



Mary Croughan
Telephone: (510) 987-9303
Fax: (510) 763-0309
Email: mary.croughan@ucop.edu

Chair of the Assembly and the Academic Council
Faculty Representative to the Board of Regents
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

January 22, 2009

PRESIDENT MARK G. YUDOF
UNIVERSITY OF CALIFORNIA

Re: Proposed EAP Business Plan

Dear Mark:

At its December 17, 2008 meeting, the Academic Council completed its review of the proposed business plan for the Education Abroad Program (EAP) submitted by Acting EAP Executive Director Michael Cowan. All divisions and four systemwide standing committees submitted comments. Council also received letters and email messages from individual Senate members who have served or are serving as EAP study center directors.

After careful consideration, the Academic Council concluded that the draft business plan is not acceptable. Council's reasoning rests on two principles that emerged from the combined deliberations of Council, the divisions, and the four standing committees:

- (1) EAP is an academic program, which falls squarely under the Senate's authority as defined by Standing Order of the Regents 105.2. As such, it must be reviewed with the same rigor and according to the same criteria as any other academic program, and its budget decisions must be driven by academic priorities.
- (2) Changes of the magnitude proposed for EAP require much more thorough justification and careful analysis than what is contained in the draft business plan.

Council requests that planning for EAP's future be conducted by a joint Senate-Administration task force that builds on the Senate's analyses in 2008 and has sufficient time to develop a well-documented strategic plan based on thoughtful consideration of multiple alternatives. Council is seriously concerned that its March 2008 critique of proposals similar to the new business plan is neither acknowledged nor reflected in the current document. Former Chair Michael Brown's letter of March 3, 2008 to then-Provost Hume conveying Council's position on the report of the Joint Ad Hoc Committee on International Education is attached for your reference. Additional Senate reports

underlying former Chair Brown's letter are available on the web at <http://www.universityofcalifornia.edu/senate/committees/council/ac.intrnl.ed.rpt.0308.pdf>.

Although Council acknowledges the very difficult and challenging economic times facing the University and the state of California, it believes strongly that EAP must be reviewed as an academic program, with thorough analysis of the quality and cost of current academic programming and careful assessment of how projected changes will affect students, the systemwide and international EAP infrastructure, and campus EAP offices.

The Academic Council also notes that UOEAP already has reduced its staffing by 21% (from 103.21 to 81.76 FTE) since 2006-07 and that its appropriation of state funds already has been cut by approximately the same percent (\$3 million) in the same period. EAP's current mix of state funding and student fee revenue is similar to that of other academic programs, and Council agrees with the Senate committees that find this appropriate (UCD, UCR, UCIE, UCPB). It is important to note that Council does not object to EAP being asked to take additional cuts similar to those imposed on other academic programs during the requested planning period (UCSB, UCSD, UCEP). However, Council reiterates its objection, previously stated by former Chair Brown in his letter referenced above, to the view that EAP is a student *service* rather than an *academic program* -- as implied by the proposal to shift EAP funding entirely to student Educational and Registration fees.

Unanalyzed risks

EAP is widely recognized as one of the best study abroad programs in the nation because of its success in institutionalizing extended periods of study abroad without prolonging time to degree. In 2006-07, the latest year for which the Institute of International Education has published data, six UC campuses ranked among the top 19 doctoral institutions in the country in the number of students who studied abroad for a semester or longer. It is critical that the review of EAP analyze the elements that are essential to this significant achievement so that they are maintained. Similarly, EAP has negotiated and maintained reciprocity agreements with a lengthy roster of the world's leading universities, as reflected in the attached list, and these agreements should not be allowed to collapse without a deliberate decision that they are not an appropriate priority. In addition, EAP has secured the use of property in other countries through leases and complimentary space agreements with host institutions that would be impossible or difficult to replace in the future if these agreements are allowed to expire. I understand that UOEAP has provided you with detailed information on its property arrangements.

The draft business plan proposes elimination of some of the study centers and most of the study center directors, but does not suggest a selection process or provide any insight as to the academic consequences of such measures. On this point, Council cautions that once dismantled, it will be difficult and prohibitively expensive to recreate UCEAP's network of infrastructure and reciprocity agreements (UCSD, UCIE). Careful assessment is needed to determine whether and how academic quality can be monitored and maintained in the absence of study center directors and whether alternative mechanisms will be adequate for advising and administrative oversight (UCD, UCI, UCSC, UCEP). UOEAP should conduct a thorough review of its current study centers, staff, and directors, as well as its campus directors, and its academic, instructional, and administrative expenses (UCI, UCEP, UCPB). This review can be concurrent with the deliberations of the task force that Council proposes, but its results must be incorporated into the decision process.

The Academic Council also sees significant near-term risks in the proposed restructuring of EAP funding and decentralization of its operations. The proposed new funding structure would shift revenue that previously went to UOEAP to the campuses, but there is no evidence in the draft business plan that these funds would be earmarked for international education. There is no assurance that campus funds will be used to support local EAP functions (UCD, UCI, UCR, UCSC, UCEP, UCIE, UCPB). UCPB recommends that if the funding shift is implemented, campuses should be required to use their new General Funds to cover: 1) the instructional costs of foreign reciprocity students, including the cost of an increasing number of reciprocity students in the future; and 2) the salaries of an increased number of EAP campus advisors to provide services that will no longer be provided by UOEAP. Unless the General Funds and the return to aid portion of student fees reallocated to the campuses are earmarked for local EAP expenses, including financial aid for students in the program, it is likely that student participation will decline as a result of diminished advising and higher costs.

Academic Council members also are very concerned about equitable access to EAP programs for underrepresented minority students and students from poor socioeconomic backgrounds. Historically, EAP has provided access to students of lesser means by trying to keep their costs for study abroad approximately the same as those for attending their home campuses. Under the new business plan, with the high probability of increased program fees, this will likely change (UCD, UCI, UCM, UCAP, UCEP, UCPB). Moreover, decentralization of EAP administration is likely to create duplication and waste, or lead to the abandonment of critical programs by the campuses (UCD, UCI, UCR, UCSD, UCEP).

Missed opportunities

The Senate's reviewing bodies believe that the proposed business plan does not take into account opportunities to build on EAP's success in order to increase revenues while maintaining programmatic integrity. Two possibilities in particular need to be explored in depth. The first is a careful analysis of whether some or all of EAP's contractual agreements with partner universities can be renegotiated to achieve savings in the context of new developments. For example, economies of scale may be possible in the European Union, where the Erasmus program has created a system of open exchange between European universities. Second, opening EAP's study centers to students from other universities may offer significant opportunities to increase revenues based on those students paying non-resident fees, while ensuring that student populations at the study centers reach a cost-effective level. Given that UC's EAP program is among the best in the nation, serious thought should be given to serving as a third party vendor to other universities. It will take time and serious study to determine whether these ideas and others suggested by the divisions and standing committees are viable.

Priorities

As noted above, Council does not object to UOEAP taking cuts similar to those imposed on other academic programs, but it strongly urges that cuts be imposed according to programmatic priorities, with preservation of EAP's immersion programs as most important. These programs constitute EAP's core mission and represent UC's comparative advantage over many of its competitors in international education (UCSC, UCSD, UCEP), as evidenced by UC's high ranking noted above among doctoral institutions sending students abroad for extended study. Accordingly, UCEP offers the following sequence in which programmatic cuts should be made: 1) investments in UC student participation in third party programs; 2) UC construct programs (where UC students are instructed in

English); 3) credit/grade-granting functions of UOEAP (however, at present these costs cannot be determined); 4) language and cultural instruction programs (that enrich the experiences of those students who are unable to participate in full immersion programs); and finally, 5) immersion programs (these provide the maximum cross-cultural experience).

Insufficient information and analysis

Overwhelmingly, Council members agreed that the draft business plan does not provide sufficient detail, information, or justification to permit its use as a planning document (UCB, UCLA, UCR, UCSC, UCSD, UCAP, UCEP). For example, the Berkeley Division remarked that the “information presented and the format used fall short of a business plan...” and found “the budget and accompanying slides inadequate to convey the complexities of UOEAP, financially and academically.” The Los Angeles Division commented that “the process by which the plan was written is incommensurate with an academic planning model.”

Slower implementation

Council found that if the proposed changes are implemented, the three-year timeline for such a drastic transformation of EAP’s funding structure is far too short. If the proposed restructuring occurs, a more gradual five- to ten-year plan will provide a smoother transition while allowing for cost-cutting measures and streamlining reforms (UCI, UCSC, UCIE, UCPB) as well as mid-course corrections. A longer transition period would allow time to evaluate how a funding model based on student fees will affect student participation in EAP programs and the resulting revenue from student fees. Long term planning will be difficult because of the fluctuation in funding due to varying enrollment numbers (which are likely to vary in direct proportion to recruitment efforts by campus EAP offices) and student choice of differently priced programs (UCIE), and the program will need time to develop an empirically based forecasting model. ***In sum, Council does not accept the proposed business plan and recommends that a joint Senate-Administrative task force with appropriate Senate representation and budgetary expertise and authority be formed to draft a new business plan.*** The Committee on Planning and Budget suggests that the proposed task force include representatives from the Senate’s standing committees on International Education (UCIE), Planning and Budget (UCPB), and Educational Policy (UCEP); EAP Acting Director Michael Cowan; at least one current or former study center director; EAP campus office staff; at least one Academic Senate division Chair; and appropriate high-level administrators from UCOP and one or more campuses with authority over EAP funding. Such a task force would be analogous to the reviewing bodies that are tasked with recommending major changes in campus-based academic programs, as it should be, given EAP’s status as an academic program under Senate purview.

Please do not hesitate to contact me if you have any questions regarding Council’s concerns or comments. For your convenience and reference, I have enclosed the comments from Senate divisions and standing committees.

