Guide to Best Practices
Articulation Agreements

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AACRAO is a non-profit, voluntary, professional association of more than 11,000 higher education professionals who represent approximately 2,600 institutions in more than 40 countries. Its mission is to provide professional development, guidelines, and voluntary standards to be used by higher education officials regarding the best practices in records management, admissions, enrollment management, administrative information technology, and student services. AACRAO represents institutions in every part of the higher education community, from large public institutions to small, private liberal arts colleges.

The association promotes the well-being and advancement of professionals in the higher education community by engaging members in the collaborative pursuit of excellence in admissions, registration, and enrollment services. The association provides relevant programs, professional development tools, and information resources necessary to chart the course for professional success.

Introduction

Educational institutions must be equipped to enroll students with different experiences and backgrounds and offer them congruous pathways to new or additional credentials and degrees. Whether the chosen pathway lies at a two-year community college or a four-year bachelor's level institution, students want and deserve the most efficient and cost-effective route to a college degree, ideally while also maintaining a balance between their studies and their other interests and responsibilities (such as career and family obligations).

In 2017, the Government Accountability Office determined that 35% of all students in the 2003-2004 academic year had transferred from one post-secondary institution to another. , Unfortunately, during the transfer process, they lost an average of 43% of their earned credits (Lederman, 2017).

> A recent report by the Graduate Center at the City University of New York supports that students are more likely to graduate if more credits transfer to one institution to the next: "Students who have all or almost all their credits transferred are 2.5 times more likely to graduate than students who have fewer than half their credits transferred, the study found. Students who get between half and 89 percent of their credits transferred have 74 percent higher odds of graduation" (pg.6)

To help students to achieve their goals in the most effective manner possible, post-secondary institutions must develop consistent pathways to allow students to maximize their time, effort, and financial resources. Transfer agreements are one of the most actionable ways institutions can assist students in meeting those goals.

The guide that follows will provide a broad range of resources that may be used by academic, enrollment, admissions, transfer, and records personnel at both originating and destination institutions, including:
- Define different types of agreements;
- Provide instruction in how to develop agreements;
- Present strategies for implementing agreements (including such aspects as marketing, and the use of technology in doing so) and,
- Discuss processes for administering and providing oversight of agreements.

It is our hope that these tools and resources will allow you to better serve the interests of your students, your institution, and the institutions with whom you articulate. However, most of these terms are generic, and the recommendations are suggestions. How to define and implement these recommendations is at the institution's discretion.

What are articulation agreements?

AACRAO defines articulation as, "the entire range of processes and relationships involved in the systemic movement of students inter-institutionally and inter-segmentally throughout postsecondary education" (Lauren, p.261). The main reason to create an articulation is to guide students to your institution through a document that openly states how to transfer in the most efficient manner. AACRAO's *Transfer Handbook: Promoting Student Success* states, "The act of forging an articulation represents the commitment each institution makes towards their transfer students. In publicly identifying specific majors, degrees, or courses that will transfer, the four year institution is by virtue saying, 'welcome, we want you here, and we want you to know ahead of time how your courses will transfer.'" (AACRAO, p.31).

> Any agreement that furthers a student's academic opportunity should be considered an articulation agreement.

The *Transfer Playbook¸* published by the Aspen Institute and the Community College Research Center at Columbia University, focuses on "articulation agreements which aim to facilitate transfer from community colleges to four-year colleges." Keep in mind, however, that articulation agreements are not limited to the traditional two-year-to-four-year format. Agreements can exist between two institutions at any academic level or between an institution and an agency, credentialing body, high school, or other entity. The reality is that students earn credits and/or enroll in multiple ways and via multiple paths.

How your institution defines an agreement may be guided by institution mission, governing body, state regulations, accreditation, or other outside influences. It's important that everyone at your institution understand your definition of an agreement.

Why are agreements important?

Only your institution can identify the need and desire for articulation agreements, but there are some generic benefits that all agreements should/could provide.

