

## **Transfer and Articulation Oversight Committee (TAOC) Quarterly Meeting**

**September 15, 2021  
Minutes**

The quarterly meeting of the Pennsylvania Transfer and Articulation Oversight Committee (TAOC) met on September 15, 2021, via MS Teams videoconference.

### **I. Welcome and Introductions**

Dr. Kimberly McCurdy, Director of the Bureau of Postsecondary and Adult Education, welcomed all the TAOC members at the meeting and turned over the meeting to Ms. Lynette Kuhn to provide an update on the implementation of Act 76 of 2019.

### **II. Update**

**Implementation of Act 76 of 2019.** Lynette Kuhn, Chief of the Division of Higher Education, Access, and Equity, provided an update on the following:

1. **Pilot workgroup:** The group decided that a fillable spreadsheet, rather than the SharePoint website, would be the most convenient and useful way for institutions to compile and submit their agreements to PDE. The spreadsheet will include the institution's name, the partnering institution, the type of agreement, and a website link where the student can find the agreement itself. The goal is for the spreadsheet to be easily accessible to students and directly link the student to the institution's transfer website in order to contact the institution's transfer office with questions. The spreadsheet is due September 30, 2021. The full list of all participating institutions will be housed on the PDE website, and updates after September 30 can be sent to the attention of Michelle Simmons at [michellsim@pa.gov](mailto:michellsim@pa.gov).
2. **Reporting requirement:** The group also determined that the annual reporting requirement portion of Act 76 will be best facilitated via Postsecondary PIMS (Postsecondary Pennsylvania Information Management System). Ms. Kuhn and Mr. Dotts are working with PIMS developers, with the plan to roll out the system in July 2022. As a result, institutions will not be required to report on the mandated reporting elements in Act 76 of 2019 until the PIMS reporting is available. It is likely that the first reporting cycle, beginning in July 2022, will be to report on transfer activities for the academic year 2021-22. A Q&A session followed (see Attachment 2).

### **III. PASSHE Transfer Policy Discussion**

Dr. McCurdy introduced Dr. Donna Wilson, Vice Chancellor and Chief Academic Officer, Academic and Student Affairs, Office of the Chancellor, PASSHE System, who discussed PASSHE Policy 1999-01-A: The Student Transfer Policy within the context of PASSHE's reorganization and consolidation (see Attachment 4).

Dr. Wilson began by explaining PASSHE's system of policies, procedures, and standards: policy is higher level and answers the "what," whereas procedures/standards are focused on implementation and interpretation, as in the "how." The current working group that is updating Policy 1999-01-A comprises PASSHE provosts, deans, registrars, and representation from the Pennsylvania Commission for Community Colleges. She invited questions from the meeting participants to help the working group as it drafts a new document and develops the procedures/standards for implementation.

A Q&A session followed (see Attachment 3). Dr. Wilson finished her presentation with the recommendation that additional questions be referred to Dr. Richard Riccardi, Assistant Vice Chancellor for Academic Affairs, Academic and Student Affairs, Office of the Chancellor, PASSHE, at [rriccardi@passhe.edu](mailto:rriccardi@passhe.edu).

The meeting ended at 11:03 a.m., with Dr. Tanya Garcia, Deputy Secretary and Commissioner of Postsecondary and Higher Education, thanking Dr. Wilson for her presentation and all the TAOC members for their participation.

**The next quarterly meeting is December 8, 2021, at 10 a.m.**

**Attachment 1  
Attendees – September 15, 2021**

**Staff**

Garcia, Tanya	Deputy Secretary, OPHE
McCurdy, Kimberly	Executive Assistant, OPHE
Kuhn, Lynette	Chief, Division of Higher Education, Access, and Equity

