

Western Oregon University

Articulation Agreement Manual

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ACHIEVE

Preface

Western Oregon University (WOU) is committed to maintaining a well-designed, effective process for developing and implementing articulation pathways with two- and four-year institutions to ensure an orderly transfer of academic credit for the students that we serve.

Western Oregon University solicits partnerships and articulation opportunities that will improve students' success and increase their access to advanced educational opportunities.

The structured pathways for community college students to pursue a WOU degree include the following activities:

- Ensure curricular alignment with key strategic partners
- Design articulation degree maps (four-year planners) for transfer students
- Create program-specific articulation agreements with community colleges and other Institutions

This Articulation Agreement Manual¹ summarizes the key elements of the process 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.

¹ The Lone Star College System and Portland State University have both graciously given permission to Western Oregon University to utilize their Articulation Agreement Guidelines Manual as a reference and guide in developing our Manual. See the Lone Star College System Articulation Agreement Guidelines Manual on their website:

http://www.lonestar.edu/departments/universityarticulation/Articulation_Manual_Handbook.pdf

See Portland State University's manual on their website: https://www.pdx.edu/academic-affairs/sites/www.pdx.edu/academic-affairs/files/Articulation%20Agreements%20Guidelines%20Manual_2.1.18.pdf

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Articulation Agreement Defined

Articulation is a broad term that relates to various methods by which students can receive credit for particular course work that they have mastered. An articulation agreement recognizes that education received at one institution is equivalent to that of another institution. Articulation Agreements are formal agreements between educational institutions for the transfer of course credit taken at one institution to another institution. They are formalized at the institutional level between Western Oregon University and regionally accredited two-year or four-year institutions. The agreements constitute a broad framework for more specific transfer planning that will define the articulation of baccalaureate degree program requirements for specific course requirements.

Articulation agreements are documents, signed by representatives of both entities that permit credits earned through another Institution's programs to be transferred to Western Oregon University. Credits are applied to a degree, counting toward the major, general education, minor, or as elective credit. The agreement often includes a minimum GPA requirement for admission and minimum or maximum number of credit hours that will transfer, as well as any other admissions requirements specific to the agreement.

Articulation agreements exist between Western Oregon University and two-year or four-year institutions to build transfer pathways and assist students' transfer. Articulation agreements formalize the process of developing and maintaining transfer pathways for students who wish to pursue a bachelor's degree. Typically articulation agreements provide students at community colleges with access to, and connections with, Western Oregon University.

The purpose of an articulation agreement is to increase the number of students' completing an associate's degree and/or coursework at a community college and going on to earn a bachelor's degree, by ensuring that courses successfully completed at another institution will transfer to Western Oregon University. Through Articulation Agreements, we assist students in reaching their educational objectives by providing information that supports a seamless transfer pathway from a two-year or four-year institution to Western Oregon University.

Goals and Benefits

WOU articulation agreements make it possible to properly advise students, allowing them to make informed decisions about which courses should be completed at a partner institution, and which courses can be transferred to WOU. Articulation degree maps (4-year planners) included in the agreement are beneficial to students and permit students to track their progress toward a selected degree as if they were enrolled at WOU.

Articulation agreements and the Degree Maps will be housed in the Provost's repository (shared Google drive) by the university Transfer Pathways Director. The Degree Maps will reflect course equivalencies between Western Oregon University and the partner institution.

Upon completing the requirements that articulation agreement stipulates, students will have met the curricular requirements that are associated with a four-year degree at WOU. Other benefits include:

- Allowing students to make the transition to WOU easier
- Having more credit count toward their bachelor's degree requirements and thereby accelerating progress while decreasing credit loss
- Preventing students from taking unnecessary courses or repeating courses by reducing duplication of instruction
- Saving money on tuition, fees, and books by eliminating the repeat of courses or "lost credits"
- Creating opportunities for continued study
- Improving workforce readiness and placement potential
- Offering motivation to continue with higher education

Educational institution benefits include:

- Improved student success
- Promoting curricular alignment
- Facilitating communication between educational institutions
- Facilitating communication between faculty and administrators
- Reducing duplication of instruction
- Expanding program content
- Enhancing public relations
- Increasing enrollment in articulated courses at the high school and college levels
- Assisting with recruitment at all levels of education
- Promoting a unified educational system

Guiding Principles

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.

