

## **2 Participating Institutions**

|          |  |          |
|----------|--|----------|
| <b>2</b> | <b>Participating Institutions .....</b>  | <b>1</b> |
| 2.1      | Overview .....   | 2        |
| 2.2      | Participation by Public Institutions of Higher Education.....  | 2        |
| 2.3      | Participation by State-Related Institutions .....  | 3        |
| 2.4      | Full Participation by Independent IHEs or State-related Institutions.....  | 3        |
| 2.4.1    | Costs .....  | 4        |
| 2.4.2    | Opt-In Process .....   | 4        |
| 2.4.3    | Opt-In Process Timeline.....   | 7        |
|          | Appendix A: Agreement Permitting Pennsylvania Institutions of Higher Education to Participate in the<br>Statewide Transfer System (Effective October 2014) ..... | 8        |

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

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## 2.1 Overview

The law requires Pennsylvania's 14 community colleges, 14 universities in the State System of Higher Education (PASSHE) and four state-related universities to participate in the statewide transfer system. All other institutions of higher education in Pennsylvania may elect to join.

A current list of Participating Institutions is available on [PAcollegetransfer.com](http://PAcollegetransfer.com).

## 2.2 Participation by Public Institutions of Higher Education

Pennsylvania public IHEs are mandated by 24 P.S. § 20-2002-C. Duties of Public Institutions of Higher Education (IHEs) to participate in the statewide transfer and articulation system and TAOC. 24 P.S. § 20-2001-C. Definitions defines "Public institution of higher education" as "A community college or an institution which is part of the State System of which is part of the State System of Higher Education pursuant to Article XX-A."

| PA Community Colleges                    | PA PASSHE Universities                      |
|--|---|
| Bucks County Community College           | Bloomsburg University of Pennsylvania       |
| Butler County Community College          | California University of Pennsylvania       |
| Community College of Allegheny County    | Cheyney University of Pennsylvania          |
| Community College of Beaver County       | Clarion University of Pennsylvania          |
| Community College of Philadelphia        | East Stroudsburg University of Pennsylvania |
| Delaware County Community College        | Edinboro University of Pennsylvania         |
| Harrisburg Area Community College        | Indiana University of Pennsylvania          |
| Lehigh Carbon Community College          | Kutztown University of Pennsylvania         |
| Luzerne County Community College         | Lock Haven University of Pennsylvania       |
| Montgomery County Community College      | Mansfield University of Pennsylvania        |
| Northampton Community College            | Millersville University of Pennsylvania     |
| Pennsylvania Highlands Community College | Shippensburg University of Pennsylvania     |
| Reading Area Community College           | Slippery Rock University of Pennsylvania    |
| Westmoreland County Community College    | West Chester University of Pennsylvania     |

Each public IHE must:

- Have its President, or a respective designee, represent the institution on TAOC.
- Participate in the development and implementation of equivalency standards pursuant to section 2004-C(c)(1).
- Establish and maintain records and data detailing the credits transferred to and received from other public IHEs as the department may prescribe.
- Make any reasonable changes and modifications to its foundation courses, including the strengthening of the courses, to ensure equivalency of those credits among the public institutions of higher education, as recommended by TAOC.
- Agree to accept for transfer foundation courses determined to meet equivalency standards developed by TAOC.
- Participate in the development of statewide program-to-program articulation agreements that allow students to transfer with full junior standing the associate of arts or associate of science degree into a parallel baccalaureate program.
- Identify associate degree programs for full transfer and acceptance into a parallel bachelor degree at a participating institution and/or identify parallel bachelor degree(s) for full transfer and acceptance of articulated associate degrees under the TAOC-approved statewide program-to-program articulation agreements, as applicable.

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

---

- Provide TAOC with copies of all articulation agreements for inclusion in the electronic articulation system and portal.
- Submit transfer data to PDE, in accordance with the transfer law and TAOC policy.

### **2.3 Participation by State-Related Institutions**

24 P.S. § 20-2001-C defines "State-related institution" as "The Pennsylvania State University, the University of Pittsburgh, Temple University, Lincoln University and their branch campuses."