In creating an articulation agreement, both institutions provide students with a roadmap not only to transfer credits, but also to choose the academic program that is right for them. Students will know what courses to take at each college, how many of those specific courses will transfer, and how each will apply towards various majors, minors, and general education requirements. A well-planned, communicated, and maintained agreement ensures students are moving in the right direction and working towards degree completion. Along with creating a blueprint of transfer courses, an agreement can create open lines of communication. Staff and faculty from both institutions must come together and talk about prerequisites; course sequences, availability, and outcomes; institutional policies; and graduation requirements.

Agreements can also help remove barriers related to transfer – including admission, loss of credit, missing academic requirements, and cost. The Community College Research Center estimates that "over 80 percent of community college students intend to earn at least a bachelor's degree. However, only about a quarter end up transferring (20 percent of these students earn an associate degree or certificate first). Only 17 percent complete a bachelor's degree" (Jenkins and Fink, 2015.) Given the high number of students who intend to transfer and don't, institutions need to work together to remove barriers; agreements can be a strong first step in identifying and solving these issues.

In addition to removing barriers, agreements provide a way for institutions to enhance diversity. Institutions seeking to change their academic profile, admit certain demographics, or provide opportunities to underrepresented or under-funded students may partner with institutions that will allow for better access. Strategically, this outreach can also help an institution meet its enrollment goals or provide much-needed academic opportunities for a population that otherwise does not have access to higher education.

The keys to developing an agreement are conversation, relationships, compromise, and opportunity. The content of the agreement drives the effectiveness of the agreement, and that content is derived from a mutual desire to help students. Agreements serve three different entities: the student, the sending institution, and the receiving institution. The agreement should be written to meet the needs of all constituencies. The students' need is to transfer seamlessly. The sending institution's need is to promote its ability to prepare students for the receiving institution. The receiving institution's need is to recruit students who are ready to be successful at their institution.

Articulation agreements provide a way for educational institutions to assist in fulfilling the needs of their communities. Developing strategic articulation partnerships can foster access to a far greater variety of academic experiences than those available at a single institution. And, as distance education becomes a preferred educational delivery mode, institutions have reach beyond their geographic contingency and outside of their campus-based facilities and infrastructure. Likewise, these opportunities allow individuals to seek credentials and careers that may otherwise not be available to them, particularly for those whose life circumstances tie them to a specific geographic area.

It is a common misconception that articulation agreements only govern the flow of credits from one school to the next. In fact, the types and variations of transfer agreements are vast, differing in scope, content, and format, among other variables. There are several ways to formalize transfer agreements and create binding articulation agreements.

The areas below demonstrate the variety of agreements.

TWO COMMON TYPES OF AGREEMENTS	
Articulation Agreement	Articulation agreements are more commonly used to formalize transfer relationships by stating the purpose of the arrangements between institutions. Articulation agreements typically: ● Are long-form agreements designed to formalize transfer agreements between institutions. ● Focus on academic professes and policies that guide transfer, such as credit transfer between schools. ● Detailed in nature, collegial in purpose. ● Can include reverse transfer provisions and other student benefits like admissions guarantees.
Memorandum of Understanding (MOU)	Memorandums of Understanding (MOU) are typically more transactional in nature, focusing on specific outcomes or responsibilities between parties. Some institutions, however, will use the MOU to establish a partnership, and leave articulation agreements to cover the academic components of transfer. MOUs typically: ● These are usually short-form agreements formalizing business relationships between institutions. ● MOUs may be used to set up general broad terms between parties. ● MOUs will often contain information around financial or resource obligations, such as tuition, faculty exchanges, space rental, data sharing, or other legal issues.

