



Canadian Bureau for  
International Education



**Assessing and Implementing Credit  
Transfer in Student Mobility Partnerships:**  
A HOW-TO GUIDE  
FOR POST-SECONDARY  
INSTITUTIONS

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*learning beyond borders*

## INTRODUCING *LEARNING BEYOND BORDERS*

In February 2017, the Canadian Bureau for International Education (CBIE), alongside over 90 member institutions, launched *Learning Beyond Borders* –a two-pronged national initiative to promote learning abroad and spark innovative institutional practices.

As part of this initiative, institutions set an objective to understand the barriers students face when considering learning abroad opportunities and identify those which they may begin to address.

## WHAT PREVENTS CANADIAN STUDENTS FROM TAKING ADVANTAGE OF LEARNING ABROAD?

Participating in learning abroad can be a powerful way to gain insight into cultural differences, be exposed to new learning contexts and cultivate understanding of global issues. However, in spite of interest from students and commitment from higher education institutions across Canada, [research shows](#) that the number of students participating in learning abroad remains consistently low, especially when compared with other developed countries.

Institutions participating in the *Learning Beyond Borders* initiative have found that a top concern for students is that course work completed abroad at a partner institution will not be acknowledged through transfer credit when they return home, perhaps delaying their graduation.

In order to support institutions in addressing this top barrier CBIE has developed the following how-to guide for educators on credit transfer in student mobility partnerships. The guide is a 7 part collection of principles, standards of good practice and practical case studies developed in collaboration with institutions across Canada. The resource promotes developing a transparent, clear and student-accessible credit transfer process to make learning abroad more attractive and accessible to students:

1. [Eleven Principles of Credit Transfer Principles of Credit Transfer in Learning Abroad Partnerships](#)
2. [Assuring Quality of Transfer Credit in Learning Abroad Partnerships](#)
3. [Overcoming Challenges in Assessing Learning Abroad Transfer Credit](#)
4. [Issues and Best Practices in Recognizing Learning Abroad Transfer Credit for Colleges](#)
5. [Building and Benefitting from International Partnerships](#)
6. [Faculty Members and Learning Abroad: A proposed continuum of engagement](#)



## THE CHALLENGES OF CREDIT TRANSFER

Canadian institutions have a long-standing commitment to international student mobility partnerships. Credit transfer is almost a universal component of such partnerships, yet how it is facilitated and who bears the risk: student or institution, is varied. Reducing uncertainty and struggle for students and building more direct pathways to credit transfer is critical if we are to improve learning abroad participation rates. This requires a coordinated effort across academic programs, the international office, and other administrative units supporting the process. Some current challenges which ultimately deter participation include:

### **BURDEN OF TRANSFER CREDIT PLACED ON THE STUDENT**

As this responsibility of determining transfer credit is placed on students rather than institutional professionals it generates uncertainty and communicates to students that the institutional value placed on learning abroad is symbolic rather than enabling.

### **ACCESS TO INFORMATION**

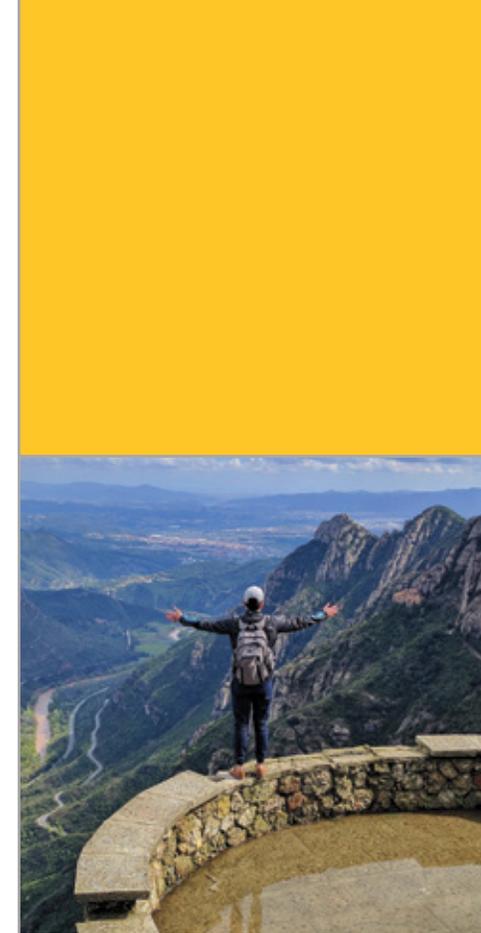
Students often lack access to timely, program-specific credit transfer information before applying for a learning abroad experience.

### **COMMUNICATION**

At the program level, students can struggle to understand the ideal time and/or the type of international experience that best suits their academic requirements.

