Resources” section of the ARUCC PCCAT Guide.

⁷ Refer to “Search Transcript Standards” within the ARUCC PCCAT Transcript and Transfer Guide for specific examples of how institutions are encouraged to transcript curricular versus co-curricular work integrated learning.

⁸ ‘Educational framework’ refers to those situations where an institution might, through its academic governing body, approve an array of courses or experiences that do not typically fall into the ‘for-credit’ realm or relate to one particular program. Achieving a particular array of community service learning that has been approved across an entire institution as a requisite to graduation is an example.

Figure 7: Non-traditional Data Elements as potential Candidates for inclusion in a Transcript



The findings from consultations with Canadian postsecondary experts indicate support for including items on the transcript that have been subject to review by the academic governing body and that are part of an approved program, credential, or educational framework at an institution.

Subsection 2.3: Transcript Operating Principles

In the Phase 1 survey, there appeared to be a diversity of opinion about making changes to previously published information on a student transcript (i.e., ‘changing history’); therefore, the Phase 2 survey and workshops facilitated an expanded conversation regarding the longevity of the academic information on a transcript, potential policies regarding retroactivity including expunging information from student records, and notating withdrawal and probation on transcripts.

Retroactive Policy Changes/Removing Data

Eighty-three percent (83%, 55) of 66 respondents agreed the future Guide should avoid retroactively applying policy changes to the transcript and expunging data. Seventeen percent (17%, 11) disagreed.

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The former group argued against postsecondary institutions retroactively applying policy changes to the transcript for the following reasons:

- History cannot be changed or rebuilt ('it's what has occurred, not what we wish had occurred').
- The transcript should reflect regulations in force at the time. Postsecondary institutions that attempt to rewrite history undermine the integrity of the information found on the transcript. The transcript may cease to be a trusted document.
- Changes undermine the basic principle that the transcript should embody a complete and historically accurate image of the academic record.
- Changes could negatively affect other institutions (i.e., they would have already made decisions based on the transcript at hand).
- No changes should occur to a specific course, program, grade, or GPA data. This information should reflect what occurred at the time the student was in attendance at the institution. Postsecondary institutions should not alter the transcript to reflect current course titles, numbering, etc.

Dissenting respondents (i.e., 17%, 11/66) indicated the following:

- It is not advisable for a postsecondary institution to adopt a blanket policy against retroactivity because certain circumstances permit schools to expunge information from a transcript (e.g., institutional error, legal reasons, successful student appeal, etc.). Further, institutions view successful appeals as correcting rather than expunging data.
- Postsecondary institutions that enforce a static record do not allow for valid amendments (e.g., for medical or personal reasons), which creates a significant access barrier.
- Institutional/local policies need to guide such decisions. For example, institutions may have discipline policies approved by the governing academic senate or board, which dictate that a disciplinary notation be identified on the transcript for only a period of time.
- The transcript legend should clearly state the institutional practices for the removal or altering of data.
- If postsecondary institutions remove or change any data on a transcript, the guiding principle of their actions should be "no negative impact on the student."
- With current interpretations of the revised Human Rights legislation, respondents indicated more students are requesting retroactive withdrawal from failed courses or from courses with poor grades as they argue that they failed to recognize their disability at the time, and were therefore unable to access accommodations to help them succeed.

Generally speaking, dissenting respondents suggested a need for detailed and commonly understood grounds to ensure equitable practices of retroactive changes/expunging of data. At minimum, an institution-wide policy was recommended.

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Academic and Non-Academic Misconduct

Phase 1 findings indicated institutions applied variable approaches when notating *academic* misconduct; in contrast, most do not notate *non-academic* misconduct. Respondents advised careful consideration and review of privacy and human rights legislation when developing institutional policies in these areas.

Academic Misconduct Findings

Of the 68 respondents, 50% (34) reported they notate academic misconduct on the transcript. Thirty eight percent, 38% (26) do not, and 12% (8) indicated it is not applicable.

Where provincial regulations do not mandate institutions to report academic misconduct on the transcript, responses vary as to how institutions approach transcript annotations:

- In general, postsecondary institutions never remove expulsions from a transcript.
- Where institutional policy on this topic exists, policies tend to determine the duration of the notation's presence on the transcript. Some do not remove it, some remove it after an appeals process and passage of an identified time period, and some remove the notation at graduation or beyond, with the exception of expulsion.
- Some institutions do not notate the reason for the withdrawal, suspension, or expulsion (only the consequence), while other institutions record the reason as "academic misconduct," "not in good standing," or the generic "required to withdraw."
- Select institutions treat academic misconduct as an internal, confidential matter. They may refuse to cite the reasons for student withdrawal to respect the student's privacy and given potential legal ramifications. These institutions view withdrawal penalties as harsh enough without transcript notations.
- Lastly, specific sectors in select jurisdictions are subject to government legislation that requires academic sanctions be noted on a transcript.

Non-Academic Misconduct Findings

Nineteen percent (19%, 11) of the 59 respondents indicated their institutions report non-academic misconduct on the transcript, and 81% (48) do not. Those that do may strictly note the consequence (withdrawal, suspension, expulsion), rather than the reason. Overwhelmingly, respondents asserted only academic misconduct should be notated given the academic role of the transcript. Other institutions cited privacy reasons, systems capacity limitations, or lack of awareness of non-academic infractions.

The new standards provide recommendations for both academic and non-academic misconduct with consideration for privacy and human rights regulations at the forefront.

Section 3: Exploring the Intricacies of Student Mobility

Subsection 3.1: Defining the Credit Hour

Phase 1 of the project and subsequent research indicated the credit hour continues to be the predominate form of characterizing academic studies at Canadian colleges, institutes, and universities. Further, there are different definitions for 'credit' in use in Canada although many share themes. There are also different degrees of transparency and coherency evident when describing credit weight on the transcript legend (i.e., the basic unit of measurement per hour). We learned in the first phase that the situation was impeding successful assessment for admission and transfer. To this point, we also heard some suggestion for greater transparency regarding course mode of delivery. In all cases, we also heard opposite views; therefore, further probing became necessary in Phase 2.

