# QUALITATIVE STUDENT MOBILITY RESEARCH IN CANADA: EXISTING CONTRIBUTIONS AND SCHOLARLY RECOMMENDATIONS

JANICE AURINI
UNIVERSITY OF WATERLOO

EMERSON LACROIX[1]
UNIVERSITY OF WATERLOO

VANESSA IAFOLLA
INDEPENDENT RESEARCH CONSULTANT

MARIA BRISBANE
UNIVERSITY OF WATERLOO

MRITTIKA DREESHA
UNIVERSITY OF WATERLOO

## Abstract

This article presents the qualitative complement to Pizarro Milian and Zarifa's (2021) analysis of Canadian quantitative research on student transfer and mobility. Drawing on 75 qualitative peer-reviewed articles and institutional reports published between 1991 and 2022, we summarize the main findings and outline the data and methodological gaps in the literature. To strengthen the rigour and broaden the applicability of Canadian qualitative research on student mobility, we emphasize the need to employ a variety of methodological strategies, including multi-site, comparative, and longitudinal qualitative research.
**Key words**: transfer, student mobility, qualitative methods, post-secondary, higher education

## Résumé

Cet article présente le complément qualitatif à l'analyse de Pizarro Milian et Zarifa (2021) de la recherche quantitative canadienne sur le transfert et la mobilité des étudiants postsecondaires. En s'appuyant sur 75 articles qualitatifs évalués par les pairs et rapports institutionnels publiés entre 1991 et 2022, l'article résume les conclusions principales et présente les données disponibles et les lacunes méthodologiques dans la littérature. Pour renforcer la rigueur et élargir l'applicabilité de la recherche qualitative canadienne sur la mobilité étudiante au niveau postsecondaire, les auteurs soulignent la nécessité d'employer une variété de stratégies méthodologiques, y compris des recherches qualitatives multisites, comparatives, et longitudinales.
**Mots clés** : transfert, mobilité étudiante, méthodes qualitatives, enseignement postsecondaire, enseignement supérieur

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1    The author is now employed by ONCAT. The opinions, findings, conclusions, and recommendations expressed do not necessarily reflect the views of ONCAT or the Government of Ontario.

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## INTRODUCTION

There has been enduring interest in student mobility in higher education research. While earlier work tended to focus on the (unfulfilled) promises of students' movement from community colleges to universities (e.g., Brint & Karabel, 1991; Dougherty & Kienzl, 2006), the field has widened to consider empirical patterns and outcomes associated with a variety of transfer pathways and policy directives (e.g., Finnie et al., 2017; St-Denis et al., 2021; Zarifa et al., 2020). Beyond analyzing the antecedents, scope, and outcomes of student mobility in higher education, this research has been used to expand our theoretical and empirical toolkit on social stratification and organizations (e.g., Brint & Karabel, 1991; Clark, 1960; Goldrick-Rab, 2006; Grubbs, 2020; Schudde et al., 2021).

Interest in transfer pathways stems from the realities of students' post-secondary pathways. Among Canada's 2.1 million post-secondary students, a sizeable number of students transfer to another college and university (Statistics Canada, 2022; Zarifa et al., 2020). In Ontario, for example, the Ontario Council on Articulation and Transfer (ONCAT) reports that over 60,000 students have received transfer credit for previous post-secondary studies (ONCAT, 2019). Non-linear pathways have implications for student experiences and outcomes, but they also give rise to a unique set of policy, program, and staffing demands within post-secondary institutions (ONCAT, 2019; Zarifa et al., 2020). These pathways include college-to-college, college-to-university, university-to-college, university-to-university, and swirlers (i.e., students who change institutions more than once; see Zarifa et al., 2020).

This article provides the qualitative complement to the review of quantitative research on student transfer in Canada conducted by Pizarro Milian and Zarifa (2021). Despite its relevance, there is no comprehensive analysis of Canadian qualitative research on student transfer. To accomplish this objective, we review the 75 relevant journal articles and institutional research reports published between 1991 and 2022. We outline how the incorporation of methodological strategies—including multi-site, comparative, and longitudinal qualitative research—can close existing gaps in the literature while also working to strengthen the rigour and applicability of research findings.

## ANALYTICAL APPROACH

A review of qualitative scholarship on student mobility in Canada was conducted between June of 2021 and June of 2022. This review captured three main sources of literature: academic journal articles, institutional research reports posted on the websites of the Pan-Canadian Consortium on Admissions & Transfers (PCCAT) and similar provincial bodies (e.g., BC Council on Admission and Transfer [BCCAT], ONCAT), and policy reports posted on the websites of research institutions that examine higher education, such as the Higher Education Quality Council of Ontario (HEQCO) and Centre for Research in Student Mobility (CRSM) at Seneca College.