SCOPE OF AGREEMENT	
Course to Course	Course to Course agreements are often known as Course Equivalency Agreements or Transfer Guides. These agreements focus on the most basic element in the transfer process: academic coursework. In these agreements, institutions determine how individual courses match (or are equivalent to) each other in terms of content, learning outcomes, relevance, and value, and typically exclude admissions guarantees and related benefits. These agreements may be organized as follows: ● A master (A to Z) list of courses that are deemed equivalent. ● Courses that make up institutional general education/core requirements. ● Program or major-specific curricula, including electives.
Program to Program	Program to Program agreements are widely used to align community college associate degrees with comparable bachelor's degree options. These agreements detail how specific courses match up with and count towards major requirements, general education/core requirements, and electives. In most cases, comparable associate and bachelor's programs exist at both institutions, facilitating the alignment of degrees (e.g., Business to Business, Criminal Justice to Criminal Justice). In other cases, community college programs may be matched with one (or more) comparable bachelor's degrees offered (e.g. Liberal Arts to multiple Arts & Science options, Human Services to Psychology, Social Work, or Urban Studies).
Major to Major	Major to Major agreements build on the structure and format of Program to Program agreements. These agreements are distinguished by a tighter alignment of program coursework based on external accreditation. Program coursework at both institutions address necessary competencies that follow accreditation standards.
Block Transfer	The word "block" in the term *block transfer* refers to the idea of students being able to transfer a partial or full credential *en bloc* – or in a bundle. This may be the block transfer of general education, or as a degree in its totality. With block transfer arrangements, the receiving institution does not have to perform a course- by-course transfer credit evaluation and can satisfy degree (or general education) requirements in bulk.

SCOPE OF INSTITUTIONAL INCLUSION	
Institution to Institution	These agreements may be generic or specific; they are an all-encompassing agreement that provides some basis for establishing and/or expanding a partnership. Participation may be at the institution-level or within a specific college or discipline/area. Many institutions formalize a generic partner agreement, and then create addendums for specific topics that can easily be updated or edited.
State-wide or System-wide	As the name implies, these agreements are exclusive to public higher education institutions in a given state. Articulation provisions such as course equivalencies, admissions guarantees, and financial benefits may be included but are limited to the public higher education system. Individual public two-year and four-year institutions retain rights to enter into agreements with private/independent institutions. Some states mandate or allow private institutions to participate in these agreements, usually in statewide employment shortage areas such as Nursing or Education.
International Agreements	Many institutions sign agreements with international institutions. These agreements may include faculty exchanges, study abroad opportunities, or training programs. They usually do not include transfer credit, as a third party is often needed to evaluate coursework from non-US institutions.

AGREEMENTS FOCUSING ON ADMISSION/ENROLLMENT	
Joint/Dual Admissions	Joint/Dual Admissions allows a student admission to both institutions simultaneously while they pursue their studies. When a student is eligible for joint/dual admissions both schools have determined admissions reciprocity for their academic programs, allowing a student to move seamlessly between each school as the student completes credentials. Often, students in admission programs have access to services and resources at both institutions, but are only enrolled at one institution at a time. For many institutions, these agreements are a way to build or manage the admissions funnel. A four-year institution may enter into an admission agreement with a community college as a way to provide remedial education or to defer students otherwise not eligible for admission.
Guaranteed Admissions	Guaranteed Admissions differs from Joint Admissions as the student's admissibility is not granted until the student completes a certain set of requirements at one institution and moves onto the next institution. Typically for a student to meet Guaranteed Admission requirements, the student must have completed a previous credential at their first institution (usually a General Education certificate or Associate degree) prior to being able to apply and gain access to the next institution. Guaranteed Admissions may guarantee admission to the institution but does not

	guarantee admission to all programs at the institution, and students may need to meet additional requirements to be admitted to specific programs or disciplines. In some cases, guaranteed admission arrangements may be agreed on a system-wide basis, where a student is guaranteed admission to a group of schools within a specific system, but not guaranteed to a specific site or location, especially in systems where capacity or space issues exist.
Joint/Dual Enrollment	Differing from Joint/Dual Admissions, Joint/Dual Enrollment is when a student is enrolled in more than one institution at the same time. This may be done to meet financial or academic need. An institution which can't offer coursework due to cost, space or institutional mission may find that a dual enrollment option allows students to stay with the institution longer, or it may be more cost effective than purchasing equipment or hiring faculty. This type of agreement is usually more legal in nature, and usually takes the form of an MOU. Often, students use this option as a transition between academic programs; for example, students in a nursing program may be dual enrolled to take both clinical and upper-level coursework at the same time. In an agreement of this nature, institutions must agree on a variety of topics not normally covered in an agreement, including data sharing, student billing, scholarships eligibility, reverse transfer, or other non-academic issues. Enrollment agreements are often accompanied by consortium agreements for financial aid purposes, but the consortium agreement will live outside of the articulation and transfer agreement and is not a requirement for two institutions to agree on joint enrollment. Joint/Dual Enrollment with high schools is becoming more common; students are pursuing both their high school diploma and their higher education degree at the same time.

