

## OFFICIAL

Policy and Procedure Statement 2.15  
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Reviewer: Director of Curriculum Services and  
Associate Director of Undergraduate Admissions

Articulation Agreements and  
Transfer Planning Guides  
(18 paragraphs)

## GENERAL INFORMATION

1. Texas State University-San Marcos is committed to maintaining a well-designed, effective process for developing and implementing articulation agreements, transfer planning guides and reverse transfer processes with lower-division institutions (defined as a public junior college, public state college, or public technical institute), to ensure orderly transfer of academic credit within an undergraduate degree program. The university recognizes the importance of transfer students in the state higher education system and makes efforts to recruit, retain, and graduate them. Texas State will eagerly participate in the state's *Closing the Gaps* initiative of matriculation and graduation goals by year 2015 using the transfer planning guides as a completion strategy. This PPS summarizes the key elements of these efforts and process to facilitate articulated transfer coursework.
2. Texas State will analyze credit accepted for transfer in terms of level, content, quality, comparability, and degree program relevance, as required by the Southern Association of Colleges and Schools (SACS). This PPS utilizes the recommendations from the Transfer of Academic Credit Policy from SACS *to review their transfer policies and procedures with a view toward making transfer of credit easier for students while continuing to honor their obligation to maintain academic quality and integrity.*
3. Texas State will comply with the Transfer of Credit Administrative Code from the Texas Higher Education Coordinating Board. *All successfully completed lower-division academic courses that are identified by the Texas Common Course Numbering System (TCCNS) and published in the Lower Division Academic Course Guide Manual (ACGM) shall be fully transferable among public institutions and shall be substituted for the equivalent course at the receiving institution. Except in the case of courses belonging to a Board-approved Field of Study Curriculum (FOSC), the receiving institution determines applicability of transferred courses to requirements for specific degree programs.*
4. In 2011, the Texas Legislature established a reverse transfer program, as defined in Texas Education Code, Section 2, Subchapter S, Chapter 61, paragraphs 61.833 (b) & (c), that applies to each student who, not earlier than the 2011 fall semester, transfers to Texas State from and/or previously attended a lower-division institution of higher education. Transfer students at Texas State who earned at least 30

semester credit hours for coursework at the lower-division institution and a cumulative total of at least 90 semester credit hours for coursework successfully completed may be considered for an associate degree. As soon as the student has met the above criteria, Texas State will ensure authorization from the student for Texas State to release the students' transcript to the lower-division institution. On receipt of a student's authorization, Texas State shall release the student's transcript to the lower-division institution, which determines if the student has earned the credits required to receive an associate's degree awarded by the lower-division institution of higher education.

## **DEFINITIONS**

5. Articulation agreements are officially approved agreements that are executed at the institutional level to develop a partnership between Texas State and a lower-division institution. The articulation agreements constitute broad frameworks for the more specific transfer planning guides that define articulation of baccalaureate degree program requirements at the programmatic level. Articulation agreements are developed at the discretion of the Provost and the President, and if deemed appropriate, can be executed in a formal signing ceremony. Articulation agreements are important in promoting statewide college transfer activities.
6. Transfer planning guides are programmatic level documents that outline:
  - university admission requirements with contact information for advising centers and undergraduate admissions,
  - program application deadlines and admission requirements e.g. as grade point average, minimum hours, test scores, auditions, etc.,
  - course equivalencies such as the course-by-course patterns for articulated transfer work and the Texas FOSC courses, and
  - the Texas general education core curriculum and degree plan requirements including prerequisites, co-requisites, sequencing, and specialized core curriculum courses.
7. Transfer planning guides may be developed and exist in the absence of a more general articulation agreement or they may be appendices to a broader articulation agreement. Transfer planning guides are designed to show how equivalent course work can help students efficiently plan their transfer to Texas State by taking the necessary courses at a lower-division institution that may transfer for credit toward an undergraduate degree program of their choice at Texas State.
8. Reverse transfer rules ensure that credits earned while a student is working toward a baccalaureate degree at Texas State are sent back to the student's former lower-division institution to be assessed in fulfillment of associate degree requirements.