We employed a combination of search terms specific to post-secondary academic transfer and qualitative methods. Using databases such as Scholars Portal and JSTOR, we searched for scholarly publications using a combination of key terms such as student, transfer, transfer student*, student mobility, Canadian, Canada, post-secondary, higher education, college, university, qualitative, interview*, focus group*, ethnography, and field method*. We eliminated most articles that did not primarily rely on qualitative data collection, although we retained a handful of "state of the field" articles that included historical or jurisdictional scans.[2] To be as thorough as possible, we inputted these articles into Google Scholar and traced articles that had subsequently cited them. We also employed an expert on computational methods and tried two separate search queries to find articles in

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2   We did include a handful of articles that refer to the inclusion of qualitative data. OUSA articles are written by students and acknowledge input from students and student groups but provide no methodological details.

the Web of Science database (McLevey & McIlroy-Young, 2017).

Our search identified 75 documents that consist of 17 peer-reviewed journal articles and 58 institutional and policy research papers written between 1991–2022. Similar to Pizarro Milian and Zarifa (2021), our review includes contributions from academic researchers (e.g., Andres, 2001), institutional researchers (e.g., Blais & Harper, 2013), and policy analysts (e.g., Missaghian, 2021). These articles tend to draw on data collected in British Columbia and Ontario and include colleges, universities, and Indigenous or First Nations institutes (e.g., Baxter, 2022; Ray et al., 2019). Three authors took primary responsibility for the analysis, following a four-step collaborative process that was reviewed by at least two of the three authors. First, each article was read by at least two of these authors. First, we summarized articles in prose, generating approximately 100 pages of notes. Second, in an Excel file, we then categorized the articles by transfer type, publication year, affiliated institutions, research questions, main findings, type of data collected, sample size, and the participants (e.g., students and staff). These summaries were cross-checked by the first author, who had read all 75 papers. Third, we organized each theme by the supporting literature, year of publication, and transfer type. Through this analysis, we were able to systematically pinpoint not only areas of focus (e.g., college-to-university transfer) but also areas or topics that are under-researched (e.g., few articles on pre-transfer information-seeking behaviour). A fourth analysis was conducted with a focus on sample and sample size to identify the quality and quantity of past research (additional tables and summaries can be found at Aurini et al., 2024a).

While our approach was thorough, our review does not include research conducted by post-secondary institutions or other agencies that is not published or shared. We may have missed articles that do not appear through online search engines using the key terms we described above and/or did not report including qualitative data collection and analysis.[3] The expertise of our research team also limited our ability to read and analyze articles written in French. Consequently, we missed articles published by the work of francophone researchers. Despite these limitations, our article presents a detailed examination of qualitative student mobility research in Canada and is a worthy complement to Pizarro Milian and Zarifa's (2021) quantitative review.

## AN OVERVIEW OF CANADIAN QUALITATIVE TRANSFER RESEARCH

Qualitative research on transfer can be broken into four main areas of research.[4] The first strand examines pre-transfer motivations and resources. Unlike its quantitative counterpart (Pizarro Milian & Zarifa, 2021), qualitative research on this topic is relatively scarce. The research that is available finds that students are not necessarily pushed out of one institution or pulled into another (Maier & Robson, 2020). Rather, the decision to transfer is often part of a series of "mature" decisions that take a variety of factors into account, such as career objectives, cost, location of institution, and prior academic experience (Wintre & Morgan, 2009; see also Andres, 2001; Decock & Janzen, 2016). In some cases, transferring institutions is premeditated. Vertical transfer (from college to university) is sometimes used as a "workaround" for students who did not initially qualify for university after high school, or as a way to ease into post-secondary

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3   We did find several articles that included "buried" qualitative data that was not identified or searchable (e.g., reference to conducting interviews in the body of the article). However, there are likely similar articles that our search methods did not identify.

4   We have kept this discussion purposefully short to allow us more space to critically examine the data and methodological gaps and to outline practical solutions for moving forward productively (for a more comprehensive descriptive summary of this literature see Aurini et al., 2024a).