AGREEMENTS FOCUSING ON CREDIT TRANSFER	
Common Course Numbering Systems	Common course numbering systems provide a foundational way to improve the efficacy of transfer agreements. When a state or system adopts a common course numbering system, this requires the institutions within the system to identify their course offerings using a similar schema and naming convention. In the most robust and coordinated systems, it expands upon this premise to ensure that similar courses between institutions are also named exactly the same and have unified learning objectives so that, if a student transfers from one institution to another, the student will be recognized for the student's previously completed coursework. The process of implementing common course numbering systems improves transparency around the transfer process for students, and it also decreases the burden on administrators or articulation personnel when attempting to crosswalk degree programs or advice students on degree maps.

	In summary:
	- In states with strong public higher education coordination, common course numbering systems may be established to oversee, coordinate, and facilitate curricular offerings across institutions. - Students and academic advisors draw on common course numbering for scheduling purposes to ensure transferability of completed courses.
Reverse Transfer	As part of the "completion agenda," more states and institutions are implementing reverse transfer options, where students transfer credits back to a previously attended institution to complete a degree even after leaving that institution. These agreements realize that students often transfer before completing a degree. In summary: - Students identify remaining degree coursework and complete this at their new institution. - Institutions collaborate closely, obtaining necessary paperwork and submitting the official transcripts for formal awarding of the degree.
Career Pathways	Implementing or creating career pathways is an activity in which many institutions are seeking to improve the efficacy of transfer and articulation agreements by providing a direct connection between career progression and the forward momentum that occurs when a student advances their studies. There are a few ways that institutions can implement career pathways in articulation agreements and some of the most common are through stacking credentials or by recognizing alternative career-oriented credit. Stackable credentials provide a pathway of content that builds on one credential to the next that provides a level of learning that is desirable to a specific career-field. For example, a community college and a university can articulate credits in such a way that a student earns a certificate tied to an industry-recognized certification that applies towards an associate degree at the community college. The student then transfers the associate degree for full credit directly to the University where the student earns a baccalaureate degree with advanced preparation in the student's field because of the progression of learning. Career pathways can also be achieved by the recognition of alternative or career-oriented credit, and for details on these types of arrangements please see the next section on alternative credit arrangements. In summary: - Career pathways build on different sets of curricula or credentials to reach specific career-oriented outcomes or knowledge - Career pathways are not always tied to the same discipline and can combine different knowledge domains. For example, some schools may articulate an Associate degree in Technology into a Baccalaureate degree in Management. - Stackable credentialing is a form of career pathways that is commonly used to enhance the efficacy of transfer agreements.
Prior Learning Assessment	An emerging area in agreements is prior learning transferability. This includes nationally-recognized exams such as AP (Advanced Placement), CLEP (College Level Exam Program) or DSST. Or, it may include military credit as identified on the Joint

	Services Transcript (JST) or as evaluated through a portfolio or competency review. In summary: ● Generally, the more standardized the evaluation backing the prior learning - like ACE (American Council on Education) or the College Board – the more likely institutions will agree to articulate alternative credit in the same manner. ● Institutions typically retain the ability to apply these credits as appropriate, without committing to specific transfer applicability.
Non-Credit or Workforce Based Credits	Articulation agreements recognizing career and technical credit are generally created in two ways. The first is the articulation of career and technical training directly between the training provider or corporation itself and the institution. In these instances, the institution will make an evaluation of the combined learning obtained for the corporate or technical learning and determine credit-worthiness for these activities. In some cases, schools may rely on external agencies like ACE (American Council on Education) to set a credit recommendation. In absence of external recognition, however, they will have expert faculty determine equivalence to credit. These evaluations for credit can consist of a review of the training programs themselves or they can also look at industry-recognized certifications to determine if a student can be articulated for credit coming directly from the career training entity. Second, as most community colleges still offer non-credit career and vocational training, some four-year institutions have also looked to conduct evaluations that articulate bundles of non-credit career and technical learning courses that may articulate for alternative credit if students further their studies at the four-year degree level. This type of alternative credit articulation usually requires the faculty or administration at both institutions to align processes, and the award of credit will commonly require the student to have taken multiple technical courses at the community college to equal one credit through articulation at the University. Oftentimes these types of alternative credit arrangements only provide for undergraduate elective credit, but variations do exist, especially in more technical disciplines where direct alignment between the content occurs. In summary: ● These agreements maximize workforce-based education, either via credential or certification, or via continuing education coursework offered primarily at the community college. ● Students who are often defined as "non-traditional" may find these agreements to be extremely beneficial. ● Institutions typically retain the ability to apply these credits as appropriate, without committing to specific transferability.