Defining credit hours, weight: the Phase 2 survey indicated 93% (71) of respondents agreed that institutions should define credit, credit weight, credit hours, etc. on a transcript legend. Eighty-six percent (86%, 66) agreed that at minimum institutions should define the predominant unit of measurement for learning in the transcript legend. Respondents advised the predominant unit of measurement should describe the unit value, as well as the instructional hours per unit/credit, per week, per term for each unit/credit value, and how the value relates to a course (or equivalent). Here are some of the apparent themes that emerged:

- Many argued that including the predominant unit of measurement in the transcript legend better facilitated transfer assessments. With this information, institutions could easily and efficiently determine transfer credit equivalency in the absence of transfer agreements and non-standardized approaches to credit systems.
- Overall, institutions should include this information on a transcript legend to satisfy principles of coherence, clarity, transparency, efficiency, and mobility.
- The dissenting group argued that most institutional credit systems are complex. If institutions attempt to describe their predominant unit of measurement on the transcript legend, they suggested the transcript would become confusing, complicated, and cumbersome. Additionally, institutions may struggle to standardize a predominant unit of measurement because different areas in the same institution may use different protocols (depending on the program, mode of delivery, etc.). Some institutions include a link to the relevant calendar sections or appropriate policies to address these discrepancies which seems to be a reasonable compromise.
- One respondent indicated the following: "There may not be a direct relationship between hours of instruction and the credit value. For example a course that runs 5 hours/week for 13 weeks may have the same credit value as a course that runs 3 hours/week for 13 weeks. The transcript legend should explain in general terms how credit is determined, i.e. "1 credit corresponds normally to 13 hours of instruction not including laboratories and auxiliary seminars." That vagueness might introduce potential error. Therefore, it is reasonable to conclude that a third party assessor of such a transcript would need to engage in more research and follow up to resolve any questions when assessing a student's background for transfer credit recognition or potential accreditation. Some argue that institutions should not include hours per week etc. in

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the transcript legend and that such details should be relegated to a course outline and/or calendar.

Mode of delivery: As mentioned previously, the majority of respondents, 85% (63/74) indicated institutions should not include mode of course delivery on a transcript for the following reasons:

- The transcript concerns itself with the learning outcomes, not how students achieve those learning outcomes.
- An institution's academic leadership and experts approve courses. We should not dissect the mode of course delivery because that undermines an institution's capacity to validate, monitor, and approve a course.
- Institutions may struggle to clearly identify modes of course delivery. For example, many face-to-face courses offer online and/or blended delivery.
- Institutions should not include modes of delivery in the transcript because it may bias the end user against the student.

Those respondents that felt mode of delivery should be identified on a transcript (11, 15%) provided the following rationales:

- It provides insight into the learning environment.
- Online courses are different from courses that institutions deliver face-to-face. Institutions should include mode of delivery to clearly highlight additional student skills achievement (e.g., 'if it is known that a student took online courses, this might indicate that the student indirectly acquired skills such as technical/digital competency').
- It may be appropriate in specific circumstances (e.g., a program or employer may desire a candidate with in-person lab participation in classes).

Subsection 3.2: Transcription of Transfer Credit

Phase 1 of the ARUCC PCCAT study revealed the Canadian registrarial and pathway community's solid commitment to developing partnerships among institutions. A number advocated for the flexibility to develop them in a customized fashion. These same respondents indicated a strong desire to harmonize institutional policy to avoid ad hoc transcript policies and practices in the area of transfer credit, to develop jurisdictional standards that preserve institutional autonomy, and to ensure transcripts contain information about transfer to enhance mobility. Differences of opinion emerged regarding principles related to the tension between program autonomy, institutional autonomy, and adoption of standards, and including details regarding studies taken at another institution on the home transcript. Therefore, the Phase 2 survey probed further to better understand the community's perspective on the risks and opportunities encountered when embedding information regarding studies taken at another institution.

One question focused on transcribing results from prior postsecondary institutions and the second on transcribing results when a student is concurrently registered.

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*Prior postsecondary:*⁹ Generally speaking, most respondents indicated support for coding recognized transfer credit for studies completed at another institution as long as it was clear it was transfer credit to ensure third parties did not confuse it with current studies at the subsequent institution. Identifying the name of the institution and the time period were seen as suitably transparent. The overarching rationale for this approach emphasized the value of identifying what educational studies led to the achievement of a credential at a particular institution. Placing this information in detail within the student information system was seen as helpful for other uses such as credential audit, prerequisite checking, advising, and reporting. Also raised was the importance of explaining the methodology used in the Transcript Legend (particularly if transferred courses impacted cumulative grade averages or credit counts; there was acknowledgement of the complexity of doing this equitably given the different grading systems at other institutions). Clarity, transparency, and mobility were seen as advanced by including this type of information.

Risks identified covered the following general areas: (i) the potential for error and future misinterpretation (e.g., inaccurate assessments, lack of currency if changes were made by the original institution after the transfer credit assessment occurred, confusion, and unclear presentation of information if it is not evident on the transcript that which resulted from awarding transfer credit); (ii) challenges with aligning different approaches (e.g., differences in credit and grading practices and overall standards); (iii) misinterpretation and potential for bias by third party reviewers (i.e., ‘that credential is not acceptable because it is based on transfer credit from X institution,’ ‘it is not possible to admit a student to X graduate program because their undergraduate record had transfer credit from a particular credential type,’ etc.); and (iv) control, legal and audit considerations.¹⁰ A select few thought the question in the survey was suggesting the ultimate goal was to create one shared official transcript across institutions where the final destination institution for the student became the holder of the official record. This was not the intention of the questioning. It is worth noting that only a few raised this as a significant concern and a few others raised the idea as a significant opportunity.

While the risks are noted, the general finding is that a degree of transparency on the transcript regarding prior postsecondary studies recognized for transfer is helpful and serves both the student, the institutions, and third party reviewers.

⁹ Survey question: In your opinion, what are the risks and opportunities when **prior postsecondary studies** are included on an institution's transcript? What policy and systems considerations emerge?

¹⁰ A select few respondents raised a concern about listing each course from the original institution on a subsequent institution's transcript, suggesting there were legal concerns; however, no regulatory information was provided to validate this point. There are audit and government reporting requirements that suggest it is important to be explicit about what is “owned” by one institution versus another. Select respondents indicated it was not a good practice to list anything about another institution on their transcript (due to an inability to control, verify, and manage the information).

*Concurrent postsecondary studies:*¹¹ Fifty-eight respondents provided reflections on this question. There were fewer dissenters and most focused on ‘how’ one would do this and the necessary agreements needed to ensure the partnership ran smoothly.¹² One respondent said it best: “the most important issue is to ensure that anyone looking at either transcript knows that the student is in such a program so that a complete picture can be determined.” Another respondent suggested that ‘the nature of the approach would depend on the nature of the partnership.’ The findings indicate success depends on establishing shared protocols that reflect the nature of the collaboration. Risks identified were far less than those mentioned for prior postsecondary studies although some were shared. Examples included concerns about shared supports, systems, and infrastructures, lack of control, legal authoritative considerations (again, no examples were provided to validate this concern), potential for duplication and error, and generally, concerns that focused on the ‘how’ of establishing such shared models successfully.

