



THE MODEL CREDIT RECOGNITION AGREEMENT TOOL USER GUIDE

Output 2 Activity 2

Version 1.4

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1. Introduction

A key objective of the ECCOE project (2019-1-FR01-KA203-062951) is the facilitation and potentiation of the way in which higher education institutions (henceforth, HEIs) can establish cross-institutional course recognition agreements. The Model Credit Recognition Agreement (henceforth, MCRA) is intended to formalise different types of cross-institutional course recognition as part of the ECCOE-System.

The MCRA could have been developed as a simple document to be filled in, shared, and eventually signed by the relevant HEIs. However, the decision was taken to design and develop an online tool to make the preparation of MCRA's more flexible and easier. The tool, as such, is a WordPress web form presenting a template of an MCRA. It enables the template to be completed semi-automatically to include the information that the ECCOE-System already contains about a given HEI. The advantages of the tool include:

1. Being able to see the process steps that an HEI in the ECCOE-System goes through when considering a recognition, together with any conditions that are applicable to reaching a successful agreement, before actually starting the preparation process.
2. Once actually started, the tool semi-automatically configures an MCRA, to include information relevant to an agreement with a given HEI. Hence, as an MCRA is developed and processed by the different parts of an HEI, it is possible to see what process steps still need to be completed, and what conditions to acceptance still exist.
3. Reuse of existing MCRA's to facilitate the preparation of new ones.
4. Adding transparency to the MCRA preparation process, so that anyone registered with the ECCOE-System, and having the relevant permissions, can access the MCRA's in preparation.

The template being generated by the tool includes two types of information:

1. **Declarative** information, which defines the MCRA, and will be on the final agreement.
2. **Procedural** information, which defines what needs to be done by both institutions to turn a template into a final agreement.

The latter is present to help the people developing a given MCRA understand the other HEIs processes and conditions, and represent a form of scaffolding, and will not be on the final agreement.

The philosophy of the tool here is "learn by observing". If an institution wants to see what an MCRA with them might look like, apart from actually reading previous ones, they can use the tool to explore:

1. How other partners undertake recognition / validation.
2. What kinds of MCRA's can be built.
3. What administrative work is required by the HEIs to turn a template into an MCRA.
4. Where the bottlenecks can appear in the process.
5. The benefits of using the ECCOE-System over writing such an agreement from scratch.

Once the template exists in the system, it can be refined by administrative and legal staff at both HEIs until it is finished¹. Once finished, the template is then an MCRA, and can be printed to be signed by the corresponding signatories.

¹ In the current version of the system only one person can edit the document. To share a document, during development, it should be submitted, which will generate a PDF.

2. User notes

1. The current version of the tool does not permit editing of an MCRA by more than one person. So a single user from an HEI (in these examples, USER-A from HEI-A, typically the one initiating the recognition process) has to prepare the MCRA. During the preparation phase it can be exported as PDF to be shared with others for comments, such as USER-B from HEI-B.
2. The four types of recognition contemplated in the tool are:
 - a. **Faculty level Formal Learning** refers to the recognition by a specific faculty at an HEI of courses taught at another HEI as part of an educational programme of a nationally accredited qualification, such as an undergraduate or Master's degree.
 - b. **Faculty level Non-Formal Learning** refers to the recognition by a specific faculty at an HEI of courses taught outside the formal educational system by another HEI or professional institution, such as a MOOC or vocational training course.
 - c. **Institutional level Formal Learning** refers to the recognition by an HEI (valid across all faculties) of courses taught as part of an educational programme of a nationally accredited qualification, such as an undergraduate or Master's degree.
 - d. **Institutional level Non-Formal Learning** refers to the recognition by an HEI (valid across all faculties) of courses taught outside the formal educational system by another HEI or professional institution, such as a MOOC or vocational training course.

3. Using the MCRA tool

3.1. MCRA recognition examples

The steps that need to be undertaken to generate an MCRA are presented in the next section. While the MCRA has been designed to be as generic as possible, permitting a wide range of cross-institutional agreements to be prepared, the four most common types of MCRA that are expected to be prepared are:

The unidirectional cross-institutional recognition of a course

Here, an HEI wants one of their courses to be recognised by another institution (in terms of its credits and content, that can be used by a student in a flexible way, e.g., to be counted as part of the free study credits for a given programme).

The bidirectional cross-institutional recognition of a course

Here, two HEIs want one of their courses to be recognised as being equivalent by the other institution. This is a reciprocal agreement (e.g., if course X has been studied at HEI-A, it can be recognised at HEI-B to be equivalent to course Y. Similarly, course Y can be recognised at HEI-A as equivalent to course X).

The unidirectional cross-institutional recognition of several courses

Here, an HEI wants a group of their courses (possibly a study programme or part) to be recognised by another institution (in terms of their credits and content, that can be used by a student in a flexible way, e.g., to be counted as part of the free study credits for a given programme, or in substitution of part of the programme).

The bidirectional cross-institutional recognition of several courses

Here, two HEIs want a group of their courses to be recognised as being equivalent to a group offered by the other institution. This is a reciprocal agreement (e.g., if course group X has been studied at HEI-A, it can be recognised at HEI-B to be equivalent to course group Y. Similarly, course group Y can be recognised at HEI-A as equivalent to course group X).