Sincerely,



Mary Croughan, Chair
Academic Council

Copy: Academic Council
Interim Provost Grey
Vice Provost Greenstein
Acting EAP Director Cowan
Martha Winnacker, Senate Executive Director

Encl. 1

UNIVERSITY OF CALIFORNIA, ACADEMIC SENATE

BERKELEY • DAVIS • IRVINE • LOS ANGELES • MERCED • RIVERSIDE • SAN DIEGO • SAN FRANCISCO



SANTA BARBARA • SANTA CRUZ

Michael T. Brown
Telephone: (510) 987-0711
Fax: (510) 763-0309
Email: Michael.Brown@ucop.edu

Chair of the Assembly and the Academic Council
Faculty Representative to the Board of Regents
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

March 3, 2008

WYATT R. HUME PROVOST AND EXECUTIVE VICE PRESIDENT, ACADEMIC AFFAIRS

Re: Systemwide Senate Review of the Report of the University of California Joint Ad Hoc Committee on International Education

Dear Rory:

Academic Council has completed its review of the Report of the University of California Joint Ad Hoc Committee on International Education and the *Minority Report* from Professor Gayle Binion. UCB, UCD, UCI, UCLA, UCR, UCSB, UCSC, UCSD, UCSF, CCGA, UCEP, UCIE, UCOPE, UCORP reviewed the Report. UCM and UCR&J formally declined to comment. UCPB generally agrees with Council's recommendations and comments, but a comment letter from this committee is not available at this time. UCPB's specific recommendations will be forwarded under a separate cover when they become available. **Although Academic Council agrees in principle with many of the goals outlined in the Report in principle, it cannot endorse the Report as written at this time. However, many of Council's concerns mirror those found in the *Minority Report*, which it does endorse.**

General Comments

Academic Council is struck by an apparent disconnect and/or contradictions between many of the recommendations, which would require substantial funding for implementation (e.g., the 'doubling' of student participation in international programs); the absence of an appropriate and sustainable funding model, accompanied by a full economic analysis, is also troubling. Further, Council is concerned about the process that produced the Report and agrees with the *Minority Report* when it observes that there was an "absence of the opportunity for any discussion among the members as to what ought to be in the report, a lack of clarity as to the source of some parts of the draft and only seriatim individual editing thereafter..."

Moreover, Council is concerned with the maintenance of quality of the Education Abroad Program's (EAP) academic program offerings, if many of the Report's recommendations are pursued without adequate funding and support. In fact, on a very basic level the Ad-Hoc Committee

was remiss in not attempting to assess the quality of EAP, which would have been useful as a starting point of reference [UCI, UCSB, UCEP, and UCIE]. Overly-aggressive cost-cutting measures, such as cutting Study Center Director positions, might significantly deteriorate the quality of EAP's programs, which has served as the 'gold standard' for university-based international exchange programs in the United States.

Another area of significant concern is the Report's reliance on third-party providers for a significant portion of the growth in the University's international programs going forward. On this point, Council agrees with the *Minority Report*, which correctly notes the glaring lack of quality in many of these programs. Relying on such third-party programs will not only be costly, but it will also be very difficult to oversee and vet these programs, which will only add to their high-cost (UCD, UCI, UCLA, UCR, UCSB, UCSC, UCSD, UCEP, UCIE, and UCOPE). **Therefore, Council recommends that one of the University's principal priorities be the maintenance of EAP's high quality academic programming. It should retain its position among a diverse portfolio of some campus-based and quality third party programs; the exploration of partnerships with third-party providers, especially private enterprises, should only be considered after considerable study and vetting.**

As of the drafting of this letter, Council had not received a response from UCPB, but a number of committees commented on the principals and recommendations related to budget in the Report. Predominantly, it was recognized that while restructuring the central UCEAP office in Santa Barbara is necessary, a model based entirely on student fees (e.g., the 'Kissler' model) may not be the best solution to preserve EAP's high quality academic programs (UCI, UCSB, and UCIE). That said, restructuring the organization itself, as well as changing the way that UCEAP relates to Senate agencies is needed. For example, UCIE comments that although UCEAP makes regular reports to UCIE on budget matters, this information has often been schematic and partial. This lack of full transparency has made it difficult for UCIE to make sound judgments about proposed cuts to its academic offerings. UCOP, though, has recently proposed a 15% budget reduction on UCEAP. Some campuses do not advocate such a deep cut, believing that doing so could cause irreversible harm to many of EAP's academic programs and undercut many of the Report's recommendations (UCR, UCSC, UCSD, and UCIE). **While Council agrees that in the current budgetary climate a cut of some kind is necessary, all cuts should be done carefully to minimize impact on academic quality, and in consultation with the Academic Senate.**

The Report is also largely silent on graduate students (UCI, UCLA, UCSC, UCSD, UCSF, CCGA, UCIE, and UCORP). CCGA points out that while a small percentage of EAP's enrollment are graduate students, there are few formal programs for graduate students; most of these students use EAP as a vehicle to pursue doctoral research abroad. Council also agrees with the *Minority Report* that the larger Report does not address the needs of graduate students who study abroad (UCLA, UCSC, UCSF, and CCGA). Towards improving the participation rates of graduate students, Council suggests that 1) EAP could be used to align UC educational priorities (e.g., health sciences) with EAP graduate initiatives; and 2) EAP study centers could provide a mechanism by which students learn local languages and travel to research sites, given an appropriate funding model

(CCGA). **Towards this end, Council recommends the empanelling of a faculty group, with expertise in both graduate and international education, which would focus on the particular needs of graduate students and how best to respond to them (UCLA).**

Specific Comments

Divisions and systemwide committees made specific comments on the following recommendations:

Recommendation 1: That UC should set a five-year goal of doubling the participation rate at each UC campus in study abroad. While Council agrees with this recommendation in principal, this will be difficult to do while maintaining EAP's academic quality at the same time (UCB, UCI, UCR, UCSC, UCSD, UCEP, and UCIE). The lack of a realistic analysis/plan as to how could realistically double their enrollments in a five-year time frame is also troubling.

Recommendation 2: That the President of the University should issue a statement on international education expressing commitment both in educational and financial terms and request release annually of a major paper on international education at UC. Council unanimously agrees and supports this recommendation.

Recommendation 3: That EAP should continue to occupy a central position in a broad portfolio of student study opportunities that include campus and third-party programs. Council agrees with the first part of this recommendation—that EAP should continue to occupy a central position in UC's international/exchange program offerings (UCB, UCI, UCSC, and UCIE). That said, Council is not persuaded by the Report's assertion that third-party programs, or even campus programs, should take up the bulk of the growth.

Recommendation 4: The entire menu of choices – EAP, campus-based programs, and approved third party provider programs – must be centrally and prominently publicized so that students at all campuses can weigh all their options, study their individual features, and then seek advice from professional staff with experience and expertise in the area. Council supports this recommendation, as long as appropriate financial support is both pledged and made available.

Recommendation 5: Campus-based student advising must also be understood as an essential element of the study abroad experience, and services in these areas must be better supported. Every UC campus must take a careful inventory of available advising and invest sufficient funds to make this aspect of international education available to all students. Council unanimously supports this recommendation, noting that increased financial support is necessary to strengthen this function.

Recommendation 6: Faculty and administrative leadership of the University must articulate the goals of international education and take steps to integrate a global perspective into commonly held belief systems about higher education. Council feels that this is a logical recommendation if UC is to achieve its goal of internationalization, however the implementation of this will depend heavily on support.

Recommendation 7: The University should consider enrolling 300-600 degree-seeking international students each year. Council endorses this recommendation in principle – e.g., that it is desirable to have more international students on UC campuses (UCSC, UCSF, UCEP, UCIE, and UCOPE); however, this recommendation could use some strengthening and/or elaboration. First, the Report makes no mention of fact that the current climate in the State Department under the Homeland Security Act is one of the prime reasons that there are fewer foreign students on UC campuses (UCSC). Also, if only the number of fee-paying foreign students increase, this may not increase the broad diversity of students on UC campuses; it may only result in an increase of wealthy international students (UCIE). In addition, Council makes the following recommendations: Re-examine reciprocity agreements relationships (UCSF, UCEP), and address the specific needs of reciprocity students (UCOPE).

Recommendation 8: The University must adopt an overall financial plan for study abroad that includes a significant continued core University support, including financial aid. Council supports this recommendation, but notes that more study is needed, including a complete economic analysis.

Recommendations 9 and 14: [9] The academic credit process for study abroad should be reviewed by the Academic Senate with an eye towards streamlining and simplification. And [14], the prerogatives of the Academic Senate for ensuring quality control and managing the course articulation must be preserved. Though more elaboration and justification would be helpful (UCSD), Council cautiously supports both of these recommendations, but notes that they may be difficult to implement if most of the growth in student participation in international programs comes through third party providers (UCR, UCEP, UCIE, and UCOPE). In particular, UCOPE remarks that curricula often do not align between UC and schools abroad. UCIE adds that it is probable that many students participating in third party provider programs will try to transfer their units to UC; this will significantly increase the workload on the faculty who are evaluating these courses. UCEP recommends forming a joint Senate-administrative work group that would be tasked with looking at strategies for facilitating approval for breadth or major credit for courses taken by a student at a non-home UC campus or for study abroad.

Recommendation 10: Wherever centralized services can be provided in a more efficient and cost-effective manner, they should be performed as a system. Council supports this recommendation in principle, but notes that its implementation will largely depend on the restructuring of UCEAP.

Recommendation 11: The responsibilities of the campuses for study abroad will necessarily be expanded, while those conducted system-wide [will become] more sharply focused. Council reiterates its concern that in order for the campuses to perform additional duties, they will need to be much better supported.

Recommendations 12 and 13: [12] In order to establish an integrated framework for international education at UC, comprised of a broad portfolio of programs, an International Education Leadership Team (IELT), appointed by the Chancellors and the President, will be charged with overseeing integration of the University's various study abroad programs, including EAP. And [13], The IELT will oversee the development and implementation of a transition plan for the short term for the University-coordinated education abroad interests and will act as a governing/advisory

group for EAP and other elements of the portfolio over the long term. Authority for oversight and direction of EAP will be vested with this body. **Council recommends that the IELT must have significant Senate representation (UCSB, UCSC, UCEP, and UCIE).** Clear oversight of EAP's academic programs lies with the Senate, and particularly UCIE. UCIE also points out that while this team seems to be an executive-level group, it is not clear from the Report whether this group has the authority to plan a long-term strategy beyond what the Ad-Hoc Review Committee has already outlined.