At minimum, each State-related IHE must:

- Identify 30 credit hours of foundation course content from equivalent courses identified by TAOC that it will accept for transfer from any other participating institution. A state-related institution shall count a course in the same manner that it would count the same or equivalent course if it were taken by a student at the state-related institution.
- Make the information identified under subsection (a) available to the department for posting on the department's publicly accessible Internet website.
- Appoint a member of the institution to represent the institution on TAOC
- Provide TAOC with copies of all articulation agreements for inclusion in the electronic articulation system and portal.
- Submit transfer data to PDE in accordance with legislation and TAOC policy.

### **2.4 Full Participation by Independent IHEs or State-related Institutions**

Under 24 P.S. § 20-2006-C an independent IHE or a State-related institution may elect to participate fully in the statewide transfer system through the adoption of equivalency standards as provided for in subsection 2004-C(c)(1) by its governing body.

24 P.S. § 20-2001-C defines an "Independent institution of higher education" as "An institution of higher education which is operated not for profit, located in and incorporated or chartered by the Commonwealth and entitled to confer degrees as set forth in 24 Pa.C.S. § 6505 (relating to power to confer degrees) and to apply to itself the designation "college" or "university" as provided for by the standards and qualifications prescribed by the State Board of Education pursuant to 24 Pa.C.S. Ch. 65 (relating to private colleges, universities and seminaries)."

IHEs that elect to participate in the system are referred to as "Opt In Institutions", or "Opt Ins" for short.

When an independent IHE or state-related IHE joins the system, the institution agrees to the same duties and level of participation as the mandated public IHEs. Therefore, each Opt-in must:

- Have its President, or a respective designee, represent the institution as a voting member on TAOC.
- Participate in the development and implementation of equivalency standards pursuant to section 2004-C(c)(1).
- Establish and maintain records and data detailing the credits transferred to and received from other public IHEs as the department may prescribe.
- Make any reasonable changes and modifications to its foundation courses, including the strengthening of the courses, to ensure equivalency of those credits among the public institutions of higher education, as recommended by TAOC.
- Agree to accept for transfer foundation courses determined to meet equivalency standards developed by TAOC.
- Participate in the development of statewide program-to-program articulation agreements that allow students to transfer with full junior standing the associate of arts or associate of science degree into a parallel baccalaureate program.

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

---

- Identify associate degree programs for full transfer and acceptance into a parallel bachelor degree at a participating institution and/or identify parallel bachelor degree(s) for full transfer and acceptance of articulated associate degrees under the TAOC-approved statewide program-to-program articulation agreements, as applicable.
- Provide TAOC with copies of all articulation agreements for inclusion in the electronic articulation system and portal.
- Submit transfer data to PDE in accordance with legislation and TAOC policy.

An Opt In has until **November 15** of each year to notify PDE *in writing* whether it intends to participate in TAOC during the following academic year. An “Academic Year” is defined as the fall, spring and summer semesters.

#### **2.4.1 Costs**

Opt-ins pay no fee to PDE for electing to participate in the statewide transfer system or portal.

The costs associated with opting to participate come from the need to contract with PDE’s software vendor for the statewide electronic articulation system and portal. Each Opt-in contracts directly with the vendor for use of the vendor’s system (includes electronic databases and tools related to the portal), institutional set-up, training and implementation, and annual maintenance.

PDE contracts with AcademyOne, Inc. for the electronic course articulation system and portal. AcademyOne offers a discounted subscription rate to Opt Ins *after* they officially join the statewide articulation system. Contracts are negotiated directly between the institution and AcademyOne. PDE does not negotiate contracts on the institution’s behalf or have control over the cost of the agreement.

For more information contact AcademyOne:

Academy One, Inc.  
101 Lindenwood Drive, Suite 220  
Malvern, Pennsylvania 19355  
Phone: 474-318-7100

#### **2.4.2 Opt-In Process**

Institutions interested in becoming a participating member of the statewide transfer and articulation system and TAOC should follow the steps below:

1. Institution expresses verbal or written interest in joining TAOC by contacting PDE:  
**PA Transfer and Articulation System**  
**Office of Postsecondary and Higher Education**  
**Pennsylvania Department of Education**  
**333 Market Street, 12th Floor**  
**Harrisburg, PA 17126**  
**Phone: 717-772-3643**  
**Fax: 717-772-3622**  
**Email: [ra-patrac@state.pa.us](mailto:ra-patrac@state.pa.us)**
2. PDE provides additional information including the Interagency Agreement.
3. IHE reviews information provided and contacts the vendor of the electronic articulation system to discuss subscribing to the various tools used to maintain the transfer system.