For both the prior postsecondary and concurrently registered scenarios, respondents emphasized the importance of ensuring transcripts tell the full academic milestone history of a student at an institution to maintain transparency regarding transfer credit and partnerships. Further, third party reviewers should be encouraged to seek official transcripts from all institutions attended (unless a shared, official transcript is created).

Subsection 3.4: Defining Inter-institutional Agreements

The findings from Phase 1 of the national ARUCC PCCAT study indicated numerous institutions do not notate partnership information on a transcript. Further, the variety of agreement types is causing confusion and negatively impacting attempts to reach a holistic understanding regarding the breadth and depth of joint programs in Canada. There were also suggestions that agreements in place between institutions in one province were not necessarily honoured in another province (i.e., an issue of reciprocity arose). For Phase 2, respondents were asked to identify other jurisdictions that might hold potential solutions or evidence to inform development of an inter-institutional agreement typology in Canada. Many of the examples suggested below informed the development of the inter-institutional definitions in the new ARUCC PCCAT Transcript and Transfer Guide; however, more research will be needed to fully develop a Canadian typology.

¹¹ Survey question: In your opinion, what are the risks and opportunities when **concurrently pursued postsecondary studies** are included on an institution's transcript? What policy and systems considerations emerge?

¹² Care was advised to resolve institutional differences collaboratively (e.g., resolving different semestering approaches, developing shared academic standards, establishing grade translations to ensure equal consideration, establishing regular data feeds, potentially issuing joint shared transcripts or having one institution as the responsible entity for issuing the official transcript, ensuring clarity in presentation on the transcript to make it clear concurrent registration is occurring, establishing shared reporting protocols and securing government support for the approach, organizing student supports to minimize impacts on students moving between two institutions concurrently, etc.).

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- International: the European Credit Transfer and Accumulation System (ECTS) and the Bologna Accord and more generally Western Europe, Australia, United Kingdom, and Germany
- United States: California State System
- Each province: there are a number of organizations that provide definitions for inter-institutional partnerships including the government ministries,¹³ quality assurance bodies,¹⁴ and within the glossaries and studies of various allied organizations and many individual institutions. The definitions are not necessarily the same at different organizations.
- Quebec: Cotutelles in Quebec -
http://www.crepuq.qc.ca/documents/rel_int/cotutelles_these.pdf
 U21 Universitas - <http://www.universitas21.com/member>
- Associations and national bodies
- Other: Trade agreements; inter-provincial patient agreements within the Health Care sector; public school agreements; institutional governance bodies; employers; professional associations; etc.

Subsection 3.5: Defining Inter-institutional Programs

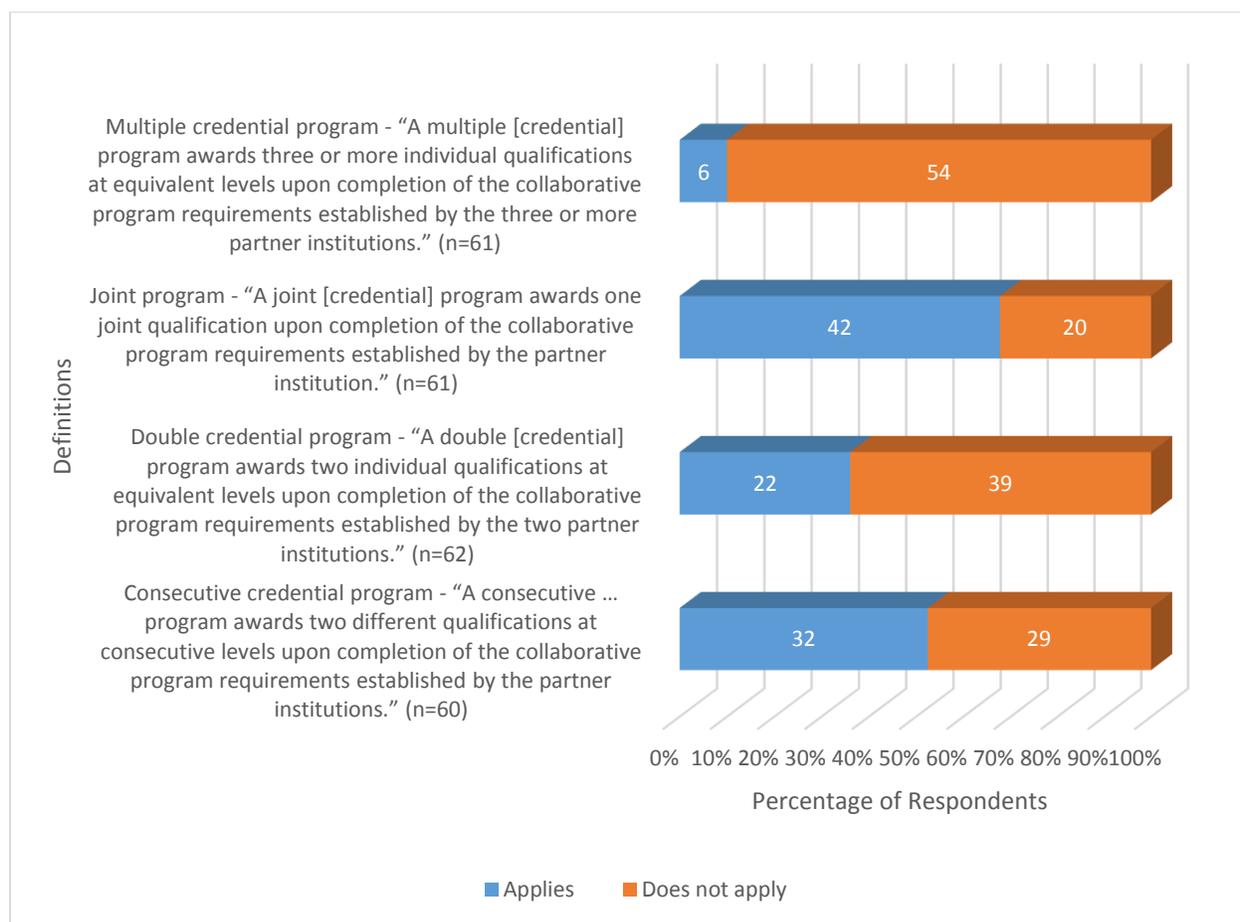
The findings from Phase 1 revealed a variety of terms in use in Canada to describe inter-institutional programs which is causing confusion; there is demonstrable evidence it is creating problems for researchers when analyzing Canada's success in the area of inter-institutional partnerships. Given that the Phase 1 consultation indicated the research should look to international models for advice in this area, the Phase 2 survey for the project tested some sample definitions for defining inter-institutional programs drawn from the scholarly research on international partnerships.¹⁵ Figure 8 provides an overview of the findings.