### **TIME**

In learning abroad, course planning must take place well in advance of the experience in order to ensure that the maximum credits can be transferred.



**IN PRACTICE:** At the very beginning of Thompson Rivers University Study Abroad Guide and on the front page of the Study Abroad website there is a statement that says: "Courses you take abroad will be counted towards your degree. If you plan your courses ahead of time and work with a program advisor then you will not delay your graduation."

## CREDIT RECOGNITION FRAMEWORK

To address these challenges and build a student-centric credit recognition framework, four inter-related elements that impact the credit transfer process must be considered and are described in this resource:

- Fundamental principles of credit transfer
- Partnership assessment
- Credit transfer implementation
- Quality assurance

### FUNDAMENTAL PRINCIPLES

Fundamental principles underscore the difference between learning abroad credit recognition with partner institutions and credit transfer requests. For a complete list see [Principles of Credit Transfer and Course Recognition in Study Abroad Partnerships](#).

#### MINIMIZE STUDENT RISK

Institutions can minimize risk placed on the students by ensuring that courses have been assessed prior to approving the experience. If a complete assessment is not possible, faculty should make a judgement based on whether the international partnership was formed and verified based on institutional parity. Where there is doubt, a review can occur through a pre-established [Quality Assurance](#) process.

#### DEVELOP PATHWAYS

Diverse pathways should be clearly mapped and shared with students to demonstrate how graduation-delay can be avoided. This mapping should indicate the best time in each program to participate and which courses they should take prior, during and post-learning abroad to ensure they receive optimal credit transfer.

#### ESTEEMED CREDIT TRANSFER PROCESS IN PARTNERSHIPS

Assessing credit through a partnership agreement should be simplified compared to a standard transfer process, since the institution has partner status and has been verified to offer an academic experience of equal quality to the experience they receive at home.



**IN PRACTICE:** The University of Alberta makes recommendations to students as to which of their 300 Education Abroad programs are relevant by Faculty and program, based on past student participation, amount of transfer credit available and relevance of content.

## PARTNERSHIP ASSESSMENT

Partnership assessment refers to the process of determining whether an institutional partner is not only an appropriate fit for student mobility at an institutional level but also at the faculty and program levels. There are a number of considerations for [selecting a new partner](#), or assessing an existing partnership.

### CONDUCT A COURSE TRANSFER ASSESSMENT

Ideally this assessment is conducted prior to entering into a partnership agreement, and at least one academic program area is committed to reviewing the course transfer opportunities and developing recommendations for interested students. This must be done by faculty with content expertise and program knowledge in conjunction with the international office.

Questions to ask include: Are there enough courses in each semester to provide students with enough transfer credit? Is there a specific semester at the partner institution where the required courses are offered? How might a pathway be designed? How will any pre-requisites be addressed upon return?

### CONDUCT AN EXPERIENTIAL LEARNING ASSESSMENT

In the case of co-operative work or experiential learning program requirements, the assessment process is similar and done in conjunction with program coordinators, ideally prior to making any work or internship opportunity available. Students should know prior to applying that there are clear credit recognition and transfer pathways available.

### WHEN CREDIT TRANSFER IS NOT THE GOAL

This guide supports institutions to develop elective and core program credit transfer for students in an academic or program focused experience. For many students this is a critical consideration in pursuing learning abroad. However, learning abroad opportunities for students can be non-academic or program focused, in which case credit transfer is not requisite. Strong learning abroad programs offer both kinds of opportunities to students and clearly communicate which partnerships serve specific program areas. If no pathway for credit transfer exists but the partnership serves other important strategic, cultural or geographic goals then that must be communicated to students in advance of the application process.



**IN PRACTICE:** Transfer credit at the University of Windsor is primarily core program credit as a result of strong faculty to faculty connections with many of its international partnerships. Student mobility exchanges are considered an extension of the University of Windsor program and grade credit is also granted for courses to acknowledge the difference with this form of transfer credit.

## IMPLEMENTATION

The need for transfer credit processes which are responsive to students may seem obvious but can be challenging to operationalize. Across the multitude of partnership agreements, grading and learning systems and home institution academic program areas, the coordination and management of transfer credit can become extremely complex. Below are some important aspects of the credit transfer process. See [Overcoming Challenges in Assessing Learning Abroad Transfer Credit](#) for additional case studies and examples.

### **DEVELOP CREDIT TRANSFER PATHWAYS BY PROGRAM**

Having clear pathways for credit transfer and graduation communicates to students the potential and accessibility of learning abroad. These pathways should go beyond listing courses available for transfer to clarify options across programs, involving collaboration between faculty/department in consultation with the international office. Whenever possible this information should be available prior to application, but at minimum prior to departure. Standard pathways can demonstrate how to incorporate a specific learning experience into academic planning, when it should take place, what courses to take and what courses are needed prior to and upon return.