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

---

4. IHE agrees to the required responsibilities and obligations outlined in the Interagency Agreement. The institution's Provost/Vice President of Academic Affairs, or an equivalent institutional administrator, signs two copies of the Interagency Agreement and returns both copies to PDE.
5. Upon receipt of the Interagency Agreement, the PDE Deputy Secretary of Postsecondary Education signs both agreements. PDE mails one official copy of the agreement to the IHE along with an acknowledgement letter and an outline of the implementation process. PDE retains the other copy for its records.
6. The vendor continues to work with the IHE to finalize the contract and provide access to the portal and related databases. The vendor notifies PDE when the contract is final.
7. IHE provides the vendor with an extract of the college's current catalog of courses. The vendor provides the institution with a template and formatting instructions for this submission.
8. IHE appoints representatives to serve on TAOC and to complete various tasks associated with membership. Institution completes TAOC Representation Form and returns to PDE:
  - a. *Primary/Secondary TAOC Representative* – Individuals at the institution who are responsible for representing the institution on TAOC.
  - b. *Primary/Secondary Representatives, Course Equivalency Management Center (CEMC)* – Individuals at the institution who are responsible for proposing the institution's courses to the TAOC Curriculum Standards Subcommittees in the electronic articulation system that supports PacollegeTransfer.com. Courses are submitted once a year via a web-based system. The CEMC contacts are also responsible for establishing and maintaining the institution's course equivalencies with other participating institutions.
  - c. *Primary/Secondary Representatives, Transfer Articulation Management Center (TAMC)* – Individuals at the institution who are responsible for posting and maintaining the institution's transfer articulation agreements on PAcollegetranfer.com.
  - d. *Primary/Secondary Representatives, Transfer Profile* – Individuals at the institution who are responsible for creating and maintaining the institution's college profile on PAcollegetransfer.com. The college transfer profile is a marketing tool as well as an information site. Students are directed to profiles when searching for basic information about your college, admissions and transfer policies and contact information. This position requires some technical knowledge since information is submitted online in the electronic transfer system and must be updated regularly. The Transfer Profile is where an IHE post its transfer policy/process and transfer credit appeals process, both of which are TAOC requirements.
  - e. *Primary/Secondary Representatives, Course Catalog Extract* – Individuals at the institution who are responsible for uploading the institution's course catalog information into the electronic articulation system that supports PacollegeTransfer.com.
  - f. *Primary/Secondary Representatives, Institution Program Search* – Individuals at the institution who are responsible for posting and maintaining the institutions degree programs in the Program Search Database on PacollegeTransfer.com.

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

---

- g. *Primary/Secondary Representatives, Statewide Program Articulation Database* – Individuals at the institution who are responsible for posting and maintaining the institutions articulated associate degree programs and/or parallel bachelor degree programs that meet the requirements of the statewide program articulation agreements.
9. Vendor works with IHE to:
- a. Trains assigned staff to use the electronic articulation system and related tools
  - b. Submit the college course extract for inclusion in the electronic articulation system
  - c. Develop a transfer college profile on PA TRAC
  - d. Submit foundation courses for review by the Framework Equivalency Standards Subcommittees. Once equivalencies are established, courses are immediately included in the electronic articulation database and available via PA TRAC.
  - e. Establish course equivalencies for TAOC-approved courses from other participating institutions. As a participating member of TAOC, an institution may not reject an approved TAOC course for transfer. When transferring a TAOC approved course, an institution must take one of three actions:
    - Enter the current equivalency that the institution has for a given course into the system;
    - Create a new equivalency for the course and enter that course into the system; or
    - If there is no comparable course, use a "ghost" course to indicate that the course is accepted even though there is no matching course taught at the institution.
10. PDE adds IHE as a participating institution on PA TRAC once the IHE has returned the signed Interagency Agreement to PDE and the vendor confirms that 1) a contract to use the electronic articulation system is final, 2) the IHE has submitted a course extract and 3) the IHE has identified at least 30 credits of Framework courses that it is willing to accept for transfer from all of the other fully-participating IHEs.
11. IHE submits copies of all articulation agreements to PDE.
12. IHE submits the institution's student transfer appeal process to PDE. If no such policy exists, the institution must develop one, provide it to PDE, and publish it for transfer students to access.
13. IHE identifies associate and/or bachelor degrees that meet the requirements of statewide program-to-program articulation.