**Attendees**

Todd, Karen	AcademyOne
Heid, Jessica	Bloomsburg University
Shultz, Kara	Bloomsburg University
Kelleway, Kelly	Bucks County Community College
Pignatore, Amy	Butler County Community College
Richardson, Belinda	Butler County Community College
Gmutza, Kaylee	California University
Sheetz, Tracey	California University
McClintock, Elizabeth	Carlow University
Stevens, Stephanie	Cheyney University
Dollins, David	Clarion University
Jacobs, Diane	Community College of Allegheny County
Thomas, Katie	Community College of Beaver County
Moore, Shelly	Community College of Beaver County
Gonzalez-Torres, Sandra	Community College of Philadelphia
Roberts, Jennifer	Community College of Philadelphia
Luckers, Lynette	Delaware County Community College
Moscariello, Dawn	Delaware County Community College
Lincoln, Alex	East Stroudsburg University
McCarthy, Sheila	Edinboro University
Sands, William	Indiana University of Pennsylvania
Lentz, Lori	Kutztown University
Trout, Ben	Kutztown University
Munley, Lindsey	Lackawanna College
Ayrton, James	Lehigh Carbon Community college
Joseph, Patricia	Lincoln University
Yeager, Libby	Luzerne County Community College
Lesser, Cheryl	Luzerne County Community College
Rapp, Danielle	Millersville University
Murphy, Kimberly	Montgomery County Community College
Oikelome, Gloria	Montgomery County Community College
Bearce, Karen	Northampton Community College
Bortz, Carolyn	Northampton Community College
Henry, Mark	Northampton Community College
Riccardi, Richard	PASSHE System Office
Wilson, Donna	PASSHE System Office
Farinelli, Robert	Pennsylvania Highlands Community College
Reighard, Erica	Pennsylvania Highlands Community College
Bolt, Lindsay	Pennsylvania State University
Rice, Michele	Pennsylvania State University
Coots, Kevin	Reading Area Community College
Corbett, Jodi	Reading Area Community College
Seaman, Cynthia	Reading Area Community College
Zeglen, Eric	Shippensburg University

Price, Emily  
Lawlor, Michael  
Yurkovic, Kate  
Helm, Jonathan  
Mathay, Patti  
Howley, Kathleen  
Yannick, Lisa  
Bishop, Kristy  
Loffredo, Maria

Slippery Rock University  
Temple University  
Temple University  
University of Pittsburgh  
University of Pittsburgh  
West Chester University  
West Chester University  
Westmoreland County Community College  
Westmoreland County Community College

**Attachment 2**  
**Act 76 of 2019 Q&A**

Q: What is the ultimate goal of this project?

A: Act 76 legislation was passed primarily to see how TAOC is working, to create a system for students to view articulation agreements, and to have a cohesive system for easy access to transfer information at the individual institutions. It is a legislative mandate and did not originate within PDE.

Q: After the September 30 deadline, how should institutions send updates and new agreements?

A: Please send them to Michelle Simmons at [michellsim@pa.gov](mailto:michellsim@pa.gov), who will add them to the full list that will reside on the PDE website.

Q: Does PDE have a standard list of types of agreements?

A: No, it is up to the individual institutions to determine what agreements to include.

Q: When will the data reporting element go into effect?

A: The plan is to begin in July 2022 when the PIMS application is completed, with guidelines and instructions going to TAOC members. Because of the technical nature of PIMS, data entry staff also will be involved with the process. The deadline for reporting will be September 30, 2022.

Q: What academic year and information will be reported?

A: Because the data must be final and accurate, the plan will be to report AY 2021-22 in September 2022. The data elements that are mandated by Act 76 are as follows:

1. The number of students who have transferred to the institution of higher education by institution of origin within the last academic year or since submittal of the institution's last interim report required under this section.
2. The total number of credits completed by transfer students at the institution of origin.
3. The total number of credits from each institution of origin that transferred to the institution of higher education for each academic year. (This reporting element does not apply to community colleges.)
4. A brief explanation of the credit transfer process at your institution.

**Attachment 3**  
**PASSHE Policy 1999-01-A: The Student Transfer Policy**  
**Q&A**

- Q: In defining parallel programs using CIP codes, will transferring institutions need to share/publish their CIP codes associated with their programs?
- A: CIP codes can be shared on a case-by-case basis, beginning with articulation agreements. CIP codes should be able to identify whether a particular parallel program is working.
- Q: Will there be grade requirements for licensing or specific accredited programs?
- A: Transfer students must meet the same requirements for retention and graduation as their peers who enrolled at the PASSHE institution as first-year students. This will be further clarified in the procedure and standards draft.
- Q: Why is the statement of “licensing/certification standards” not included in the graduate section?
- A: There are no changes in the policy statement on graduate programs. While there is no credit limit, we will consider it and try to address it in a future procedure/standards document.
- Q: Are courses that are in an online modality (such as science with lab) transferable?
- A: This document will not undo current P2P agreements already in place; online modalities can be addressed in future P2P negotiations.
- Q: Will there be a standard on how to enter block credit?
- A: Within the policy statement, all associate degree recipients’ general education credits will satisfy the university’s general education requirements, with the three exceptions mentioned earlier. This applies only to Associate of Art and Associate of Science, not the Associate of Applied Science, for which the curriculum varies widely.
- Q: Could you provide guidance on the spring 2022 implementation timeline?
- A: We are still working on development with transfer advisors and admissions staff members to provide clarity and consistency. Spring 2022 implementation means that the new policy will be effective for students transferring in summer and fall 2022. It isn’t feasible to have the policy implementation in place in time for students transferring in spring 2022.

