



# PROACTIVE TRANSFER CREDIT COMMUNICATION

Examining the relationship between proactive credit transfer communication, applicant conversion rates, and student persistence (ONCAT Project 2015-06)

[Executive Summary](#)

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Student mobility has become an increasingly prevalent topic of conversation throughout the post-secondary education sector. In addition to providing cost savings to students and government, recognition of prior education permits students to complete their credential at an institution that best meets their needs and contributes toward facilitating an education system that is both accessible and equitable (Zhou, Hamade & Camman, 2014). There are multiple reasons why institutions may wish to provide an applicant's transfer credit assessment prior to the applicant accepting or declining the offer of admission. Institutions may also elect to wait for an applicant's commitment prior to initiating the transfer credit assessment process.

With funding from the Ontario Council on Articulation and Transfer (ONCAT), researchers from the University of Ontario Institute of Technology (UOIT) undertook a three-year study to examine the opinions and perceptions of those transferring from other universities or colleges. The primary aspect being studied was a modification in the timing and the processes to inform students about the transfer credits that they could receive at UOIT. The standard process, or baseline, was a currently existing manual, PDF and paper-based, system. The transfer credit evaluation and notification system was then revised to a semi-automated process that allowed applicants to receive their transfer credit assessments in conjunction with their offer of admission via a self-serve applicant portal. This study specifically excluded applicants to formal pathways, and engineering transfer applicants who follow a differentiated process.

The Social Research Centre, a UOIT based research centre affiliated with the Faculty of Social Sciences and Humanities, was engaged to assist in the development of, and to program, administer, and analyze a sixteen question attitudinal survey. This survey explored the attitudes and perceptions of incoming transfer applicants to the student facing side of the transfer credit process as a whole, including communication and notification mechanisms. Additionally, application and conversion data, student success and retention data, and impact on internal business practices were also recorded.

Analysis of student attitudes and perceptions through Phases 1-3 shows trends only, however, it is clear that some of the trends are representative of the participants' attitudes and behaviours as correlated through multiple questions, including free-form comments. Respondents overall were satisfied with UOIT and the transfer process. Transfer credits are of value to incoming transfer applicants and all respondents indicated they would prefer to receive an evaluation of their transfer credits prior to making a decision on an offer of admission to UOIT. While all respondents indicated a preference for advance notice, many indicated higher priority in the programs offered at UOIT, the location of the school, and the learning environment. In every phase of the study, the responses indicate that quality is more important than quantity; applicants are happy to wait to receive an evaluation that is more complete. Moreover, it is still possible for an applicant to be completely satisfied with the amount of transfer credits granted, despite not having received a complete evaluation at the time of offer.

While the process in Phases 2 and 3 was more automated, the results are now available to students in a self-service portal. There may exist an issue in the communication with applicants regarding the transfer credit process. Applicants are now required to log-in to their applicant portal and view any updates made to their transfer credit evaluation. If the detailed offer letter is not read in its entirety, applicants may miss the information, not realizing that they have a transfer credit evaluation waiting for them. It could be that the communication to encourage students to view the portal regularly is lacking. Students may or may not be receiving transfer credit notifications far earlier than they realize, but they are not checking the portal.

In Phase 3, challenges with document submission through the applicant portal required the institution to revert back to email and web form. It is possible that this technical challenge impacted the level of satisfaction with the ease of the submission process in that students who had expected to submit through the portal received an email asking manually for submissions, causing confusion. Additionally, those who did not submit

documentation through the portal in a timely manner were also notified via email, which may have created confusion regarding preferred method of submission.

Over the course of this study, the number of offers and accepts relative to the respondents was fairly consistent year over year, while the conversion rate decreased in Phase 3 after all changes to the transfer credit process were made. During the time of the study, in an effort to increase student mobility from college to university, UOIT increased the number of formal pathway programs available and witnessed an increase in applications, offers, and conversion rates to these formal pathway programs. This increase may be a contributing factor to the decrease in respondent conversion during Phase 3 of the study, particularly as some applicants apply to the pathway program and the four-year version of the program as a backup. If they are accepted to both programs, the pathway program is often the preferred option due to the automatic transfer credit block awarded.

Over 95% of Survey respondents who attended UOIT remained in good standing (a grade of C or higher). Approximately 70% of the students achieved an average of B- or higher. The persistence of survey respondents is higher than that of applicants from secondary school, with a difference of 19% for year one persistence in Phase 1 of the study. The success of respondents who attended UOIT, and higher persistence rates, may indicate that transfer students' prior experience in post-secondary institutions make them better prepared for the educational environment in comparison to secondary school students.

Despite mixed respondent feedback regarding the efficacy of UOIT's transition to a semi-automated proactive process, transfer credit staff experienced significant time-savings, as they were no longer required to type transfer credit assessments and e-mail multiple iterations of an assessment to every transfer applicant over the course of the admissions cycle. These efficiencies permit staff to provide a higher level of service to an increasingly large applicant pool. Semi-automation also ensures that instances of human error are reduced, as preliminary evaluations are based on an automatic comparison of Electronic Data Interchange (EDI) transcripts and UOIT's transfer equivalency database.

Recommendations for implementation of this process at other institutions include developing a workflow solution for credit evaluation process and student communication; and early discussion with IT service areas to ensure an adequate amount of human and technical resources are available for the duration of the entire process and for potential revisions or improvements after launch. It was concluded that institutions with the time and resources to implement such a project should consider it a worthwhile endeavour, as the impact on applicants, students, and staff are far reaching.

#### *Project limitations*

As a research team, we noticed inconsistencies in the response rate and potentially in the logic of the responses. This could be a consequence of the timing of the surveys which may have impacted the respondents' desire to complete the survey and their ability to accurately recall their experience.

It is difficult to conduct a multi-year study when working with disparate populations. There is a lack of continuity in their experiences and therefore in their survey responses. In an ideal world, a study of this nature would track one group of applicants who were exposed to the original process as well as subsequent improvements.

Efforts were made to increase formal pathway programs available at the same time this study was being conducted. This external factor may have influenced the results relative to the sample population. Ideally, any changes that may have unintended consequences for the study should be held until study completion to ensure data is reflective of only the changes being specifically monitored.