

## Subsection 3.4: Defining Inter-institutional Agreements

### Considerations:

There are many different types of agreements in place at colleges, institutes, and universities in Canada. Their characteristics vary although thematic similarities are evident. Agreements affecting the area of transfer can be university wide, faculty/school specific, program specific, or at the level of courses such as for cross-registration initiatives. These agreements can also have legal ramifications.

The findings from Phase 1 indicate that numerous institutions do not notate partnership information on a transcript despite the *Essential* recommendation in the 2003 ARUCC Transcript Guide (33% reported notating partnerships on transcripts). Further, there is evidence that the variety of agreement types is causing confusion and negatively impacting attempts to reach a holistic understanding regarding the breadth and depth of joint programs in Canada. There were also suggestions that agreements in place between institutions in one province were not necessarily honoured in another province (i.e., an issue of reciprocity arose). While likely small, the suggestion is that there is a potential negative impact on inter-provincial student mobility. There were also comments made regarding intra-provincial reciprocity issues.

While some of these findings do begin to stray beyond the scope of the ARUCC PCCAT Project, the research suggests that transcription standards need to be identified and amplified. Further, establishing an agreement nomenclature framework might potentially reduce confusion. It is also worth stating that certain institutions and governing organizations have approved specific partnership agreement terminology. In light of the project's commitment to the principles of institutional autonomy and provincial authority, it is important to respect these formally approved protocols. In so doing, the project is seeking to identify common practices that might inform promising practices in the area of transfer nomenclature glossary development.

### Online Survey and Workshop Questions

1. What other jurisdictions might provide a definitional framework for inter-institutional agreements that would lend insights to the Canadian postsecondary sector?

### Background:

Evidence from Phase 1 indicates institutions and jurisdictions use variable approaches to describe inter-institutional partnerships. Given the evidence, it would be fair to say that it is difficult to point to a national standard; however, there are jurisdictional examples. As the research of Dr. Jane Knight illustrates (2008, 2011), this challenge is not unique to Canada or Canadian institutions.

The most common agreement terms used in Canada are listed in order of popularity below. The italicized terms were also found to be common in the BCCAT *Credentialing Practices for Joint Program* study (Duklas, 2013, p. 11).

- Memoranda of Understanding;
- *Block transfer agreements*;
- *Articulated agreements*;
- *Pathway agreements*;
- *Numeric titling agreements*;
- Bridge/bridging programs or agreements.

Duklas et al. (2014). ARUCC PCCAT Phase 1 Report, pp. 102-103.

Although the terms in the call out within this section are most commonly used at Canadian postsecondary institutions, none of the glossaries examined provided definitions for all the options; typically, “Block Transfer Agreement” and “Articulated Agreements” were defined.

A review of terms culled from glossaries created by institutions, allied organizations, and governments reveal that formal definitions for agreement types do not always appear to exist in current glossaries. Table 3 highlights some of the terms in use in Canada.

*Table 1: Agreement Terms in Use in Canada*

Term	Definition
Degree Partnership	An agreement between two institutions that allows students to earn credit toward a credential at one institution while enrolled at the other institution. May also be called ‘dual enrollment’.
Memorandum of Understanding (MOU)	A formal agreement of intent between two or more institutions to accept courses (or clusters of courses) for credit. Generally MOU's also incorporate other factors such as recognition of co-op placements, reduced course load (beyond what is accepted for advanced credit) for completion, etc. that is not normally found in a Transfer Agreement.
Reciprocal Bilateral Transfer Agreement	A transfer agreement that has been negotiated between two institutions whereby Institution A agrees to accept the course (or cluster of courses) taken at Institution B in lieu of its own course (or cluster of courses) and reciprocally, Institution B agrees to accept the course (or cluster of courses) taken at Institution A in lieu of its own course (or cluster of courses). Therefore, reciprocal bilateral agreements are always two-way agreements (see unidirectional bilateral transfer agreement).
Unidirectional Bilateral Transfer Agreement	A transfer agreement negotiated between a sending institution and a receiving institution which is primarily intended to be one-way. In practice, advance credit for courses involved in an agreement usually will be awarded at either institution, particularly when the agreement involves courses that are part of a university transfer program. However, in some cases credit will not be awarded in the opposite direction; for example, Institution A may agree to accept Institution B’s cluster of transferable courses in lieu of one of its own courses and have the agreement entered in the Transfer Guide. However, it might not be appropriate for Institution B conversely to award transfer credits for the cluster of courses if a student with the one course from Institution A presented it for advanced credit assessment (see reciprocal bilateral transfer agreement).
Transfer Agreement	Formal agreement between postsecondary institutions that specifies how courses and credits completed at the sending institution will be accepted and applied at the receiving institution.
	An agreement between two institutions (a sender and a receiver) that specifies how the sending institution's course or program will be accepted for (transfer) credit at the receiving institution.
Articulation Agreement	An agreement, typically between two institutions but also between an institution and an organization such as an occupational body, that authorizes studies undertaken in specific programs to be credited toward direct entry and/or Advanced Standing into a specific program at the receiving institution.