**Figure 1**
*Analytical Approach*
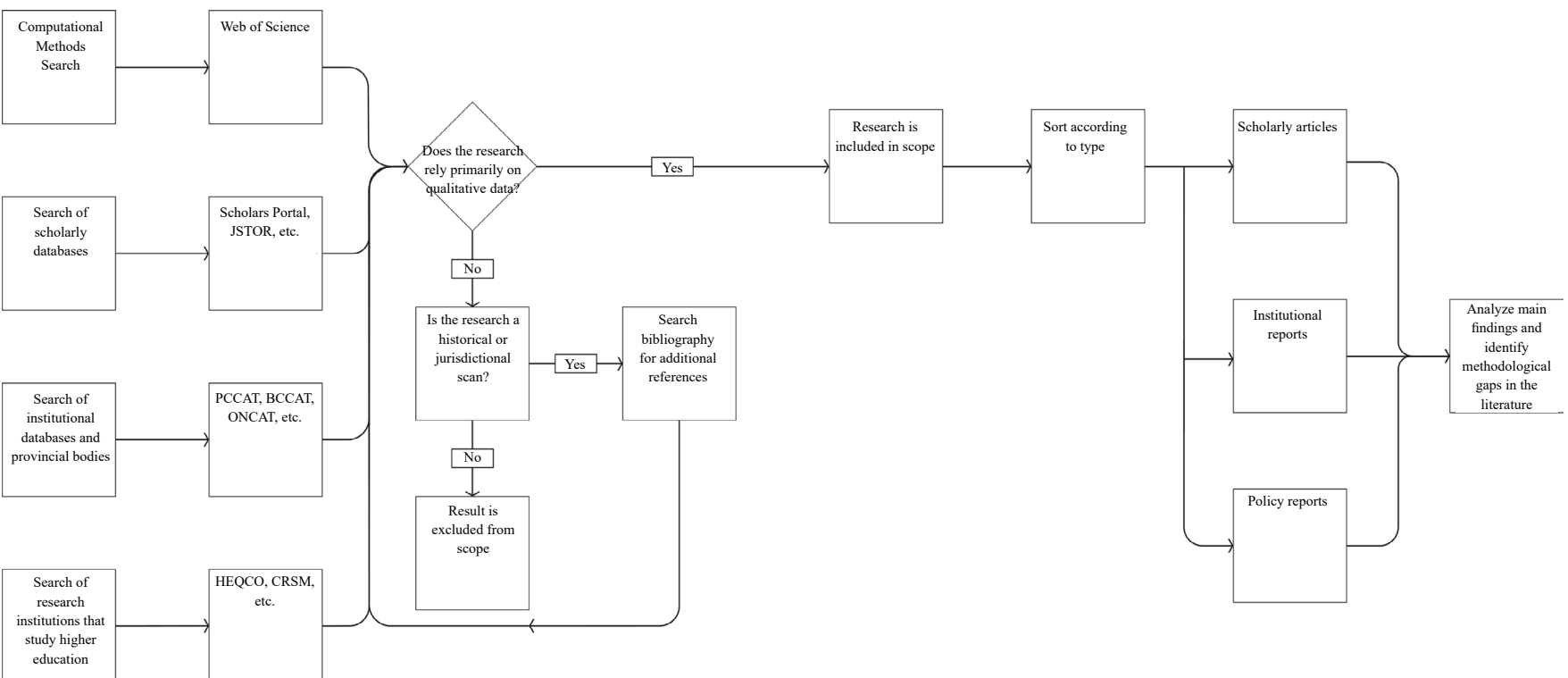
(e.g., Lang, 2018; Lang & Lopes, 2014; Smith & Frank, 2020). A handful of research has also reported that some students value their prior post-secondary experience and believe it supports their overall learning and career objectives (e.g., Decock & Janzen, 2016).

At the pre-transfer stage, researchers have also examined the quality of resources that are available and how sending and receiving institutions can improve the transfer process (e.g., Baxter, 2022; Duklas, 2019). While students often turn to family and friends for advice (e.g., Arnold, 2011; Wintre & Morgan, 2009), they also frequently rely on program administrators and other advisors. This body of work tells a mixed story. Some researchers have found that students are generally satisfied with the transfer process and note utilizing helpful websites, advisors, and tutoring and counselling services (e.g., Green et al., 2020; Lang & Lopes, 2014; Ray et al., 2019). Other researchers, however, find that students sometimes have trouble getting timely, accurate, and consistent information. These students report feeling confused about the transfer process, the number of transfer credits they will receive, their academic standing, and new program requirements (e.g., Barnett & Coppins, 2021; Decock & Janzen, 2016; Gerhardt et al., 2012; Gorman et al., 2012; Kettle et al., 2018; Mallette et al., 2015; Montague et al., 2022; Percival et al., 2015). Broadly, this literature emphasizes the importance of providing students with a "transparent set of guidelines, communicating transfer credit decisions prior to registration, streamlining processes, and having trained support staff who are able to provide consistent and timely information" (Aurini et al., 2024a; see also Barnett & Coppins, 2021; Gerhardt et al., 2012; Usher & Jarvey, 2012).

