I. Minutes:
   Approval of the October 25, 1988 Minutes of the Academic Senate (pp. 2-5).

II. Communication(s):
A. Materials available for reading in the Academic Senate office (p. 6).
B. Memo from Heirendt to Schools/Departments re Sun Workstation Proposals (p. 7).
C. Resolution(s) approved by President Baker:
   AS-299-88/Gooden Resolution on an Honorary Doctor of Laws Degree

III. Reports:
A. President
B. Academic Affairs Office
C. Statewide Senators

IV. Consent Agenda:
V. Business Item(s):
A. Resolution to Amend Procedures for Meritorious Performance and Professional Promise Awards-Murphy, Chair of the Personnel Policies Committee, Second Reading (pp. 8-11).
B. Resolution in Support of Merit Salary Adjustments for All Nonfaculty Employees-Dobb, PCS Caucus Chair, First Reading (pp. 12-13).
C. Resolution to Amend the Bylaws Making the Research Committee an Elected Committee-Rogalla, Chair of the Constitution and Bylaws Committee, First Reading (pp. 14-16).
D. Resolution on Endorsement of the Draft Executive Order and Draft Guide for State Funded Campus-Based Study Abroad Programs-Weatherby, Statewide Senator, First Reading (pp. 17-46).

VI. Discussion Item(s):
GE&B Committee response to the "General Education Transfer Curriculum and The California State University" Report-Culver, Chair of the GE&B Committee (pp. 47-48).

VII. Adjournment:
(New reading materials highlighted in bold)

6/6/88 Revised Trustee Policy on Student Health Services (CSU)
6/13/88 Materials on Student Suicide (CSU)
6/14/88 Guidelines for Allocation of Funds Received Through the Program Change Proposal on Research, Scholarship, and Creative Activity (CSU)
6/27/88 Draft of Joint Committee Report on the Master Plan (California Legislature)
7/5/88 "Profile of CSU Employees - Fall 1987" (CSU)
9/12/88 Retention, Tenure and Promotion Cycle--1988/89 (materials initiating the 1988-89 faculty personnel action cycle) (Cal Poly)
9/13-14/88 Meeting of the Board of Trustees Agenda (CSU)
9/14/88 Personnel Policies and Procedures Manual (CSU)
9/15/88 Status of Academic Senate CSU Resolutions (most recent resolutions that have been acted upon) (Academic Senate CSU)
9/23/88 Hispanic Underrepresentation: A Call for Reinvestment and Innovation [Hispanic Commission Follow-up Report] (CSU)
9/23/88 Principles and Policies: Papers of the Academic Senate of The California State University (Academic Senate CSU)
Memorandum

To: All Schools and Departments
Via: Dwight Heirendt, Manager

Academic Computing Services

From: Peggy Rodriguez
Instructional Computing Consultant

Subject: Sun Workstation Proposals Due November 20

Proposals are now being solicited campuswide for award of a Sun workstation to be used for teaching. Through a grant coordinated by the Office of the Chancellor, Sun Microsystems is prepared to award one advanced workstation to Cal Poly. Proposals, due by November 20, should be submitted to Academic Computing Services, Building 12, East Entrance.

Phase I of this grant has already provided a chemistry workstation to each of six campuses in the CSU system. In the current phase, all disciplines, including non-scientific disciplines, are invited to submit proposals. One workstation will be awarded to each of the remaining 13 campuses. Cal Poly's winning proposal will be selected by an ad hoc committee appointed by the Instructional Advisory Committee for Computing.

Proposals should emphasize teaching "with" rather than "about" technology, through use of existing commercial or academic software. A team of at least two full-time faculty is required for any proposal. Other criteria for proposals are attached herewith. Additional information about Sun workstations and possible applications is available from Academic Computing Services, extension 2516.

Please help us circulate this announcement throughout your department.

Criteria for proposals are available in your department office.
Background statement: The Personnel Policies Committee recommends that faculty members, who apply (or are nominated) for a Meritorious Performance and Professional Promise (MPPP) Award and who do not receive one, should be notified. At present, the MPPP Awards procedures require only that recipients of the awards be notified.

**RESOLUTION TO AMEND PROCEDURES FOR MERITORIOUS PERFORMANCE AND PROFESSIONAL PROMISE AWARDS**

**WHEREAS,** Applicants and nominees for Meritorious Performance and Professional Promise (MPPP) Awards should be informed as to the outcome of the MPPP Awards selection process; therefore be it

**RESOLVED:** That the Procedures for Meritorious Performance and Professional Promise (MPPP) Awards be amended as follows:

Section VI.A.

Recipients as well as the Personnel and Payroll Offices shall be notified, in writing, within five (5) days of concurrence. Applicants and nominees who did not receive awards shall be notified, in writing, after all awards allocated to the University have been granted. The dean's office of each school will send out the notifications after:

1. it receives the list of applicants and nominees who did not receive awards. This information will be provided by the Chair of the School MPPP Awards Committee;

2. it has been notified that all awards allocated to the University have been granted. This information will be provided by the Personnel Office.

Proposed By:
Personnel Policies Committee
October 11, 1988
PROCEDURES FOR
MERITORIOUS PERFORMANCE AND PROFESSIONAL PROMISE AWARDS

I. PREAMBLE

This policy is designed to implement Articles 31.11 through 31.19 of the Memorandum of Understanding for Unit Three (faculty) agreed to in December, 1984.

Equal Opportunity guidelines govern the granting of MPPP Awards just as they do all other significant personnel actions at Cal Poly -- neither nominating faculty nor subsequent review bodies may discriminate on the basis of race, religion, or sex.

II. ELIGIBILITY

All persons covered by the Memorandum of Understanding for Unit Three are eligible to apply for or be nominated for Meritorious Performance and Professional Promise Awards.

No MPPP Awards shall be made except under criteria mutually developed and approved by the campus President and the body of the Academic Senate.

No MPPP Awards shall be granted without a positive recommendation from the particular school or appropriate administrative unit MPPP Committee.

III. CRITERIA

Meritorious Performance and Professional Promise Awards shall be given: (1) retrospectively, to recognize excellence in one or more of the following areas -- teaching, professional activity, service and/or (2) prospectively, to promote excellence in one or more of the same areas.

Individual schools may choose whether to develop more specific criteria statements appropriate to their disciplines as long as they do not contradict the general university statement. They are also free to determine whether variable criteria are appropriate for different ranks. If school committees elect to elaborate their own criteria, they are urged to remain consistent with established school criteria for other personnel decisions. School statements of criteria should be distributed to faculty and forwarded to the Academic Senate Personnel Policies Committee well in advance of any selection cycle.

IV. APPLICATIONS/NOMINATIONS

Applications and nominations for MPPP Awards must document a candidate's excellent performance in teaching, professional activity and/or service. Or

Applications and nominations for MPPP Awards must document proposed projects which would enhance a faculty member's performance in teaching, professional activity, and/or service. (Examples of some appropriate uses are travel, research support, technical/clerical support, released time, etc.) Or

Applications and nominations for MPPP Awards may combine the above.

V. SELECTION PROCESS

All members of Unit Three may submit applications or nominations to appropriate department heads by January 10. Past recipients are as eligible as all other unit members.
Every school or appropriate administrative unit shall elect a committee by January 15 to review applications/nominations for MPPP Awards. (Each department or other appropriate unit elects one representative from faculty who have neither applied for nor been nominated for an award.)

Department heads shall forward all applications/nominations to school committees by January 20. No rankings occur before nominations/applications reach school committees.

School committees will review nominations/applications without prejudice in favor of nominations as opposed to applications or vice versa, and by February 15, forward to the dean or appropriate administrator no more than the same number of applicants/nominees as MPPP Awards allocated to the school/appropriate administrative unit. Only positive recommendations shall be forwarded. School committees need to complete and return data sheets furnished by the Academic Senate before they disband.

If the dean or appropriate administrator concurs with the recommendations, the awards shall be granted as recommended no later than March 1.

If the dean/appropriate administrator disagrees with the recommendations forwarded by the faculty, both the recommendations of the dean or appropriate administrator and those of the faculty shall be forwarded to the President by March 1.