Term	Definition
	<p>A formal agreement between one or more colleges and one or more educational institutions or boards of education that recognizes learning achievement, facilitates student progress, minimizes curriculum duplication, and eases the transition from one institution to the other.</p> <p>Official agreement between two (bilateral) or more (multilateral) postsecondary institutions that defines the terms and conditions enabling students to transfer between specific programs. May also determine which courses or programs taken at the sending institution will apply to graduation requirements at the receiving institution.</p>
Block Transfer Agreement	A transfer agreement in which a predetermined number of transfer credits is granted to transferring students who have successfully completed a certificate, diploma or cluster of courses at another institution. Generally, block transfer is used to award credit for courses that, as a group, are recognized as having an academic wholeness or integrity and that collectively satisfy part of the requirements for another credential.
Laddering	<p>“Laddering”: A process which allows you to build upon previously earned credits or credentials, either from secondary or postsecondary institutions.</p> <p>“Career Laddering”: using a previously earned postsecondary credential to enter another program at a higher level.</p>
Transfer Pathway	Defined route from one program or institution to another program or institution that specifies eligibility requirements and how transfer credits will be accepted and applied at the receiving institution. Usually applies to multiple sending institutions and one or more receiving institutions Does not require formal signed agreement between institutions.
Cotutelle (graduate doctoral agreement)	A customized program of doctoral study developed jointly by two institutions for an individual student in which the requirements of each university’s doctoral programs are upheld, but the student working with supervisors at each institution prepares a single thesis that is then examined by a committee whose members are drawn from both institutions. The student is awarded two degree documents though there is a notation on the transcripts indicating that the student completed his or her thesis under Cotutelle arrangements.

While the practice might be to use a particular term and, perhaps, entrench it in institutional policy or publish it on a provincial glossary, that does not necessarily mean it is commonly used, understood, or defined. The same term could be used to mean different things as the example in Table 4 for ‘block credit’ illustrates. Sometimes this term is defined as a type of an agreement, a process, a form of articulation, a type of credit, etc.

Table 2: Analysis of "Block Credit" and its different Categories of Usage across Canada