WOU intends to enter into agreements that:

- Will be created for the purpose of increasing access to and attainment of students' educational/career goals
- Will ensure alignment of other colleges or university's course offerings with WOU majors
- Will be established to have a compelling interest and need for current/future students
- Will serve to maximize educational opportunities and services to enhance career opportunities for students in workforce development programs
- 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 WOU Strategic Plan

Types of Agreements

| Agreements Managed by Academic Units | | | |
|--|--|---|--|
| Type & Form | What | How | Authorized Signatory |
| <p>Program-to-Program Articulation Agreement</p> <p>Will include a Course Articulation Agreement and Degree Map.</p> | <p>Specifies how courses in a program at a Community College (CC) will transfer to a specific major at WOU.</p> <p>Example: PCC to WOU PS 222 = PS 2XX Meets PS 222 requirement of Early Childhood/Elementary program.</p> | <p>Formal agreement, generally initiated by department, program, or division. May allow courses that are not a direct equivalent to WOU courses to be accepted to meet major requirements for a specific major only.</p> | <p>Must be vetted and signed by; department head or program coordinator, and division chair, dean, the Provost (or designee), and University President.</p> |
| <p>Course-to-Course Articulations</p> | <p>Example: PCC to WOU EC 200 = EC LD EC 201 = EC 201 FN 225 = CH 250</p> | <p>Initial evaluation of courses by articulation specialists in the Admissions/Registrar's office. If transfer is unclear a general "XX" is used and the major department and dean are asked to review and advise. Department and division, with support of the dean, may change the original articulation determination of an articulation specialist.</p> | <p>Admissions/Registrar (or designee).</p> <p>Agreements by faculty must be vetted and signed by; department head, program coordinator, or division chair.</p> |
| Administratively Managed by Administrative Units | | | |
| <p>Statewide Agreements</p> | <p>Associate of Arts Oregon Transfer (AAOT) Associate of Science Oregon Transfer – Business (ASOT-B) Organic Chemistry Agreement HB 2998</p> | <p>Coordinated, vetted, and administered at the state-level.</p> | <p>Authorized state agencies such as Oregon Transfer Articulation Committee (OTAC)</p> |
| <p>Reverse Transfer</p> | <p>Reverse agreements allow a community college to accept credits earned after a student transfers to WOU in order to allow them to apply toward an associate's degree.</p> | <p>Initiated by Registrar's Office (RO) or community college.</p> | <p>Registrar (or designee)</p> |

| | | | |
|--|--|---|--|
| <p>Admission Agreements: (Notice of Educational Collaboration)</p> | <p>Guarantees that students who meet certain criteria will be admitted. Does not identify how specific courses transfer.</p> | <p>These are generally focused on international students transferring from a community college in the United States.</p> | <p>Initiated and signed by the Office of International Affairs, or by the Office of Admissions for domestic institutions. Only finalized, upon final vetting and signature of the Provost (or designee). If special tuition/fee rates apply the VP of Finance must approve.</p> |
| <p>Degree Partnership Program (formerly Dual Admission Agreements)</p> | <p>Students who apply for degree partnership admission in a degree partnership program and are admitted to both WOU and a partner community college, may continue to take classes at their CC before during or after matriculating at WOU. Credits count at both their CC and WOU toward their financial aid load.</p> | <p>Sponsored by the VP of Academic Affairs or the VP of Student Affairs. Various departments involved include, admissions processing, communication with partner institutions, transcript evaluations, and financial aid, carry out the primary functions of the agreement.</p> | <p>University President</p> |
| <p>General Education Block Transfer</p> | <p>Example: Interstate Passport</p> | <p>Provost's office and Faculty Senate sponsor and review.</p> | <p>Authorized state agencies such as the HECC. May also receive endorsement from the Joint Transfer Articulation Committee (OTAC). Vetted by faculty.</p> |

Review, Authorized Signatory, and Record Maintenance

The requirements for an articulation agreement depend on the specific agreement itself. Students must meet minimum WOU admission standards and grade requirements as outlined in the specific agreement.