Recommendations 15 and 16: [15]—‘Nine Principles for a new Funding Model for EAP’; and [16], the University should develop a detailed implementation plan for installing the new structures outlined and recommended in the report ...The plan should be finalized no later than February 2008 in order to synchronize with the 2008-09 budget cycle. Council reiterates its observation that EAP is arguably one of the best, if not the best, education abroad programs in the nation; it is imperative that it is properly funded and not be allowed to languish. There is also a general skepticism that EAP can be funded by student fees alone; as an academic program (UCIE), some subsidies would seem to be required to appropriately fund its valuable academic programs (UCD, UCI, UCSB, and UCIE). The issue of a sustainable and stable funding model needs considerable more study and any restructuring should be driven by academic quality concerns, and not financial pressures, which has the potential to do substantial harm to academic programs (UCR, UCIE). Given this, the time table laid out in the recommendation 16 should be modified and/or lengthened.

If you have any questions, please let me know. For your convenience and reference, I have enclosed the comments from all responding divisions and systemwide committees.

Sincerely,



Michael T. Brown, Chair
Academic Council

Copy: Academic Council
María Bertero-Barceló, Executive Director

Encl: 1

IIE - Open Doors Table 30A

**LEADING INSTITUTIONS BY LONG-TERM DURATION OF STUDY ABROAD AND INSTITUTIONAL TYPE,
2006/07**

<u>Rank</u>	<u>Doctoral/Research Institutions</u>	<u>City</u>	<u>State</u>	<u>Students</u>
1	University of Notre Dame	Notre Dame	IN	335
2	New York University	New York	NY	230
3	University of California - Santa Barbara	Santa Barbara	CA	185
3	University of Wisconsin - Madison	Madison	WI	185
5	University of Arizona	Tucson	AZ	184
6	Pepperdine University	Malibu	CA	183
7	University of California - San Diego	San Diego	CA	164
8	University of Washington	Seattle	WA	152
9	University of Illinois Urbana - Champaign	Champaign	IL	140
10	Tufts University	Medford	MA	116
11	George Washington University	Washington	DC	112
12	University of California - Los Angeles	Los Angeles	CA	109
13	University of California - Berkeley	Berkeley	CA	105
14	University of California - Santa Cruz	Santa Cruz	CA	101
15	University of Minnesota - Twin Cities	Minneapolis	MN	97
16	Georgetown University	Washington	DC	91
17	University of Michigan - Ann Arbor	Ann Arbor	MI	89
18	Cornell University	Ithaca	NY	88
19	American University	Washington	DC	80
19	University of California - Davis	Davis	CA	80

EAP Partner Rankings

*London Times Ranking 2008 Shanghai Jiao Tong Ranking 2008

Country	Partner Institution	*London Times Ranking 2008	Shanghai Jiao Tong Ranking 2008
AUSTRALIA	Australian National University	16	59
AUSTRALIA	Monash University	47	
AUSTRALIA	University of Adelaide	106	
AUSTRALIA	University of Melbourne	38	73
AUSTRALIA	University of New South Wales	45	186
AUSTRALIA	University of Queensland	43	144
AUSTRALIA	University of Sydney	37	97
AUSTRALIA	University of Western Australia	83	150
CANADA	University of British Columbia	34	35
CHINA	Fudan University	113	
CHINA	Peking University, Beijing	50	
DENMARK	University of Copenhagen	48	45
FRANCE	Ecole Normale Supérieure, Paris	28	73
FRANCE	University of Grenoble		176
GERMANY	Free University of Berlin	137	
GERMANY	Georg-August University of Göttingen		90
GERMANY	Humboldt University Berlin	139	
HONG KONG	Chinese University of Hong Kong	42	
HONG KONG	HKUST - School of Science	39	
HONG KONG	University of Hong Kong	26	
IRELAND	Trinity College Dublin	49	
IRELAND	University College Dublin	108	
ITALY	University of Bologna	192	
ITALY	University of Padova		188
JAPAN	Kyoto University	25	23
JAPAN	Osaka University	44	68
JAPAN	Tohoku University	112	79
JAPAN	Tokyo Institute of Technology	61	116
JAPAN	University of Tokyo, Hongo Campus	19	19
MEXICO	National Autonomous University of Mexico	150	184

NETHERLANDS	Leiden University	64	76
NETHERLANDS	Maastricht University - Faculty of Economics & Bus. Admin.	111	
NETHERLANDS	Maastricht University - Faculty of Psychology	111	
NETHERLANDS	Utrecht University	67	47
NETHERLANDS	Wageningen University and Research Center	142	196
NEW ZEALAND	University of Auckland	65	
NEW ZEALAND	University of Canterbury	186	
NEW ZEALAND	University of Otago	124	
SINGAPORE	National University of Singapore	30	110
SOUTH AFRICA	University of Cape Town	179	
SOUTH AFRICA	University of KwaZulu-Natal, Howard College-Durban		
SPAIN	University of Barcelona	186	167
SWEDEN	Lund University	88	97
TAIWAN	National Taiwan University	124	159
UNITED KINGDOM	Cardiff University	133	102
UNITED KINGDOM	Imperial College London	6	27
UNITED KINGDOM	University of Birmingham	75	91
UNITED KINGDOM	University of Bristol	32	61
UNITED KINGDOM	University of Cambridge, Pembroke College	2	4
UNITED KINGDOM	University of Durham	122	174
UNITED KINGDOM	University of East Anglia		175
UNITED KINGDOM	University of Edinburgh	23	55
UNITED KINGDOM	University of Glasgow	73	126
UNITED KINGDOM	University of Lancaster	170	
UNITED KINGDOM	University of Leeds	104	131
UNITED KINGDOM	University of London, King's College	22	81
UNITED KINGDOM	University of London, Queen Mary	160	161
UNITED KINGDOM	University of Manchester	29	40
UNITED KINGDOM	University of Nottingham	86	82
UNITED KINGDOM	University of Sheffield	76	77
UNITED KINGDOM	University of St. Andrews	83	
UNITED KINGDOM	University of Sussex	130	148
UNITED KINGDOM	University of Warwick	69	197
UNITED KINGDOM	University of York	81	



December 5, 2008

MARY CROUGHAN
Chair, Academic Council

Subject: Education Abroad Program business plan

Dear Mary,

On December 1, 2008, the Divisional Council (DIVCO) of the Berkeley Division discussed the University of California Education Abroad Program (UOEAP) business plan, informed by the comments of the divisional committees on Educational Policy and International Education. The overall sense of DIVCO is that the information presented and the format used fall short of a business plan. DIVCO found the budget and accompanying slides inadequate to convey the complexities of UOEAP, financially and academically. Accordingly, DIVCO declined to endorse the plan as presented, and recommends that a detailed plan in a more conventional format be presented.

DIVCO discussed a number of concerns related to the business plan. Specifically, DIVCO considered the role of third party providers, who account for a large percentage of UC students studying abroad. The financial as well as curricular and academic advantages of UOEAP were recognized by DIVCO, but the costs of these advantages were impossible for DIVCO to assess. At the end of a thorough discussion, DIVCO felt that it lacked sufficient information to make an informed decision about the future of UOEAP based on the plan in its current form. DIVCO asks that the next iteration include the analysis supporting the "EAP Funding Model." In other words, we would appreciate seeing a line item budget of projected revenue and expenditures compared to the current funding model.

Sincerely,

A handwritten signature in cursive script that reads 'Mary K. Firestone'.

Mary K. Firestone
Chair, Berkeley Division of the Academic Senate
Professor, Environmental Science, Policy and Management

Cc: Ignacio Navarrete, Chair, Committee on Educational Policy
Paulo Montiero, Chair, Committee on International Education
Lili Vicente Goldsmith, Senate Analyst, Committee on Educational Policy
Sumei Quiggle, Senate Analyst, Committee on International Education



OFFICE OF THE ACADEMIC SENATE
ONE SHIELDS AVENUE
DAVIS, CALIFORNIA 95616-8502
TELEPHONE: (530) 752-2231

December 8, 2008

MARY CROUGHAN, CHAIR
Assembly of the Academic Senate
Academic Council
1111 Franklin Street, 12th Floor
Oakland, CA 94607

Re: University of California's Education Abroad Program Business Plan

The Education Abroad Program Business Plan was distributed to all of the Davis Division standing committees and the Faculty Executive Committees of the schools and colleges. Comments were received from the Committees on International Studies and Exchanges, Planning and Budget and the Faculty Executive Committee from the College of Letters and Sciences. The Davis Division is cognizant of the rationale for reducing expenses associated with the University of California Education Abroad Program including the proposal to create a self-supporting model. We remain concerned that the budget plan does not adequately meet the charge of President Yudof for "significantly higher levels of student access to high-quality international opportunities."

It is important to underline the status of the Education Abroad Program (EAP) as an academic program, not a student service. In an era of growing internationalization, we strongly support international education as central to the mission of the University of California. Without a strong commitment to international education at the University of California, the top California high school graduates we seek to attract will choose other educational opportunities. It is worrisome that the budget plan foresees a decline in student FTE. Instead, it should address how to increase opportunities in a period of budget austerity. The shift from MCOI (Marginal Cost of Instruction) to student fees signals a philosophical shift away from EAP as an academic program to a student service. Although we are not opposed to considering alternative sources of revenues to support EAP, we believe that education abroad should be supported financially in a similar fashion as other academic programs.

The University of California has a well-earned reputation for excellent study abroad programs. Any budget plan should seek to ensure that the quality of the programs is retained. The current mechanisms in place, such as study center directors, are being dismantled without alternative systems to replace the academic oversight that the directors provide. This concern is especially strong with regards to third party providers. There appear to be no mechanisms in place that could provide UC academic oversight for such programs. Economies of scale are available in a system-wide setting for such programs although University Office of the Education Abroad Program (UOEAP) staff is being systematically reduced and many previously centralized services delegated to the campuses themselves.

