Educational Partnerships and Outreach
Articulation, Transfer, and Partnership Agreements Manual

For Deans, Department/Program Chairs, and Faculty

Last Updated: March 2020

Preface

Oregon Tech (OT) is committed to maintaining well-designed, effective partnerships that promote access to Oregon Tech Degree programs. Educational Partnerships and Outreach work with faculty and staff to develop and implement articulation pathways with two- and four-year institutions to ensure accurate transfer of academic credit to maximize credit transferability. Oregon Tech partners with institutions where articulation opportunities will improve student success and increase access to advanced educational opportunities.

The structured pathways for community college students to pursue an Oregon Tech degree includes the following activities:
- Ensure curricular alignment with key strategic partners
- Create transfer guides for partner colleges
- Facilitate program-specific articulation agreements with community colleges and other institutions
- Collaborate on best practices for transfer students to include dual enrollment and reverse transfer with partner colleges

This manual [1] summarizes the key elements of the process that are overseen through Oregon Tech Educational Partnership and Outreach Office and provides the structure to deans, administrators, department/division chairs, program coordinators/directors, and faculty for the preparation, approval, implementation, and renewal of agreements that will facilitate articulated transfer work.

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[1] Western Oregon University has graciously given permission to Oregon Tech to utilize their Articulation Agreement Manual as a reference in developing our Guidelines Manual. See the Western Oregon University Articulation Agreement Manual on their website:
https://www.wou.edu/transferpathways/files/2020/01/Articulation-Agreement-Manual.pdf

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What are the different types of Agreements and Collaborations?

Type of Agreement:	Steps to Implement Agreement:
Articulation Agreements Signed agreements that promote transferability of credits across institutions to a specified Oregon Tech program. These agreements most commonly exist with our 2-year community college partners, but also can promote transfer at 4-year institutions too. Articulation agreements are official documents that ensure and guarantee credit transfer into designated programs at Oregon Tech.	1. Work with EPO to draft articulation 2. Send to CC partner contact for review 3. Finalize edits 4. Send for signatures 5. Post online
Course-to-Course Articulations Example: PCC = Oregon Tech BA 211 = ACC 201 MTH 111 = MATH 111 SOC 205 = Social Science Elective	1. Initial evaluation of courses is done by the Registrar's Office. 2. If additional review is needed, the major department is asked to review and advise on course transferability. 3. Registrar's will add in course articulations to the transfer tables.
Dual Enrollment Agreements Establish co-enrollment processes with our community college partners. These agreements coordinate admission, transfer, and financial aid processes to assist in concurrently taking classes at each institution.	1. Initiated college to college 2. MOU developed by EPO, Admissions, Financial Aid, Registrar, and CC partners 3. MOU signed by President
Joint or Dual Degrees Aligns programs at two institutions so student can pursue programming to earn a dual or joint degree. These programs can also be referred to as 2+2 or 3+1 or 4+1 programs.	1. Initiated by college departments 2. Agreement is created via department and EPO 3. Draft sent to college partner for review 4. Finalize edits 5. Send for signatures 6. Post online
Reverse Transfer Agreements state that community college partners will accept credits from Oregon Tech after a student transfers out of their community college and apply those credits toward the completion of	1. Initiated college to college 2. MOU developed by EPO, Admissions, Financial Aid, Registrar, and CC partners 3. MOU signed by President

an Associate's degree. This encourages completion rates among our CC partners.	
Statewide Agreements: Associate of Arts Oregon Transfer (AAOT) Associate of Science Oregon Transfer - Business (ASOT-B) Oregon Transfer Module (OTM)	1. Initiated through state consortium 2. Oregon Tech usually appoints faculty to serve on subject-expert committees 3. State-wide agreements are vetted through a state process and Provosts weigh in 4. Agreements are signed and initiated through HECC
Transfer Guides Marketing tools to show transferability between CC partners and Oregon Tech. Although these guides do not represent an official academic agreement, it is important to note that all transferable courses are acknowledged in our course equivalency tool that is managed by the Registrar's Office.	1. Department or faculty contacts EPO with desire to create transfer guide 2. EPO creates guide 3. Faculty review for accuracy 4. Post final guide online

Transfer Guides

What is a Transfer Guide?