All articulations, co-admissions, and reverse transfer agreements shall have all applicable administrative reviews completed and be signed by all Parties prior to commencement of any duties/actions by the Parties as stipulated in the agreement.

An articulation agreement is a binding legal contract and requires review by an authorized WOU signatory with authority to contractually bind the university **before** submission to the Partnering Institution. Individual WOU schools/colleges are **not** authorized to enter into an articulation, degree partnership program agreement or reverse transfer agreement **without** President and Provost approval.

All agreement types **require** a Financial Impact statement be provided prior to negotiating the agreement. The type of information required includes but is not limited to the following list:

- FTE in feeder program at the community college
- Number of credits to be completed at Western Oregon University
- Projected average credits per term
- Projected terms to completion of four-year degree
- Projected new Western Oregon University students per year
- Percent anticipated to complete the four-year degree
- Percent of program estimated to be completed by non-completers

Faculty and/or staff engaging in these agreements must complete the university approved Articulation Agreement Financial Impact Statement Template. A sample of the template can be found on the Transfer Pathways website at <https://wou.edu/transferpathways/articulation-agreements/>.

Agreements are only valid if they are executed by persons authorized to bind the Party (Western Oregon University) in contract (University President, VP Finance, or VP/General Counsel).

A copy of the original agreement **must** be included with the amendment, change, extension or renewal at the time documents are processed for approval.

Signed copies of the original agreement and any amendments, changes, extensions or renewals are kept in the Provost's office. Copies of all currently executed agreements will be kept in the Provost's repository. Expired agreements will be archived electronically in the Articulation Agreement database.

All agreements **are expected** to follow the templates and guidelines in this document.

Process Overview

1. Primary Considerations

The first stage in the process is to assess how the agreement aligns with the institution's guiding principles for creating new agreements. Proposals that are **not** in alignment with these principles may not become approved, implemented agreements.

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

2. Development Agreement

Consultation with the University Transfer Pathways Director is recommended during the development of an Articulation Agreement.

- Internal Development - The Dean's office and Department Head/Program Coordinator where the program is housed, determine area specific agreements (<https://wou.edu/transferpathways/articulation-agreements/>).
- Program-to-program or course-to-course agreements:
 - A faculty member wishing to propose a program-to-program agreement should consult with their division chair/program coordinator to discuss the benefits of the agreement and how engaging in this agreement meets WOU's mission fulfillment and alignment with *Forward Together*. The division chair/program coordinator can initiate a discussion with the appropriate dean.
- Draft agreements are written by the University Transfer Pathways Director with the following considerations:
 - Complies with the Articulation Agreement Guidelines
 - Proper consultation with all impacted departments
 - Provides input and review from the Partnering Institution
 - It is encouraged that academic advisors be consulted regarding curricular details of agreements.
- External Development - The Partnering Institution may approach Western Oregon University to draft an institutional or program specific agreement **and requires** a Western Oregon University sponsor. The draft agreement is written by the University Transfer Pathways director and reviewed by the Provost's Office, Registrar's Office, Dean's office, and appropriate Department Head/Program Coordinator with the same considerations as an agreement internally developed.

Comments and concerns from impacted areas and Partner Institution are considered and brought to the University Transfer Pathways Director, Registrar's Office, and Dean's office for discussion with those who developed the agreement.

3. Content

To ensure quality and consistency of agreements, the following areas should be addressed in all articulation agreements into which Western Oregon University enters.