By March 5, the President shall transmit both sets of recommendations for review by the University Professional Leave Committee, which shall forward its positive recommendations by March 20 to the President for his/her consideration in making a final determination by April 1.

If the UPLC makes a negative determination, the committee shall state their reason and shall return the denied application to the originating school committee with the request to forward a substitute recommendation to the dean/appropriate administrator. Repeating the original process. Each level of review shall complete and forward its recommendations within five (5) working days.

If the President disagrees with the UPLC, he/she shall state their reasons and shall return the denied application to the originating school committee with the request to forward a substitute recommendation to the dean/appropriate administrator, repeating the original process. Each level of review shall complete and forward its recommendations within five (5) working days.

This process shall be repeated until all the awards are granted or until the nominee/applicant pool is exhausted.

Awards shall be granted no later than June 30.

VI. GENERAL PROVISIONS

A. Recipients as well as the Personnel and Payroll Offices shall be notified in writing within five (5) days of concurrence.

B. Awards shall be paid within 30 days of having been granted.

C. When there is question as to the definition of the appropriate administrative unit for a particular application/nomination said question shall be referred to the Personnel Policies Committee for resolution.

D. All other questions about procedures and dates should also be referred to the Personnel Policies Committee.
E. Criteria remain broadly defined at the university level, but individual schools may opt to develop more specific criteria statements. (See III-Criteria)

F. Past recipients of MPPP Awards are eligible for repeated awards.

G. Part-time Unit Three employees are eligible for awards.

H. No rankings occur before nominations/applications reach school committees.

I. School committees need to complete and return data sheets furnished by the Academic Senate before they disband.

J. Equal Opportunity guidelines govern the granting of MPPP Awards just as they do other significant personnel actions at Cal Poly.

* Approved by the Academic Senate 4/22/86
Background statement:

For the past three years, no specific provision has been made in the California state budget for Merit Salary Adjustments (MSA's) for California State University (CSU) nonfaculty employees.

In 1985/86, 1986/87, and 1987/88, the Chancellor's Office of the CSU made cuts in other areas of its budget to assure MSA's for CSU staff. However, for 1988/89, it made no such adjustment. The failure to find room in its operating budget to fairly compensate nonfaculty employees has led to a demoralization of staff, inequities between staff and faculty employees, and threatens to undermine the effectiveness of employees to contribute to the mission of the CSU system.

It is not enough as faculty that we sympathize with the plight of support staff. We know that the lack of a Merit Salary Adjustment in a year of increased medical premiums and parking fees means less pay. We should use every avenue possible to give concrete evidences of support to their quest for compensation. Therefore, the attached resolution has been drafted to give evidence of our concern and our desire for speedy action to restore nonfaculty Merit Salary Adjustments to the CSU budget.

AS-____88/____

RESOLUTION IN SUPPORT OF MERIT SALARY ADJUSTMENTS FOR ALL NONFACULTY EMPLOYEES

WHEREAS, Funds for nonfaculty merit salary adjustments (MSA's) have been cut from the California state budget for the past three years; and

WHEREAS, The administration of The California State University system cannot shift funds from within its own budget to award nonfaculty MSA's this year; and

WHEREAS, Failure to grant such increases is a denial of economic parity and contravenes CSU employment policy to base salary adjustments on merit evaluations; and

WHEREAS, Inflation and other increases in basic employee expenses, such as medical care and parking, have effectively reduced living wages; and

WHEREAS, These inequities threaten both the productivity of nonfaculty support staff and the contributions that they may effectively make to the mission of The California State University system; therefore, be it
Resolution in Support of Merit Salary Adjustments for All Nonfaculty Employees

RESOLVED: That members of the California Polytechnic State University Academic Senate urge the CSU Chancellor's Office to seek every means possible for restoring the Merit Salary Adjustments to nonfaculty support staff; and be it further

RESOLVED: That this resolution be forwarded to the appropriate bodies for immediate action; and be it further

RESOLVED: That the California Polytechnic State University communicate its concern about this issue to the Statewide Academic Senate and urge it to take an official position in support of restoration of state funds for nonfaculty Merit Salary Adjustments.

Proposed By:
Linda Dobb, Chair
Professional Consultative Services Caucus
November 1, 1988
Background statement:

The June 14, 1988 directive from the Chancellor’s Office specifies that the faculty committee which evaluates State Funded Faculty Support Grants must be elected by the faculty. This provision was negotiated with CFA. The directive did not specify that elected faculty only should serve on the committee; however, the resolution is drafted to make it an elected faculty committee. The Research Committee has the expertise and has expressed a desire to be the committee to evaluate these proposals. This will require changing the membership of the Research Committee from appointive to elected positions.

Several concerns were expressed as this request was being discussed. They are reported here as an aid to Senate deliberation. This will create a powerful committee which evaluates all competitive grants on this campus; the operating procedures should provide assurance that evaluation of different grants will be accomplished using distinct sets of criteria to assure that all types of proposals will have a chance for acceptance. The present practice of committee members abstaining from competition for grants during their tenure on the committee should be codified in the operating procedures as well.

An election is requested for this committee early in 1989 in order for operating procedures and criteria for evaluating State Funded Faculty Support Grants to be developed by the start of Spring Quarter. This will allow award winners a full year for completing their grants. Regular election would put off awards until the Fall Quarter and grantees would have but six months to complete these school-year grants.

The Constitution and Bylaws Committee deliberated on this proposal October 4 and October 11. The recommendation was passed with five positive and one negative vote. (Members from the School of Architecture/Environmental Design and the School of Science and Mathematics, as well as the student representative seats were vacant.)

RESOLUTION TO AMEND THE BYLAWS
MAKING THE RESEARCH COMMITTEE AN ELECTED COMMITTEE

WHEREAS. The committee evaluating State Funded Faculty Support Grants must be elected; and
RESOLUTION TO AMEND THE BYLAWS
MAKING THE RESEARCH COMMITTEE AN ELECTED COMMITTEE
AS—____-88/____
Page Two

WHEREAS, The Elections Committee has the expertise to perform this service; therefore, be it

RESOLVED: That the Bylaws of the Academic Senate be amended as follows:

VII.15 A. b. Responsibilities

The Elections Committee shall be responsible for supervising and conducting the election process for membership to the Academic Senate, Research Committee, University Professional Leave Committee, Senate offices, the statewide Academic Senate, appropriate recall elections for the preceding as per Section VIII of these Bylaws, and ad hoc committees created to search for such university positions as president, vice presidents, and school deans, etc....

(2) Election of Academic Senate members, Research Committee and Professional Leave Committee.

(a) At the March meeting of the Senate, the committee shall announce impending vacancies in the Senate membership (according to the filled full-time equivalent faculty positions as of the first week of February, as listed by the university Personnel office), in the Research Committee, and in the University Professional Leave Committee. At the same time, each caucus shall be notified in writing of its vacancies.

I.12.a. Membership
Members of the Research Committee shall be elected by the faculty. Ex officio members of the Research Committee shall...

b. Responsibilities
(3) Evaluate requests for State Funded Faculty Support Grants and make recommendations for funding when appropriate to the President through the Academic Senate. Ex officio members shall be nonvoting for these deliberations.

(4) Evaluate...

c. This section becomes obsolete and will be stricken from these Bylaws June 30, 1989.

(1) Election for the Research Committee shall be held early in Winter Quarter 1989.

(2) Members elected from the Schools of Agriculture, Architecture and Environmental Design, Business, and Engineering shall serve two-year terms. Members elected from the Schools of Liberal Arts, Professional Studies and Education, Science and Mathematics, and the
RESOLUTION TO AMEND THE BYLAWS
MAKING THE RESEARCH COMMITTEE AN ELECTED COMMITTEE

Page Three

representative from Professional Consultative Services shall serve one-year terms.

(3) The committee shall develop detailed operating procedures and criteria for evaluating State Funded Faculty Support Grants to be approved by the Senate before March 17, 1989.

(4) The committee shall develop criteria for evaluating Care grant proposals in the 1989-1990 school year to be approved by the Senate before June 8, 1989.