During the lifetime of the ECCOE project it is expected that different types of recognition will be added to this list.

3.2. The unidirectional cross-institutional recognition of a course

Prerequisites

1. The participants highlighted in this recognition process are:
 - a. USER-A from HEI-A (the person who will prepare the MCRA).
 - b. LEGAL-A from HEI-A (the person who will sign the MCRA for HEI-A).
 - c. USER-B from HEI-B (the person who will collaborate in the preparation of the MCRA on behalf of HEI-B, although s/he will not need to use this tool).
 - d. LEGAL-B from HEI-B (the person who will sign the MCRA for HEI-B).

(See note 1 above)

2. USER-A needs to check to see if his/her HEI already forms part of the ECCOE-System. In which case the recognition steps and conditions will already be in the system for the MCRA tool. If this is not the case, s/he should contact the relevant department in his/her institution to find out the following information, which needs to be added during the registration process):
 - a. The steps to be taken by the institution (including the relevant actors) in order to establish the agreement.
 - b. The possible conditions, complications, and factors that might affect the successful recognition of a given course by the HEIs.
 - c. The name of the legal representative who will be the signatory of the agreement.
3. USER-A will contact the relevant actors or department at HEI-B to identify USER-B and ensure that HEI-B is registered with the ECCOE System. If this is not the case, then HEI-B needs to register before an MCRA can be generated using the tool.

MCRA Tool Workflow

1. USER-A must register with a user name and password in order to access and manage MCRAs, if s/he hasn't done so already. Here is the link:
<https://eccoe.eu/register/#/>
2. USER-A needs to include the general institutional data using the option “**Add the data about your institution for the MCRA**” on the frontpage of the tool (if this does not already exist for the HEI). This is a crucial step, since if this information is not provided, the MCRA can not be completed in the next step since the information will not be held in the system. The data that need to be collected and included in this step are the following:
 - a. Name of the respondent; Your institution (name and acronym);
 - b. Type of recognition (see note 2 above);
 - c. Full description of the recognition required;
 - d. Objective of the recognition;
 - e. Institution process steps that have to be undertaken in order to achieve the proposed recognition;
 - f. Conditions of the potential recognition/validation process.
3. Once all the data of the previous step is complete, the next step is for USER-A to include all the required information necessary to generate an MCRA by selecting the option “**Prepare your MCRA**” on the frontpage of the tool. The data that needs to be selected or included in this step are the following:
 - a. Section 1: Write a significant title for the agreement, for example (for each of the four types highlighted above):

Recognition example	Title
The unidirectional cross-institutional recognition of a course	Unidirectional agreement by HEI-B for the recognition of MOOC TITLE offered by HEI-A
The bidirectional cross-institutional recognition of a course	Bidirectional agreement between HEI-A and HEI-B for the recognition of MOOC TITLE offered by HEI-A and MOOC TITLE offered by HEI-B
The unidirectional cross-institutional recognition of several courses	Unidirectional agreement by HEI-B for the recognition of MOOCs TITLE1 and TITLE2 offered by HEI-A
The bidirectional cross-institutional recognition of several courses	Bidirectional agreement between HEI-A and HEI-B for the recognition of MOOCs TITLE1 and TITLE2 offered by HEI-A and MOOCs TITLE3 and TITLE4 offered by HEI-B

- b. Section 2 is the preamble, noting general information about the MCRA and does not need to be edited.
 - c. Section 3:
 - i. In the field “Select your institution”, HEI-A should be selected from the menu.
 - ii. In the field “Select the recognition type your institution will use for this MCRA”, the relevant type should be selected (see note 2 above).
 - iii. In the field “Select the other institution”, HEI-B should be selected from the menu.
 - iv. In the field “Select the recognition type the other institution will use for this MCRA”, the relevant type should be selected (see note 2 above).
 - d. When section 3 is completed the agreement details will appear in section 4. USER-A does not need to add them. The information complements that of section 3 and includes the typical steps (section 4.3) that each HEI will need to follow to prepare an MCRA and any conditions that need to be met before such an agreement can be achieved.
 - e. Section 5: Complete the description of the agreement, including all relevant information about the course that is not included as annexes to the MCRA.
 - f. Section 6: Include the name of LEGAL-A and LEGAL-B, the people who will sign the agreements (signatories);
 - g. Section 7: Determine the start and expiry dates of the agreement by selecting them from the calendar menus;
 - h. Section 8: Similarly, select the dates of signature by each institution from the calendar menus;
 - i. Section 9: Finally, include the web addresses (URLs) of any annexes that HEI-A wants to include: course programmes, other existing agreements, etc. Note that annexes are not compulsory, only the ones that both institutions want to include need to be added.
4. Once the MCRA is complete, the next step is to press the “**Generate draft MCRA**” button and a PDF will be generated. Since we are still in the open peer review process, this tool is only a beta version, and as such, a final MCRA cannot currently be generated. When the tool is finished, it will be possible to do so, and the final version will not contain either the process steps or the constraints that are only needed during the MCRA development. The final PDF will need to be downloaded and revised, and signed by LEGAL-A and LEGAL-B at the respective HEIs. If the MCRA is incomplete, USER-A can come back later and edit and resubmit it. This is done using the option “**Manage your MCRAs**” on the frontpage of the tool.