The second strand of this literature examines post-transfer experiences and perceptions. Almost half the articles published between 1991 and 2022 examine the consequences of transfer, including how students adjust to new models of teaching, learning, and administrative procedures (e.g., Blais & Harper, 2013; Carleton University, 2013; Gawley & McGowan, 2006; Gerhardt & Ackerman, 2014; Green et al.,

2020; Ray et al., 2019; Woodhead & Oh, 2016) and the barriers that they face along the way (e.g., Barnett & Coppins, 2021; Penner et al., 2017; Percival et al., 2016). While many of these studies find students struggle before and after transferring institutions, some studies find that students experience an improved academic or social "fit" at their new institution (e.g., Cameron, 2005; Maier & Robson, 2020) and point to resources or processes that helped eased their transitions (e.g., Coffey et al., 2012). For example, numerous studies suggest initiatives such as student mentorship programs, open houses specific for transfer students, and bridging connections through academic advising help ease student transitions (see Mallette et al., 2015; Montague et al., 2022).

There is also a body of literature on staff perceptions; however, it tends to consider specific institutional initiatives or pathways (e.g., Laurentian University Office of Francophone Affairs & Collège La Cité, 2017; Mallette et al., 2015; McQuarrie, 2020). These researchers generally find that faculty express concern about transfer students' academic preparation, including their writing and research skills and foundational knowledge (e.g., Bowker, 2021; Missaghian, 2021; O'Donnell et al., 2018). For example, in a study of collaborative nursing programs, college faculty expressed that they could better support students in their transition to university if they had access to the courses students would be enrolled in for their first semester of the university program. This information would help them develop strategies to prepare them for their next academic endeavour (Mallette et al., 2015).

The third strand of literature examines ways to improve transfer policies and practices (e.g., Arnold, 2011; BCCAT, 2015; Cookson Consulting, 2018; Luckai et al., 2016; Speers et al., 2012), along with the tools that could ease the transfer process (e.g., Centre for Policy and Research in Indigenous Learning, 2019; Mulligan et al., 2017; Peters & Parkin, 2017). These studies complement the literature on student challenges and barriers noted above and offer practical solutions such as providing students with early transfer assessments, developing block agreements to define a predetermined

number of credits that will be granted, and centralizing information (e.g., Barnett & Coppins, 2021; BCCAT, 2015; McQuarrie, 2020). In addition to streamlining the transfer process, this body of literature also emphasizes the benefits of preparing students for the academic expectations and methods of assessment at their new institution (e.g., Luckai et al., 2016). This preparation may include instituting mandatory writing courses, connecting students with academic advisors, and facilitating social connections (e.g., Montague et al., 2022).

The final strand of literature is relatively large and includes jurisdictional scans or historical policy reviews (e.g., Andres & Dawson, 1998; Smith et al., 2019; Trick, 2013; Young et al., 2017). While these analyses generally capture all transfer types, they tend to provide a holistic overview rather than examining specific transfer pathways or policy analyses. This strand of the literature offers system-level considerations and opportunities for provincial governments to provide better opportunities for their learners (e.g. Trick, 2013). For example, in a system like Ontario's, institutional differentiation requires a robust credit-transfer system to allow for more seamless student mobility (Young et al., 2017).

The qualitative arm of student transfer research has yielded practical insights that have helped improve processes, practices, and services. Still, there are significant data and methodological limitations in qualitative transfer research in Canada. We outline these gaps and provide concrete recommendations for advancing the field.

## (OVERCOMING) BARRIERS TO THE ADVANCEMENT OF QUALITATIVE TRANSFER RESEARCH

### Data Limitations

Our review exposed an overall lack of qualitative data on student mobility in Canada. Through an extensive and multi-pronged search, we could only identify 75 journal articles and institutional reports published over three decades, almost half of which are 10 or more years old. While many of the broader lessons are still valuable, we question whether data collected over a decade ago still accurately reflects current student, policy, or institutional transfer realities. Nonetheless, it is important to account for these findings to show the thematic coverage of the transfer literature, identify the respective transfer pathways that have garnered the most research interest, and highlight gaps for future research to explore.

As shown in Figure 2 the bulk of qualitative inquiry on transfer occurred between 2011 and 2020, with a heavy focus on the college-to-university transfer pathway. Most importantly for a research audience, we could only identify 17 peer-reviewed articles published during our entire observation window. While we found many more institutional reports, these often reflect specific program priorities or pathways (e.g., Harvell et al., 2018; Lakehead University & Fanshawe College, 2022; Laurentian University Office of Francophone Affairs & Collège La Cité, 2017; Mallette et al., 2015) rather than providing a broader analysis that contributes to the wider examination of student mobility in Canada. However, some of these limitations extend to the journal articles we examined. Most research is limited to one or two post-secondary institutions (e.g., Andres, 2001; Hurlihey, 2012) and, in some cases, focuses on students in one program or pathway, such as nursing or engineering (e.g., Cameron, 2005; Eilser & Clement, 2015; Montague et al., 2022). While some of the "state of the field" content analyses provide snapshots of transfer policies and practices across the sector, they lack the human touch that other qualitative methods can bring to this field of study. Widening the scope of qualitative research to include students and staff from multiple post-secondary institutions would provide a more fulsome and analytical lens to student mobility research that stretches outside the (potential) unique circumstances of particular a program, institution, or pathway.