Transfer and Articulation Oversight Committee  
 Governance, Policies and Procedures  
 Revised: 10/16/14

**2.4.3 Opt-In Process Timeline**

| Date        | Task  |
|-------------|---|
| November 15 | <ul style="list-style-type: none"> <li>➤ Sign and return Interagency Agreement to PDE</li> <li>➤ Notify PDE <i>in writing</i> whether the Institution intends to participate in TAOC during the following academic year</li> </ul>  |
| January 1   | <ul style="list-style-type: none"> <li>➤ Deadline to submit a course catalog extract to the vendor of the electronic articulation system form (instructions to be provided by the vendor)</li> <li>➤ Deadline to submit courses for approval by the Curriculum Standards Subcommittees via the Course Equivalency Management Center (CEMC)</li> <li>➤ Deadline to submit articulation agreements electronically to PDE</li> </ul> |
| January 30  | <ul style="list-style-type: none"> <li>➤ Deadline to submit updated Student Transfer Credit Appeals Policy to PDE.</li> </ul>   |
| March 1     | <ul style="list-style-type: none"> <li>➤ Deadline to create college profile on PAccollegetransfer.com</li> </ul>  |
| May 1       | <ul style="list-style-type: none"> <li>➤ Deadline to establish course equivalencies in CEMC for approved framework courses</li> <li>➤ Deadline to provide a copy of the institution's student transfer appeal process to PDE</li> <li>➤ Deadline to identify associate and/or bachelor degrees that meet the requirements of statewide program-to-program articulation</li> </ul>   |

## Appendix A: Agreement Permitting Pennsylvania Institutions of Higher Education to Participate in the Statewide Transfer System (Effective October 2014)

### TRANSFER AND ARTICULATION INTERAGENCY AGREEMENT

This Agreement (the “Agreement”) is made and entered into this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_, by and between the Pennsylvania Department of Education (“Department”) and \_\_\_\_\_, (hereinafter called the “Institution”)

WHEREAS, the General Assembly of the Commonwealth of Pennsylvania amended the Public School Code of 1949 by adding Article XX-C “Transfers of Credits Between Institutions of Higher Education” (24 P.S. § 20-C) and thereby establishing the Statewide Transfer and Articulation System (referred to herein as the “Statewide Articulation System”); and

WHEREAS, 24 P.S. § 20-2002-C requires public institutions of higher education in Pennsylvania to participate in the Statewide Articulation System; and

WHEREAS, 24 P.S. § 20-2006-C permits State-related institutions and independent institutions of higher education in Pennsylvania, as defined, to elect to participate in the Statewide Articulation System; and

WHEREAS, the Institution, through its governing body, has adopted the equivalency standards as provided for in subsection 2004-C(c)(1) and has agreed to abide by the duties prescribed in 24 P.S. § 20-C of public institutions of higher education; and

WHEREAS, the Department and the Institution agree that this Agreement enumerates the responsibilities, obligations, rights and privileges of the Institution, which has elected to participate in the Statewide Articulation System.

NOW, THEREFORE, the Department and the Institution enter into this Agreement intending to be legally bound and mutually agree as follows:

1. The term of this agreement shall commence on \_\_\_\_\_, and shall continue through each succeeding academic year, commencing with the \_\_\_\_\_ academic year, until and unless the institution notifies the Department of its intention to terminate the agreement. If an institution seeks to terminate its agreement to participate in the Statewide Articulation System, it must notify the Department by November 15 of the year prior to the academic year when termination is desired.