Proposed By:
Constitution and Bylaws Committee
November 1, 1988
RESOLUTION ON
ENDORSEMENT OF THE DRAFT EXECUTIVE ORDER AND DRAFT
GUIDE FOR STATE FUNDED CAMPUS-BASED STUDY ABROAD PROGRAMS

WHEREAS, There has been a lack of systematic policy regarding state funded campus-based study abroad programs; and

WHEREAS, A draft executive order and draft guide regarding state funded campus-based study abroad programs has now been prepared by The California State University Office of International Programs; and

WHEREAS, The Academic Senate of The California State University (CSU) has called for responses from campus senates concerning both the draft executive order and guide; therefore, be it

RESOLVED: That the California Polytechnic State University Academic Senate approve in principle the draft executive order on campus-based study abroad programs subject to the exceptions to the proposed executive order; and be it further

RESOLVED: That the California Polytechnic State University Academic Senate approve in principle the draft guide on state funded study abroad programs subject to the exceptions to the draft guide; and be it further

RESOLVED: That the Chair of the California Polytechnic State University Academic Senate be directed to forward the approval and exceptions to both the draft executive order and the draft guide to the Chair of the Academic Senate of the CSU and to the Office of the CSU Vice Chancellor for Academic Affairs.

Proposed By:
Joseph Weatherby
Statewide Senator
November 1, 1988
ENDORSEMENT OF THE DRAFT STATEMENT "A PRACTICAL GUIDE:
STANDARDS AND PROCEDURES FOR STATE FUND SUPPORTED SEMESTER ABROAD PROGRAMS"

WHEREAS, There has been a lack of a systematic policy relating the Chancellor's Office to state funded campus-based study abroad programs in the California State University; and

WHEREAS, State funded, campus-based study abroad programs now service the majority of CSU students who study abroad; and

WHEREAS, The need for cooperation and development of study-abroad programs as a major component of the CSU curricula has been made apparent in several studies and reports, e.g. Task Force on the Pacific Rim, Ad Hoc Committee on Study Abroad Programs (Detweiler) and The Master Plan Renewed; and

WHEREAS, The Acting Director of International Programs of the CSU Chancellor's Office has prepared for review a draft statement, "A Practical Guide: Standards and Procedures for State Fund Supported Semester Abroad Programs; and

WHEREAS, The draft Guide is intended to supercede the document titled "Guidelines for the Establishment, Administration, and Evaluation of Study Abroad Programs for CSU Students" (AS-1766-87/ACSP); therefore be it

RESOLVED: That, subject to three exceptions, the Academic Senate of The California State University approves in principle the draft Guide; and be it further

RESOLVED: That the draft Guide along with Senate exceptions be forwarded to the campus academic senates for their review and comment.
BACKGROUND STATEMENT:
The draft is twenty two pages long, divided into four parts: Academic Logistics, Services and Finances, Student Recruitment and Approval Requirements. Under these four topics, there are seventy procedural statements. The CSU Academic Senate takes exception to three procedural statements.

1. Item 14, Page 4 - would require that all cost which directly support instruction be paid for with state funds.

   This narrow interpretation seems to be inconsistent with CSU policy as expressed in Executive Order 362 which delegates to campus presidents the authority to establish miscellaneous fees when they are for the actual pro rata cost of optional materials, services or facilities used in connection with courses.

   If the broad allowances provided by Executive Order 362 are not continued, it will be difficult, if not impossible, to offer many campus-based study abroad programs.

2. Item 29, Page 9 - would prohibit the current practice of accepting free or reduced travel cost for faculty and administrators assigned to supervise students traveling on state funded campus based programs.

   Some travel agents have indicated that the lack of faculty supervision could result in an increased cost to student groups.
The cost of budgeting faculty travel for state funded campus-based study abroad programs would have the effect of ending large overseas programs in the CSU.

Further, this narrow interpretation of travel policy could have a negative impact on continued faculty supervision of many campus-based state funded enrichment programs such as forensics, athletics, physical education at the club level, music, model United Nations activities, and optional field trips.

3. Item 56, Page 16 - would exclude concurrent enrollment students from participation in campus-based classes overseas. This conflicts with normal concurrent enrollment practices on campus.

The exclusion of concurrent enrollment students from campus-based study abroad programs will deprive some programs of the critical mass of students necessary to operate the program.
ENDORSEMENT OF THE DRAFT OF THE EXECUTIVE ORDER ON STATE FUNDED SEMESTER ABROAD PROGRAMS IN THE CSU

WHEREAS, There has been a lack of a systematic policy relating the Chancellor's Office to state funded campus-based study abroad programs in the California State University; and

WHEREAS, State funded, campus-based study abroad programs now service the majority of CSU students who study abroad; and

WHEREAS, The need for cooperation and development of study abroad programs as a major component of the CSU curricula has been made apparent in several studies and reports, e.g. Task Force on the Pacific Rim, Ad Hoc Committee on Study Abroad Programs (Detweiler) and The Master Plan Renewed; therefore be it

RESOLVED: That the Academic Senate of the California State University refer the attached documents to the local campus senates for review and comment; and be it further

RESOLVED: That the Academic Senate CSU approve in principle the draft Executive Order on State Funded Semester Abroad Programs subject to the following exceptions attached to the draft of the proposed executive order.
1. The Title, "State Funded Semester Abroad Programs," should be changed to read "STATE FUNDED CAMPUS-BASED STUDY ABROAD PROGRAMS." And all subsequent references to "semester" abroad programs should be deleted and replaced by the more appropriate "campus-based study abroad programs", e.g., in paragraphs 2, 3, 4, 4a., 4c., 4d., 4e., 4f., 4g., and 6.

2. Given the stated intention of the Commission for Extended Education to "mainstream" Extended Education into the campus curricula the second sentence in paragraph 4a. presents a problem.

3. Paragraph 4d. does not state the criteria and standards to be used.

4. Paragraph 4e. establishes unrealistic time frames for renewing program approvals.

5. Paragraph 4g. is too broadly constructed and gives veto power to a single study abroad program e.g. delete "or competes with".

6. Paragraph 6 should be more generally designated to accommodate planned reorganization of international education oversight in the Chancellor's Office, e.g. "is delegated to the Vice Chancellor of Academic Affairs or his designee."
THE CALIFORNIA STATE UNIVERSITY

A PRACTICAL GUIDE: 

STANDARDS AND PROCEDURES FOR STATE FUND SUPPORTED SEMESTER ABROAD PROGRAMS

Introduction

This publication implements Chancellor's Executive Order No. ____, and provides detailed guidance on required and recommended policies, standards, and procedures for the development, establishment, conduct, and evaluation of semester abroad programs offered by campuses of The California State University system. It is designed to be used both as a general reference and as a practical checklist for faculty and administrators who are contemplating or operating such programs. The contents are based on input from a variety of sources, including official system policy, advice from the Statewide Academic Senate, the recommendations of individual faculty and staff members on the campuses of The California State University, and on the long experience in state funded overseas study operations of the staff of the CSU Office of International Programs. A PRACTICAL GUIDE is a living document which will profit from the suggestions of its users. Their comments and recommendations for its improvement are solicited.

Organizing and operating academic programs in an international and intercultural environment is a complex and demanding effort which holds out the opportunity for powerful instructional enrichment, but which also requires a well-coordinated effort on the part of many elements of the campus community. The material which follows illustrates the roles played by many campus personnel. The success of these unique programs depends on a collegial and broad-based effort on campus which will guarantee the support and services these programs require.

In the text which follows, a distinction is made between recommended and required standards and procedures. Nevertheless, each listed element should be regarded as a significant aspect of planning and conducting high quality semester abroad programs. A PRACTICAL GUIDE specifies requirements for meeting Chancellor's Office standards for the initial approval of proposed programs and for the review and approval of reiterations of previously approved programs. The intent of these processes is to assure the proper development of system policy guidance in a new area of academic endeavor and to exercise both the support and responsible supervision of CSU international activities which such activities require. Campuses are encouraged to develop and document their own internal procedures and standards for the development, operation, and approval of state funded semester abroad programs consistent with Executive Order No. ____ and A PRACTICAL GUIDE.