More generally, the budget plan appears to be drafted in response to budget constraints rather than to a systematic evaluation of how UOEAP and the campus offices can best organize opportunities for international education. The rush to implement budget cuts, after prior budget cuts and systematic

reorganization of UOEAP in recent years, threatens to dismantle a program known internationally for its excellence. We need to identify and maintain the core of excellence rather than dismantling programs that may need to be rebuilt in the future while recognizing the need to achieve greater efficiencies.

We are concerned that UC will be unable to maintain its mandate to serve students' study abroad aspirations in the context of steep fee increases. The only way that enrollments in the program can be sustained in light of increased fees is to dramatically increase the amount of available financial aid. The business plan discussed raising additional money for aid but lacked concrete/tangible examples of potential grants/gifts. Even if the Education Abroad Program had a well-developed plan for seeking more funds from grants and gifts, it is unlikely that these funds would be available in time to offset the anticipated fee increases during the first years of operation under the new model. This means that interested students will find it more difficult to participate. The business plan does not contemplate a reduction in participation following a dramatic fee increase.

The proposed budget shifts revenue, which previously went to UOEAP, to the campuses themselves without any provision to ensure that the local EAP offices will be supported. We believe that the commitment to international education is a University-wide priority. There should be a minimum level of support guaranteed for the campus EAP offices, as these offices provide the front door to the education abroad programs. Additionally, the plan sets the stage for much of the work being performed at the central level to be re-delegated to the campuses. The local EAP offices are the natural recipients at least initially of this workload. On the UC Davis campus, we will seek administration assurances that the current commitment to education abroad will be supported financially at a level comparable to other academic programs. In a period of budget shortfalls, it is easy but shortsighted to cut programs that are central to the academic mission of the University.

Education abroad is a transformational experience for students and Davis Division faculty actively encourage students to participate. This is particularly true in the College of Letters and Sciences; the Education Abroad Program currently serves a disproportionate number of students from the college. Even if the program is able to sustain the quality of its international programs, as it reduces expenses under the current plan, it seems likely fewer students will have the opportunity to participate.

Sincerely,



Robert L. Powell III, Chair
Davis Division of the Academic Senate and
Professor and Chair, Department of
Chemical Engineering and Materials Science



Office of the Academic Senate
2300 Berkeley Place South
Irvine, CA 92697-1325
(949) 824-2215 FAX

December 5, 2008

Mary Croughan, Chair, Academic Council
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200

**RE: SYSTEMWIDE REVIEW OF THE EDUCATION ABROAD PROGRAM
(EAP) BUSINESS PLAN**

At its meeting of December 2, 2008, the Irvine Division Academic Senate Cabinet reviewed the Education Abroad Program (EAP) Business Plan. The stated goal of the proposal is to reduce EAP's operating expenses without reducing quality by adjusting both the funding model for EAP and the education abroad FTE allocated to UCOP, EAP headquarters at UCSB, and the international study centers.

The proposed plan would gradually shift EAP funding from general fund support to student fee support. It would also cut administrative expenses at the International Study Centers by replacing many of the in-residence UC faculty study center directors with local faculty "liaison officers" to provide academic oversight and support, or assign UC faculty to provide students with distance support and expertise over email.

The Cabinet agreed that the EAP business plan presents significant changes to EAP funding without adequate study of the long-term consequences of the plan. The Cabinet's main concerns were as follows:

1. The UC should continue to support the Education Abroad Program as an academic program that provides UC students with quality educational programs throughout the world. The proposed plan indicates that the increased student fees would not discourage participation. However, since future fees will be based partly on the actual per-student instructional and administrative costs of the program, the fees for programs will vary considerably. Many students will be forced to make decisions on programs based primarily on cost instead of the program quality and academic objectives. Also, the funding levels may lead to closure of some international centers that are unable to survive as a consequence of lower enrollments. A financial analysis should be done to determine how much students would actually need to pay in fees in order to determine if the EAP program is even viable with the new funding model.
2. Sending funds directly to campuses may mean more transparency in decisions about allocating money to EAP on each campus, and force the central office to operate more efficiently. However, in terms of budget impact it is unclear how the \$11,409,000 projected for 2011-12 was derived, and how it would be distributed among the campuses. An additional concern is the commitment to maintain

- scholarship and the return-to-aid component of the fees of students participating in EAP to support student participation.
3. The business plan proposes reducing the number of faculty-in-residence center directors. However, the plan might have considered reducing the number of faculty FTE at international centers with established programs to allow for adequate faculty oversight at centers in other countries requiring additional faculty oversight. A careful study of a regional model to staff the centers to provide adequate oversight should be considered. This study should be conducted with the intent to identify: (1) under-staffing where regional conditions and support provided by the partner institutions are clearly insufficient, and (2) over-staffing where regional and institutional conditions do not require much additional supervision from EAP personnel. The EAP courses that receive UC credit, and control of the academic quality should continue to be provided.
 4. The centralized administration of the UCEAP has been a longstanding issue, but is not fully addressed in this plan. It is not clear how decentralizing the program would increase administrative efficiency and effectiveness, as well as improve cost efficiency especially in the current economic climate. It seems redundant and costly to replicate EAP at each UC campus. The Cabinet agreed that a more effective solution would be to house a centralized administration directly on a UC campus that is committed to invest in an academically sound EAP program. Different campuses could submit proposals and compete for this privilege. Such a strategy would ensure faculty-based academic oversight of UCEAP. Moving UCEAP to a different location and really integrating it with one of the UC campuses would also facilitate the transition of UCEAP to a leaner and more efficient administration.

The Senate Cabinet agreed that several of the proposed changes in the funding model of EAP would negatively impact the quality and accessibility of the Education Abroad Program experience for its students. The need to provide international educational opportunities as part of our students' academic program is essential for the students' understanding of global issues and international systems. The Cabinet was concerned with the haste with which such important changes to the EAP are being pushed forward by the Office of the President. Therefore, the UCI Division does not endorse the EAP business plan, and strongly recommends a thorough yet expedited analysis of, and Senate evaluation of the impact of the proposed business plan.

The Irvine Division appreciates the opportunity to comment.



Jutta Heckhausen, Senate Chair

C: Martha Kendall Winnacker, Executive Director, Academic Senate



ACADEMIC SENATE EXECUTIVE OFFICE
LOS ANGELES DIVISION
3125 MURPHY HALL
LOS ANGELES, CA 90095-1408

PHONE: (310) 825-3851
FAX: (310) 206-5273

December 5, 2008

Mary Croughan
Chair of the Academic Council
University of California Academic Senate

In Re: Education Abroad Business Plan

Dear Mary,

Thank you for the opportunity to review and opine upon the Education Abroad Business Plan. Upon receipt of the plan, I invited all Senate Committees to review it, but specifically requested responses from the Committee on International Education (CIE), the Council on Planning and Budget (CPB), and the Graduate (GC) and Undergraduate Councils (UgC). The Executive Board, which speaks for the Division on such matters, also reviewed the document.

UCLA cannot support the Education Abroad Business Plan as written, and hopes to be included in the review of future drafts. I will outline the major criticisms of the report presently. However, the responses by CPB, UgC, and CIE outline further detailed criticisms, which are also endorsed by the Executive Board, and are attached for your review.

- The process by which the plan was written is incommensurate with an academic planning model. Given that the UC Education Abroad Program is highly regarded, if no longer entirely fundable, any cost-containment plan should start with an assessment of programmatic strengths (e.g., UC Faculty engagement in the program; centralized administration eliminates duplicative efforts throughout the system), mission-critical aspects of the program, as well as program weaknesses and non-essential components. The cost-containment plan would then proceed to reduce funding while preserving programmatic strengths and mission-critical aspects of the program, while pruning away weak and non-essential areas. This plan shows no evidence of any such consideration.

Moreover, the plan contains no discussion of alternative models that were considered and subsequently rejected. Has the UC System investigated building partnerships with other research universities (Michigan, Stanford, Texas, Virginia)? How do other large, public institutions provide international educational experiences for their students?

- If funding is to be shifted away from the centralized office to the campuses, the plan should include a mechanism that ensures transparency of funding allocations to the campuses. Without such transparency, campuses will be left with no means of assessing where the money went and if it was used in the way that most supports international education efforts.
- There is great concern that the proposed business plan will have the consequence of limiting international educational experiences to affluent students. Detailed financial projections, including fee structures, are necessary to better understand and better evaluate the impact this plan will have on students of varying economic means.

UCLA understands that the current EAP model may well be a luxury we can no longer afford. However, the process by which this plan was constructed, its informational gaps and oversights lead us to conclude that this business plan cannot be supported.

Thank you again for the opportunity to review this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Michael Goldstein", with a stylized flourish at the end.

Michael Goldstein
UCLA Academic Senate Chair

Cc: Martha Kendall Winnacker, Executive Director UC Academic Senate
Jaime R. Balboa, CAO UCLA Academic Senate

**UCLA Committee on International Education Response
to UOEAP Business Plan Recommendations
October 2008**

November 19, 2008

Respectfully submitted,

2008-09 Committee on International Education (CIE)

Francesco Chiappelli

Diane Gu, Graduate Student Representative

Olga Kagan

Michael Lofchie

Jonathan Post

Ian Coulter, *CHAIR*

Introduction

In an earlier UCLA CIE letter dated February 4th, 2008, sent to Elizabeth Bjork, Academic Senate Chair in response to the proposed changes to EAP, the committee stated the following:

There is a very real danger that a program that has been the flagship of UC International Education and the envy of other institutions throughout the world, that has a long and enviable history, could be seriously undermined by some of the recommendations.

New EAP Model

Both in the earlier *Kissler Report*, and in President Yudof's recent Directive to UOEAP to cut their budget, there has developed the opinion that while EAP is a quality program it is a very expensive program and given the proposed cuts in other areas it should also undergo cuts. This same attitude was expressed by Provost Rory Hume at a meeting with the UC Committee on International Education on May 23, 2008. He saw the EAP as a heavily subsidized program with an out-of-control budget. Provost Hume further suggested that EAP's structure be changed drastically to become a **service-driven enterprise**, citing **UC Press as the optimal model for change**.