## **PURPOSES**

9. Interest in establishing an articulation agreement may originate from the lower-division institution, from Texas State, from professional associations, or from external grants. Articulation agreements are usually developed because officials desire a formal document that demonstrates a partnership between the lower-division institution and Texas State to assist the state in meeting goals for student retention and success.
10. The establishment of transfer planning guides also originate from the lower-division institution, from Texas State, or from external grants. Transfer planning guides are developed because:
  - there are significant numbers of transfer students into a particular degree program from a lower-division institution,
  - there are structured degree programs with multiple course requisites and equivalencies that necessitate careful planning,
  - there are significant opportunities to increase the number of transfer students,
  - there are significant course equivalences already approved with a lower-division institution for a particular degree program, or
  - there is a strategic interest to maximize course transfer and enrollments in identified high need areas for the state of Texas.

## **PROCEDURES AND APPROVALS**

11. If an articulation agreement is deemed appropriate, the Provost will consult with the President for final approval. The Curriculum Director, in consultation with the Associate Director of Undergraduate Admissions and/or the Registrar, then contacts the academic official at the lower-division institution. If the agreement is approved, a formal signing of the agreement is arranged. If so desired by the Provost and President, a signing ceremony may be arranged, or the signing may be handled through the mail.
12. The following materials are used to develop new and update existing transfer planning guides:
  - a. current catalogs and degree plans for the lower-division institution and Texas State,
  - b. the Texas general education core curriculum and the Texas Core Webcenter,
  - c. the Texas field of study,
  - d. transfer course equivalencies,
  - e. the ACGM,
  - e. the TCCNS,
  - f. Samples of completed transfer planning guides from the same lower-division institution, and/or from similar academic disciplines at other lower-division institutions.

13. Developing new transfer planning guides begins with the Office of Undergraduate Admissions. The Associate Director (or designee) will develop an annual schedule of new guides prioritized by transfer enrollment trends in high demand programs from lower-division institutions. An individual interested in developing a new guide should contact the Associate Director. In consultation with the Director of Undergraduate Admissions, the Associate Director evaluates the need for the requested guide, and updates the schedule with the requested guide, if necessary. The Associate Director will contact the interested individual to discuss the options of a transfer planning guide. The Associate Director (or designee) then drafts the new guide and submits the draft guide to the Curriculum Director (or designee) for review.
14. For updating existing transfer planning guides, the Curriculum Director (or designee) reviews degree plan changes in the undergraduate catalog and develops an annual schedule of existing guides that need to be updated based on enrollment and interest trends in high demand programs from lower-division institutions. The Curriculum Director (or designee) makes the appropriate changes in the guides prioritized by degree changes for the selected institutions and programs.
15. The attachments in this PPS are the example formats for transfer planning guides. Attachment A shows an example of a transfer planning guide that contains only the lower-level degree requirements listed by their Texas Common Course Number equivalent and is not individualized by two-year institution (only by major). Attachment B shows an example of a transfer planning guide that contains a general list of degree requirements with no prerequisites or co-requisites at either the individualized two-year institution or at Texas State. Attachment C shows an example of a transfer planning guide that contains the degree requirements and the course equivalencies represented in a general list of courses individualized at the two-year institution and the structured course of study with prerequisites and co-requisites only at Texas State. Attachment D shows an example of a transfer planning guide that contains the degree requirements and the course equivalencies represented in a semester-by-semester degree plan with prerequisites and co-requisites individualized at the two-year institution and at Texas State.  
The decision of which format should be used in a given situation will be made after analyzing the prerequisites and co-requisites in the requested degree plan.
16. For new and existing guides, the Curriculum Director (or designee) logs the status of the guide as pending and submits the pending guide to the affected Supervising Advisor. After a reasonable time, the Supervising Advisor notifies the Curriculum Director (or designee) that either the guide needs further changes or is ready for final approval. If there are no changes to the new or existing guide, the guide is sent to Associate Director of Undergraduate Admissions (or designee) for posting to the website. If changes are needed to the new guide, the Curriculum Director (or designee) submits those changes to the Associate Director (or designee) for further edits. Once changes are completed, the guide is posted on the transfer planning guide website and the Curriculum Director (or designee) is notified.

## BI-ANNUAL REVIEWS

17. Each articulation agreement and transfer planning guide is reviewed every two years. The Curriculum Director will work with appropriate parties to determine the effectiveness of the guides using transfer trends in the programs. Reverse transfer processes are reviewed by the Registrar on a bi-annual basis.

## CERTIFICATION STATEMENT

18. This PPS has been approved by the reviewer listed below and represents Texas State's Division of Academic Affairs policy and procedure from the date of this document until superseded.

Review Cycle: \_\_\_\_\_ Review Date: \_\_\_\_\_

Reviewer: \_\_\_\_\_ Date: \_\_\_\_\_

Approved: \_\_\_\_\_ Date: \_\_\_\_\_

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