¹³ Example: <http://caat.edu.gov.on.ca/documents/AdmissionsPolicy.pdf>

¹⁴ Example: <http://oucqa.ca/framework/1-6-definitions/>

¹⁵ The definitions examined in the national survey were from a study regarding international partnerships: Knight, J. (2008). *Joint and Double Degree Programmes: Vexing Questions and Issues*. London: The Observatory on Borderless Higher Education

Figure 8: Applicability of Definitions for international Collaborative Programs to Canadian Contexts¹⁶



The most commonly shared is “joint program”; the least common is “multiple credential program,” with 88% (54 / 61) indicating the associated definition did not apply. When probed for clarification, respondents suggested the select definitions didn’t ‘quite’ apply to their jurisdiction or didn’t offer sufficient categories for the range of partnerships in which their institution engaged. Given the range of partnership types in Canada and the lack of a typology, these findings are not that surprising. We encourage institutions to review Dr. Knight’s comprehensive study for further insights.

Subsection 3.6: Operational Transfer Credit Nomenclature Usage

There is a tremendous variety of transfer credit terminology used in Canada to describe the particulars of transfer credit, blocks or clusters of courses, the nature of the credit assigned for past studies as it relates to the program to which the student is seeking access, whether or not it directly applies to a particular discipline (such as a major), and so forth. Phase 1 findings indicated this variety is having an impact on administrators, policy developers, and students. Given this, Phase 2 survey participants were

¹⁶ Definitions are attributed to Dr. Knight’s comprehensive study: Knight, J. (2008). Joint and Double Degree Programmes: Vexing Questions and Issues. London: The Observatory on Borderless Higher Education

asked to provide suggestions on how to encourage adoption of best practices for transfer nomenclature. Respondents validated the creation of the **ARUCC PCCAT Transcript and Transfer Guide** as a solid initial step. They also encouraged routine conversations and messaging to highlight interest, research and solutions for continuing to resolve the variety. The councils on articulation/admissions and transfer were identified as sources for best practice and related research. Respondents further emphasized the importance of engaging academic leaders and government colleagues to resolve differences. Further training of practitioners and policy developers was also recommended.

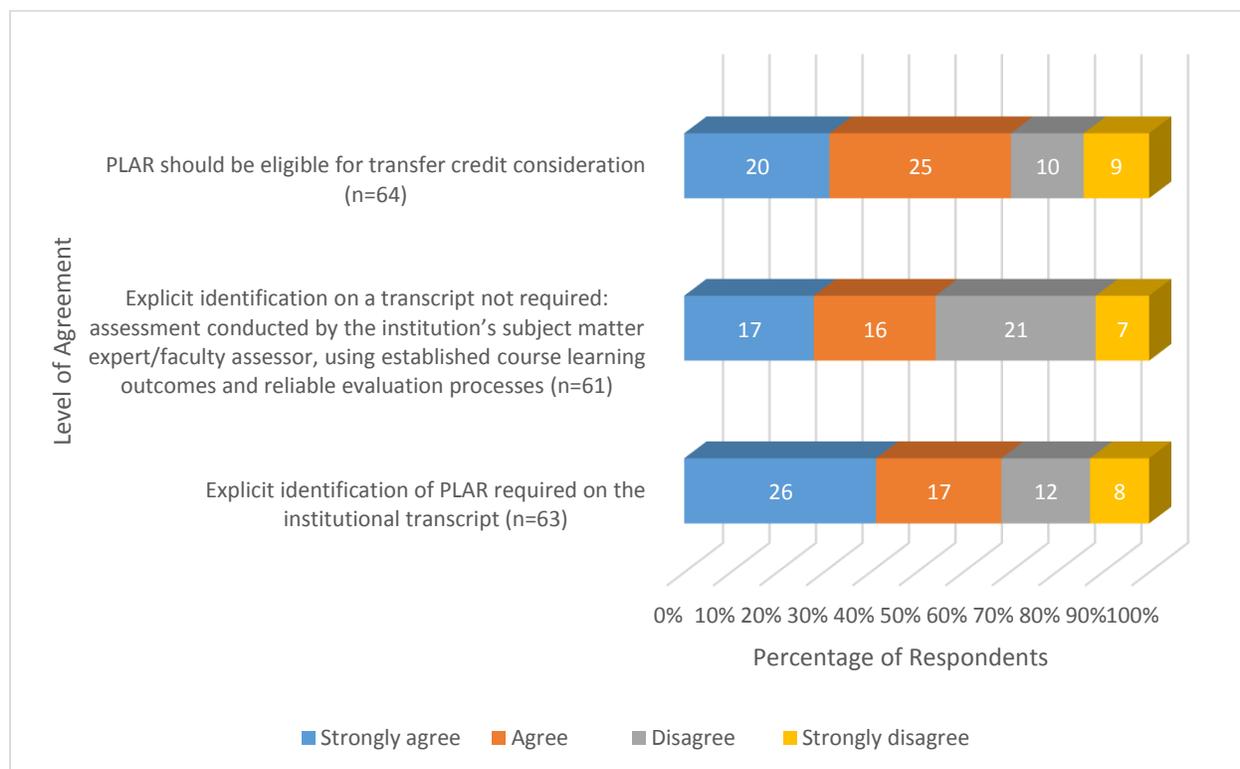
The respondents emphasized the importance of adopting the following principles to guide transfer nomenclature development:

- Establish clear nomenclature and definitions that are simple and understandable to a layperson and avoid jargon, acronyms, and “trendy names” (e.g., “2+2”);
- Preserve institutional autonomy;
- Align with international standards.

Subsection 3.3: Prior Learning Assessment (PLAR)

Phase 1 findings indicated a variety of practices across Canada for transcribing PLAR and assessing it for transfer. As a result of further probing in Phase 2, the responses highlight a difference of opinion regarding whether or not a PLAR assessment should be noted on a transcript. Figure 9 indicates the diversity.

Figure 9: Opinion Poll for PLAR - Transcript and Transfer Credit



The material in this document results from research and consultation conducted as part of the **ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study** (September, 2015).