The concentration of data collection on only one type of transfer is another limitation. Most qualitative research on student transfer is focused on vertical (i.e., college-to-university)

**Figure 2**

*Canadian Qualitative Peer-Reviewed Journal Articles and Institutional Reports*
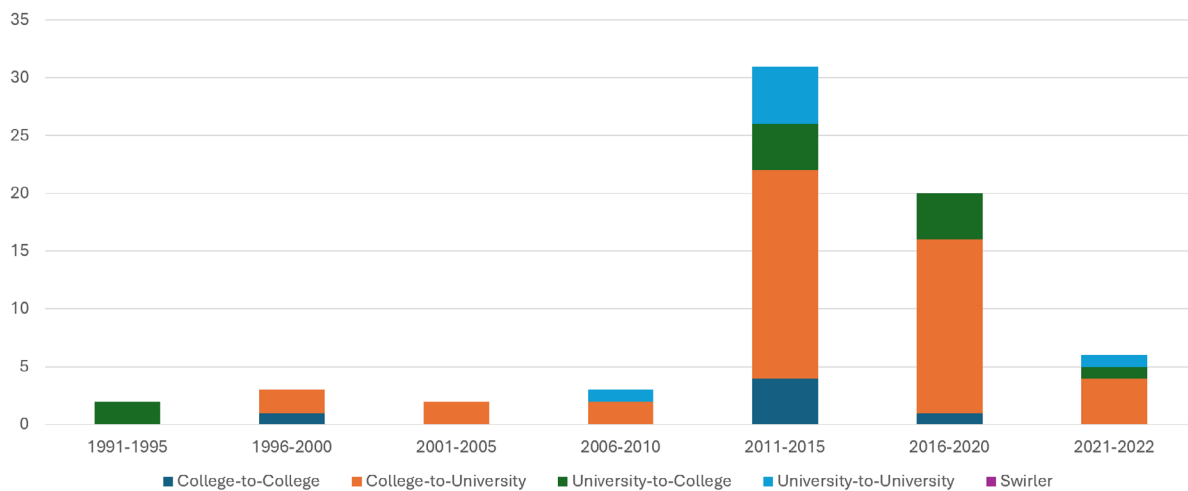


transfer (41 articles). There are a handful of articles that examine university-to-college transfer (12 articles); however, college-to-college (four articles) and university-to-university (three articles) transfers are almost absent in the Canadian literature. We could find no articles on "swirlers"—those students who change institutions more than once. The overwhelming focus on college-to-university transfer limits our ability to generate a comprehensive picture of student mobility. In southern Ontario, for example, there are similar proportions of students transferring from college to university (2.03%), from university to college (2.15%), and from university to university (1.73%), followed by college-to-college transfers (1.52%) and swirlers (0.52%) (Zarifa et al., 2020). Ignoring transfer pathways other than college-to-university leaves a yawning empirical gap in the qualitative transfer literature.

Moreover, although there are a number of articles that we categorize as investigating "all types" of transfer, these articles tend to consist of qualitative data based on staff, faculty, or administrators' general perceptions of transfer students, rather than a targeted analysis of different transfer pathways. Few studies examine a variety of transfer pathways (e.g., for an exception see Lang, 2009). None of the studies we found systematically compare or contrast the pre-, during-, or post-transfer process or ex-

periences of students who are travelling on different transfer pathways.

Similar to its quantitative counterpart, the qualitative literature does not capture students early on in their educational careers (for an exception see Lang, 2009). As noted by Pizarro Milian and Zarifa (2021), educational research "has long examined the shadows cast by children's primary schools, neighbourhood contexts, and family backgrounds" (p. 88) (e.g., Alexander et al., 2014). A better understanding of student transfer demands stretching our analyses back into the later stages of high school to find out how to improve the process by which students make their initial post-secondary choices. For some students, their first post-secondary choice and subsequent transfer is part of a series of steps, some of which are premeditated. In short, we should reconceptualize "transfer" as part of the (educational) life course, rather than something that "happens" once students arrive at post-secondary. Not only is this approach more empirically honest, but it has the potential to embed student transfer within transparent and thoughtfully articulated pathways that learners could envision in high school when they are making their initial post-secondary plans.