I. ACADEMIC MATTERS

All study abroad programs begin with a concept which ties domestic educational objectives to perceived opportunities for enrichment, specialization, and/or altered intellectual perspective available in a foreign learning environment. The linking of domestic academic programs with a foreign instructional environment produces opportunities, but also special requirements involving curriculum, collegial governance, logistics, and other factors which complicate the process of realizing the program concept. This section points to the key matters in moving from step 1, the preparation of a written general concept of the proposed program, to a detailed academic plan.
A PRACTICAL GUIDE: Standards and Procedures for State Fund Supported Semester Abroad Programs

The Curriculum

☐ 1. Do courses selected for the instructional curriculum support specific elements of degree programs currently offered at the campus?

Required: Programs supported by state funds must be so designed that they allow "normal progress" toward the accomplishment of campus graduation requirements.

Courses may support general education requirements, major and/or minor requirements, and/or elective courses within the broad scope of campus graduation requirements.

☐ 2. Are courses selected for the semester abroad curriculum based on existing, approved campus offerings; on proposed course offerings unique to the program; or on courses offered by a foreign institution?

Defining the origin of each proposed course in these terms will lead to appropriate strategies for obtaining approvals in accordance with established campus review and evaluation procedures.

☐ 3. Have contact hours and unit credits been specified for each proposed course?

Required: Prevailing campus standards for assigning contact hours to justify unit credit award will normally be observed for semester abroad programs. Exceptions, as in the case of coursework offered by a foreign institution, must be approved in advance by campus authorities according to established local procedures.

☐ 4. Have detailed course descriptions been developed for each proposed semester abroad course which incorporate any special features associated with the foreign instructional environment?

Detailed course descriptions are not only essential for campus approval processes, but an essential part of program promotion and instructor selection. They must be prepared early in the process of program development.

☐ 5. Does the curricular plan provide sufficient unit credit to allow full time enrollment?

Required: As an aspect of the "normal progress" standard, state funded semester abroad programs must require enrollment in a full term of instruction. This is normally interpreted to be 15 semester hour credits but may not be less than 12 semester or quarter hour credits. Programs of shorter duration than a semester or quarter may be exempted from this requirement by the Chancellor's Office.
6. Have all curricular options and course enrollment rules and requirements (including course prerequisites) been defined and described in the program plan?

Rules on minimum and maximum unit enrollment levels should be prepared and published in program publicity information as well as the program proposal.

7. Have any planned instructionally-related tours or travel been described? Are such activities fully integrated into the instructional program?

**Required:** Note that academic credit cannot be awarded for travel per se. Travel time is noninstructional time. Integration of tour and travel activities must be accomplished by on-site instruction, retrospective reports, etc.

8. Does the curriculum considered as a whole relate to the instructional site? Does each course support the overall curricular theme of the program concept?

**Required:** It is critical that instruction support a theme consistent with the program locale; otherwise the curriculum will lose the academic focus which justifies its conduct at a particular overseas site.

9. Can the curriculum be repeated in subsequent iterations of the program? Do adequate instructional resources, including qualified faculty, exist to support continuation of the program?

The campus makes a major commitment when it initiates a semester abroad program. The curricular plan should provide for continuation of the program beyond its inaugural operation. It is particularly important that the program locale and theme be supportable by related instruction in subsequent iterations. Long term planning for these iterations should be a part of the initial program plan. "Cobbled together" curricula based on faculty availability alone should be avoided.

10. Does the curriculum include both classroom and physical orientation to the host country and/or instructional site?

Practical and cultural orientation to the host country and instructional site is an essential element of programmatic success. It insures quick integration of the student into the local environment. Effective initial orientation is particularly critical in programs operating for only a semester as time for student integration is relatively limited.

11. If the program is conducted in a non-English speaking locale, does the curriculum provide instruction in the host country language?

A basic principle of successful international education is the critical role of language competency in cultural integration. The curriculum should incorporate an appropriate level of instruction in the host country language, including a language "survival" skills component, as part of a well conceived orientation program.
If the program assumes a specific level of language competency, the linguistic preparation required must be carefully defined in advance in terms of successful prior formal instruction and/or competency evaluation through tests and interviews. In selecting participants, care must be taken to avoid too great a degree of variation in language preparation levels as this could invalidate the curriculum for some participants.

12. Have provisions been made in the curricular plan to allow for a sufficient instructional staff to permit a variety of teaching methods and perspectives in the semester abroad curriculum?

Too few instructional faculty create a "thin" program which does not approach the variety of perspectives students would normally expect to encounter within a particular field of study on campus. While practical considerations necessarily limit the number of faculty positions which can be supported by a semester abroad curriculum, primacy should be given to a quality student experience. Thirty to sixty students taking a full academic program from two instructors may represent a too intense use of the same instructional faculty and may adversely affect instructional quality.

While this standard does not recommend the application of fixed, absolute student/faculty ratios or formulas, campuses may wish to establish guidelines to guarantee appropriate staffing levels as a part of internal program proposal reviews.

13. Have all academic aspects of the program received a thorough review and approval by faculty committees and academic administrators as specified by campus authorities prior to submission for Chancellor's Office approval?

Required: The planning and development process must begin early enough to permit successful completion of all campus review processes before seeking final approval to operate any proposed program. The Chancellor's Office will not act until campus processes have been completed. Likewise, on campus processes designed to evaluate existing programs and approve changes in their academic aspects must also be completed prior to submission to the Chancellor's Office for authority to renew their operation for each subsequent year.

14. Do adequate instructional facilities exist and are such facilities available for use at the semester program instructional site?

Laboratories, libraries, classroom space, photocopying and typing (word processing) equipment, calculators, computing and data processing equipment, audio-visual and graphics support, administrative supplies, printing support, telephones, and office space—any of these and a myriad additional items may be critical to or desirable for instructional success. Do not assume the availability of anything. Plan for every needed item.
Required: Note that costs associated with any and all materials, facilities, or services that directly support instruction, or program administration, must be paid with state funds. To employ funds collected from students for such purposes amounts to the application of an unauthorized tuition to their enrollment in the semester abroad program. Accordingly, all materials, facilities, or services must be identified and costed in the program state fund budget. Overlook nothing—even those items that you may assume are free—in your cost plan. If the campus proposes to charge any instructional fees, such as a laboratory fee, to participating students, such proposed fees must be derived from currently approved on-campus fees practice and may not be employed to avoid the obligation to provide state fund support for instruction, instructional facilities and materials, and administrative support as described elsewhere in A PRACTICAL GUIDE. Typically, such fees will be minimal and directly associated with individual materials or services costs within the context of particular courses.

Personnel Matters

☐ 15. Has an approved campus procedure for the selection and assignment of faculty been established in which peer assessment, competitive selection, and open access are respected?

Mandatory: State and Federal law, CSU policy, labor contracts, and campus procedures all govern the selection of faculty personnel for teaching assignments. Regardless of the proprietary interests of faculty or administrators who initiate particular semester abroad programs, actual staffing decisions must derive from approved personnel selection processes.

☐ 16. Have faculty qualifications to participate in the semester abroad program been defined in terms of instructional competencies, experience in the cultural milieu of the overseas instructional site, and appropriate administrative experience?

It is particularly critical that instructional personnel involved in semester abroad programs be equally well qualified to conduct formal instruction and to assist students in appreciating the instructional and personal aspects and opportunities of the host environment. Inexperienced personnel will undermine student confidence and limit the full integration of the student experience—the essential objective of semester abroad programs.

☐ 17. Have staffing requirements been defined both in terms of instructional requirements [see Standard I 12, above] and administrative requirements?

Planners typically underestimate the commitment of semester program staff to the operational aspects of the program. Counseling, advising, handling logistical details, providing unplanned for support services for students, covering faculty absences, handling programmatic correspondence and paperwork, interfacing with host agencies, institutions, and governments, and dealing with contractors for services, housing, and travel—all these produce demands on faculty time beyond in-class instruction and support of instructionally-related and extracurricular tours and activities. Staffing in depth for such requirements is an essential part of program planning.
18. Have appropriate arrangements been made and clearances obtained from departments and schools to permit the absence of selected faculty for semester abroad assignment?

Early involvement of departments and schools in the planning of semester abroad programs will make their own planning easier and will elicit improved cooperation.

19. Have arrangements been made for the extension of faculty benefits and pay while serving on the semester abroad assignment?