There are two contentious issues with this position:

1. The first is that EAP is an academic program with oversight from the Senate. It is not a service program.
2. It is not a subsidized program in any sense different from other academic programs. EAP is a formal UC instructional course for which students receive UC credit and grades. The UC Academic Senate, faculty, and staff are extensively involved in all aspects of the program. The programs receive formal external reviews within three years of initiation and every 10 years by the Senate. The fact that is EAP is funded out of the General Fund through the Presidents Office does not alter either of the above facts. The question therefore should be whether this program is over funded for the services it provides.

Quality vs. Quantity

All parties seem to agree that it is an outstanding program of very high quality. It is therefore legitimate to ask if EAP is being unfairly singled out for what is a drastic budget cut. To date neither the *Kissler Report*, information from the President's Office or budget information emanating from EAP itself, enables us to determine if this is an over budgeted program, whether the current size budget is necessary to perform the functions EAP does, or maintain the quality it has established, or whether EAP can survive the size of the proposed budget cut being. This lack of crucial information makes it almost impossible to evaluate what is being proposed.

The Proposed Business Plan

In the proposed budget the cuts to UOEAP are drastic (see Table 1).

The funding from the *General Fund*:

- In 2005-06 was **\$20,156,000**,
- By 2008-09 was reduced to **\$18,507,000**
- By 2011-12 will be reduced to **\$4,393,000**

In the same period the *contribution from student/other fees*:

- In 2005-06 were **\$4,532,000**;
- By 2011-12 will be increased to **\$20,431,000**.

Other Expenses

The category "other" would include campus specific fees for services and facilities used by campus students while participating in UOEAP programs. So the **first consequence** is what amounts to **cost shifting**, from the General Fund to the students. It is difficult to see how the program will remain accessible to all students under that plan but no data is given to show the impact of this on those students who are economically challenged. At the same time, **scholarship funding will drop**:

- In 2005-06 it was **\$1,506,000**;
- In 2008-09 reduced to **\$933,000**;
- By 2011-12 it will be reduced to **\$261,900**.

The **second drastic change** will be in expenditures for UOEAP, which will drop from what it was in 2005-06, **\$8,492,000**, to **\$6,465,000** in 2011-12. This of course must be reflected in **reduced staff**.

Staffing and Services

In the past year the staff dropped from June 2007 until September 2008 from **FTE 103.21 to 81.76**. At the same time it is contemplated that EAP will **increase its services** to the campuses and expand the program. It is difficult to see how these two things can be rationalized: cuts to staff and increased services.

We should also note that during these cuts, **the number of students in EAP reached an all time high in 2007-08 of 4,529 students**. One suggestion for expanding the service is more efficient use of IT but no evidence is given to show either this is achievable or that the IT staff can do this or that that is what the clientele wants or will tolerate. It also ignores the morale impact of the cuts, present and future, on the staff.

The **quality** of the program is dependant on attracting quality staff and retaining them. Another large change is in the cost of *International Field Operations*:

- In 2005-06 this was \$16,241,000
- In 2008-09 it was reduced to \$15,901,000
- In 2011-12 it will be reduced to \$13,564,700

This will be accomplished in several ways. The first is moving away from **UC faculty appointed country Directors**. A second is to **reduce the number of offices in countries** (through both amalgamation and closures). The third is to **reduce the staff and the costs of the offices in the host countries**.

This may involve more use of liaison faculty, appointing country Directors and not UC ones, closing program that are deemed to be too expensive, and cutting overhead costs. There are numerous problems with this scenario:

1. It ignores the real contribution that UC Faculty Directors make both to the experience of the students but also in the very good relationships we tend to enjoy with our international partners.
2. Second, it has the potential to reduce the safety and support systems that are in place for our students.

The **first obligation of EAP**, and we would suggest, UC, is the **welfare of the students**. All past Directors can tell of student crises that were either solved or mitigated by having a UC Director on the ground and each can tell of parents whose anxieties were greatly relieved by having one as well. The resident UC Director has been a strength of this program.

In some cases our presence might be demanded by the importance of the country for language and cultural exchanges such as the program in Russia and in Africa even if the demand is not great. Further, we see quite large fluctuations in programs from one year to the next. Programs that were in demand wane for a short period and then bounce back in popularity. Thirdly, one of the strengths of EAP is its **stability**. It takes a considerable time to establish a program with all the legal, academic and administrative infrastructures in place. These programs are not like a water spigot that can just be turned on and off yearly. Last but not least, many of these programs are exchange programs and **we sign contracts with international partners for these programs**. If we wish to continue signing contracts with only prestigious institutions that are considered to be of the same quality as UC canceling such programs would hurt our reputation.

Still another large change as shown in the EAP funding model is that the **Campus EAP support** will be **reduced to zero from \$933,000 in 2008-09**. This would have a big impact on UCLA where approximately a third of the EAP budget comes from this transfer of funds. Even if the proposed \$16 million reduction from the General Fund to EAP is allocated to the campuses, there may be two problems. The first is whether the President's Office will in fact allocate those funds to the campuses and the second, if they are transferred to the General Funds of the campuses, whether they would go to EAP programs.

Impact

The budget proposals therefore will have a drastic impact on EAP as it is currently operated. Given that it might be appropriate to contemplate what will be lost. EAP has been the flagship program for International Education. In this era of globalization, the UC system should be seeking the means and resources of expanding programs that offer students the opportunity to immerse themselves in the culture, language and institutional environment of other nations.

We offer several considerations below that are important in any proposed cuts to EAP:

1. EAP is the program with full UC Senate oversight for both its academic quality and administration. Such an oversight should be the norm for all international education programs offered by UC.
2. EAP currently is the most experienced of all UC offices in the development of bilateral agreements with credible universities and is the depository of the most knowledge and experience with international legal and technical requirements related to international programs.
3. EAP is also the most experienced UC institution for evaluating international program offerings both initially and through its regular 5 year and 10 year reviews.
4. The EAP exchange program has been a unique achievement and is both desired and highly regarded by our foreign partner institutions.
5. The full year or semester-long programs remain the richest immersion program available to students and should remain the top priority for international education.
6. While other programs are fulfilling import niches and needs, they are in fact inferior in terms of cultural immersion which we continue to feel should be the priority objective of our programs.
7. The EAP program has been built around the concept of exchanges. It is not just a program of placing UC students overseas but of bringing international students (and faculty) to our campuses. The very nature of the exchange programs has been a mechanism for keeping international experience affordable for our students. It is important to maintain it as an exchange program.

8. EAP is an academic program with all that it implies including full Senate oversight and it has been funded in the same manner as other academic programs. Since we do not expect other academic programs to be self sustaining, why should we expect EAP to be so?

Conclusion

There is no doubt that EAP cannot survive in its present form with this kind of drastic cut in their budget. So the question becomes whether drastically reducing EAP would be in the interest of UC and its students. The 63,000 alums from EAP would probably answer in the negative. Can the individual campuses step in and pick up the program? Some probably can and will, while smaller campuses may not be able to. It is very unlikely that any campus could create the full range of services EAP provides or fully match EAP expertise. Furthermore, it would not appear to be cost effective to have each of our campuses develop their own programs abroad.

Whatever are the answers to these questions, what will result is a fragmented system with variations across the campuses. This will replace a centralized program that is equitable for all of our campuses and for all of our students and which ensures all the campuses share equally in the exchange of students coming to UC. We will lose the office that has the expertise and the infrastructure to efficiently organize international programs and that is universally recognized as one of the best such programs in the US.

EAP Funding Model

TABLE I

SUMMARY OF SELECT REVENUE & EXPENDITURE DATA			
	2005-06 (Actual)	2008-09 (Estimated)	2011-12 (Estimated)
Revenue:			
Appropriations	\$20,156,000	\$18,507,000	\$4,393,000
Student Fees / Other	\$4,532,000	\$6,393,000	\$20,431,000
Expenditures:			
UOEAP	\$8,492,000	\$7,134,000	\$6,465,000
Int'l Field Operations	\$16,241,000	\$15,901,000	\$13,564,700
Scholarships	\$1,506,000	\$1,271,900	\$261,900
Campus EAP Support	\$959,000	\$933,000	\$0
FTE	2566	2355	2255
Impact on Campuses	n/a	n/a	\$11,409,000

- This new plan facilitates two major goals; 1. achieves major economies and efficiencies and 2. remains a “gold standard” of affordable, high quality programs
- By 2011-12 the Business Plan will reduce EAP’s General Fund Appropriations by a total of 85% or \$16M from the 2005-06 level
- In return EAP will collect and retain student fees, less return to aid
- In line with projected revenue, EAP will make additional cuts in expenses at UOEAP and in International Offices
- Among the cuts will be the replacement of most UC faculty International Office Directors residing abroad
- Academic oversight and quality control will be ensured through appointing host university faculty liaison or program officers where UC faculty previously served; in depth, focused program reviews; California based UC faculty providing on-going consultation, academic administration and problem solving
- Administrative costs overseas will be reduced. In EAP “self-construct” classes the cost of instruction will be reduced by managing class size and the number of courses offered
- EAP will eliminate programs that are too expensive and those with minimal enrollment
- UOEAP will continue reducing overhead through further streamlining of operations, eliminating redundant processes and relying more fully on I.T. for efficiencies.
- EAP will retain \$4.4M in appropriations as a base budget – amount sufficient to provide essential and scalable services.
- The plan provides a projected positive financial impact to the campuses of \$11M (as projected for 2011-12), principally due to the pass-through of appropriations removed from EAP’s annual budget and transformation of the UC faculty International Directorship model

December 2, 2008

TO: Michael Goldstein
Chair, Academic Senate

FR: Joseph Bristow
Chair, Council on Planning and Budget

RE: Response to the Education Abroad Program (EAP) Business Plan

Dear Professor Goldstein:

The Council on Planning and Budget would like to be in a position to provide an informed and constructive response to the detailed proposals for radically downsizing and decentralizing the activities of EAP. Unfortunately, despite our repeated invitations over the course of the past month, we were not able to make contact with Professor Val Rust, who heads UCLA's EAP. It is regrettable that we did not have the opportunity to hear Professor Rust's views on the likely effects the EAP business plan will have on students' opportunities to study abroad, particularly because the cutbacks in the program are severe. This situation proved especially frustrating because CPB was left with a number of pressing questions that arose in light of our meeting with Professor Ian Coulter, Chair of the International Education Committee. As a result, the feedback I provide in this letter is not as detailed or complete as CPB would like.