Attachment 4  
PASSHE Policy 1999-01-A (PDF)



## PA State System of Higher Education Board of Governors

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Effective: January 14, 1999; Section F is effective fall 1999

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### Policy 1999-01-A: *The Student Transfer Policy*

See Also: [Board of Governors Policy 1990-06-A](#)

Adopted: January 14, 1999  
Amended: October 6, 2016  
and July 14, 2021

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#### A. Introduction

The student transfer policy operates on the principle that competencies and learning outcomes developed and documented through prior learning are the basis of recognition of transfer credit, not course matching. The intent of this policy is to maximize the acceptance and application of college-level credits awarded by postsecondary institutions with CHEA-recognized accreditation.

Sound public policy advocates that students who transfer into and among State System universities be able to complete their education without unnecessary repetition of learning successfully completed and documented at another institution.

The State System recognizes the value of learning that students demonstrate upon earning an associate degree. Undergraduate students who transfer into a State System university with an Associate of Arts or Associate of Science degree in a parallel program will be awarded junior status and shall not be required to satisfactorily complete more than 60 credits to earn a 120-credit baccalaureate degree in a Program to Program (P2P) or other parallel program, regardless of the courses they took to earn the associate degree; they will have the same requirements for admission to a particular academic program and for retention as students who began their education at a State System University.

The purposes of this policy are:

1. To facilitate transfer of undergraduate and graduate students and their prior learning to and among State System universities.
2. To ensure that students can complete their education without unnecessary duplication of coursework.
3. To assist non-diploma and non-degree-holding students who have earned college-level credits from a previously attended PA Community College earn an associate degree or other credential by "reverse transferring" their current PA State System University credits back to their PA Community College.



## B. Background

In 2008, legislation amended the Public School Code of 1949 by adding Article XX-C "Transfer of the Credits between Institutions of Higher Education" and established the Statewide Transfer and Articulation System so that students could transfer Associate of Arts (AA) and Associate of Science (AS) degrees into parallel bachelor degree programs at State System universities with junior standing.

A Transfer and Articulation Oversight Committee (TAOC) developed a process and timeline for implementing statewide Program to Program (P2P) articulation agreements. TAOC created a transfer credit framework for 30 credits of foundational courses in 6 areas as well as the guidelines for program articulation from 2-year to 4-year institutions. Representative community college and 4-year college faculty developed Program to Program transfer articulation understandings for academic major programs.

## C. Definitions

### 1. Undergraduate Degrees:

- **Associate's Degrees:** An associate degree indicates that the holder has developed proficiencies sufficient to prepare for upper division collegiate work or to enter directly into a specific occupation. Associate degrees are awarded only for completion of a coherent program of study designed for a specific purpose. They reflect satisfactory achievement of a minimum of 60 semester hours of credit, in two parts: a general education component and an area of concentration or major component. Examples of associate degrees include Associate of Arts, Associate of Science, and Associate of Applied Science.
- **Bachelor's Degrees:** A Bachelor's degree is a four-year degree that consists of two principal components, general education and in-depth study in a major, which, taken together, are designed to prepare the student for a productive career, informed citizenship, and continuous growth.

### 2. Graduate Degrees:

**Master's Degrees:** A master's degree represents advanced study beyond the baccalaureate degree and signifies mastery in a discipline or professional field. A master's program requires a minimum of 30 semester credit hours and usually includes three basic components: (a) a common core of courses related to the discipline or field of study; (b) a concentration or specialization in a focused area of the discipline; and (c) cognate courses which broaden perspective or mastery, or provide special skills.

**Doctorate Degrees:** The doctorate is the highest academic degree awarded in American higher education and is of two types: the Doctor of Philosophy (Ph.D.) and the Professional Doctorate. Though the primary distinction is that the Ph.D. is a research degree and professional degrees are applied degrees, most doctoral programs include both research and applied studies.

3. **Certificates:** A certificate is a formal credit-based credential designated on the academic record and awarded by an educational institution to indicate completion of an organized program of study at the postsecondary level that does not culminate in a degree.