Program planners should consult with the campus personnel officer to determine the availability of benefits and arrangements necessary for proper handling of paychecks, etc. While some services can be arranged with ease, others may be less accessible, or may require a special effort. Medical and dental programs should be of particular concern. No assumptions are justified. All details must be checked. Supplementary costs may be involved. Neither should planners fail to consider the health and medical benefits of dependents whether accompanying the CSU employee abroad or not.

Likewise, even experienced faculty travelers will need to think about the personal arrangements involved in an absence of several months. The development of local "practical guides" which pass on suggestions from one generation of semester abroad staff to another on these matters will prove to be helpful and is strongly recommended.

20. Have arrangements been made with departments and schools to conduct appropriate personnel assessments for semester abroad instructional faculty and administrators?

Particular care must be taken to be certain that consideration for tenure and promotion are in no way adversely affected by absence from the home campus to serve on semester abroad program staffs. Arrangements for completion of standard annual evaluations, where appropriate, must be made.

Assignments as a member of a semester abroad teaching/administrative support group places special demands on those who participate. While its professional value as international teaching and research experience is limited, semester abroad assignment requires special teaching, leadership, and management skills which should receive appropriate recognition as a part of faculty career development.

21. Has a comprehensive plan of internal evaluation for the semester abroad program been prepared and approved in accordance with campus procedures?

Required: An evaluation plan which results in a focussed and detailed review of program operations is essential as a tool to capture operational
experience and to permit that experience to be shared by the home campus community and others who must make judgments about and assign resources to the semester abroad program. It is a substitute for the more regular oversight given to academic operations on campus.

The value of the evaluation process is related not only to its effective design and the broad communication it establishes between the program and the campus community from whence it draws its support. Its value is also defined in the frankness and candor of its reporting. Quality overseas programs are had only at the expense of a self-critical process. Not less significant are the constantly changing factors of operating within a foreign instructional environment. Only effective program evaluation can detect such changes and provide hints on necessary adaptations.

☐ 22. Have arrangements been made to incorporate student evaluations into the comprehensive evaluation process?

Questionnaires should be developed which are aimed at evoking the student perspective in the evaluation process. In developing such questionnaires, it must be noted that leaving room for open comment usually produces the most useful input.

Additionally, arrangements for the preparation of standard student evaluations of faculty performance, if they are required, must be made well in advance. Normally, the standard campus procedures should be respected in this matter, but conditions may require modification of those procedures. This may, in turn, require prior coordination on campus.

☐ 23. Have grading policies been established and approved for the program? Have arrangements for timely reporting of grades been made?

Some program participants may have special needs for grade reporting for graduation or other reasons. Students should know in advance when grades will be reported on campus. Special attention must be given to the applicable rules and procedures for the assignment of "incomplete" grades, as conditions may not permit the subsequent completion of assigned work away from the instructional site abroad.
II. LOGISTICS, SERVICES, AND FINANCE

Travel and Insurance Services

Program-arranged (group and individual) travel is a campus responsibility to the participating students. It may not be avoided or delegated. Contracted travel agents and carriers do not normally deal directly with students nor can they under any circumstances make individual agreements with students enrolled in the semester abroad program who are participating in program arranged travel services.

☐ 24. Have air carriers been selected which are approved under the provisions of Chancellor's Executive Order #486?

Required: Only those air carriers may be employed for program-arranged travel which have complied with Trustees standards. Air carriers which have so complied are announced in Chancellor's Executive Order No. 486, which is prepared in the Educational Support Office of the Chancellor's Office. This announcement is updated quarterly, and is circulated to the CSU campuses. Currently non-approved air carriers may become approved by application to the Chancellor's Office. Contact Dr. Philip Johnston, (213) 590-5992 or ATSS 635-5992 for further information.

☐ 25. Is the travel agency bonded in accordance with standard State of California contracting procedure?

Required: As the contracting agency will be handling student funds, it is essential that it be bonded and handle student funds received as a trust until the promised services are actually provided.

☐ 26. Has a valid, approved contract for travel services been concluded prior to the transfer of any funds in payment?

Required: A valid, approved contract is one which has been obtained in a competitive bidding or approved single source process and executed by an authorized officer of the campus in accordance with standard State of California contracting procedures. No travel arrangements may be confirmed, tickets issued, or payments made until a valid contract is in effect.

Required: In addition, care must be taken to avoid any implication that the travel services contractor is in any way affiliated with the CSU campus or the State of California. Using tour operator publicity channels or publications to advertise or promote the program, or permitting the contractor to employ any means to wed in public the interests of the State of California with those of the contractor is a serious violation of public contracting policy. Your campus contracting officer is qualified to assist you in interpreting this aspect of your relationship with your contractor.

☐ 27. Do contracts provide for cancellation refunds and penalties, and are students advised in advance of commitment to program-arranged travel of program travel refund policies and procedures?
28. Is travel insurance provided to cover all air travel portions of the trip at a minimum?

Required: Travel insurance for CSU group travel is a Board of Trustees requirement. A minimum of $50,000 coverage is suggested.

29. Do the terms of travel contracts protect the campus and participating faculty from involvement in any potentially unethical or improper relationships or benefits?

Required: Tour contractors typically offer "free" or reduced fee, or refunded travel services for program operators as an inducement. In all state supported programs, official travel by faculty and administrators must be supported by appropriated state funds as a state expense. "Free" travel inducements amount to a transfer of profits from fees paid by students as a "kick-back" or consideration to CSU program operators for filling seats. This is not in itself an illegal arrangement, but becomes so when it leads to mixing student and state funds and expenses in a CSU state funded program. It also implies a potential conflict of interest on the part of any public employee who would accept such arrangements.

It is strongly recommended in travel contract negotiations that standard "free" travel offers be dealt with by declining the offers, but by requesting that the resultant contractor's savings be applied to a general discount of student travel costs.

30. Are ticketing arrangements designed to maximize economy and travel efficiency for students?

A balance must be struck between cost and convenience in arranging student travel. Semester program operators should consider all aspects of flight and ground services offers by contractors: number of modal transfers, routing, in-flight services (meals, movies, flight equipment), time of arrival, stopovers, etc. The lowest cost may produce intolerable travel conditions and negatively color student attitudes from the outset of the program. On the other hand, unnecessary luxuries may set students to wondering whether program planners have taken their pocketbooks into account.

31. Will the travel contractor provide necessary assistance at check-in and at critical transfer points in the student travel itinerary?

Check-in at a crowded airline desk can be easy or complicated and harrowing. Intermodal transfers can result in stragglers, missed buses and trains, etc. Spell out with the contractor every detail of the student trip from the departure point to the instructional site.

32. Have all travel documentation requirements for students and faculty been carefully defined? Are documents in hand and in order?

Clarify with the travel contractor and/or the local consulate of the host country for your program's instructional site what documentation will be
required for students and staff. Passports and required student visas are standard for students, but shot records and health certificates may also be required. In some countries, staff may have to obtain prior clearances to enter as an employed person—on a business-related status. Do not assume that tourist visas are sufficient for either students or staff. The laws of the host country govern the status of visiting U.S. nationals. They may not be safely disregarded.

Also, do not overlook transit documentation requirements if students must stop over in a third country en route. Make sure students sign passports and understand the use and significance of their travel documents.

☐ 33. Does the travel plan include arrangements for a smooth transition at the instructional site into temporary or permanent housing arrangements?

Students are tired and travel weary at trip's end. Psychologically, they will need a well handled transition to the comfort (and security) of a waiting room, shower, and bed. Program planners should consider an appropriate meal schedule on that first day at the instructional site. A 24 hour period of lightly structured personal adjustment after arrival is needed before instruction begins to allow for time zone adaptation.

☐ 34. Do provisions exist for an independent student travel option?

Some program participants may wish to travel to the instructional site separately from the group. There should be a program policy to deal with such requests for exception to group travel arrangements. If exceptions are permitted, joining instructions will have to be issued and a student waiver of program responsibility for travel arrangements and travel insurance coverage signed. Program operators should be aware that too wide a utilization of such options might reduce the travel group size and may result in higher per capita travel costs, depending on travel contract provisions.

Housing and Food Services

Perhaps no other factor concerns students more at the outset of an overseas study program than housing. Knowing that comfortable residential facilities are awaiting their arrival takes on a disproportionate significance to inexperienced travelers facing the unknown of foreign locales. Good planning will result in relatively comfortable and affordable housing and convenient, affordable, and (one hopes) palatable meals being available to the students. This, in turn, will produce benefits in good student morale and give a boost to group efforts.