Transfer Guides are marketing tools to show transferability between Partner Institutions and Oregon Tech. The guides show all courses at the Partner Institution that will transfer to a specific Oregon Tech program based on the current catalog.

Students are not required to take all courses listed before applying or starting at Oregon Tech *unless* it is a "pre" program (i.e. Pre-Dental Hygiene).

It is important to note that Transfer Guides are not official transfer evaluations and are subject to change.

Example:

Klamath Community College View school website

Pre-Dental Hygiene

Degree: Bachelor of Science

Required Courses

Transfer Course	Oregon Tech Course	Credits
BIO 231 - Anatomy and Physiology I BIO 231L - Anatomy and Physiology I Lab Must take both	BIO 231 - Human Anatomy and Physiology I	4
BIO 232 - Anatomy and Physiology II BIO 232L - Anatomy and Physiology II Lab Must take both	BIO 232 - Human Anatomy and Physiology II	4
BIO 233 - Anatomy and Physiology III BIO 233L - Anatomy and Physiology III Lab Must take both	BIO 233 - Human Anatomy and Physiology III	4
BIO 234 - Microbiology I	BIO 105 - Microbiology	4
CHE 104 - General Chemistry I CHE 104L - General Chemistry I Lab Must take both	Satisfies CHE requirement: CHE Elective with Lab	4
HPE 225 - Nutrition	BIO 205 - Nutrition	3
MDA 101 - Medical Terminology I	BIO 200 - Medical Terminology	2
SOC 204 - General Sociology: Sociology in Everyday Life	SOC 204 - Introduction to Sociology	3
SPE 111 - Fundamentals of Speech	SPE 111 - Public Speaking	3
WRI 121 - English Composition I	WRI 121 - English Composition	3
WRI 122 - English Composition II	WRI 122 - Argumentative Writing	3
No Equivalent - Take at Oregon Tech	DH 100 - Introduction to Dental Hygiene	2

What is the value of a Transfer Guide?

Transfer Guides provide students at a partner community college or University with all possible courses they can take before transferring to a specific Oregon Tech program. This allows students to have a full picture of their options so they can decide when the correct time to transfer is. Other benefits include:

- Allowing students to make the transition to Oregon Tech easier
- Having more credit count toward their bachelor's degree requirements
- Preventing students from taking unnecessary courses or repeating courses
- Quick process as signatures from OT and Partner departments are not needed

Who can approve and edit a Transfer Guide?

The Transfer Outreach Coordinator (TOC) has the authority to approve and edit a new or existing Transfer Guide. Requests may also be sent to the Director of Educational Outreach and Partnerships. See Appendix A for Oregon Tech contacts.

Process Overview

☐ Reach out to EPO to determine if a Transfer Guide is appropriate.
    ☐ Please note: all prerequisites for Professional programs will be considered for Transfer Guides in lieu of Articulation Agreements.
☐ Once approved, determine all courses at the institution that can be transferred into the program.
    ☐ Courses must be noted as transferable in Oregon Tech's Transfer Tables.
    ☐ If course is not listed, it must be updated with Registrar's before Transfer Guide will be approved (Appendix B)
☐ Fill out Transfer Guide Template (Appendix C)
☐ Send to Transfer Outreach Coordinator for approval.
☐ Once reviewed and approved, the TOC will upload the guide online.

Printable Marketing Materials

Printable Transfer Guides can also be created for use in advising centers, at events, or for general advising use. These guides are general one-page front and back. Examples can be found in Appendix D. The Transfer Guide PDF's include:

- A description of the program and where it is offered
- Information on Oregon Tech graduation requirements
- Admissions and scholarship information
- "How to Read" section and TOC contact information
- Transferrable courses from partner institution to OT

Departments interested in a printable PDF in addition to the online guide, must fill out the Transfer Guide PDF Request Form (Appendix C) and return to the TOC.

Articulation Agreements

What is an Articulation Agreement?

Articulation Agreements are signed documents that promote transferability of credits across institutions from a specified partner program to a specified Oregon Tech program. These agreements most commonly exist with our 2-year community college partners, but also can promote transfer at 4-year institutions too. Articulation agreements are official documents that ensure and guarantee credit transfer into designated programs at Oregon Tech.