AGREEMENTS BASED ON COMPETENCIES	
Competency Based Articulations	Defined pathways are pathways where institutions come together to create greater or more enhanced learning outcomes upon transfer. Defined pathways are typically discipline-specific where faculty and administrators from both institutions come together to build a degree pathway from the ground up using the shared understanding that as the student progresses through this specific pathway they will be more prepared for advanced content as the student continues through their coursework. Defined pathways are most commonly found in program-to-program or major-to-major transfer agreements and are usually most prevalent in public systems. Defined pathways not only provide a student a seamless transfer option, but also allows two institutions to work together collegially to build degree pathways that enhance the student's learning as the student seeks higher level degrees and academic credentials. In summary: ● Often as part of Program to Program or Major to Major agreements, defined pathways refer to intentional planning carried out by community college and baccalaureate collaborators to identify and build aligned curricula. ● In ideal situations, the collaborating institutions use defined pathways to construct new programs with aligned curricula. In other circumstances, institutions (as well as systems) use defined pathways to revise and improve existing programs to facilitate transfer.

STRUCTURE OF AGREEMENT TERMS	
2 + 2 (60 semester credits/60 on a traditional 120 credit program)	2 + 2 programs are designed for students who take half of a degree at one institution and the second half at another institution. Usually, this is the completion of an associate's degree at a community college and subsequent transfer into a four-year institution for bachelor's degree completion. One of the hallmarks of this type of program is degree completion and a clear, defined pathway to get there. A student's enrollment status may cause an agreement like this to vary in length.
3 + 1 (90 semester credits/30 on a traditional 120 credit program)	A 3 + 1 partnership program is often designed when two institutions can collaborate for a specific outcome. This type of agreement is designed for a student to complete 75% of the coursework at an institution and transfer to another institution for the final, often senior level, coursework. A good example of this might be a nursing program, where prerequisite and clinical work can be completed at one institution, with upper-division coursework being completed at another institution.

1 + 3 (30 semester credits/90 on a traditional 120 credit program)	A 1 + 3 agreement is designed for a student to start at an institution and transfer after 30 credits of work and without degree completion. This is seen with programs that are structured to the point that three years is required for timely graduation. Programs that may benefit from this type of structure include engineering, where a student can take introductory coursework at one institution but will need to be at a different institution to complete their major requirements.

What should be included in an agreement?

When discussing content, the following should be addressed:

Bringing together groups to determine how, what, and why the agreement is being developed is paramount.

- **Purpose**
  Agreements should benefit both institutions and their students. However, there will be situations where one institution may have a stronger motivation. The specificity of the purpose of the agreement may vary from quite generic language - such as to prepare students for the workplace, to provide a new pathway to a degree, or simply to provide a seamless transition - to a more targeted purpose, such as to boost the local economy or to meet a workforce shortage such as in teaching or nursing. It is important that the purpose be clearly described by the initiating/requesting institution and the associated documentation of the agreement.

- **Format**
  The format of the agreements should be as consistent as possible. There may be multiple templates depending on the type of agreement being signed. Do not let format ruin a potential partnership; as long as the needed content is included, the format is simply a compromise.