At the same time, not all transfers are strategic (e.g., Lang & Lopes, 2014). Students some-

times have "problems choosing an institution and program of study, without enough critical background to understand the implications" of their decisions (Fisher et al., 2012, p. 16). Rigorous qualitative data has the potential to improve college and university retention and reduce the number of students who take *unplanned* and *unwanted* non-linear pathways, sometimes at a great personal and financial cost.[5] Post-secondary administrators also recognize costs and inefficiencies associated with poor retention and completion rates, and the resources needed to manage students who take non-traditional pathways to and through their institutions (e.g., bridging programs, student advising). Developing a more empirically grounded understanding of how students make preliminary post-secondary choices might generate better initial matches between students, institutions, and programs in the first place (see Maier & Robson, 2020).

Our review points to four key gaps, which dovetail with our methodological discussion below. First, there are *large gaps in the qualitative data on student transfer*. Canadian research on transfer motivations and information-seeking behaviour are relatively dated, sparsely covered, or both. The almost singular focus on college-to-university transfer points to the need for more serious investigations of other transfer pathways. Rather than speculating on the origins of these omissions, bodies like ONCAT and BCCAT are well-positioned to encourage research that is more strategically focused on these underexamined dimensions of transfer.

Second, *there is a pressing need for multi-institutional and comparative qualitative data* that consists of different combinations of institutions, transfer pathways, and data (including, when appropriate, quantitative data). While colleges and universities will still need to engage in smaller-scale research projects that speak to their specific institutional priorities or reporting requirements, multi-institutional and comparative qualitative research can address broader questions about student mobility in Canada. These analyses could include a variety of institutional configurations (e.g., a large number of colleges or universities, or a combination of the two), qualitative methods (e.g., interviews, focus groups, content analyses), participants (e.g., deans, advisors, students), pathways (e.g., college-to-college, university-to-university), locations (e.g., rural vs. urban, provincial differences), and time points (e.g., students who are considering transferring). Multi-site and comparative qualitative methods could allow researchers to develop a more comprehensive understanding of the key issues and produce some level of generalization beyond one particular institution, program, or pathway. These methods use a standardized set of qualitative research methods and questions to analyze cross-site comparisons and the emergence of major findings or themes across sites (e.g., Herriott & Firestone, 1983; Ragin, 1987).

Third, most of the literature is fixated on students' more immediate pre- and post-transfer decision making and experiences. *Student mobility research in Canada would be strengthened by gathering longitudinal qualitative data*. Longitudinal qualitative research could capture students at the "choice" (high school), "decision" (selecting post-secondary), "post-secondary entry," and post-secondary "stay" or "transfer" phases to explore pathways to and through post-secondary. Longitudinal research addresses not only change or stability over time, but also the contextual factors that inform events, experiences, or perceptions. Charting student pathways over time can illuminate not only the timing and nature of events, but also student rationales, behaviours, and experiences during critical transition points (Neale, 2020; Saldaña, 2003). Done well, it has the potential to move the research frame from a "snapshot"

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5   Some researchers have found that transfer students tend to have lower graduation rates and are less likely to complete their degrees in a timely manner (e.g., Davies & Pizarro Milian, 2020; Drewes et al., 2012; Pizarro Milian & Munro, 2020). Other studies have found that transfer students earned fewer credits and pursued less ambitious credentials (e.g., Stewart & Martinello, 2015). Knowing whether these outcomes relate to the nature of transfer decisions (planned vs. unplanned) could be a critical variable of interest that has direct policy implications.

to a "movie" by providing "access to the 'interior logic' of lives, discerning how change is created, negotiated, lived and experienced" over time (Neale, 2020, p. 9).

By viewing transfer as a social process that commences long before students enter post-secondary institutions, longitudinal qualitative research can examine how students' personal and family characteristics (e.g., social class), social and cultural capital (e.g., personal networks, comfort asking professionals for advice), and educational resources (e.g., access to qualified guidance counsellors) shape post-secondary decision making and pathways, and the degree to which post-secondary choices align with students' aspirations, interests, abilities, and temperaments (e.g., for an exemplary example see Missaghian, 2020). Moreover, it would capture a variety of pathways as students move into, stay in, or transfer out of post-secondary institutions and pathways.

Fourth, *an arm of qualitative research on student mobility should gather data on transfer prevention*. To date, scholarship has taken for granted the reality of student mobility. Qualitative researchers have yet to rigorously examine ways to reduce the number of unplanned and unwanted transfers. This strikes us as a glaring omission. While some transfers are planned, perhaps as another step toward some educational or career goal, for other students, transferring represents an unplanned disruption that may be accompanied by economic, psychological, or social repercussions. Preventative qualitative research aims to improve the (initial) student–post-secondary fit: What information and resources do students need to make their initial post-secondary choices? How can we help students plan their post-secondary pathways more efficiently and reduce the likelihood of unplanned or unwanted transfers?[6]

Both longitudinal and preventative approaches have the capacity to support empirically grounded guidelines that can help students optimize their pathways and match their post-secondary plans with their goals, interests, and personalities. These analyses are amenable to a variety of qualitative (e.g., interviews, focus groups, and field methods) and mixed methods approaches (e.g., including a student questionnaire) required to develop and rigorously evaluate guidelines that reduce the likelihood of unplanned or unwanted transfers.