- *Rationale for the agreement -- This includes a brief statement indicating the reason for forming this agreement.
- Academic Agreements:
 - *Partner institution details (name, contact, accreditation, etc.)
 - *Names of impacted programs (if applicable)
 - Submit a Permanent Articulation request form via the portal (for course-to-course equivalencies only)
 - Transfer guide/degree map and financial impact statement (for program-to-program agreements only)
- Administrative Agreements:
 - *Agreement Partner details (name, contact, accreditation, etc.)
 - *Information related to any financial obligations (as applicable)
- All Articulation Agreements and corresponding documentation (degree maps/transfer guides, and financial impact statement, etc.) that support the agreement will be housed in the Provost's repository.

*Required when completing Notice of Intent. It is recommended that all supporting documents are submitted at once, however, the database does allow submitters to submit supporting documents as they are finalized.

4. Initial Notice of Intent

The request for an articulation agreement may be generated from either an internal (WOU curriculum team, department or division) or external (originating from another institution) source so long as external agreements have a Western Oregon University sponsor.

Regardless of the origin of the agreement, **all** requests to initiate developments of transfer agreements must be communicated in writing, via the "[Notice of Intent](#)" form, to the University Transfer Pathways Director. Upon submission of the Notice of Intent, an email will automatically be sent to the University Transfer Pathways Director and the submitter.

The Department Head/Program Coordinator, Division chair, or Dean's office will generate the request of the "[Notice of Intent](#)" ([Appendix C](#)) to the University [Transfer Pathways Director](#).

Please note: You must be logged into your portal to submit a Notice of Intent.

Incomplete submissions **will expire** in 6 months. An email will be sent letting the submitter know the "Notice of Intent" is set to expire. Programs have the ability to submit a new "Notice of Intent" if they still wish to proceed with the agreement.

5. Approval

After the agreement is finalized, signatures and copies will be made in accordance with the procedure laid out for the type of agreement being established (see appropriate checklist, [appendix A- Course-to-Course or Program-to-Program](#) or [appendix B- Administrative](#)). **Note**, applicable agreements **are not** valid until the Partner Institution has returned a signed copy to Western Oregon University. Upon receipt of the signed copy from the applicable partner, implementation will be as scheduled or in the next feasible term, depending on the nature of the agreement.

6. Communicate/Disseminate

Following approval by obtaining the appropriate signatures, the original agreement is archived, in the Provost's Office. A copy of the signed agreement will be kept in the Provost's repository, by the University Transfer Pathways Director.

The University Transfer Pathways Director will notify and provide copies as follows:

Notify:

- Faculty Senate (Program-to-Program)
- Deans
- Divisional instruction leaders/Program Directors
- Department head
- Academic Advisors
- Provost's office

A copy of the agreement is disseminated as a PDF to:

- Partnering Institution
- Participating academic units
- Registrar
- Financial Aid
- Admissions (for purposes of recruitment and articulation awareness)

7. Promotion/Marketing

Relevant departments/divisions will coordinate promotion and marketing of transfer articulation agreements to students in several ways:

- Inform academic advisors and curriculum teams of new agreements at departmental meetings, and/or training sessions.

- Ensure that Course Articulation Agreements, degree maps, and financial impact statements are housed in the Articulation Database by the University [Transfer Pathways Director](#).
- Consider, in coordination with MarCom, other printed venues to promote agreements, (e.g., brochure, college catalog, and appropriate websites, etc.).

8. Regular Review

Curriculum changes initiated by Western Oregon University must be communicated to and resulting changes coordinated with the Partner Institution. Likewise Partner Institutions must communicate and coordinate with Western Oregon University upon initiating curricular changes that impact agreements.

The University Transfer Pathways Director and the Registrar may prompt departments to do an annual or bi-annual review with the transfer institution. Any revisions to the program transfer agreement will be reviewed and approved by:

- Program representatives
- Office of the appropriate dean
- Provost
- President and VP, Finance (If applicable)

Please keep in mind the impact academic curriculum changes have on Articulation Agreements.