- **Components**
  The essential components of an articulation agreement might include:
    - Participating institutions, or divisions of institution, which are party to the agreement.
    - Specification of degree types and alignments, such as Associate of Arts with Bachelor of Arts, Associate of Applied Science to Bachelor of Science, or even Bachelor's to Master's programs.
    - Conditions for admission. For example, elements such as the number of earned/transferrable credits, GPA, deadline dates, and/or forms required to establish participation.
    - Matriculation dates at both institutions that establish the academic requirements to be followed and completed.
    - Specific transfer policies that may be different for students under the agreement (for example, if there is a certain time after which credit earned in certain technical fields is no longer eligible for credit and an explanation as to how these policies apply).
    - Identification of the catalog upon which the articulation was based, relative to each school.
    - Any course-to-course equivalencies, degree equivalency grids, or curricular crosswalks aligning the programs to be articulated between the two institutions, substitutions for

such (if appropriate), and recommended choices for electives that will facilitate on-time completion. Individual program alignment spreadsheets for visual ease and student understanding might be provided.
- Other degree requirements such as standardized test scores (e.g. PRAXIS), required clinical hours outside the coursework, residency requirements, etc.
- Clear illustration of expected credits and/or time to graduate when possible.
- Dates of applicability as well as length of the agreement and conditions for renewal and/or for termination.
- Non-academic opportunities (or exclusions), e.g. on-campus housing, honors, guaranteed admission, scholarships, advising, etc.
- Data sharing requirements, opportunities, and limitations.
- Legal language as required by the institution, state, or other entities.
- General section that references that students coming in vis-à-vis this agreement are subject to all other university policies and requirements not otherwise specifically addressed in the agreement.
- Agreement marketing process and responsibilities.
- Point of contact for both institutions.
- Assessment policy, including which data will be shared, what the measures of success (and failure) are, and how to identify next steps to improve the agreement.
- Signatories – those officially acknowledging and accepting the agreement on behalf of their institution -- will vary by school, but could include any or all of the following: Presidents, Chief Academic Officers, Academic Deans, Department Chairs, or specific liaison personnel or designate.

Who should be involved?

The voices at the table will be determined by the culture of the institution and may vary from the list below. The type of articulation agreement may also determine which individuals who are involved in the process.

- **Transfer Counselors/Specialist/Articulation Agreement Coordinator** – The designated manager of articulation agreements, university partnerships, or transfer should be heavily involved. These representatives usually have the most experience and training in working with other institutions, degree and curriculum alignment, barriers facing students, guiding regulations, and best practices.
- **Admissions/Registrar/Enrollment Management** - Any type of articulation agreement will need to be promoted by the admissions office. It's essential to have a representative from this area to speak about the abilities to promote the agreements. Additionally, admissions can provide a good analysis of prospective student interest and the potential market. These staff will be speaking to potential students and will need general knowledge about how the articulation agreement works, enough to explain it correctly to students or partners. The more they are aware of the particulars of an agreement, the better the message will make it to the students who are part of the agreement
- **Marketing/Communications** - Once signed, an agreement needs to be promoted. Having a marketing/communications representative in the loop will help with getting the correct information out. The message needs to be sent externally and internally. It's equally important to share the message with prospective students and constituents at both of the partnering

institutions. Those areas include staff, faculty, current students, alumni, key stakeholders, the board of trustees, and other related partners.

- **Faculty** - Faculty need to be involved in the review of curriculum and how articulated credit will apply to the degree program. Many articulation agreements require an in-depth look at course content and applicability of coursework. Additionally, if credit for prior learning is being assessed, faculty need to determine how that will be applied. The extent to which faculty are involved can be determined by the institution; however, faculty need to have say and at times be the decision makers on articulation content and completion toward a degree.
- **Provost/Leadership/Senior Management** - The extent of the involvement at this level may be driven by campus climate, culture or existing procedure. However it is determined, senior leadership should be involved to sign all agreements. This can be involvement at the beginning to get the agreement started, support as decisions are being worked on and then a final review to be sure the agreement from both parties is in line with the institution's mission and vision.
- **Academic Advising** - The area that will advise for all of the specifics of an articulation agreement should be part of the conversation. Important factors such as how credits fit into a degree program and what a student has left to complete the degree need to be determined as part of the process. Additionally, advisors need to be aware of what the agreement says, what an institution has the capacity to do, and how it impacts the students and advisors. Policies and procedures for the agreement could also be determined during these conversations.
- **Business Office/Financial Affairs** - Agreements that allow for students who take courses at a discounted or flat rate requires the business office officials to review the document. This will help with developing a process and procedure for the agreement and to ensure the financial aspect runs smoothly.