### **GRANT BOTH PROGRAM AND ELECTIVE CREDIT**

From an academic standpoint program areas must also move beyond elective credit towards core course credit. In keeping with partnership agreements founded on the principle of institutional parity, a very limited number of pre-determined courses should be deemed ineligible for transfer credit from within a student's program.

### **MAKE INFORMATION ON TRANSFER CREDIT TRANSPARENT AND WIDELY AVAILABLE**

Create an environment whereby information on transfer credit is understood by key academic and support staff including faculty, academic advisors and international office staff. Involving faculty and orienting them to partner profiles and transfer pathways encourages an active role in encouraging students to participate in learning abroad.

**IN PRACTICE:** Several universities and colleges have faculty designates who act as academic advisors to support students who wish to participate in a learning abroad activity. They assist in creating a plan for not only the learning abroad experience, but also what to take on return.



### **TRANSFER CREDITS FOR SHORT-TERM EXPERIENCES, TOO**

Credit transfer principles can apply to both short term experiences, work integrated learning, co-op education or host faculty-led field schools in addition to semester or year-long programs.

### **EXPLORE LEARNING ABROAD TRANSFER CREDIT IN SHORT-TERM PROGRAMS**

There are significant barriers when the home program is of shorter duration. Two-year associate degrees or diplomas offer limited flexibility in the course work or training required, and finding appropriate partners for a semester long experience in these contexts can be challenging. Colleges in this initiative have shared several innovative ways they are engaging students in learning abroad in these contexts. For more in-depth insights see our case studies resource: [Issues and Best Practices in Recognizing Learning Abroad Transfer Credit for Colleges](#).

### **MAINTAIN RECIPROCITY**

In general, exchange partnerships require the students pay their tuition at their home institution and then travel to their study destination. Such agreements may require that specific registration, financial systems and tracking mechanisms be developed. It's critical to have a solid plan and realistic expectations at the foundation of reciprocal exchange agreements. While term by term or year by year equity is inadvisable, a general rule of thumb is that balance should be achieved over a 3 to 5 year period. If there is a persistent imbalance, one partner should suspend sending students until the balance returns. Of course, other factors come into play such as the ancillary benefits the partner institutions derive—the extent of these benefits will come to bear on determining what defines 'balance' or 'reciprocity' in each partnership.

**“For the most part those credits could only be accepted back as electives. They could not count towards core courses within their academic program. This was really restrictive in terms of what kinds of courses they could take, especially as most students go abroad later in their academic career, and by then they often don't have very many electives left.”**



## QUALITY ASSURANCE

Requiring academic areas to grant transfer credit and facilitate pathways in support of expanded learning abroad engagement requires strong collaboration and trust between administrative and academic units on campus. Quality assurance measures serve to support validation and facilitate transfer credit decisions. Recommendations for quality assurance include:

### **ESTABLISH STRONG CONNECTIONS AND DEVELOP TRUST**

The credit transfer process with an institutional partner requires a high level of trust and coordination. When these are successfully in place, many concerns related to granting transfer credit can be not only addressed but nullified. Faculty connections are an integral component of this relationship and should be supported. To learn more see our guide [Faculty Members and Learning Abroad: A proposed continuum of engagement](#).

### **MEASURE STUDENT OUTCOMES**

It is essential to have quantitative measures to assess whether students meet program learning objectives after returning from a learning abroad experience. This includes tracking a number of indicators such as grade point average comparisons; pre- and post-learning abroad experience; performance on courses requiring pre-requisites that may have been waived and exit interviews on academic experience from students who participated in a learning abroad experience.



**“In some  
departments nobody  
believes that any  
other university  
could teach the  
course as well as  
'we' do.”**

## SUMMARY

Canadian institutions are keen to increase student participation in learning abroad. However, understanding and accessing credit transfer is cited as a major barrier for students considering learning abroad. This guide and suite of accompanying resources supports institutions to address this barrier through a credit transfer framework within international partnerships.

Students need a clear plan and pathway for incorporating a learning abroad experience into their learning. CBIE will continue to lead Canadian institutions in developing principles and practices that respond to this need, contributing to improved student experiences and augmented learning abroad participation rates across our campuses.

*CBIE is grateful to the following member institutions for their input and collaboration during the development of this guide: Algonquin College, Carleton University, Centennial College, College of New Caledonia, Kwantlen Polytechnic University, Langara College, MacEwan University, Medicine Hat College, Mount Royal University, North Island College, Seneca College, Simon Fraser University, Saint Mary's University, Saskatchewan Polytechnic, School District No.43 (Coquitlam), University of British Columbia, University of Calgary, University of Saskatchewan, Western University*





*Photos: Learning Abroad photo contest 2017*



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