If a curriculum change will affect an Articulation Agreement, the department initiating the Articulation Agreement will need to connect with community colleges and those individuals/units to ensure that changes are communicated.

Each reviewed Articulation Agreement will be dated to reflect the date of the review and to assist in maintaining the most current agreements.

9. Agreement Renewal

Articulation agreements typically expire after three years. A year prior to expiration, the University [Transfer Pathways Director](#) will notify departments that an agreement is about to expire. At this time, the department works with the Partner Institution to review and revise the Articulation Agreement as appropriate. Departments update (as needed) the Articulation Agreement form, the Course Articulation Agreement and Degree Map. All updated forms are submitted for review and approval following the standard process found in [Appendix C](#).

Appendices

Appendices

[Appendix A: Course-to-Course/Program-to-Program Checklist](#)

[Appendix B: Administrative Agreements Checklist](#)

[Appendix C: Forms \(Notice of Intent, Degree Map Template, and Transfer Guide Template\)](#)

[Appendix D: WOU Contacts](#)

Appendix A: Course-to-Course/Program-to-Program Checklist

Primary Considerations

- Students are the primary beneficiaries of the agreement
- Partner institution has regional accreditation status

Regional Accrediting Body: _____

- Institution is not-for-profit
- An agreement in this area does **not** already exist
- A new or needed additional opportunity will be provided for students
- There is enough benefit to warrant the work involved in developing, maintaining, and updating the articulation agreement
- Department(s) directly connected to the agreement supports it
- The financial impact to Western

Initiation

- Western Oregon University department contacts Partnering Institution or vice versa.
- The Department Head, Program Coordinator, Division Chair, or Dean is notified of intention to create an Articulation Agreement.
- Course-to-course: the permanent articulation request is completed via the portal
- Program-to-program: the transfer guide/degree map and financial impact statement forms are completed

Notice of Intent to Develop an Articulation Agreement

- Department Head, Program Coordinator, Division Chair, or Dean notifies the University [Transfer Pathways Director](#) in writing by submitting a “**Notice of Intent**” to develop an Articulation Agreement following the standard format found in Appendix A.
- Course-to-course: A copy of the email received when submitting a permanent course articulation request is forwarded to the University Transfer Pathways Director
- Program-to-program: the transfer guide/degree map and financial impact statement templates are forwarded to the University Transfer Pathways Director.
- The University Transfer Pathways Director; coordinates all involved parties.

Review, adjustment, and vetting phase:

- Coursework suitability or continuity of courses has been properly vetted with all impacted academic units offering the courses.
- Course articulation lists that are part of the agreement are shared with the Registrar’s Office for review.

- The University Transfer Pathways Director in collaboration with the Registrar's Office will communicate any errors or questions to the department for resolution and adjustment of agreement as necessary.
 - Department, division, or dean submits the final draft of the transfer guide/degree map to the University Transfer Pathways Director.
 - The University Transfer Pathways Director drafts the agreement and begins the approval process.
 - Only courses that do not have direct equivalencies and need to be programmed into Degree Tracks are listed in the agreement. We use the transfer guide/degree map to ensure alignment to 30-60-90 and to update transfer course articulations as needed.
 - Approval Process Workflow.
 - Dean signs **TWO** copies of the agreement.
 - Provost signs **both** copies of the agreement.
 - Partnering Institution signs **both** agreements and returns one signed copy to the University Transfer Pathways Director.
- Communicate/Disseminate the Agreement
 - The University Transfer Pathways Director posts the agreement in the Provost's repository and logs it in the Articulation Agreements Database.
 - The University Transfer Pathways Director notifies and distributes scanned pdf copies of the Articulation Agreement to participating academic units, Registrar's Office, the Western Oregon University advising community, Admissions, and others as appropriate.
 - The University Transfer Pathways Director provides the original copy to the Provost's Office to archive and saves a pdf copy to the Provost's repository.
- Promotion/Marketing
 - Department links to the course articulation form from appropriate departmental websites.
 - Department should consider other venues to promote agreements.