What principles should guide Articulation Agreements?

Articulation is a process and relationship involving the vertical and lateral movement of students through a formal education system. The agreement is based upon guidelines, policies and accreditation principles. The agreements are intended to expand and create access for our students.

Oregon Tech intends to enter into agreements that:
- Will be created for the purpose of increasing access to and attainment of students' educational and career goals
- Will ensure alignment of other colleges or university's course offerings with OT majors
- Will be established to have a compelling interest and need for current and future students
- Will provide effective and cooperative connections to strengthen partnerships and initiatives that benefit students
- Will reduce costs to students
- Are mutually beneficial to all Parties
- Align with the Oregon Tech Strategic Plan

Who can approve an Articulation Agreement?

Initial approval of an Articulation Agreement is done by the Director of EPO. Final approval is completed through a digital signature process. Each Articulation Agreement must be signed by:
- Director of EPO
- Oregon Tech Dean
- Oregon Tech Department Chair
- Oregon Tech Registrar
- Partner Institution: at least two signatures - one from Academic Leadership and one at the Dean level. Defer to partner for confirmation.

What is the process for developing an Articulation Agreement?

The process for an Articulation Agreement includes primary considerations; initiation and development; review, adjustment, and vetting; approval; distribution of the Articulation Agreement; annual review and renewal. A simplified checklist for faculty can be found in Appendix E.

<u>Primary Considerations:</u> The first stage in the process is to assess how the agreement aligns with the institution's guiding principles. Proposals that are **not** in alignment with these principles may not become approved, implemented agreements.

Proper consultation with all impacted departments is a requirement before initiating any agreement.

Before initiation, the following conditions must be met:

☐ Students are the primary beneficiaries of the agreement

☐ Partner institution is regionally accredited and not-for-profit

☐ There is enough benefit to warrant the work involved in developing, maintaining, and updating the articulation agreement

☐ Department(s) directly connected to the agreement support(s) it

<u>Initiation and Development:</u> Consultation with EPO is **required** in order to develop an Articulation Agreement. Approval will not be given if an "Articulation Agreement Faculty Request Form" is not filled out. Once approval is given, the departments and faculty are responsible for drafting the initial Articulation Agreement. Any questions on how to draft the Articulation Agreement should be directed to the Transfer Outreach Coordinator.

The following must be completed for the initial draft:

☐ Department or CC partner reaches out to EPO for approval via the "Articulation Agreement Faculty Request Form" (Appendix C)

☐ Initial Articulation Agreement is drafted using the template (Appendix C)
   Content includes:
   - ☐ Partner institution program and OT program
   - ☐ Partner institution and OT personnel required to sign - some partners may require more signatures
   - ☐ Section 1: Partner program courses required for degree with OT equivalents
   - ☐ Section 2: Courses required for OT program that can be completed at partner institution
   - ☐ Section 3: Courses required for OT program that must be completed at OT
   - ☐ Appropriate footnotes

☐ Completed template is sent to EPO Director and TOC

<u>Review, Adjustment, and Vetting:</u> Once EPO has received the initial draft, the Transfer Outreach Coordinator will review the draft and communicate any edits/adjustments that are needed.

The TOC will review the following:

☐ All required courses are listed for both the specified partner program and the specified Oregon Tech program

☐ Course articulations are documented with Registrar's and appear in the Transfer Tables

☐ Credit totals are correct, and match specified programs

☐ Correct footnotes are used throughout the document

    ☐ Prefixes are adjusted to match partner institution

☐ Formatting

If there are any errors, the TOC will return the Articulation Agreement to the appropriate party for editing.

Approval: Once the Articulation Agreement draft has been approved by the Transfer Outreach Coordinator, the Director of EPO will begin the signature process. A PDF of the final, approved draft will be sent out via Sign Now.

To complete the approval process, the following signatures are needed:

☐ Director of EPO

☐ Oregon Tech Dean

☐ Oregon Tech Department Chair

☐ Oregon Tech Registrar

☐ Partner Signature 1 - Academic Leadership

☐ Partner Signature 2 - Dean or equivalent

Distribution of the Articulation Agreement: After all signatures are received, the Articulation Agreement must be distributed to the appropriate stakeholders.