In his presentation to CPB on November 17, Professor Coulter explained that the recommendations of the Kissler Report are largely responsible for the devastating cuts in EAP's budget. Currently funded at over \$20M, EAP will have in the near future an operational budget of \$4M. This means that the EAP office based at Goleta, which has had some 120 staff members in the past, is becoming much smaller in size. Correspondingly, the number of education abroad study centers (currently forty-four in number) will shrink, if not vanish altogether. It appears that opportunities for faculty members to head an EAP study center will come to an abrupt end. Further, the EAP business plan proposes that funding for education abroad will be routed through UCOP to the EVC of each campus. On this basis, it will be at each EVC's discretion to disburse the funds for EAP.

Professor Coulter mentioned the Kissler Report insisted that EAP had been overfunded. He contended that it was difficult to determine the basis on which the claim of overfunding had been made. Professor Coulter added that it was clear that the implementation of the EAP business plan meant that the cost of studying abroad would increase considerably for students. While he stated that private companies offer study-abroad opportunities for UCLA students, Professor Coulter did not clarify how these

businesses had in the past competed with EAP. Nor could he elucidate how private companies might serve our students in the future. The lack of hard data about the funding of each student made it hard for the Council to assess whether EAP was indeed as expensive as it might first appear.

Thus CPB remained somewhat unclear about a number of points arising from Professor Coulter's observations. As a consequence, members of the Council raised the following questions—ones that we hoped Professor Rust might be able to answer:

- Is it likely to be the case that the diminishment of EAP will mean that the opportunity to study abroad will be available only for wealthier students? In other words, will EAP become a program for the financially privileged?
- How long have private companies offering study abroad program been active on the UCLA campus? How have their programs compared financially and academically with EAP? Who has approved these privately run programs? Do these private programs have overseas institutional contacts that differ from those of EAP?
- Has the UC system considered building links for study abroad programs with other major public universities, such as Michigan, Texas, and Virginia? How do other large public institutions operate programs of this kind for the students?
- How might the removal of study centers headed by a UC faculty member affect the welfare of our students studying abroad? Can the UC system always rely on host institutions to provide the counseling support that our students may need when they reside in a foreign country?

In sum, CPB concluded that it is of course highly desirable for UC in general and UCLA in particular to maximize students' opportunities to study abroad—so long as such programs of study are operated economically and responsibly.

The Council remains extremely disappointed that Professor Val Rust did not have the courtesy to respond to any of our invitations to meet with us. Perhaps Senate Executive Board would like to undertake some follow-up to see if there is a reason why the UCLA head of EAP was unresponsive to the Council's requests to meet with her.

Sincerely,



Joseph Bristow
Chair, Council on Planning and Budget

Cc: Jaime Balboa, Chief Administrative Officer, Academic Senate
Linda Mohr, Assistant Chief Administrative Officer, Academic Senate

December 3, 2008

To: Michael Goldstein, Chair
Academic Senate

From: Dorothy Wiley, Chair
Undergraduate Council



Re: Proposed Changes University of California Education Abroad Program Recommendations

The merit and possible pitfalls of broadly altering the way in which international educational experiences are offered to University of California students has been reviewed extensively elsewhere. After careful consideration of these materials, we recommend that the University abide by the following principles:

1. Preserve the cultural and language immersion wherever possible. As a mission of undergraduate education is to offer high quality educational experiences, it is particularly important that language instruction include opportunities to experience spoken and written language in a natural setting among those who are fluent. Also, it is difficult to recreate cultural experiences in a classroom and there is substantial educational value to a lived *laboratory* experience of immersion in another culture. Culture is difficult to recreate in a classroom as it reflects the interaction of human communities, their language, and environment.
2. It is important to monitor the redistribution of funds to the campus level when funding is reallocated. If the intent of this change is to create international educational experiences that better reflect local campus priorities, it is similarly important that insure accountability. It would be disheartening to dismantle such a highly valued program only to find that the *block-grant* type of funding produces fewer and lower quality of educational experiences for students.
3. The University should seek to establish uniform policies that standardize grading and credit awarded to student participants. It is especially important that integrity of the *educational* experience be assured for student participants as we move from this largely centralized program to a decentralized model of administration.
4. It is important that the Academic Senate and UC administration come to consensus about policies governing UC support or sponsorship for programs administered by third-party providers. Although our first priority should be the quality and integrity of the educational experience, we have a moral obligation to maximize the safety of our students. The developmental norms of older adolescents and young adults often lead them to underestimate risk. It is as important to evaluate the safety of settings and services provided by external contractors as it is for UC-generated programs.

If you have any questions or need additional information, please feel free to contact me (x 5-0803; dwiley@ucla.edu) or Judith Lacertosa, UgC Principal Policy Analyst (x51194; jlacertosa@senate.ucla.edu).

cc: Jaime Balboa, Academic Senate, CAO

UNIVERSITY OF CALIFORNIA, MERCED

BERKELEY • DAVIS • IRVINE • LOS ANGELES • MERCED • RIVERSIDE • SAN DIEGO • SAN FRANCISCO



SANTA BARBARA • SANTA CRUZ

ACADEMIC SENATE, MERCED DIVISION
UNDERGRADUATE COUNCIL (UGC)
MANUEL MARTIN-RODRIGUEZ, CHAIR
Mmartin-rodriguez@ucmerced.edu

UNIVERSITY OF CALIFORNIA, MERCED
P.O. BOX 2039
MERCED, CA 95344
Ph: 209-228-7930
Fax: 209-228-7955

December 12, 2008

To: MARTHA CONKLIN, CHAIR, DIVISION COUNCIL

From: MANUEL MARTIN-RODRIGUEZ, CHAIR, UGC

Re: UGC Comments on the UC Education Abroad Program (EAP) Business Plan

At its meeting on December 3, 2008, the Undergraduate Council discussed the proposal for a new business plan for the University's Education Abroad Program. Below are the main points that reflect the main concerns of UGC:

- Education abroad is and should be an essential part of a UC education. UGC strongly supports the mission of the EAP.
- Maintaining the academic quality of the EAP should be a top priority. Current and future budget cuts should not jeopardize this particular element of UC education.
- Although the plan mostly concentrates on the reduction of administrative expenses, it is UGC's belief that accessibility for *all* students should be maintained. For instance, the business plan states that there will be a potential increase in students' expenses. If the increase becomes a reality and no additional support is allocated, underprivileged students will be excluded from equal access to the program.
- UCEP or other senate committee should explore in detail alternative options for the current grade conversion system, which seems to be a factor in current costs. The implementation of a mechanism that would convert grades would alleviate some of the costs and the burden this process imposes on faculty.

cc: UGC
Senate Director Clarke
Senate Analyst Paul



CHAIR, ACADEMIC SENATE
RIVERSIDE DIVISION
UNIVERSITY COLLEGE BUILDING, RM 225

ANTHONY W. NORMAN
DISTINGUISHED PROFESSOR OF BIOCHEMISTRY
AND BIOMEDICAL SCIENCES
RIVERSIDE, CA 92521-0217
TEL: (951) 827-5538
E-MAIL: ANTHONY.NORMAN@UCR.EDU
SENATE@UCR.EDU

December 5, 2008

Mary Croughan
Professor, Obstetrics, Gynecology, and Reproductive Sciences
Chair, UC Systemwide Academic Senate
1111 Franklin St., 12th Floor
Oakland, CA 94607

Dear Mary:

RE: EDUCATION ABROAD BUSINESS PLAN

I am writing to provide you with the UCR Senate review of the Education Abroad Program (EAP) Business Plan that was prepared by Michael Cowan, Acting Executive director of the EAP.

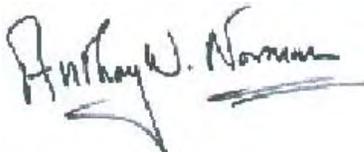
Here at UC-Riverside the EAP Business Plan was reviewed by our Planning & Budget Committee (P&B), the Committee on Educational Policy (CEP) and the Committee on International Education (CIP). I have summarized their responses below.

The three Committees felt that our UC EAP provided an important educational opportunity to interested students from our 10 campuses who wished to enrich their learning experience in a wide variety of available foreign centers. Indeed, some 4500 students per year (200 - 250 students per year from UCR mostly in short summer programs) have partaken of the EAP program in recent years. Academically our UC EAP program is considered to be the 'gold standard' for university based international exchange programs in the US. That notwithstanding, UC President Yudof, who is seriously challenged by the fiscal status of the State of California and of the budget prospects for UC both this fiscal year and in future years, has given a directive to EAP to "achieve major economies and greater cost-efficiency, to depend much less on general funds, and to rely much more on student fees". Implementation of this mandate will result in a reduction of the EAP budget revenues provide by the UC General fund by 85 % (approximately a \$14 million) reduction in 2011-2012.