Appendix B: Administrative Agreements Checklist

Primary Considerations

- Students are the primary beneficiaries of the agreement
- Partner institution has regional accreditation status (not applicable, Statewide Agreements)

Regional Accrediting Body: _____

- Institution is not-for-profit
- An agreement in this area does **not** already exist
- A new or needed additional opportunity will be provided for students
- There is enough benefit to warrant the work involved in developing, maintaining, and updating the articulation agreement
- Department(s) directly connected to the agreement supports it

Initiation

- Appropriate party at Western Oregon University works with institution, agency, committee, etc. regarding the design of the agreement.
- Begin working on the Financial Impact Template.

Notice of Intent to Develop an Articulation Agreement

- Appropriate party notifies the University [Transfer Pathways Director](#) in writing with a “**Notice of Intent**” to develop an Articulation Agreement following the standard format found in [Appendix C](#).
- Submit the Financial Impact Statement Template to the University Transfer Pathways Director
- Transfer Pathways Director; drafts memo documenting the proposed agreement (if applicable).
- Transfer Pathways Director; coordinates all involved parties.

Review, adjustment, and vetting phase:

- Involved parties will coordinate planning activities and troubleshooting discussions for potential challenges.
- Challenges, implications, and resource requirements will be compiled and shared with leadership.
- Resolutions are developed for any show-stopper issues.
- Transfer Pathways Director finalizes the memo after all changes are made (if applicable).
- Transfer Pathways Director begins the approval process.

- Revise and finalize the Financial Impact Statement Template (if applicable).

- Approval Process Workflow
 - Transfer Pathways Director obtains signatures on the agreement document from appropriate internal Western Oregon University parties.
 - If applicable; Transfer Pathways Director obtains signatures on the agreement document from appropriate external parties.

- Communicate/Disseminate the Agreement
 - The University Transfer Pathways Director posts the agreement in the Provost's repository and logs it in the Articulation Agreements Database.
 - The University Transfer Pathways Director notifies and distributes scanned pdf copies of the Articulation Agreement to participating academic units, Registrar's Office, Western Oregon University advising community, Admissions, and others as appropriate.
 - The University Transfer Pathways Director provides the original copy to the Provost's Office to archive and saves a pdf copy to the Provost's repository.

- Promotion/Marketing
 - Varies by agreement and involved parties. All efforts will be made to notify current and potential students of beneficial agreements.

Appendix C: Forms (Notice of Intent, Agreement Templates, Degree Map Template, and Transfer Guide Template)

[Notice of Intent](#)

[Permanent Articulation Request](#)

[Program-to-Program Agreement Template](#)

[International Admission Agreements Template](#)

[Degree Partnership Program Agreement Template](#)

[Transfer Guide and Degree Map Template](#)

Appendix D: WOU Contacts

| Title | Name | Phone | Email |
|---------------------------------|-------------------------|----------|------------------|
| Director, Transfer Pathways | Kristin M. Mauro, Ph.D. | 838-8732 | maurok@wou.edu |
| Provost | Ron Winningham, Ph.D. | 838-8297 | winninr@wou.edu |
| University President | Rex Fuller, Ph.D. | 838-8888 | rfuller@wou.edu |
| Dean LAS | Kathy Cassity, Ph.D. | 838-8226 | cassityk@wou.edu |
| Dean COE | Mark Girord, Ph.D. | 838-8518 | girodm@wou.edu |
| University Registrar | Amy Clark | 838-8187 | clarkaj@wou.edu |
| Director of Admissions | Rob Fidtner | 838-8601 | findtnr@wou.edu |
| Director of Financial Aid | Kella Heyler | 838-8679 | helyerk@wou.edu |
| V.P. for Finance | Ana Karaman, Ph.D. | 838-8137 | karamana@wou.edu |
| Office of International Affairs | Neng Yang | 838-8590 | yangn@wou.edu |