Steps to distribute to internal constituents and partners:

☐ Articulation Agreement is posted online by the TOC (once signed)

☐ Faculty connects with Partner Institution contact to distribute link to staff, faculty, and students

Annual Review and Renewal: Annually, Articulation Agreements will need to be reviewed and edited based on potential curriculum changes. At the beginning of the academic year, each department will receive a list of their current Articulation Agreements. The department is responsible for working with their partner contacts to determine if any changes are necessary to the existing agreements.

Any revisions to the Articulation Agreement will be reviewed and approved by:

☐ Program representatives at both Oregon Tech and the partner institution

☐ Transfer Outreach Coordinator

If no revisions are needed, the department will work with the TOC to renew the existing Articulation Agreements.

How are Articulation Agreements tracked?

Departments, EPO, and the Registrar's Office will all be responsible for maintaining accurate records of Articulation Agreements. An overall summary and final drafts will be housed under EPO and monitored and updated by the Transfer Outreach Coordinator.

Students following an Articulation Agreement before Fall 2020 must disclose their intent with the Registrar's Office **and** their advisor to have it tracked appropriately.

For a student using an Articulation Agreement starting Fall 2020:

☐ The student must fill out the Articulation Notification Form online (Appendix C)

☐ Registrar's Office will document all necessary information in Banner and DegreeWorks

☐ Notice and pertinent information will be forwarded on to EPO, the student, and the student's faculty advisor

Appendix A: Oregon Tech Contacts

Administrative and Academic Leadership	
Administrative Program Specialist Registrar's Office	Allison Baker allison.baker@oit.edu
Director Educational Outreach and Partnerships	Carleen Drago Starr carleen.drago@oit.edu
Executive Assistant to the Provost	Paul Titus paul.titus@oit.edu
Provost and Vice President for Academic Affairs	Dr. Joanna Mott joanna.mott@oit.edu
Transfer Outreach Coordinator Educational Outreach and Partnerships	Cori Graves corinne.graves@oit.edu
University Registrar	Wendy Ivie wendy.ivie@oit.edu
Academic	
College of Health, Arts, and Sciences (HAS) Dean	Dan Peterson dan.peterson@oit.edu
College of Engineering, Technology, and Management (ETM) Dean	Tom Keyser tom.keyser@oit.edu
HAS Department Chairs	
Communication	Dan Peterson dan.peterson@oit.edu
Dental Hygiene	Paula Russel paula.russel@oit.edu
Emergency Medical Services	Jamie Kennel jamie.kennel@oit.edu
Humanities and Social Sciences	MariaLynn Kessler marialynn.kessler@oit.edu
Mathematics	Tiernan Fogarty tiernan.fogarty@oit.edu
Medical Imaging Technology	Debbie McCollam debbie.mccollam@oit.edu
Medical Laboratory Science	Dawn Taylor dawn.taylor@oit.edu
Natural Sciences	Ken Usher ken.usher@oit.edu
Respiratory Care and Polysomnography	Sarah Fitzpatrick sarah.fitzpatrick@oit.edu

ETM Department Chairs	
Business Management	Hallie Neupert hallie.neupert@oit.edu
Civil Engineering	Roger Lindgren roger.lindgren@oit.edu
Computer Systems Engineering Technology	Todd Breedlove todd.breedlove@oit.edu
Electrical Engineering and Renewable Energy	Hope Corsair hjcorsair@oit.edu
Geomatics	Jack Walker jack.walker@oit.edu
Manufacturing and Mechanical Engineering and Technology	Brian Moravec, Interim brian.moravec@oit.edu

Appendix B: Course-to-Course Checklist

If a course is transferrable and does not appear in Oregon Tech's [Transfer Tables](), faculty must review the course and work with the Registrar's Office to update the system. A simple checklist of the process is listed below.

☐ Confirm course is not listed or incorrect in the Transfer Tables

☐ Determine if there is an equivalent course at the partner institution. If course descriptions are needed, reach out to the Transfer Outreach Coordinator.