What should the process of developing an agreement be?

Every institution is going to have its own process for developing agreements. The process itself is the most important; every agreement should go through the same review, development, signature, and implementation process. Establishing a firm process, with multiple routes to completion, is a necessity.

At the very least, the process should include ways to:

- **Solicit agreements.** The need for agreements can come from anywhere – suggestions may be solicited from faculty, staff, leadership, workforce needs, existing partnership agreements, or even students.
- **Determine what kind of agreements are needed, and the scope of those agreements**. Is a formal agreement needed, or will course to course articulations work? What accreditation, state, or system rules govern what kind of agreements can be achieved?
- **Identify components of agreements**. What items are required by both your institution and the partnering institution? Will any of these components need to be negotiated? Will they require legal review?
- **Determine if the agreements are needed.** Assess if the agreement is in the best interest of your institution or for the student by asking the following:
  - How is this agreement beneficial to the student?
  - What makes this agreement unique for this institution/the partnering institution?
  - How does this agreement establish a pathway?
  - Is the pathway clear?
  - Can we implement and assess the agreement?

- o   Do both parties want the agreement, and if not, how can they work together to move forward?
- **Develop agreements.** As necessary, bring together faculty or administrators. Identify needs and solutions. Finalize content, deliverables, signatories, etc.
- **Sign agreements.** There are many ways to sign an agreement – via mail, electronically, in a big ceremony, etc. Make sure everyone signs, and make sure signed copies are distributed appropriately.
- **Update agreements.** What is the process to update or terminate an agreement? How often should the agreement be updated? What happens to students if an agreement is updated or ended? How much notice is needed to end or update?

What should happen after agreements are signed?

Once an agreement is signed, there is still much work to do. An agreement is only as good as the knowledge and ability to use it successfully.

	CHANNELS TO PROMOTE AGREEMENTS
Website	- Many institutions do a good job of posting agreements on a website, but often finding those web sites is daunting. An articulation website should be front and center – these are agreements that will help students, after all – and connect to common websites used for advising, registration, transfer planning, the catalog, etc. - What is on the website is also important. Do students or advisors need to see the full agreement? Probably not. They want to see course pathways or articulations, benefits of the agreement, or how to get additional information. If that information is hidden within a longer agreement, then develop a quick fact sheet for that agreement. - It is wise for both the two-year and the four-year institutions to publish the agreement, or at the very least, agree about who is posting it and how it will be referenced by the other institution. - For statewide or other larger agreements, make sure a website is clear about the scope of the agreement. Reference primary source information whenever possible. - It should also be noted: the US Department of Education, and many accrediting bodies, requires a list of agreements to be posted on the web. - Due to the nature of the content, non-editable PDFs or other documents are strongly encouraged.
Marketing	Potential venues for marketing agreements: - Social media - TV screens around campus

	● Computers in the library ● A rotating carousel on your website or campus portal ● Flyers or posters in program buildings Print materials will be outdated quickly, so refrain from fancy, expensive publications, and stick with simple, updatable flyers that can be distributed at events, in classrooms, be left on tables, etc.
Outreach	● **Classrooms.** If your institution has identified gateway courses for a particular major, and you recently signed an agreement in that area, plan to visit each of those classes to share the information. Or, email the professor to share the information with students if you can't visit them. ● **Faculty and staff.** Make sure that the campus community knows the agreement has been signed. Send an email to all advisors, faculty, chairs, deans, admissions, marketing/communications department, etc. with updated agreements. The frequency of this email may depend on how many agreements you sign. Train faculty and staff on the agreement's parameters and how to encourage students to utilize it. ● **Prospect list.** If you have a prospect list from a partner institution, reach out those students and let them know an agreement was just signed, and how it could benefit them. Use the agreement as a recruitment or conversion initiative. ● **Distinct populations.** The same could be done for other distinct populations – honors students, athletes, Phi Theta Kappa members, students of color, adult students, etc. ● **Information sessions in person and online.** Invite partner institutions to table on campus, or host an information session, to share information about the agreement. ● **Online information session**.