☐ 35. Have appropriate accommodations been contracted for in accordance with standard state contracting procedures well in advance of student arrival?

While single source contracting is probably justified in many instances in contracting for housing services, a housing search should be made of the
A PRACTICAL GUIDE: Standards and Procedures for State Fund Supported Semester Abroad Programs

instructional site to identify well located housing of an appropriate level of comfort and at an affordable cost. Thought should also be given to how well the housing arrangements contribute to the cultural integration aspects of the program. Housing arrangements which isolate the student group from the cultural environment, though they may be easy to arrange, may be less desirable than housing with families, dispersed small group living, or other possible options.

**Required:** The program is responsible to the students for housing arrangements it contracts on their behalf. Contracts with housing providers must be executed in accordance with standard state contracting procedures, but must comprehend local practices and standards for residential leasing and renting in the host country.

**Required:** Costs for housing and any associated food services, including expenses specifically associated with program management of housing arrangements must be charged to students, not to state fund accounts as such expenses are not directly related to program administration and the instructional curriculum. Such costs must be defined as a part of the student budget for the program.

**Required:** Housing contracts must specify refund amounts and conditions; limits of program liability for use and abuse of housing facilities and furnishings; access to ancillary services, such as laundry facilities; specific provisions for meals to be provided. No significant detail should be left to a merely verbal understanding. Special care is due in a situation where the state contracts for services which are to be paid for by students. Potential liabilities must be specific so that students, in turn, can be advised of the extent of their individual financial responsibility to the state for program-arranged housing and meal services.

☐ 36. Has a program housing policy been established?

The program housing policy permits a clear statement of student housing options; rules of conduct in housing, and penalties; terms of early cancellation and refunds; and options on meals, if applicable. Establishing a housing policy is essential to an informed student body, to assure student cooperation and compliance, and to avoid misunderstanding.

☐ 37. Is the housing near to classroom and other program facilities or to dependable local transportation? Are costs for required local transportation included in the student budget?

☐ 38. Are costs for utilities included in the housing contract, or are students subject to individual charges?

Inclusion in contracted housing costs of utilities expense based on gross estimates is preferred to individual billings as the latter may vary widely from student to student, and billings may be delayed. In some locales, utilities costs may equal the cost of the lease on a monthly basis.
Will students be required to provide their own linens, utensils, or other items to render their housing arrangement usable?

Such items must be planned for as materials to be brought from home or purchased at the instructional site as part of the student budget.

**Health and Safety**

Operating an overseas program places a special responsibility on the campus to plan for all aspects of student needs in the overseas locale. Illness and injury are virtually inevitable events in the course of conducting programs abroad. Arrangements must be made in advance to deal with such events effectively.

Has the program arranged for a dependable overseas health and accident insurance coverage for students (and staff) which will meet all contingencies from outpatient services to major hospitalization?

**Required:** Program participants must be covered by an appropriate medical insurance policy. The costs for such coverage must be borne by the insured, not by state funds.

Program planners should select coverage which provides substantial major medical coverage and reasonable outpatient coverage as well as at least a $10,000 death and dismemberment benefit. To be effective, the casualty insurer must provide a responsive and relatively simple claims process. The insurer should provide a specific guide of policy coverages and terms in a brochure form in straightforward language for student use.

Most policies available for overseas programs employ a reimbursement feature rather than a direct payment to health providers. Accordingly, students must be advised to be prepared to cover medical expenses from their own resources until reimbursements are received from the casualty insurer.

**Required:** The program must be prepared to guarantee or prepay from contingency funds any major medical expenses or hospitalization costs when these exceed what may reasonably be supported by students from their own resources. Arrangements must be made in advance with students to permit the program operators to obtain reimbursement for committed or expended program contingency funds. Such contingency funds may also be required to cover emergency medical evacuation costs.

Health and accident insurance costs should be incorporated into the student budget.

Have medical services available at the instructional site been surveyed?

It is crucial for program operators to know what facilities are available for emergency medical treatment of students and staff and to have a
referral list of physicians. Assistance in obtaining information of this kind can be had by contacting the U.S. Consulate nearest the instructional site. Limits on medical services at isolated sites should be reported to students prior to their departure for overseas.

□ 42. Have any special medical precautions recommended for residence in the host country been identified and reported to participants?

Everything from recommended inoculations to food and sanitation cautions should be reported in advance of departure to students.

□ 43. Have cautions on safety issues relevant to the instructional site been provided to students?

Traffic hazards, knowing "the bad part of town," and terrorism are subjects, among others, which students need to know about their new environment. Program operators need to make their own site survey—to include housing facilities—for safety issues. Student deaths and severe injuries have resulted from ignorance of traffic rules and practices, safety factors involved with rail travel, and the threat of unvented heaters and other environmental factors. Failure to forewarn can expose program operators and campuses to criticism and suit, not to mention the potential pain of witnessing avoidable casualties.

□ 44. Have participating students been required to undergo detailed physical examinations and to report their medical histories?

Having medical examinations prior to departure not only provides an opportunity to discover conditions which may need special treatment at the instructional site, but also provides a medical record which may be used in emergency situations at the site. The medical record should include blood type and Rh factor and an evaluation of any significant abnormalities. The physical examination also provides a useful basis for dealing with disputes about "pre-existing conditions" which may arise with casualty insurers.

Program Budgeting and Financial Aspects

This section does not provide a complete plan for designing and reporting the program budget. Campuses are responsible for devising their own semester abroad program budget formats and reporting/approval procedures. It is the intent here only to point to some basic and minimal requirements and considerations to assist program planners to avoid common errors in thinking about budgetary matters.

"State support" programs involve the use of appropriated public monies to support the administrative and instructional aspects of operating a public university. In the CSU, California resident students pay specified Trustees-authorized fees: the State University fee; instructionally-related activities fee; health facilities fee; student body association fee; and student center fee. These fees do not cover facilities, faculty salaries and benefits, equipment, or administrative costs associated with planning and conducting instruction. Semester abroad programs which are not operated under the aegis of the campus office of continuing or extended education
office, must operate as state support programs. They must, in their fiscal aspects, carefully distinguish between program costs which must be covered by public monies and those which must be supported by monies collected from participating students.

☐ 45. Has a state support budget been prepared? Has state money been identified or committed to support this budget prior to the making of any contractual or participant selection commitments?

☐ 46. Has a detailed student budget been prepared?

While state costs should be relatively easy to specify, student costs are usually a combination of known and estimated costs. Student budgets should result in a comprehensive picture of the total amount of money the average student is likely to spend throughout the entire duration of the program. Travel, books and materials, housing and meals, personal expenses, insurance costs, and entertainment expense, as well as campus fees, are all components of an appropriate student budget. A process of budget evaluation and update based on actual student experience should result in ever more accurate student budgets in each iteration of the program. A post-program student cost questionnaire is, therefore, highly recommended.

Required: A detailed, projected student budget incorporating the best possible estimates must be submitted with proposals for approval by the Office of the Chancellor.

☐ 47. Has a method of disbursement for state and student funds been established which permits holding and disbursement of funds both on campus and (if applicable) at the instructional site? Will an overseas bank account be required?

☐ 48. Has a state trust account been established on campus for the receipt and accounting of student funds?

Required: No funds may be collected or solicited from students prior to final approval of program approval by the Office of the Chancellor and until approved application and selection processes are complete. Funds may then only be received by officers of the campus authorized to receive and retain such funds.

☐ 49. Will students receive a detailed, individual accounting of the disposition of the funds they have paid into the program?

Program operators should maintain sufficient records of the expenditure of student funds to account for their disbursement for program-arranged services. Unexpended funds remaining at the close of each program iteration must either revert to an authorized trust fund (as a contingency fund, for example), to state general funds, or be refunded to the participating students. Each campus must establish its own policy on this matter.

☐ 50. Has a comprehensive refund, penalty, and non-refundable fee policy been established, approved and provided to program participants?
51. Have emergency funds for medical and evacuation purposes been identified in the program budget?

Note: Contingency funds must ultimately derive from student sources as such costs are not legitimate state expenses. The campus chief financial officer should be consulted on rules and procedures for establishing a contingency fund.