When the PLAR assessment was conducted using an institution's expert/faculty assessor, 54% (33/61) indicated explicitly identifying PLAR as the source on a transcript is not required. However, explicit identification without this clarification resulted in 68% indicating it should be on a transcript.¹⁷

Respondents provided rationales for their responses. Those in favour of explicit identification indicated the following:

- Identification ensures the receiving institution understands the source of the credit. Proponents of this view felt that institutions who adopt PLAR as a principle should disclose the source of the assessment out of fairness and accuracy.
- PLAR is different from a course where students, "...may not have read the same material, done any exams, written any papers, or done projects like students do in class."

An alternate view was expressed by some respondents:

- If an institution grants a student credit for PLAR, then the institution should represent the credit on the transcript. In this instance, the student meets course outcomes and therefore, "previous experience should not be negated/overlooked." However, some argued that the institution should not identify whether they derive the credit from a PLAR process on the transcript (i.e., source is not relevant in this context). The student has met credit outcomes through a quality assured process; therefore, it is irrelevant whether they did so in a classroom or through PLAR. This is the model followed by the Quebec CEGEPs given the quality assured and controlled partnership in place with the government ministry.

Eighty-six percent (86%, 45/64) indicated PLAR should be eligible for transfer credit. Rationales provided by respondents generally followed the principle of ensuring students were not unduly disadvantaged or required to repeat work. There was also an emphasis on respecting quality assured PLAR assessment practices delivered by qualified subject matter experts.

For the dissenting respondents, there was uncertainty expressed regarding whether consistent, rigorous practice occurs across all PLAR assessments at all institutions. Questions were raised suggesting a lack of knowledge and confidence in institutional PLAR assessment processes; further, that the next institution in a student's educational journey should have the opportunity to reassess the previous work and experiences (i.e., to conduct a PLAR process again).

CAPLA's recently launched *Canadian RPL Quality Assurance Manual*¹⁸ demonstrates the national commitment to supporting quality assured assessment practices. The evidence from this opinion poll suggests there remains a continuing opportunity, as some respondents suggested, to conduct more research, share information, and undergo training (even of non-PLAR practitioners) to broaden understanding and support for PLAR.

¹⁷ Respondents were able to provide an opinion to all three questions.

¹⁸ Reference <http://capla.ca/quality-assurance/>

Subsection 3.7 of Consultation Document: Institutional Readiness for Documenting Final Achievement of Competency-based Education and Learning Outcomes

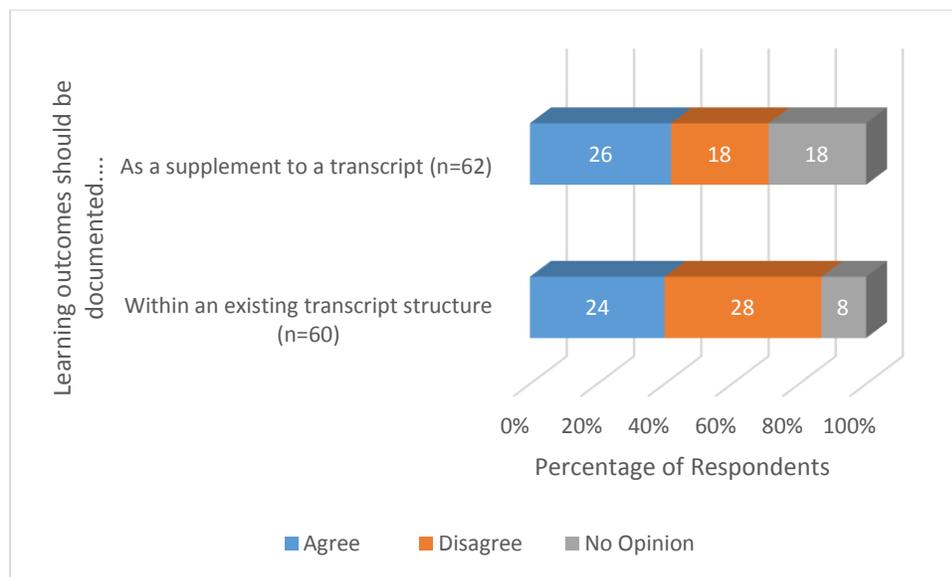
The ARUCC PCCAT study revealed that 62% (39) of institutional respondents were not experimenting with transcribing alternate forms of learning beyond the credit hour; 24% (15) were, and 13% (8) indicated not applicable (n=63). Comments shared by the 15 respondents indicated that institutions should capture workshops (e.g., financial, counselling, introduction to research, college life, orientation, etc.), community service, and other forms of learning, but to do so on some other document other than the academic transcript. Two respondents suggested publication within a Continuing Studies document as a viable opportunity. Examples of alternate forms of transcription that were reported included coding results such as the following:

- “Satisfactory/unsatisfactory” for practicums and “Pass/fail” in place of exchange grades
- Grades or “CR”¹⁹ for awarded transfer credit
- “Citation” to recognize completion of three Community Service Learning courses
- “CR,” “EQ,” “MO” (modified), “WI” (withdrawn)
- “T” – transfer; “P/F” - pass/fail; “CO” – continuance grade; “CR” – credit granted on work experience
- “pour les cours non crédités : attestation ou non attestation; pour les transferts de crédits : EX (exemption); auditeur libre; crédit ou Échec; compassion; abandon »

Polling of institutional respondents revealed disagreement regarding documenting learning outcomes within a transcript (n=60) or within a document that functions as a supplement to a transcript (n=62). Figure 10 provides the findings.

¹⁹ Sometimes the respondents explained their coding when responding to this question but not always.

Figure 10: Documenting Achievement of Learning Outcomes on a Transcript



Forty-two percent (42%, 26/62) of respondents agreed with learning outcomes and/or competency based learning achievement *supplementing* the transcript. The remaining 58% (18+18) were evenly matched between disagreeing and having no opinion.

Forty-six percent (47%, 28/60) disagreed with documenting achievement of learning outcomes within the existing transcript. The majority of the dissenting group indicated this information is already available in existing curriculum documents including syllabi and course outlines, as well as institutional websites. Others conflated learning outcomes/competency-based achievement with co- and extra-curricular activities, and indicated students should document these activities in a portfolio/another format outside of the academic transcript.

For those who supported including this information in a supplementary format, the representative rationales included the following:

- Ensures clarity and avoids confusion about achieved learning
- Allows flexibility for students when sharing achievements with third parties
- Introduces opportunities to link results from credit work with results from achievement of learning outcomes (e.g., as an addendum document to the transcript)²⁰
- Builds on existing examples (e.g., professional schools such as medicine and dentistry) which are already including competency-based outcomes on the transcript)

The majority of respondents provided no opinion when asked ‘what model of supplementary documentation for documenting achievement of learning outcomes would fit the Canadian context.’