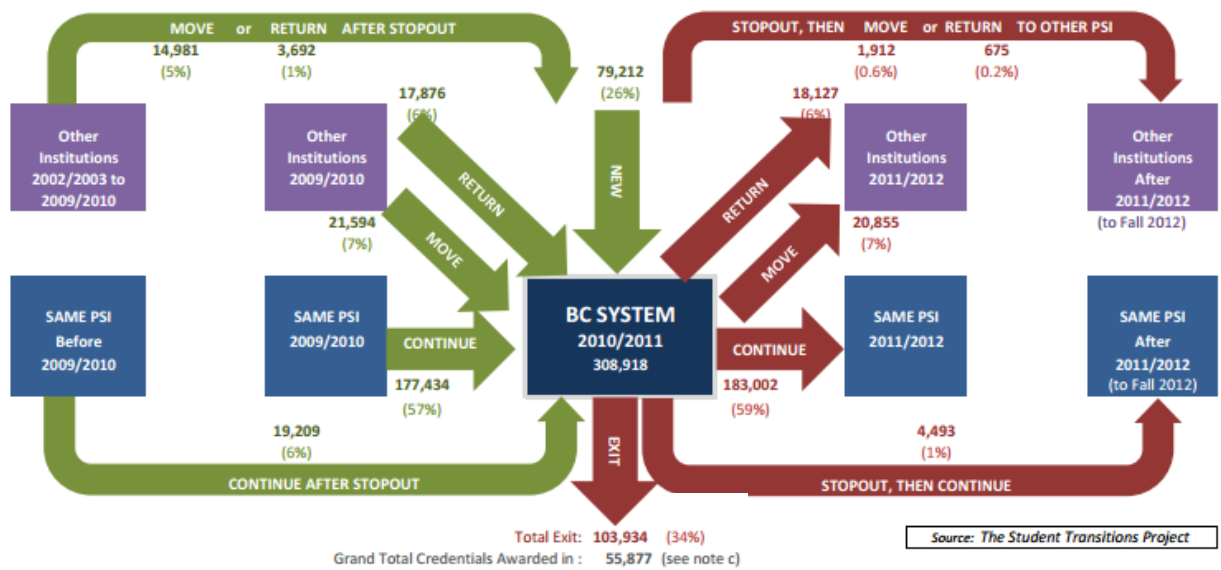
Category of Use for Block Credit	Definition
Type of agreement	A transfer agreement in which a predetermined number of transfer credits is granted to transferring students who have successfully completed a certificate, diploma or cluster of courses at another institution. Generally, block transfer is used to award credit for courses that, as a group, are recognized as having an academic wholeness or integrity and that collectively satisfy part of the requirements for another credential.
Timing and what a student obtains	Block Transfer occurs when a group of courses, often in the form of a certificate or diploma, is recognized for transfer credit. You should be able to transfer directly into the second or third year of the degree program depending on the agreement. Block transfer works well if you complete the entire diploma. If you don't complete the entire diploma, you'll probably still receive some transfer credit if the individual courses are listed.
Type of articulation	Block transfer articulation occurs where institutions compare whole programs and award credit on the basis of total hours or credits, rather than for individual courses. This form of articulation is used, for example, in granting credit for a diploma completed at one institution toward a degree program at another institution.
Type of credit granted	Credit granted based on completion of the transfer credential.
Type of credit granted	Advanced Standing for a group of credits or courses at one institution based on their equivalence to a defined set of course or program learning outcomes at another institution. Block credit enables students to enter a program at a receiving institution at an advanced level.
Type of courses accepted for credit	A group of courses, such as a completed certificate or diploma program, that are accepted for transfer credit into a degree program.
A process	The process whereby a block of credits is granted to students who have successfully completed a cluster of courses, certificate or diploma, recognized as having an academic wholeness or integrity, and related in a meaningful way to part of the degree program.

Of relevance to this section is the focus in some of the agreement definitions on ‘senders’ and ‘receivers’ (e.g., “unidirectional” agreements). The ARUCC PCCAT Phase 1 report highlighted the findings of a Student Transitions study by the BC provincial government. It, along with other research, is fundamentally changing perceptions regarding discrete distinctions between ‘senders’ and ‘receivers.’ The relevant data for British Columbia demonstrating this shift is highlighted in Figure 1 below.

Figure 1 provides an overview of student mobility numbers from British Columbia’s Student Transitions project (BC Ministry of Advanced Education, n.d.). While comparable data is not available from other Canadian provinces, it demonstrates that students are combining attendance at a number of schools all the way through their educational journey; suggesting that a shift is occurring with regard to long-held understandings regarding the concepts surrounding transfer, transcript standards, and transfer credit nomenclature more generally (Rob Fleming; Robert Adamoski, personal communication, January 23, 2014).

Duklas et al. (2014). ARUCC PCCAT Phase 1 Report, p. 35.

Figure 1: Student Pathways to BC Public PSE Institutions 2010/2011 and Future Student Pathways, up to Fall 2012



Source: BC Ministry of Advanced Education. (n.d.). *The Student Transitions Project*. [http://www.aved.gov.bc.ca/student\\_transitions/](http://www.aved.gov.bc.ca/student_transitions/)

The range of findings regarding agreement nomenclature from the first phase is included in Figure 2 below (ARUCC PCCAT Phase 1 Report, 2014, p. 11).

Figure 2: Agreement Nomenclature in Use in Canada