☐ Once reviewed, email Allison Baker (allison.baker@oit.edu) with correct equivalency. Required information:
- ☐ Partner institution course
- ☐ Oregon Tech course
- ☐ Term and year equivalency started
- ☐ Any additional notes (Must be taken with other course, needs a test, does not count for upper-division, etc.)

Appendix C: Forms

Transfer Guide Template
Transfer Guide PDF Request Form
Articulation Agreement Faculty Request Form
Articulation Agreement Template

- Course entry: Some possible course formats are given in the first section. Please follow naming guidelines.
- Footnotes: Many possible footnote options are listed. Likely some, but not all, will be used for each Articulation Agreement.

Student Articulation Notification Form - New form coming soon

Appendix D: Transfer Guide PDF Examples

Clackamas Community College - Renewable Energy Engineering
Clackamas Community College - Pre-Medical Laboratory Science
Clackamas Community College - Information Technology

Appendix E: Faculty Articulation Agreement Checklist

Primary Considerations

☐ The agreement aligns with Oregon Tech's Guiding Principles

☐ Students are the primary beneficiaries of the agreement

☐ Partner institution is regionally accredited and not-for-profit

☐ There is enough benefit to warrant the work involved in developing, maintaining, and updating the articulation agreement

☐ Department(s) directly connected to the agreement support(s) it

Initiation and Development

☐ "Articulation Agreement Faculty Request Form" filled out

☐ Received EPO approval

☐ Draft Initial Agreement in coordination with EPO. Content includes:

    ☐ Partner institution program and OT program

    ☐ Partner institution and OT personnel required to sign - some partners may require more signatures

        ☐ EPO Director

        ☐ OT Department Chair

        ☐ OT Dean

        ☐ OT Registrar

        ☐ Partner Signature 1 - Academic Leadership

        ☐ Partner Signature 2 - Dean or equivalent

    ☐ Section 1: Partner program courses required for degree with OT equivalents

    ☐ Section 2: Courses required for OT program that can be completed at partner institution

    ☐ Section 3: Courses required for OT program that must be completed at OT

    ☐ Appropriate footnotes (see chart)

☐ Completed template sent to EPO Director and TOC

Review, Adjustment, and Vetting

☐ Edits from TOC adjusted

☐ TOC has reviewed and approved AA draft

Distribution of Articulation Agreement

☐ Articulation Agreement is posted online by the TOC (once signed)

☐ Faculty connects with Partner Institution contact to distribute link to staff, faculty, and students

Articulation Agreement Footnotes	
Required	Excess credits will transfer to Oregon Tech as general elective credit with the exception of developmental course work; these credits will not be used toward the [OT program].
	Baccalaureate students must complete a minimum of 60 credits of upper-division work before a degree will be awarded. Upper-division is defined as 300- and 400- level classes at a bachelor's degree granting institution.
	Oregon Tech's [OT program] requires X credits.
Most likely will be used	To maximize useable credits toward the [OT program], the listed course is recommended.
	Does not count toward the 60 upper-division credit requirement.
	Students can transfer up to X credit hours of Humanities electives into the [OT program]; these courses should be designated as Humanities electives by Oregon Tech. However, only three (3) humanities credits can be studio/performance based. Choose from the following [Partner Institution] prefixes: ART, ENG, HUM, MUS, PHL, R, TA, or Languages (second year/200-level only).
	Students can transfer up to X credit hours of Social Science electives into the [OT program]; these courses should be designated as Social Science elective by Oregon Tech. Choose from the following [Partner Institution] prefixes: ATH, ECO, GEO, HST, POL, PSY, SOC.
Other electives and partner-specific	The [OT program] requires X biological or physical science course(s) with lab. Choose from following [Partner Institution] prefixes: BI, CH, G, GS, or PH. ENV will not be accepted.
	Students can transfer up to X credit hours of Math/Science electives into the [OT program]; these courses should be designated as Math/Science electives by Oregon Tech. Choose from the following [Partner Institution] prefixes: BI, CH, G, GS, MTH, PH.
	(For KCC only) Must take PSY 201A, 202A, and PSY 203A to receive credit for Oregon Tech's PSY 201, 202, 203 or PSY 201A and PSY 202A for Oregon Tech's PSY 201 and 202. PSY 203A will transfer to PSY 203.