52. Have arrangements been made to disburse financial aid awards to students at the instructional site?

Special arrangements are needed to register semester abroad students and to permit the release, transfer, and disbursement of such funds either prior to student departure for the instructional site, or after arrival at the site. Students dependent upon financial aid to support their program expenses will be concerned to receive their aid on a timely basis.

53. Has a student payment schedule been prepared? Does it provide for deferred payments for financial aid recipients?

While it is not mandatory, breaking program payments into a schedule may be convenient for students and parents. For those students who are dependent upon financial aid, some form of payment deferment may be necessary to allow them to participate.

54. Will a petty cash fund be maintained by program staff at the instructional site?

Arranging a state and/or student fund resourced petty cash fund for small on-site expenses can be a very useful practice. Alternatively, staff can make purchases from their own funds and claim reimbursement.
III. STUDENT RECRUITMENT AND SELECTION

There are three basic elements in a successful educational program: a well conceived curriculum, a knowledgable and prepared faculty, and a capable and motivated student body. Obtaining the latter element of this essential trio for a semester abroad program requires a thoughtful recruiting strategy and an effective selection process. The program preordains the nature of its student body in the methods and messages it employs in its publicity and recruiting materials. The selection process serves to refine the self-selection which goes before the formal application process. Accordingly, program operators should develop a clear concept of the ideal program participant and appeal to that concept throughout the recruitment, application, and selection effort.

☐ 55. Has a semester abroad program publicity and recruiting program been designed which will open the application process to the broadest possible number of qualified students?

State funded programs have an obligation to publicize widely and recruit students from the campus community on a broad basis. Programs designed to serve only a preidentified group of students may not meet this obligation.

☐ 56. Have academic and personal qualifications for participation in the program been defined as application and selection criteria?

As any quality program is necessarily designed with standards for student preparation in mind, semester abroad programs must derive from their basic conceptual intent and specific course structure the personal qualities and specific academic preparation they must require to assure instructional success. These standards should be employed with minimum exception unless and until experience proves that modification of the criteria is justified.

Required: Note that only matriculated students of the CSU system are eligible to benefit from CSU state funded academic programs and services. Students from other higher education institutions and secondary school students who are not matriculated at a CSU campus are not eligible for state funded semester abroad programs.

☐ 57. Have publicity and recruiting materials been prepared which accurately and thoroughly describe or characterize the academic, financial, and personal commitments required from students? Does the material also describe accurately the selection criteria to be employed and provide instructions on gaining access to the application process?

Required: Proposed or renewing programs proposals submitted to the Office of the Chancellor must be accompanied by samples or drafts of publicity and recruiting materials.

☐ 58. Has an application form been developed which explores all relevant issues of qualification and provides needed personal data on applicants?
59. Will applicants be interviewed prior to selection?

Long experience has shown that the selection interview is a useful tool in assessing student interest, preparation, and motivation. It affords an opportunity for clarification of program and participant goals. Some applicants for overseas study programs come with personal agendas which may or may not be compatible with the program design.

60. Has an appropriate selection process been established? Have qualified individuals been selected to participate in the decision-making aspects of that process?

Program operators may find it useful to include an array of faculty, counseling personnel, and others in the process of participant selection as well as being represented themselves to give breadth and balance to the process.

61. Will faculty or other recommendations be required as part of the application process?

Recommendations from colleagues can be extremely valuable in assessing student qualifications and as a means to develop an academic and personal profile of each participant which will be useful to program operators at the instructional site.

62. Will students receive notification of the disposition of their applications at the time most convenient for their individual planning?

Students who have applied to a semester abroad program must plan employment, situations at home, finances, and other personal factors as well as their academic programs. Notification of program selection decisions should come as early as possible prior to the beginning of the semester abroad program to accommodate their planning.

63. Has an efficient means of completing predeparture program business with students been established?

A well-organized predeparture processing system to complete necessary paperwork, arrange for visas, submit payments, apply for options, preregister, and all other actions which students must take prior to departing for the overseas instructional site will not only speed the effort, but will help to avoid overlooking details. In some cases, small details overlooked on campus can create major problems for students and/or staff at the instructional site.

64. Will an appeal process be incorporated into the selection plan?

Program operators should consult with campus admissions personnel on the rights of applicants for admission to campus-based academic programs and the obligations and authority of the campus to control admission to such programs. To assure fairness, substantive appeals to the selection process by students who have not been accepted to the program may be desirable. Prevailing campus practice and policy should guide the establishment of appropriate methods for the semester abroad program.
65. Does the program have a stated policy on nondiscrimination?

**Required:** Announcing in program materials that participation in the program will not be subject to restrictions on the basis of race, color, sex, handicap, or national origin is a fast and firm requirement. Program operators must be prepared to include non-citizens (even visa students) and students with handicaps as well as admit students whose race or color may present potential cultural communications obstacles at the instructional site and to provide all possible assistance to such students. Students with physical handicaps who require special environmental considerations may not always find the overseas instructional sites responsive to their needs. Program operators must make a reasonable effort to accommodate such students. Early counseling and a detailed awareness of the instructional environment on the part of program operators will assist in dealing with specific student situations.
A PRACTICAL GUIDE: Standards and Procedures for State Fund Supported Semester Abroad Programs

IV. REQUIREMENTS FOR APPROVAL OF SEMESTER ABROAD PROGRAMS PROPOSALS

This section provides details on what materials must be submitted and what procedures employed to obtain authorization from the Office of the Chancellor to operate a state fund supported semester abroad program. Following this process will assure a timely and uncomplicated cooperative effort between the campus and the Chancellor's Office. Failure to follow its minimal requirements will result in costly and unnecessary delays. The objective is to assist campuses to institute quality programs and to avoid potential liabilities and pitfalls wherever possible.

Prior to Submission

Before submitting a new proposal or a proposal to renew a previously operated program, the campus must have completed certain steps to maintain a logical process and to assure that campus authorities are not bypassed.

☐ 66. Has a general program concept been prepared and approved for further development by the appropriate campus authorities.

Program development may involve the use of state resources in personnel, materials, and travel. Before such development is undertaken, a concept proposal should be approved by the appropriate campus officers. The campus should predefine this initial process and name the responsible officials.

☐ 67. Has a fully documented final proposal been prepared?

Required: A fully documented proposal will reflect a great deal of preparation and effort. It will include, at a minimum:

☐ • A summary of the program concept

☐ • Course lists: including detailed descriptions, course numbers, unit values, and contact hour information. Each description will also include a statement on any prerequisite study or other preparation.

☐ • A curriculum plan, summarizing the course structure and enrollment requirements.

☐ • A summary of planned instructionally related tours and travel.

☐ • An approximate calendar of events for the semester abroad program.

☐ • A brief description of any planned on-site orientation program.

☐ • A statement on the estimated potential for reiteration of the program over a specified number of years.
A PRACTICAL GUIDE: Standards and Procedures for State Fund Supported Semester Abroad Programs

- Information on faculty and staff: Brief position descriptions; description of faculty selection process to be employed; student/faculty ratio to be achieved. [Qualifications of faculty selected need not be included.]

- Description of instructional facilities and support required, and of the plan for obtaining such facilities and support.

- A description of the plan for all aspects of program evaluation, including student evaluation.

- Copies of all proposed draft agreements or contracts for services: travel, accommodation, instruction, facilities, insurance, etc.

- A detailed state fund budget plan.

- A detailed student budget plan.

- A statement of program student accounting procedure and refund policy.

- Samples or drafts of publicity and recruiting materials.

- A description of the student selection process, to include a summary of selection criteria.

- A copy of the student agreement or contract.

- A statement of the program’s nondiscrimination policy.

68. Has each aspect of the total proposal received appropriate on campus reviews by faculty and staff?

Program planners must think beyond approvals in the academic area alone. Coordination with business affairs, legal, student services, and other elements of the campus community may also be appropriate. It is the responsibility of the campus to determine its own internal review and approval processes, but that process must be completed prior to submission to the Office of the Chancellor.

69. Has the final proposal been submitted to the campus President and/or Vice President for Academic Affairs for approval?