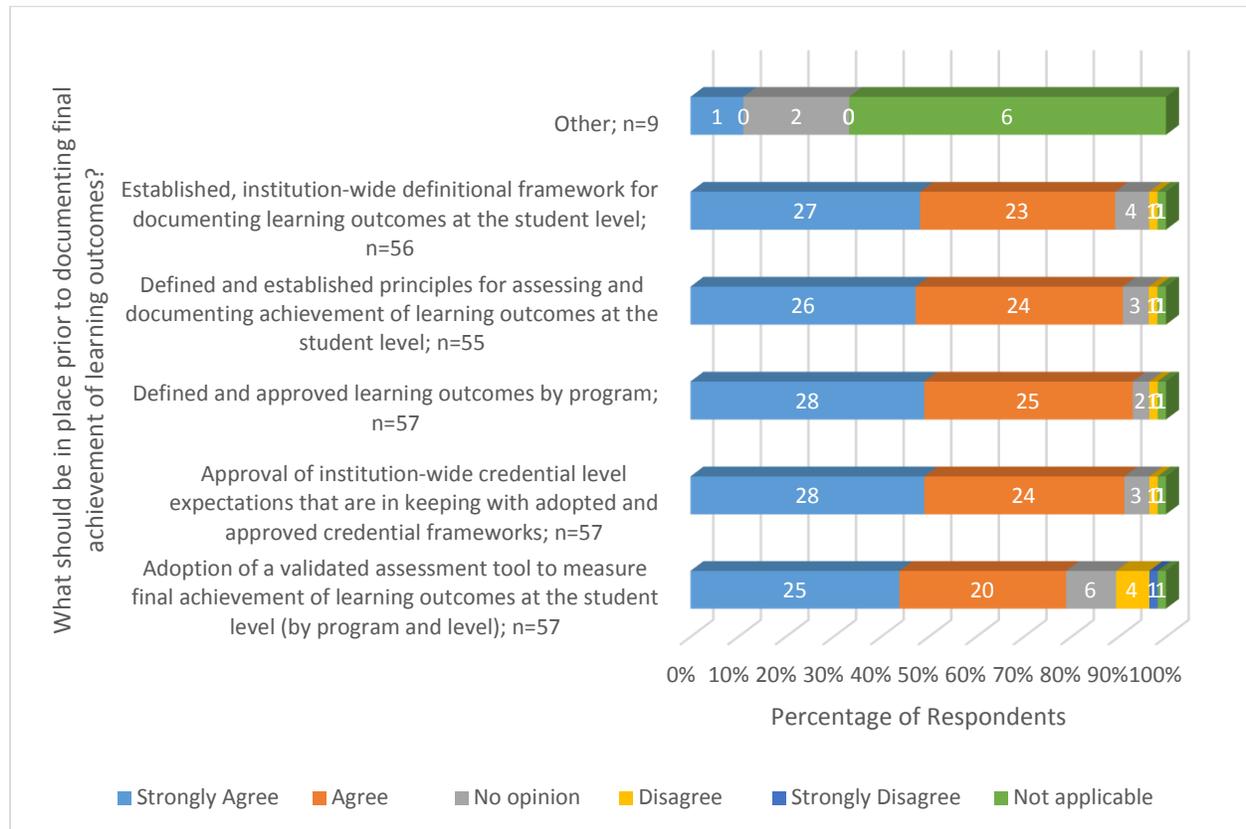
²⁰ Note: Stanford University is pursuing this model at the academic course level (however, not for co-curricular learning outcomes achievement).

The material in this document results from research and consultation conducted as part of the *ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study* (September, 2015).

For those few who did, most supported a complementary document model (i.e., a supplement to the transcript) similar to the United Kingdom, European, and Australian examples. The second group also supported the recommendation to adopt ‘some kind of online learning portfolio.’ There appears to be little support for badging or micro credentialing.²¹

Respondents were asked to identify the core requirements that must be in place before documenting achievement of learning outcomes at the individual student level (whether on a transcript or a separate competency-based record). The findings are available in Figure 11.

Figure 11: What must be in place prior to documenting learner achievement of learning outcomes at the student level?



Concluding Comments:

The breadth and depth of consultation with the Canadian postsecondary community has resulted in the creation of the **ARUCC PCCAT Transcript and Transfer Guide**. The variety of research methods employed included extensive reviews of institutional policies and websites, reviews of available foundational and scholarly research, two online national surveys, in-person and virtual workshops in every Canadian region supported by ARUCC and PCCAT, more than 50 stakeholder interviews, and debate and discussion with senior registrarial and pathway leaders across Canada. The amalgam of this research

²¹ A form of credentialing to recognize learning. See EDUCAUSE for more information: <http://www.educause.edu/library/badges>

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provides a rich and comprehensive foundation for the Guide that is evidence based and informed by experts. The national **ARUCC PCCAT Transcript and Transfer Guide** achieves the original principles and objectives of the project: to continue to create the infrastructure and tools for Canadian registrarial and pathway practitioners and policy developers that enhance student mobility and yet respect and preserve institutional and provincial autonomy and authority. The tremendous support for this project by hundreds of professionals representing Canadian institutions and allied organizations from across the country demonstrates the collaborative culture that exists across regional boundaries.

As with any project, the registrarial and pathway community suggested additional research and/or information sharing opportunities in the following areas:

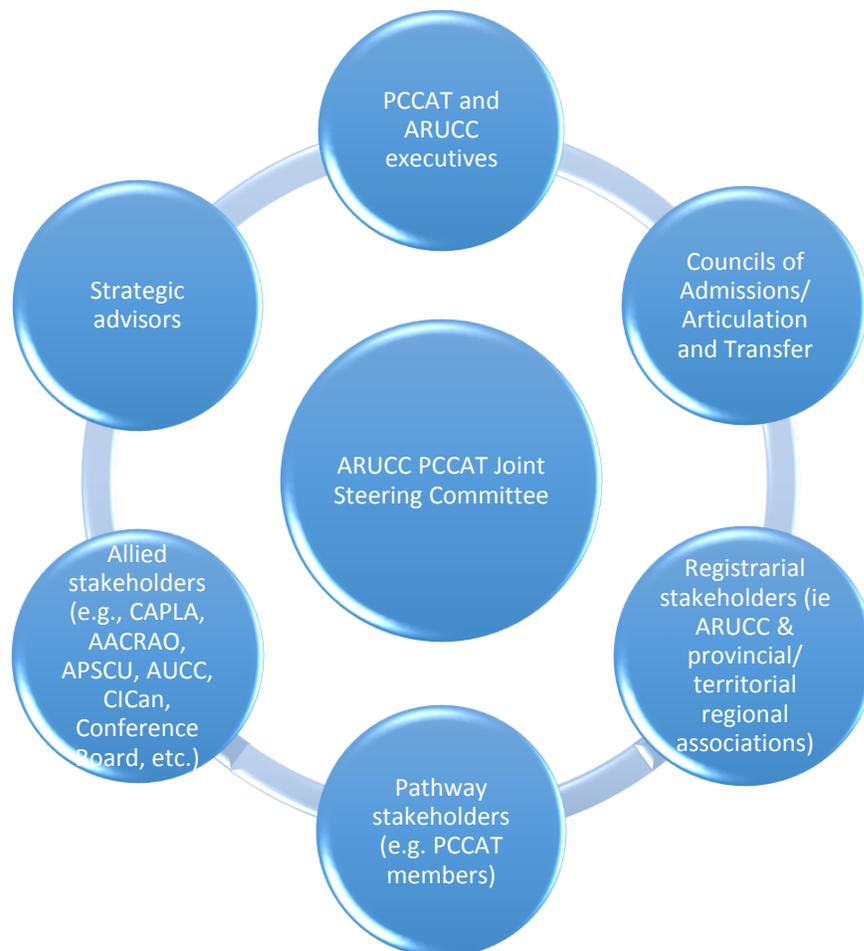
- Researching and developing a Canadian inter-institutional partnership typology and creating capacity to understand the breadth and depth occurring across the country,
- Exploring enhanced data sharing models and reporting that builds on the comprehensive work of CanPESC and provincial organizations like OUAC, BCcampus, and OCAS,
- Studying and creating a comprehensive student record that reflects final achievement of learning outcomes at the course, program, or credential level,
- Creating information sharing and training opportunities to advance understanding and opportunities for prior learning assessment and recognition,
- Developing mechanisms, communities of practice, and data capacity to allow a full appreciation of the breadth and depth of student mobility across provincial and territorial boundaries.

These suggestions validate efforts underway such as the ARUCC Groningen Student Mobility Task Force, the collaborative efforts and research of the councils on admissions/articulation and transfer both within and across regional boundaries, the commitment on the part of institutions and allied organizations to support students, student mobility and related research, the work of the CanPESC committee in the area of data exchange and standards development, and initiatives such as the **Framework for Collaboration** signed by CICan and Universities Canada.

Appendix A: Consultation Groups

Figure 12 identifies the various parties involved in the consultation process. Additionally, the leadership of each regional registrarial and pathway organizations/associations has been consulted. This facilitated the reach of the consultation and validation process. The **registrarial** stakeholders are defined as ARUCC members primarily supplemented by registrarial members of regional associations aligned with ARUCC. Examples include the provincial registrarial organizations in the various provinces and territories. PCCAT members and the councils of articulation/admissions and transfer were also core participants in this project; many, along with ARUCC, are sponsors of the project and all have an interest in the success of the project goals. The pathway organizations include the following: Alberta Council on Admissions and Transfer (ACAT), British Columbia Council on Admissions and Transfer (BCCAT); Campus Manitoba; Maritimes Provinces Higher Education Commission (MPHEC); the Saskatchewan Credit Transfer and Learner Pathways Committee; New Brunswick Council on Articulations and Transfer (NBCAT); Ontario Council on Articulation and Transfer (ONCAT); and the Pan-Canadian Consortium on Admissions and Transfer (PCCAT).

Figure 12: Stakeholders Involved in Consultation Process



The material in this document results from research and consultation conducted as part of the *ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study* (September, 2015).

Allied Stakeholders

The first phase of the ARUCC PCCAT project recognized the importance of allied stakeholders to this project. Immediate examples include the Canadian PESC User Working Group; the Canadian Association for Prior Learning Assessment (CAPLA); leadership involved in the strategic guidance of the co-curricular record; the American Association of Collegiate Registrars and Admissions Officers (AACRAO); the Councils of Ministers of Education, Canada (CMEC) Canadian Information Centre for International Credentials (CICIC); the Higher Education Quality Council of Ontario (HEQCO); the Canadian Association of Graduate Studies; Universities Canada; Colleges and Institutes Canada (CICan); and the Conference Board of Canada. These national and international organizations comprise the groups that appear to have close interest in the areas of transcript standards and transfer credit policy. Each were invited into this consultation process.

Appendix B: Summary of Consultation Questions

- Section 2: Toward a 2015 ARUCC Transcript Guide.....
- Subsection 2.1: The Role of the Transcript
1. Should the role of the transcript be redefined? If yes, how and what principles should underpin this redefinition?
 2. Indicate your level of agreement with each of the following transcript standard principles. A transcript should (note: these are in addition to those already confirmed in Phase 1).....
 - i. Depict academic achievement of relevant academic milestones.....
 - ii. Demonstrate the issuing institution’s adherence to quality assurance.
 - iii. Facilitate student mobility through different institutions and programs by ensuring clarity. ...
 - iv. Reflect regulations approved by the academic body of the issuing institution.
 - v. Ensure transparency about relevant milestones in a student record related to the credential the student is pursuing.
 - vi. Be sufficiently comprehensive.
 - vii. Be coherent, easy to understand, and supported by a comprehensive transcript key/legend.
 3. Identify your level of agreement with the following statement: Student achievement outcomes from programs reviewed by institutional academic governing bodies that are subject to academic quality assurance review should be the only items reflected on the transcript. What is the rationale for your position?
 4. What other documented outcomes regarding learner achievements should be published on a transcript? What is the rationale for your position?
 5. If approved by the institutional academic governing body, which of the following should be represented on a transcript: Bridging programs offered as part of an approved certificate, diploma, or degree; Non-credit bridging programs that are not part of an approved certificate, diploma, or degree; Bridging programs that combine credit and non-credit studies and that are not part of an approved certificate, diploma, or degree; Non-credit learning of relevance to the academic record (e.g., Academic Honesty tutorials, Ethics tutorials); Credit-based work integrated learning/experiential education. What is the rationale for your position?
- Subsection 2.2: Specific Transcript Components.....
6. What is your opinion regarding the future recommendations for the various transcript component and student record system categorizations in the following database: <link to database deleted> **Error! Bookmark not defined.**
 - The future recommendations for both the transcript standards and the student record system seem appropriate.