2. The Institution, which has elected to participate in the Statewide Articulation System, agrees to comply with the following responsibilities and obligations:

- a. Have its President (or a respective designee) represent the Institution as a voting member of TAOC and to assume all responsibilities in accordance to the *Pennsylvania Department of Education Transfer and Articulation Oversight Committee Governance, Policies and Procedures* (referred to herein as the “Manual”);

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

---

- b. Adopt, through its governing body the foundation course equivalency standards developed by the Transfer and Articulation Oversight Committee (“TAOC”) and apply them in each academic year during the term of this Agreement;
- c. Submit foundation courses to be reviewed by the subcommittees of the TAOC prior to the commencement of each academic year;
- d. Identify course equivalencies for all TAOC-approved courses;
- e. Accept for transfer, credits in all courses approved by the TAOC review process and apply these credits towards graduation requirements in accordance with the Manual;
- f. Participate in the development of statewide program-to-program articulation agreements that allow students to transfer with full junior standing the associate of arts or associate of science degree into a parallel baccalaureate program;
- g. Identify associate degree programs for full transfer and acceptance into a parallel bachelor degree at a participating institution and/or identify parallel bachelor degree(s) for full transfer and acceptance of articulated associate degrees under the TAOC-approved statewide program-to-program articulation agreements, as applicable;
- h. Submit annual transfer data to the Department in accordance with 24 P.S. § 20-C and the Manual;
- i. Participate in the Statewide Articulation System for the entire academic year for each academic year during which the Institution remains a party to this agreement;
- j. Make any reasonable changes and modifications to its foundation courses, including the strengthening of the courses, to ensure equivalency of its credits among the other participating institutions;
- k. Abide by all policies, procedures and decisions of the TAOC Dispute Resolution Subcommittee;
- l. Subscribe to the Department’s selected electronic articulation database or software program and portal;
- m. Submit existing transfer and articulation agreements, transfer credit policies and transfer credit appeal policies annually to the Department; and
- n. Comply with all future TAOC requirements implemented as rules, policies or procedures that are communicated to and affect participating institutions.

3. The Department agrees to provide the following rights and privileges to the Institution, as a participant in the Statewide Articulation System:

- a. Include the Institution as part of the Statewide Transfer and Articulation System;

Transfer and Articulation Oversight Committee  
Governance, Policies and Procedures  
Revised: 10/16/14

---

- b. Provide the Institution with access to all Statewide Articulation System benefits and electronic databases or software programs as they relate to the state transfer system;
- c. List the Institution on the Pennsylvania Transfer and Articulation Center (“PA TRAC”), the statewide transfer portal that provides students, parents and advisors direct access to transfer information, including articulation agreements for all participating institutions; and
- d. Include the Institution in the Commonwealth’s marketing and promotion of PA TRAC and the Statewide Articulation System.

**4. Termination of Agreement** In addition to the Institution’s annual right to terminate this agreement in accordance with paragraph one (1) above, the Department may terminate this agreement at any time for its convenience or if the Institution fails to satisfy its responsibilities under paragraph two (2) above. The Department shall provide written notice of termination and of the effective date thereof, at which point the rights afforded under paragraph three (3) will cease.

IN WITNESS WHEREOF, the parties have executed this Agreement:

**Authorized Representatives for the Institution. If this Agreement is signed by anyone other than the holder of specific titles below, then the Agreement must be accompanied by a Board resolution or Board minutes clearly establishing that the signer, by name and title, has the authority to sign the Agreement and bind the organization:**

|   |  |      |
|---|--|------|
| Print Name and Circle Title:<br>President or Vice President | Signature of President or Vice President | Date |
|---|--|------|

|  |                                     |      |
|--|-------------------------------------|------|
| Print Name and Circle Title:<br>Secretary or Treasurer | Signature of Secretary or Treasurer | Date |
|--|-------------------------------------|------|

**Authorized Representative for the Department:**

|   |             |
|---|-------------|
| <b>DEPUTY SECRETARY<br/>OFFICE OF POSTSECONDARY AND HIGHER EDUCATION<br/>PENNSYLVANIA DEPARTMENT OF EDUCATION</b> | <b>DATE</b> |
|---|-------------|