## Methodological Limitations

Extending the scope, rigour, and transferability of student mobility qualitative research in Canada presents several challenges. Similar to the quantitative hurdles outlined by Pizarro Milian and Zarifa (2021), qualitative research on student transfer is siloed. However, unlike its quantitative counterpart, there are no standardized data sets that can be linked. Yet, there is reason for optimism. Bodies like ONCAT have developed impressive partnerships across the post-secondary sectors and can act as a conduit between ministries, colleges, universities, and researchers.[7] These bodies can leverage their unique positions within the ecosystem of post-secondary education to initiate ambitious research agendas that address the gaps outlined above and provide a more comprehensive picture of student mobility in Canada. Since the first data limitation (e.g., lack of data on several transfer pathways) can be addressed using existing research practices, we turn our discussion to some of the methodological challenges of conducting multi-institutional, comparative, and longitudinal research.

First, whether led by one or several researchers across institutions, *data collection and anal-*

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6    By focusing on generating better initial student–post-secondary matches or fit, this orientation is different from recruitment efforts (e.g., generating a high-quality pool of applicants) or student retention efforts (e.g., efforts to improve student success) (e.g., Childs et al., 2017).

7    These partnerships include similar bodies such as BCCAT, CATNB, ACAT, the Government of Ontario, the Ministry of Colleges and Universities, post-secondary organizations (e.g., HEQCO, eCampusOntario, Council of Ontario Universities), and colleges and universities from across Ontario.

*ysis must be structured to enable comparison across sites*. Standardized definitions (e.g., who counts as a transfer student?), data collection tools (e.g., interview schedules), sampling decisions, and plans for data analysis must be developed and coordinated in a manner that still allows for the unique aspects of institutional sites to be captured. As researchers are usually required to obtain research ethics approval at each institution involved, they will have to maintain a consistent protocol across sites when addressing individual comments or changes from research ethics boards (REBs).[8]

Second, *researchers must be able to generate sufficient sample sizes*. The term "saturation" is routinely invoked in qualitative research to justify the termination of data collection. However, saturation does not mean that the researcher has "heard it all" (Morse, 1995, p. 147; see also Morse, 2015). Rather, every theme or claim is saturated with a substantial amount of data, not a handful of cherry-picked quotes. The way to address this challenge is to have large enough samples at each research site that allow researchers to fully saturate emergent themes with sufficient data.

We propose the following guidelines for each site and/or transfer pathway. Morse (2000), Denzin and Lincoln (2005), and Creswell (2013) recommend approximately 20–50 participants for interview studies. A focus group that is more structured and has a homogenous sample usually requires fewer focus groups (three to six) compared to one that includes a more open-ended and heterogenous sample (four to eight focus groups) (e.g., Malterud et al., 2016). However, these guidelines may need adjustment. Some researchers recommend conducting pre-specified rounds of data analysis (e.g., every five interviews) to determine whether subsequent rounds of data collection are necessary based on the degree to which themes are supported by a sufficient amount of evidence (e.g., Vasileiou et al., 2018). More re-

cent approaches caution against a priori saturation estimates, noting that it is incumbent on researchers to empirically demonstrate measures of saturation in their work (Hennink & Kaiser, 2022). Another way to think about saturation is the "information power" of the sample (e.g., Malterud et al., 2016). To make bolder statements about transfer experiences of students, researchers will require much larger samples than those with narrowly defined aims (e.g., an institution-specific initiative).

Third, *these types of projects will produce large amounts of data that need a team to analyze and write up*.[9] Intercoder reliability is a well-known challenge for qualitative team-based data analysis; it refers to an "agreement between different coders regarding how the same data should be coded" (O'Connor & Joffe, 2020, p. 2). While guidelines vary, coding consistently requires developing a codebook with clear instructions and having the entire data analysis team code a portion of the collected data together (e.g., the same set of interviews, the same segment of a focus group), along with routine check-ins to make sure the coding remains consistent over time. Multi-institutional projects may give rise to a different set of hurdles. The context of each college and university varies and may challenge the research team to develop a codebook and sampling strategy that adequately captures the nuances underpinning the collected data (see Aurini et al., 2024a).[10]

Fourth, *these types of research projects give rise to practical issues*. They require a healthy budget, along with enough lead time to (a) negotiate access, formulate partnerships with colleges, universities, or other researchers; (b) get REB approval across institutions; and (c) build

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8 Our years of experience conducting these kinds of projects mirror Robson and Maier's (2018) description of the REB process.