4. **Program to Program (P2P):** Refers to a Pennsylvania statewide program to major program articulation agreement that provides a clear transfer pathway into a State System university for community college students who have selected a transferable major program. Associate of Arts and Associate of Science degrees that are part of the P2P articulation contain a minimum of 30 hours of liberal arts among the following six fields of study: Composition, Public Speaking, Humanities & Arts, Behavioral/Social Sciences, Sciences, and Mathematics, and 21 credits of major program coursework. Universities may designate additional programs as precursor or parallel programs by reason of articulation agreement or similarity in disciplinary content or student outcomes, as indicated by 4-digit CIP code.
5. **Prior Learning:** Refers to student learning that occurred prior to enrollment at a State System university. Prior learning includes college-level credits earned elsewhere as well as the assessment of skills, knowledge and competencies acquired outside the classroom against a set of standards or learning outcomes. Prior learning may include documented learning such as but not limited to Advanced Placement, International Baccalaureate, DANTES, CLEP, military experience, and credit by exam.
6. **Credit:** The recognition of attendance or performance in an instructional activity (course or program) that can be applied by a recipient toward the requirements for a postsecondary degree, diploma, certificate, or other formal award, irrespective of the activity's unit of measurement.
7. **Directed General Education (Prescribed General Education):** General education courses that are required for the major are considered "directed general education" or "prescribed general education". Therefore, directed (prescribed) general education courses are counted in the general education requirement/credits, not in the major or cognate requirements.
8. **Reverse Transfer:** A credit review of degree seeking students who transferred from a PA community college to a four-year Pennsylvania State System University without having earned their associate degree. Credits earned while working toward their bachelor degree will be sent to the PA Community College for evaluation for possible credit towards the completion of the associate degree requirements. PA's State System of Higher Education Universities and the 14 Pennsylvania Community Colleges have a signed and executed statewide Reverse Transfer Agreement.

#### D. Policy Statement

All college-level credits from postsecondary institutions with CHEA-recognized accreditation will be accepted in transfer, regardless of how the prior learning was acquired. The intent of this policy is to maximize the application to degree requirements of college-level credits awarded by such accredited institutions. Review of learning from non-accredited institutions will be evaluated locally on a student by student basis. State System Universities shall ensure consistency and equity in the application of credit from non-accredited institutions.

It is up to the receiving State System University how the credit is applied towards the intended degree, within the provisions of this policy:

## Undergraduate

- In the acceptance and application of undergraduate transfer college-level credits, the receiving institution will first apply as many college-level credits as possible toward the satisfaction of general education requirements, then to requirements in the major, and finally to elective credits.
- State System universities will recognize the integrity, design and validity of general education programs at other institutions with CHEA-recognized accreditation and will accept general education coursework when comparable. General education credits aligned with the PA Statewide Transfer Credit Framework will transfer toward the general education requirements at the receiving institution.
- Students who transfer to a State System institution from a postsecondary institution with CHEA-recognized accreditation with an Associate of Science or an Associate of Arts degree, or having completed general education requirements for a bachelor's degree, an Associate of Science or an Associate of Arts degree, shall have satisfied the general education requirements at the receiving university. Exceptions may be made for the following, provided that these exceptions do not extend the student's time to the degree:
  - (a) One signature general education course (up to 3 credits), if applicable;
  - (b) Any prescribed general education course required for the major, if not satisfactorily completed;
  - (c) General education overlays satisfied in advanced courses in the major.
- Undergraduate students who transfer into the State System of Higher Education with an Associate of Arts or an Associate of Science degree from a postsecondary institution with CHEA-recognized accreditation in a parallel academic program or as part of the P2P Statewide agreements will be awarded full junior standing and shall not be required to satisfactorily complete more than 60 credits to earn a 120-credit baccalaureate degree in a P2P or other parallel program, regardless of the courses they took to earn the Associate degree; they will have the same requirements for admission to a particular academic program and for retention as students who began their education at a State System University. Students transferring into a program with accreditation or licensing/certification standards may be required to take limited additional credits to meet those standards.

## Graduate

- Students may transfer one-third of the equivalent graduate-level credits required in a graduate program.

## E. Guaranteed Admissions

Admission to a State System university is guaranteed for undergraduate students transferring from a Pennsylvania Community College with an associate degree and for students transferring from one State System University to another State System University, subject to the following:

- Students with an Associate of Science or Associate of Arts in a parallel academic program or as part of the P2P Statewide agreements are guaranteed admission to the P2P or parallel academic program, subject to capacity, as long as they meet criteria for admission required of students who began their education at a State System university.

Universities may designate majors or programs of study that are limited access by reason of accreditation-, clinical-, or resource-based capacity.

- Dismissal from a Previous Institution for Disciplinary Reasons may limit the ability to enroll in the Institution. Criminal Conviction of a Felony Offense or Dismissal from a Previous Institution for Disciplinary Reasons may limit the ability to complete certain academic majors/programs and may affect approval to live in university-owned or university-affiliated housing. These will be handled on a case-by-case basis.

#### **F. Effective Date**

The policy will become effective no later than start of Spring 2022.