

## Instructions for Completing an Education Program Agreement

1. **Before creating an Education Program Agreement, please contact the appropriate Associate Dean in your college.** They will discuss whether an Education Program Agreement or MOU/MOA is warranted. If the details of a program have not yet been established, but ISU and the other institution of higher education desire to sign something that indicates ISU and the other institution intend to collaborate together in the future, the Office of General Counsel suggests using the [Memorandum of Cooperation and Understanding template](#), which is also available on the Office of General Counsel's website. Once ISU and the other institution have established the program details, they will enter into another agreement (examples below) that sets forth those details.

2. **Is the agreement with an institution of higher education located outside of the United States?**

The United States government maintains lists of entities and countries with whom individuals and entities in the United States may not conduct business. If the Education Program Agreement is with an institution of higher education located outside of the United States, contact ISU's Export Control Coordinator at [export@iastate.edu](mailto:export@iastate.edu) to ensure that the institution of higher education with whom you wish to establish an agreement is not on one of those lists.

3. **Select an Agreement Template**

The Office of General Counsel website contains templates for several kinds of education program agreements. Please select the agreement template best suited for your needs.

- [Direct Enroll Agreement](#) – This template should be used when ISU and another institution of higher education desire to establish a program where ISU students will take courses at the other institution for a short period of study (e.g., one or two semesters) and ISU will collect program fees from ISU students and pay the programs fees to the other institution. The Direct Enroll Agreement is different than the other Education Program Agreements in that ISU treats it as a procurement of services. For this reason, the Procurement Services Department should be consulted for assistance in completing the template.
- [Dual Degree Agreement](#) - This template should be used when ISU and another institution of higher education desire to establish a program where the other institution's students will study for period of time at the other institution, transfer and study at ISU, and then receive degrees from both ISU and the other institution.
- [Facilitated Transfer Agreement](#) – This template should be used when ISU and another institution of higher education desire to establish a program that facilitates the transfer of students from the other institution to ISU. The other institution's students who transfer to ISU will receive a degree only from ISU.
- [Student Exchange Agreement](#) – This template should be used when ISU and another institution of higher education desire to establish a program where the students of each institution will take courses at the other institution for a short period of study (e.g., one or two semesters), while students continue enrollment in their home institution.

*If none of the above are suitable to your needs*, you may contact the [Office of General Counsel](#) for assistance in creating a customized Education Program Agreement.

#### **4. Complete Appropriate Agreement Template**

Complete the highlighted areas in the Education Program Agreement. As you complete the highlighted information, you should remove the highlighting. You may delete the highlighted sentence in Section I (Purpose) referencing the Memorandum of Cooperation and Understanding if ISU and the other institution have not previously signed a Memorandum of Cooperation and Understanding. You may also delete the highlighted paragraph in Section VII (Student Records) if the other institution is not located in a country that is part of the European Union.

Complete Addendum A of the Education Program Agreement. In doing so, contact those within your department and college with knowledge of admission requirements and transfer and graduation requirements (if applicable).

#### **5. Send Education Program Agreement to Other Institution**

Send the Education Program Agreement to the other institution of higher education to review and to complete information that they need to provide. If the other institution desires to make substantive changes to the Education Program Agreement, ask the other institution to do so using tracked changes. Typographical changes or changes to complete missing information are not substantive changes.

If substantive changes are made to the Direct Enroll Agreement, submit the proposed changes to Procurement Services for review. The Office of General Counsel should review proposed substantive changes to other Education Program Agreements.

Determine if the other institution requires original hard copies of the signed agreement. From ISU's perspective, original hard copies are not necessary unless the other institution requires them.

#### **6. Route the Education Program Agreement for Signatures**

Once the Education Program Agreement has been completed, it may be routed for signatures. If your agreement is an ISU template without changes, you may initiate the routing process immediately. If substantive changes were made, you must have preliminary approvals of your college and the Office of General Counsel before initiating the routing process.

Using the link provided by your college Associate Dean contact, complete the online routing form to initiate the process. Once the online routing form is completed, Study Abroad Center personnel will manage the workflow to obtain the signatures. If they have any questions, they will reach out to the contact person listed on the form.

Whenever possible, the Education Program Agreement will be routed for digital signatures using the Smartsheet system outlined [in this flowchart](#). The agreement will route first to the other institution, then through the ISU signature process. After all signatures have been obtained, the Education Program Agreement will route to the Associate Provost for Academic Programs for signature. Education Program Agreements will not be reviewed by the Associate Provost for Academic Programs until all the previous steps above are completed.