The material in this document results from research and consultation conducted as part of the *ARUCC PCCAT National Transcript and Transfer Credit Nomenclature Standards Study* (September, 2015).

- Refinement of transcript component recommendations is required in the following areas:_____
 - Refinement of student record system recommendations is required in the following areas:_____
 - The following items should be added: _____
7. The search categories in the Transcript Standards Comparison Database...(Response Categories: make sense; should be refined as follows....)

Subsection 2.3: Transcript Operating Principles.....

8. Should the future Guide re-emphasize a commitment to avoiding retroactive application of policy changes to a transcript? Should the future Guide re-emphasize a commitment to avoiding expunging data from the student transcript?.....
9. What core principle(s) should govern best practice in this area particularly if the practical evidence suggests retroactive changes to student records occurs (selectively) at a number of institutions in Canada?.....
10. If it is known that an institution engages in this practice beyond the rare exception, what implications does this have for how transcripts are received, assessed, and perceived by other institutions when students apply for further studies?
11. Is there a chance that retroactive removal of information from a student transcript would impede student mobility and perceptions of an institution’s commitment to academic quality?
12. Provide a rationale for your responses above.
13. Does your institution report academic misconduct on a transcript? For those institutions that do report academic misconduct on transcripts, what reasons and/or rationale underpin this approach?
14. Does your institution report non-academic misconduct on a transcript? What rationale underpins your institution’s approach?.....

Section 3: Exploring the Intricacies of Student Mobility.....

Subsection 3.1: Defining the Credit Hour

15. Do you agree that how your institution defines credit, credit hour, and credit weight should be identified on an institutional transcript key/legend to facilitate assessment and transfer? Please provide a rationale. (Response categories: Agree, Disagree)
16. Confirm your agreement with the following: at minimum, institutions should specifically define within the transcript key/legend the predominant unit of measurement for learning. This should describe the unit value and the number of hours of instruction per unit/credit, per week, and per term for each unit/credit value and how the unit/credit value relates to a course (or equivalent). If you disagree, please provide a rationale.....
17. Phase 1 findings suggest there is very selective interest in including mode of delivery on a transcript; in contrast, some jurisdictions and institutions focus on learning outcomes and

consider mode of delivery irrelevant. In your opinion, what are some of the considerations that should drive whether or not mode of delivery should be identified on a transcript? What is the rationale for your response?.....

Subsection 3.2: Transcription of Transfer Credit

18. In your opinion, what are the risks and opportunities when student information regarding studies taken at another institution is embedded within your school’s transcript? What policy and systems considerations emerge?.....

19. What assumptions drive decision making in this area? What might be ways to mitigate reliance on those assumptions?

Subsection 3.3: Prior Learning Assessment (PLAR).....

20. Identify your level of agreement with the following statements:.....

- PLAR results should be explicitly identified on the institutional transcript.....
- PLAR results do not need to be explicitly identified when the assessment is conducted by the institution’s subject matter expert/faculty assessor, using established course learning outcomes and reliable evaluation processes to assure quality.....
- PLAR results should be eligible for transfer credit assessment

21. Provide a rationale for your responses above.

22. Are there other considerations and/or potential research that the researchers should explore to help inform development of promising national practice for transcribing PLAR and assessing it for transfer credit?.....

Subsection 3.4: Defining Inter-institutional Agreements

23. What other jurisdictions might provide a definitional framework for inter-institutional agreements that would lend insights to the Canadian postsecondary sector?

Subsection 3.5: Defining Inter-institutional Programs

24. Do the following definitions apply to your local context?.....

- Consecutive credential program - “A consecutive ... program awards two different qualifications at consecutive levels upon completion of the collaborative program requirements established by the partner institutions.” **Error! Bookmark not defined.**
- Double credential program - “A double [credential] program awards *two individual qualifications* at equivalent levels upon completion of the collaborative program requirements established by the two partner institutions.”
- Joint program - “A joint [credential] program awards *one joint qualification* upon completion of the collaborative program requirements established by the partner institution.”
- Multiple credential program - “A multiple [credential] program awards three or more individual qualifications at equivalent levels upon completion of the collaborative program requirements established by the three or more partner institutions.”

Subsection 3.6: Operational Transfer Credit Nomenclature Usage

25. How might adoption of new best practices or promising practices for transfer credit nomenclature be encouraged and realized across Canada?
26. Are there any transfer credit terms missing from your local context that you have noticed in other jurisdictions and that you would recommend be adopted as a standard in light of the changing Canadian postsecondary environment?.....
27. What principles should inform good practice when implementing transfer credit nomenclature?.....

Subsection 3.7: Institutional Readiness for Competency-based Education and Learning Outcomes.....

28. Is your institution experimenting with transcribing alternate forms of learning beyond the credit hour? Click on “Not applicable,” if you do not represent an institution.
29. If you represent an institution, provide an example of where your institution has represented a final result other than a grade on a transcript or in another institutional artifact. Does your institution have a policy in place that underpins this practice? If so, provide the URL for the policy. (Response categories: Yes, please explain; No; Not applicable)
30. Identify your agreement with the following: learning outcomes and/or competency-based learning achievement should be documented...(Response Categories: Agree, Disagree, No opinion, Don't know)
- Within an existing transcript structure.
 - As a supplement to a transcript.....
31. Rather than expanding the transcript, do you think a separate complementary document is necessary that details alternate forms of learning outcomes achievement?.....
32. If yes, what would you recommend? If no, proceed to the next question.
- Something similar to the UK HEAR Document, the European Diploma Supplement, or the Australian AHEGS Document
 - Some form of Badging.....
 - A new competency report
 - Some kind of learning portfolio
 - Other; if you responded with “Other,” provide details here.....
33. What core requirements must be confirmed and in place before documenting achievement of learning outcomes at the individual student level whether on a transcript or on a separate competency-based report?.....
- Check all that apply. Response categories: Strongly Agree, Agree, No opinion, Disagree, Strongly Disagree, Not applicable

- Adoption of a validated assessment tool to measure final achievement of learning outcomes at the student level by program and level.....
 - Approval of institution-wide credential level expectations that are in keeping with adopted and approved credential frameworks.....
 - Defined and approved learning outcomes by program.....
 - Defined and established principles for assessing and documenting achievement of learning outcomes at the student level.
 - Established, institution-wide definitional framework for documenting learning outcomes at the student level.
34. If you chose “Other,” please provide the explanatory details here.
35. Is there anything else you would like to add to support this project?