- **CEP**: The CEP recognized that the EAP Business Plan proposed a significant increase in student fees to back-fill the input of funds from UCOP. CEP's principal concern was that imposition of a large increase in student fees could create a problem of equal access for all students on the Riverside campus. Given the broad student diversity here at UCR, this then is a serious concern with no apparent solution in sight.
- **P&B**: Our P&B Committee presented both a majority report (5 members) and a minority report (1 member). The majority report cited several broad issues of concern: (a) the EAP is not a plan, but a mandate with little concern to the consequences of the significant budget cuts; (b) the document was prepared without input from the campus directors of EAP; (c) P&B objects to the characterization of EAP as a non-academic program; (d) P&B is concerned about the apparent aim of decentralizing EAP; and (e) the discussion of student fee increases is confusing and incomplete (it is far from being transparent). The Minority report touched on many of the points listed above, but with lesser fervor.
- **CIE**: The CIE provided a 5 page report. CIE recognizes that "in the current financial climate, it seems unavoidable that severe cuts to programs like EAP will be part of such a business plan" like the one proposed for EAP. The prime question then becomes to what degrees will the cuts and other proposed changes damage EAP? Will this result in a change in the character (excellence) of EAP fundamentally and irrevocably. The CIE then addressed four main topics of concern. These included the following: (a) Faculty involvement in EAP [it is proposed two-thirds of the faculty-in-residence student center directors will be eliminated which creates a cascade of problems]; (b) Equitable student access to EAP [Conversion of funding to a student-fee based model leads to concerns about student access to the program, which is of particularly concern here at UCR]; (c) funding for campus operations in support of EAP [this portion of the business plan implies that UCR's central administration will have to provide at least \$100,000 annually in addition to its current support, which seems unrealistic]; and (d) preservation of EAP as an academic program [the tenor of the Cowan report is that EAP is really a service program rather than an academic program].

In summary, the three UCR Senate committees who invested time in reviewing the EAP Business Plan have all found troubling issues or problems that are not addressed or answered in the Cowen EAP Business Plan. There is a consensus that the proposed new business plan is the result of President Yudof's mandate for an 85% reduction in UC General Fund contributions to EAP. None of the committees are comfortable with this business plan and all urge further senate involvement in defining the future of EAP at the University of California.

Sincerely yours,

A handwritten signature in black ink that reads "Anthony W. Norman". The signature is written in a cursive style with a horizontal line underneath the name.

Anthony W. Norman
Distinguished Professor of Biochemistry and
Biomedical Sciences; and
Chair of the Riverside Division

CC: Martha Kendall Winnacker, Executive Director of the Academic Senate
Sellyna Ehlers, Director of UCR Academic Senate office



ACADEMIC SENATE
Santa Barbara Division
1233 Girvetz Hall
Santa Barbara, CA 93106-3050

senate.reception@senate.ucsb.edu
(805) 893-2885
<http://www.senate.ucsb.edu>

Joel Michaelsen, Chair
Deborah Karoff, Executive Director

December 4, 2008

Mary Croughan, Chari
Academic Senate

Re: EAP Business Plan

Dear Mary,

Several councils and committees of the Santa Barbara Division have discussed the EAP Business Plan, including the Undergraduate Council, Council on Budget and Planning and the Committee on International Education (CIE). The Faculty Executive Committees of the College of Letters and Science, the College of Creative Studies, and the College of Engineering have also reviewed the Plan. We offer the following comments on behalf of the Division.

The Santa Barbara campus sends more students on EAP than any of the other campuses which means the program is of high value to the local students and faculty. All of the reviewing councils are very concerned about the potential impact of the decisions and assumptions inherent in the EAP Business Plan. At the same time, many groups found the presentation of the plan wanting on several critical fronts.

The Division believes that UC has been a leader in international education for almost five decades and that the plan, as presented, seems likely to diminish the program at a time when the world demands that our students have international experience. The Council on Planning and Budget (CPB) states "In today's academic environment study abroad is no longer a luxury; it has become an intellectual necessity." The College of Engineering Faculty Executive Committee suggests that the program prepares students "for careers in an increasingly global society, where domestic and international corporations are looking for academically prepared students to become part of their multi-lingual and culturally aware workforce."

All of the Councils are cognizant of the budgetary crisis which places so many areas of UC at risk. The proposed additional cuts to the EAP budget of about 20%, coming on top of a 15% cut in the current year budget, do appear severe, particularly since they are being considered in something of a vacuum. But in fact, they may not be significantly more severe than the cuts some other campus units will be hit with in the next few years, especially since EAP appears to have been largely shielded from the multiyear cuts that the campus had to absorb earlier this decade. When all is said and done, it seems likely that more than a few units on campus will sustain cuts in the 25%-35% range, or more, between 2001-02 and 2011-12.

CIE expresses frustration that the plan seems to completely switch the funding away from UOEAP and towards the campuses when UOEAP performs critical functions best performed by a centralized unit: student health and safety, negotiation and maintenance of 130 agreements with international institutions, coordination of on-site arrival and orientation, the financial and administrative management of 50 study centers abroad, academic oversight of thousands of courses from foreign institutions and the technological infrastructure to track all student activity. They suggest that none of these functions will be performed as effectively on individual campuses, nor is it efficient to do so. On the other hand, a good deal of the current mess seems to be a result of the fact that EAP is an academic program run out of OP, an organization that does not have much other direct exposure to running academic programs. Furthermore, returning money to campuses is not necessarily a bad thing, provided the allocation formula is based on campus' levels of participation in EAP and the money is at least partially allocated to EAP-related activities on the campuses. The key issue, which is not addressed in the proposal, is what services are best kept at OP and how much they will cost.

There are several specific concerns expressed by many of the reviewing groups in terms of understanding the impact of the some of the proposals in the plan. All of the groups have questions about the funding structure, and the potential impact on the academic quality of the overall program and the impact of possible additional fees on students. The fee structure will influence who can afford to participate and the vagueness about increased fees caused concern about overall and equal access to the program. The reviewers are concerned that increased fees will impact the overall participation rate and they understand that the robustness of the program is directly tied to participation numbers. The proposed budget does not actually include significant increases in program-specific fees, so it is impossible to determine what the impacts would be or the degree to which scholarships might mitigate increased fees. The College of Engineering Faculty Executive committee says that, prior to increasing student fees, cost savings should be realized by reducing administrative expenses, by better utilizing support services at host institutions and by the elimination of the most expensive and least utilized programs. CPB suggests that the funding changes be implemented over a period of five years rather than three, so the impact of the funding shifts can be monitored more closely.

Both CPB and CIE suggest that any fees collected from reciprocity students (Instructional Payment to Campuses for Reciprocity Students equal to \$1,003,500) should stay with UOEAP as the campuses will receive the MCOI funding. Of major concern to several groups is the recommended transfer of the \$930,000 (Campus Financial Support) from the UOEAP budget directly to each of the campuses. Several groups stressed the important role that the Campus Office has in recruiting students, and they recommend that if this money were to go directly to campuses, then it should be mandated to support the activities of the campus EAP offices. The proposal removes that money in 2009-10 but does not provide full allocations to campuses until 2011-12, leaving a possible gap that would require campuses to either lay off staff or cover the deficit themselves. This time lag is also a potential issue with about \$1 million of the centrally-held scholarship funds that is scheduled to disappear in the first year.

All of the reviewing groups are unable to determine how the academic quality of the program will be monitored and maintained if the plan goes forward in its present form. The reduction of faculty presence abroad might lead to a diminishment of academic quality and the plan is especially vague about how the quality of instruction and coursework will be monitored in an ongoing way. The L&S Faculty Executive Committee asks a question raised by several groups; explain what kind of mechanisms are envisioned for assessing the management of programs abroad? Undergraduate Council was unclear as to the impact of increasing the class size for EAP programs; in the absence of information about current class size it is impossible to assess the effect of any increased class size on the quality of instruction.

Finally, several reviewing groups are frustrated that several of the comments and concerns expressed during the review of the Joint Ad Hoc Committee on International Education (2007), seemed to have gone unheeded. This is especially frustrating as the proposed plan appears to rely on several assumptions in the so-called Kissler model which were rejected by earlier reviewing agencies as being inadequate and unrealistic.

Thank you for the opportunity to comment.

Sincerely,

A handwritten signature in cursive script, reading "Joel Michaelsen".

Joel Michaelsen, Chair
Academic Senate, UCSB



1156 HIGH STREET
SANTA CRUZ, CALIFORNIA 95064

Office of the Academic Senate
SANTA CRUZ DIVISION
125 CLARK KERR HALL
(831) 459 - 2086

December 5, 2008

Mary Croughan, Chair
Academic Council

RE: UCSC Response to Senate Review of the Business Plan for Education Abroad Program (EAP)

Dear Mary,

Thank you for providing us with the opportunity to comment on the Business Plan for the Education Abroad Program. Our committees on International Education (CIE), Educational Policy (CEP), and Planning and Budget (CPB) contributed to our divisional response.

At the outset, the lack of detail and vagueness of the Plan is profoundly troubling. While we recognize Professor Cowan's offer to provide additional information and clarification, the proposed Business Plan is, as it stands, insufficiently detailed to address (or perhaps even formulate) concerns about the Plan. Indeed, as Professor Cowan notes in his cover letter, the "overly terse" PowerPoint format does not provide the research and analysis that may lie behind the proposal, and that readers need to provide substantive comments. Without a greater level of detail, comment on the "Plan" is doomed to be driven by uncertainties generated by the terseness of the plan. There are simple and fundamental manifestations of this difficulty: for example, at least some justification or explanation is needed for the estimated increase of \$14 million in student fee revenue. Student fees appear (we think) to be the only sizable revenue source explored, and whether or not the potentially negative consequences of fee increases on student enrollment have been factored in, or estimated in the analysis is enigmatic. The role of administrative expenses is also unclear: a profile of local administrative expenses would have been very helpful for determining the degree to which administrative cuts might (or might not) be conducted.

Moreover, the context of past Senate reviews seems to have been lost. Last year, senate divisions reviewed the ad hoc report on EAP and clearly stated problems and concerns with the overall restructuring of EAP. The current plan appears to adopt almost verbatim the recommendations that consultant Jerry Kissler made to UCOP last year, many of which were strongly opposed by the Academic Senate and the campus EAP offices. In general, we believe that this plan proposes a new business model without fully thinking through the implications. It presumes that retrenchment and reduction is the best way to go, without exploring the possibility of expansion through entrepreneurship.