9 Standardized research protocols (e.g., interview schedules) and sufficient training will reduce variation at the data collection phase of the project.

10 As Herriott and Firestone (1983) aptly observed, site-specific reporting "enhances description but tends to mask over similarities and differences across sites" while cross-site reporting "facilitates generalization, but often at the expense of site-specific context" (p. 17).

and train teams of research assistants. Managing data collection across sites and/or time requires a substantial amount of effort to track down participants and arrange data collection (e.g., scheduling interviews). By design, such projects generate massive amounts of data that must be managed, cleaned (e.g., preparing transcripts), analyzed, and written up.

In terms of longitudinal qualitative research, compared to the data linking options available to quantitative researchers (see Pizarro Milian & Zarifa, 2021), qualitative researchers will likely have a more contracted window to track students.[11] However, a longitudinal qualitative study that follows students from the later stages of high school into post-secondary is entirely feasible. This work will naturally capture students who take both planned and unplanned linear and non-linear pathways that have more steps, including victory laps (i.e., returning to high school for an additional year of study) and transfers from and to various types of post-secondary institutions. These studies will require researchers to collect data at least two or three times to examine how students select which post-secondary institutions to apply to, the factors that inform their decisions to attend a particular school, and the consequences of their decisions once they attend (for an example of this approach see Missaghian, 2020, 2021).

Finally, our review points to the *methodological need to increase the trustworthiness and transferability of transfer research.* Although there are notable exceptions (e.g., Arnold, 2011; Coffey et al., 2012; Fisher et al., 2012; Usher & Jarvey, 2012), qualitative research is largely based on examinations of one or two institutions. Other articles have very small (e.g., Harvell et al., 2018; Percival et al., 2015) and/

or unspecified sampling techniques and sample sizes (e.g., Gawley & McGowan, 2006). Due to these limitations, those articles suffer from a lack of methodological detail about how the authors went about their data collection and analysis (e.g., Duklas, 2019; Eilser & Clement, 2015; Lennon et al., 2016; Mallette et al., 2015; Shook et al., 2016).[12] Implementing rigorous and transparent research designs, recruitment processes, sampling techniques, data collection processes, and analysis procedures will increase the trustworthiness and broader applicability of Canadian student transfer research.

## CONCLUSION

Enrolment patterns are becoming increasingly complex, and a sizeable proportion of students take non-traditional pathways to secure credentials (e.g., Mehta & Davies, 2018; Zarifa et al., 2020). Quantitative researchers have documented the intricacies of making the decision to transfer between institutions and programs, how students weigh a variety of potential rewards and risks, and how they juggle myriad institutional channels at their current and destination institutions. Researchers have identified the characteristics of students who transfer (e.g., Lee et al., 2009), the proportion of students who transfer (ONCAT, 2019), regional differences (Sano et al., 2020), transfer students' performance (e.g., Gerhardt & Masakure, 2016), and the proportion of students who engage in different transfer pathways (e.g., Finnie et al., 2017; Hillier et al., 2020; Zarifa et al., 2020).

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11 Researchers will have to spend time tracking down participants and minimizing attrition. Small incentives could be built into the budget to entice participants to stay engaged in the research process. In our own study of transfer students, we found small token of $10–$20 helped maintained high levels of participation during data collection (see Aurini et al., 2024b; LaCroix et al., 2024).

12 Some of these challenges are rooted in the general nature of qualitative research: recruiting, data collection, and data analysis are often difficult and time-consuming. However, transfer researchers have a key advantage over other qualitative researchers: transfer students are not a hidden population and are captured by administrative reporting mechanisms in their schools. Registrar's offices can identify and generate internal lists of transfer students and contact them by email. During recruitment, researchers can use pre-screening questions to stratify samples by transfer type and other characteristics that are important to the study aims.

Pizarro Milian and Zarifa (2021) flag several critical gaps in the quantitative literature on student transfer that will demand substantial cross-sector collaboration. Our review of qualitative research on student transfer suggests that this domain requires significantly more catch-up. Qualitative research on student transfer is both siloed and mired by structural holes in the existing literature that require a collaborative "doubling-down" of efforts.[13] Colleges and universities, higher education professionals, students, and government all stand to benefit from a smoother and more attuned transfer system. Through more meticulous research designs and attention to the methodological foundations of qualitative research, we are optimistic about our collective capacity to fill these data and methodological holes and improve our qualitative understanding of student mobility in Canada.

## ACKNOWLEDGEMENTS

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13  Some jurisdictions, like Ontario, are equipped with the policy-level buy-in (e.g., ONCAT) and an army of capable researchers, both internal and external to colleges and universities, to qualitatively unpack the critical nuances of student mobility.

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