	TECHNOLOGY CONSIDERATIONS
Degree Audit System	If students need to follow a degree plan different than the current version, then a degree audit system should be updated so that students can be approved for courses outside the traditional program. A separate degree or major code may be an easy way to track students using the agreement.
Catalog maintenance system	Many catalogs share information about partnerships. A new agreement should prompt an update to the catalog, including any curricular changes made during the process. Since agreements should be tied to a catalog year, it's important that the catalog represents the agreement as much as the reverse is true.

Financial aid modules	If course exceptions are made, or if coursework is being transferred beyond an established degree, financial aid may need to make updates, in coordination with the degree audit system, to ensure that financial aid will cover all the courses in the agreement. Agreements that cover unique scholarships, tuition discounting, fee waivers or other financial matters may also require additional programming changes. Agreements can also have an effect on access to military compensation; Go Army Ed or VA approval may be required to be updated.
Course equivalency database	If new course equivalencies, or exceptions, have been made, then the course equivalency system should be updated within a reasonable amount of time. Also, if both institutions are using and/or partnered through external facing state-wide or third-party transfer systems, these should be updated as well in conjunction with any internal student information system (SIS) tables.

In Summary: Best Practices

Best Practice: Have a framework for articulation agreements.

Establish guides to help develop agreements. Know what you want to be included in agreements, what type of agreements your institution will sign, who needs to sign which type, which majors will be willing to participate, how flexible you can be with scholarships or admission requirements, etc. Knowing upfront what you can and can't do will make the process easier.

Best Practice: Get the right people involved.

Having the right people at the table accomplishes multiple goals: it ensures institutional buy-in, it makes the development process easier, and it identifies issues prior to signature. It may be good to have multiple groups in place – a process committee, a content committee, and an implementation committee – to ease the burden of work, move documents through in a timely manner, and make meeting/commitment time more efficient.

Best Practice: Start with the most important agreements, and then move forward.

Developing an agreement takes a great deal of time and resources. It would be a shame to spend time on an agreement that isn't going to help students. Prioritize your agreements based on institutional impact, need, and best return on investment.

Best Practice: Designate an Agreement Coordinator.

It's important to designate a coordinator(s) to help organize the individuals who will be part of the articulation agreement process. Coordinators are helpful to meet deadlines, get questions answered, and move the agreement along to signature and implementation.

Best Practice: Complete the process by notifying populations when an agreement is signed.

Most agreements are signed and then never shared with those who need it most – the faculty, advisors, and students. Establish a process to alert your campus community that an agreement has been signed.

Best Practice: Integrate agreements into your catalog, degree audit system, course equivalency guides, website, and any marketing or outreach initiatives.

Agreements need to be used to be effective. Make sure agreements are integrated into key components of the student experience.

Best Practice: Maintain a master articulation agreement calendar.

It's important to routinely update agreements. Maintain a calendar (in whatever format works for you) that allows you to see when an agreement is signed, when it is effective, and when it needs to be updated. The calendar can also help you manage the development and renewal process.

Best Practice: Use data to support developing or discontinuing agreements.

There are multiple data points that can influence agreements. The most common are how many students transfer between institutions and in what majors. But other data can be beneficial: how many credits are lost in transfer, how well do students do in upper-division coursework upon transfer, what is the average admissions GPA for incoming students, what is the cost of attendance for the entire degree pathway, etc. These various data points can begin a much-needed conversation or provide feedback on the success of an agreement.

Best Practice: Link agreements to catalog year

Because curricula change, it is important to tie course to course or degree to degree agreements to the catalog year on which they were developed. Students should be using the same agreement throughout their path, even if there are changes to the curriculum and agreements are updated. In a perfect world, a receiving institution would honor the course taken and the remaining courses identified when the student started following the agreement.

Best Practice: Don't sign agreements just to have agreements.

When talking about student success, it is not quantity that matters, it is quality. Spend time developing agreements that will help students, rather than just doing agreements for the sake of having them.

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