Required: The Office of the Chancellor will consider only formal proposals for semester abroad programs which originate with either the President, or Vice President for Academic Affairs of the campus making the submission. This will assure that all applicable on-campus procedures have been followed prior to submission.
70. Has the proposal been prepared according to a plan which permits time for on-campus and Chancellor's Office review without impinging on essential operational deadlines?

Allow a period of up to a year after initiation of the proposal for on-campus and on-site development and campus approvals to be obtained. Allow at least 30 days for Chancellor's Office review. The planning and approval time should be phased so as to allow all processes to be completed prior to contract deadlines and the initiation of the student recruiting effort.

**Required:** Programs may not be announced until approval to operate is granted by the Office of the Chancellor.

### Proposals for Subsequent Iterations

Once program proposals have received a full review and have been approved in accordance with the above-described process, campuses may submit abbreviated documentation for review and approval of subsequent iterations of the same program. Such abbreviated, or summary, submissions will include, at a minimum:

- Description of proposed changes in the academic structure, offerings, instructional site, or other major academic program revisions in the new iteration, or a statement confirming repetition of the previously approved academic program.

- Revised proposed student and state budgets.

- Copies of all revised and updated agreements and contracts, including student agreements.

- Samples of proposed publicity and recruiting materials.

- A copy of the previous program iteration campus evaluation, if not previously provided.

### For Assistance

A PRACTICAL GUIDE will help the state fund support semester abroad program planner and operator to organize the effort to design a quality program proposal and to realize the promise of the ideas from which the program proposal was born. It cannot answer all questions, nor cover all cases. Planners have been encouraged in A PRACTICAL GUIDE to make use of the valuable resources which exist on campus to help them achieve their objectives. They should also feel free to avail themselves of knowledgeable staff in the Office of the Chancellor when
answers—particularly on matters of system policy—are not available on campus. A brief phone call can save time and effort. For matters related to state fund supported semester abroad programs, including the development of this publication, contact:

Dr. Richard L. Sutter  
Acting Director  
The California State University  
International Programs  
ATSS 635-5655  
or  
(213) 590-5655
Executive Order No. ______

THE CALIFORNIA STATE UNIVERSITY
OFFICE OF THE CHANCELLOR
400 Golden Shore
Long Beach, California 90802-4275

Executive Order: ______

Title: State Funded Semester Abroad Programs

Effective Date: ______

1. This Executive Order is issued pursuant to Title 5, California Administrative Code, Sections 40100 and 40102.

2. Campus Presidents of The California State University (CSU), or their designees, may initiate state funded semester abroad programs which support, enrich, and/or broaden existing curricular offerings.

3. For purposes of this Executive Order, "state funded" shall mean any CSU campus instructional program which in any respect employs appropriated public funds to support its operation. "Semester abroad" shall mean any CSU campus instructional program which is in whole or part conducted at a site outside of the United States of America and which approximates in duration one standard academic semester, or academic quarter, or any part thereof.

4. The following policies and procedures apply to the development, administration, and conduct of all state funded semester abroad programs:

   a. State funded semester abroad programs must be administered and conducted as regular offerings of the CSU campus. They will not be operated under the terms of authority of, nor shall they be organized as, extension or special session programs.

   b. Such programs must undergo a normal on-campus development process which incorporates all appropriate administrative and academic reviews and approvals as defined by the CSU campus president, or his designee.

   c. State funded semester abroad academic offerings must present a coherent, thematic course of study which is congruent with or adjunct to the campus curriculum and which relates to the overseas instructional site. Courses offered must satisfy CSU campus graduation requirements, as a condition of receiving state fund support.

   d. Prior to the establishment or operation of any state funded semester abroad program, a detailed proposal must be submitted by the Campus President, or designee, to the Office of the Chancellor and written approval from the Office of the Chancellor of said proposal must be received by the Campus President, or designee.
Executive Order  

Page 2

e. Approval by the Chancellor’s Office to operate a proposed state funded semester abroad program is granted for a single semester, quarter, or part thereof only. Each proposed subsequent iteration of the program must receive summary review and approval by the Chancellor’s Office.

f. Campus Presidents, or their designees, will incorporate plans for the review, evaluation, and improvement of state funded semester abroad programs as a regular feature and condition of their approved operation. Reports, including information obtained in the review and evaluation process and summary of planned or instituted improvements will be provided on a timely basis at the conclusion of each iteration of the program.

g. No state funded semester abroad program may be established which duplicates or competes with The California State University International Programs.

5. This Executive Order may be augmented by guidelines and procedures consistent with its provisions by the Vice Chancellor, Academic Affairs, or designee.

6. Approval of proposals for state funded semester abroad programs is delegated to the Director of International Programs, Office of the Chancellor. Proposals should be forwarded to that office for review.

W. Ann Reynolds

Date: ________
The recommended General Education Transfer Curriculum and the Academic Senate's supporting resolution have been circulated to all campus senates for final review. The recommended transfer curriculum contains 37 lower division semester units distributed among areas A-D, and fits within the minimum of 48 semester units prescribed by Executive Order 338. It introduces no change in upper division general education course work. Before the Academic Senate CSU takes final action, it seeks campuses' comments regarding the philosophical and descriptive language in each area.

The transfer curriculum has grown out of intersegmental cooperation among the California State University, the University of California, and the California Community Colleges begun in spring 1987 and continued through academic year 1987-88. The primary purpose of the program is to facilitate transfer of students from the community colleges to either the CSU or the UC, as clearly expressed by the Master Plan Review Commission. Such a provision was enacted into law in AB 1725 (Vasconcellos).

Because all three segments of public higher education are involved in the issue of transfer, the initial work of development was undertaken by the Intersegmental Committee of the Academic Senates (ICAS), comprised of the Executive Committees of the three systems' academic senates. The first draft was circulated to CSU campuses in November 1987, and both regional and systemwide campus chairs' meetings followed thereafter. In response to communication from campuses, the General Education-Breadth Advisory Committee incorporated as many suggestions as were feasible and, in cooperation with the Academic Affairs Committee of the statewide Academic Senate, produced the document now before us.

The program consists of 37 lower division semester units, with 31 of these common between CSU and UC. The remaining 6 units for the CSU are devoted to oral communication and critical thinking as required by Executive Order 338. Statutory requirements in American History and Government are not included in the G.E. Transfer Curriculum.

The final draft will be on the agenda of the Academic Senate CSU in January 1989 as a first-reading item. The Executive Committee of the statewide Academic Senate will meet with campus senate chairs on November 11, 1988, and the transfer curriculum will be on their agenda. Campus academic senates and relevant committees should act quickly in order for information to be exchanged at the November meeting. Following that meeting, the campus academic senates are asked to forward their final written recommendations to the statewide Academic Senate by December 1, 1988.

Several implementation issues remain to be developed after the curriculum is adopted. Intersegmental committees are working further to develop a transfer program for high-prerequisite majors and procedures on certification.
Memorandum

State of California

RECEIVED
OCT 25 1988

San Luis Obispo
CA 93407

fo: Charles Andrews, Chair

Academic Senate

Date: October 24, 1988

File No.: 

Copies: GE&B Committee

From: John Culver, Chair

GE&B Committee

Subject: Committee Response to the "General Education Transfer Curriculum and The California State University" Report

As you requested, the GE&B Committee has discussed the GE Transfer Curriculum Report. While our reaction to the report is favorable for the most part, all of us are aware of how well intended ideas (e.g., intent of GE and narrative description of subject areas) are often difficult to operationalize. Clearly, it is up to community colleges and CSU institutions to ensure the spirit of general education by monitoring the academic integrity and validity of the courses offered in the subject areas. The transfer curriculum is an idea whose time arrived several years ago. We should move to implement it.

We are very supportive of the language in the Subject Area on English Communication which emphasizes "a substantive amount of activity to written composition." Similarly, the Subject Area on Mathematical Concepts and Quantitative Reasoning which excludes "courses on the application of statistics to particular disciplines" as fulfilling this requirement is sound.

As you are aware, our campus includes the statutory requirements in American History and Government in the Subject Area on Social and Behavioral Sciences inspite of the cover memo to the Report which says that this requirement should be separate from general education. Quite simply, the inclusive of 40404 with 40405 lessens the breadth of coverage our students receive in Area D on this campus.