We understand that the proposal involves changes in how resources flow; MCOI funds will go to a student's campus instead of to EAP, while EAP will get fees that the campus currently gets when a student studies abroad. The latter change has the helpful intention of keeping EAP's budget proportional to the number of EAP students. We frankly do not understand (and this is not for lack of examining the bullet points in the PowerPoint) how all of this will shake down in terms of the fiscal impact to individual campuses. It does not appear that the proposed business plan answers the question of individual campus impacts, and this alone is, from our perspective, a fatal flaw. Indeed, if this funding model is adopted, it appears that the chancellors of each campus will receive additional MCOI money without any restriction regarding how the extra funds will be used. It would seem highly appropriate that this money come to the campus as line-item funds earmarked for the administration of campus EAP programs and other programs related to international education, rather than simply be admixed into the general campus resource pool.

An additional cause for concern comes from the question whether EAP will be depending increasingly on additional fees from students--beyond educational fees that EAP recoups. We understand that (some?) EAP expenses will qualify for financial aid, but we suspect, and our Office of International Education agrees, that unmet costs will likely go up in many particular cases. Though we understand the budget backdrop, we are unhappy at the prospect of a valuable component of a UC education becoming less accessible to a majority of students, and perhaps wholly inaccessible to students from less advantaged backgrounds. We would urge the campus and UOEAP to seek funding models that do not have such a differential effect. The fact that some programs will cost more than others--for example a possible \$1500 surcharge for "Great Cities" programs--only heightens this worry about accessibility. It raises a second concern, too: students will increasingly choose programs based on cost rather than on educational goals. CEP notes that the opportunity for all UC students to globalize their perspective can only become more important with each year that passes, and we therefore urge that EAP maintain realistic and affordable paths of access to qualified applicants.

Beyond the difficulties posed by the minimal information in the report, the lack of attention to prior Senate comment, and major queries emerging about the financial underpinnings and ramifications of the proposed changes, UCSC has the following specific comments:

- 1) Given current financial constraints, we can understand the impulse to eliminate the Study Center Director positions at almost all EAP study-abroad locations. We could envision this being viable as a temporary cost-cutting measure, though we would need a fuller argument from the UOEAP office as to why this move is necessary. However, over the longer term, it is hard to imagine the UC study-abroad experience retaining its current quality without an eventual restoration of the Study Center Director positions. The directors, drawn from UC faculty, understand the needs of our own students. They serve an important oversight and advising role. Experience has shown that it is directors who, while serving at a study center, periodically update the study abroad programs to adapt them to shifting student interests and levels of preparation, and to address problems that have developed over time. In short, the role of faculty directors may be vitally important to the "gold standard" defined by EAP programs, and we suggest that this funding be reinstated as soon as possible.

- 2) The "Plan" calls for a major restructuring of the UOEAP administration and its EAP programs within the next three years. A more gradual period of change, perhaps over a six to ten-year period, could both guarantee a smoother transition that allows for experimentation and feedback, and would also allow for ongoing consultation with both the campuses and the Academic Senate.

- 3) The "Plan" foresees a significant reduction in the number of EAP programs that the University of California will support in the future. It is essential that EAP's "immersion/exchange" and

"language/culture" programs remain the "core" programs supported by UC. Short-term programs (2 months to a semester) are more expendable.

4) The "Plan" assumes that campuses will contract with third-party providers if they want to supplement the overseas offerings currently provided by EAP. UCSC thinks this is the wrong approach, as many third-party providers are more expensive and less rigorous than those programs that EAP maintains. For the past two decades, UOEAP has maintained its leadership among study-abroad programs at U.S. universities by building the largest, most diverse, and most rigorous program in the world, we feel it makes more sense for UOEAP to become a third-party provider to other campuses, by opening up our programs to the California State system and to other campuses inside and outside California. In this sense, the assumption that reduction and retrenchment are the best (or sole) ways to move forward with EAP may (at a minimum) be incomplete: the possibility of expansion through entrepreneurship should be explored.

As is hopefully clear from these comments, UCSC finds the present Plan unacceptable—it is, on the face of it, inadequate for the retooling of a major and important academic enterprise. We sincerely hope that a well-documented and clearly thoughtful plan emerges as a result of Senate comment.

Sincerely,

A handwritten signature in black ink, appearing to read "Quentin Williams". The signature is written in a cursive, flowing style.

Quentin Williams, Chair
Academic Senate
Santa Cruz Division



OFFICE OF THE ACADEMIC SENATE

9500 GILMAN DRIVE
LA JOLLA, CALIFORNIA 92093-0002
TELEPHONE: (858) 534-3640
FAX: (858) 534-4528

December 5, 2008

Professor Mary Croughan
Chair, Academic Senate
University of California
1111 Franklin Street, 12th Floor
Oakland, California 94607-5200

SUBJECT: University of California Education Abroad Program, Business Plan & Recommendations

Dear Chair Croughan:

At the December 1 meeting of our Senate Council of the San Diego Division, we held an extensive and thorough discussion of the proposed EAP (Education Abroad Program) Business Plan, released for Senate-wide Review on October 8, 2008.

As background to this discussion, we received reports from several of our local committees who were asked to comment on the proposed EAP Business Plan, including our Committee on International Education, Committee on Planning and Budget, Committee on Educational Policy, and lastly a letter received from Professor Michael Parrish, current EAP Study Center Director at Edinburgh, Scotland. Of these, we have included only the former, as it represents such a thoughtful and thorough response which complements my briefer comments here.

To summarize, the San Diego Division is **STRONGLY AND INCONTROVERTIBLY OPPOSED** to the proposed Business Plan, both in concept and in specific detail. We urge the Academic Council and the leadership of the Academic Senate to oppose vigorously the implementation of this plan.

The essential reasons for our opposition are summarized here:

1. **WHAT HAS TAKEN MANY YEARS TO CREATE, ONCE DISASSEMBLED, CANNOT EASILY BE RECREATED.** The agreements negotiated by EAP over many years in a wide variety of international host countries represent significant accumulated expertise that provides enhanced educational opportunities for thousands of UC students every year. If eliminated, either partially or wholly, it will be impossible to replace or recreate this framework.
2. **DECENTRALIZATION OF EAP FUNCTIONS WILL INCREASE, RATHER THAN DECREASE, EXPENSES.** The existence of a single administrative entity located at UCSB to provide systemwide administration of EAP for all UC campuses represents an example of one function where the "power of 10" becomes a reality. It would be impossible for any individual campus to provide the strong centralized organization of formal agreements with partner universities, and an efficient administration of many essential functions such as registration, fees, and health and safety issues. Again, we stress that if there are fiscal problems in the administration of EAP, the solution is not to disassemble this centralized office, rather the solution should be to improve its functionality while preserving the invaluable functions that are currently provided to all of the campuses.

3. **THE PROPOSED "BUSINESS PLAN" IS NOT A BUSINESS PLAN.** The proposed Business Plan is, in fact, not a business plan at all. There is no detailed analysis of many important details of the financial transactions involved in the operation of EAP, and thus no way to divine whether the conclusions and recommendations of the proposed Business Plan are correct. A thorough business plan would include a detailed analysis of financial assets flowing through the program, revenues and expenses by various categories over a number of past years, together with an equally detailed analysis of how the proposed changes would affect these categories. The proposed Business Plan fails completely in these essential regards. Lastly, we note that while the proposed Business Plan includes a provision that would return to campuses significant funds that currently go to UCEAP, disappointingly, the proposed plan makes no provision to ensure that such returned funds would actually be earmarked or guaranteed to be available for EAP activities administered locally. This is an essential flaw.
4. **RELIANCE UPON AN OUTSIDE CONSULTANT'S REPORT ELIMINATES THE CONSULTATIVE PHASE WITH THE FACULTY OF THE UNIVERSITY OF CALIFORNIA, REPRESENTED BY THE ACADEMIC SENATE.** There is within our administrative framework the UCIE, University Committee on International Education. If concerns exist that the EAP program is not optimally administered, then UCIE is the appropriate body to undertake an analysis of EAP operations, and should provide informed advice about academic priorities that could be incorporated into a new business plan. Possibly, there may exist a need for a new joint Senate-Administration Task Force for the purpose of formulating a new and comprehensive academic and business model for EAP. This would presumably have representatives from both UCIE and UCPB, and would be broadly consultative across the UC campuses.
5. **EDUCATION ABROAD OPPORTUNITIES ARE AN ESSENTIAL ASPECT OF UC OPPORTUNITIES.** As the world becomes ever more "hot, flat, and crowded," it is imperative that our students have opportunities to learn about the competitive international and global socioeconomic, cultural, and scientific structures in which they will be expected to perform successfully upon graduation. In these times of global competition at all levels, it would be shortsighted if not xenophobic to reduce opportunities for international study which are an integral and much sought after part of our educational mission.
6. **CONSIDER PROPORTIONAL BUDGET REDUCTION UPON EAP.** Pending an appropriate review of UCEAP and a new, authentic business plan, either by UCIE or by a joint Senate-Administration Task Force as proposed above that is responsive to faculty input, some reviewers would favor a proportional budget reduction to UCEAP of the same magnitude as imposed upon other academic components of UC. At present, we find no evidence that a disproportionate budget reduction will improve the quality of education that UC seeks to provide.

Sincerely,



Daniel J. Donoghue, Chair
Academic Senate, San Diego Division

Attachment

cc: W. Hodgkiss

UNIVERSITY OF CALIFORNIA, SAN DIEGO

UCSD

BERKELEY • DAVIS • IRVINE • LOS ANGELES • RIVERSIDE • SAN DIEGO • SAN FRANCISCO



SANTA BARBARA • SANTA CRUZ

John B. Haviland, Professor
e-mail: jhaviland@ucsd.edu
office tel.: +1.858.822.0752

UCSD Department of Anthropology
9500 Gilman Drive #0532
La Jolla, CA., 92093-0532

1 December 2008

To: Dan Donoghue, UCSD Senate Chair
From: John B. Haviland, CIE Chair
Re: Cowan budget proposal for restructuring UOEAP

Dear Dan,

Following on your memo of Oct 28, 2008 I write to give you a brief formal response from CIE to the Cowan “business plan” for EAP. Given the short timeline, CIE met on November 18th to consider this and associated documents. As the UCSD representative I then attended the UCIE meeting in Oakland on Nov. 20th where the budget proposal was considered by the system-wide representatives. Because UCIE’s response will I presume shortly be forthcoming, here I summarize some reactions from our own division’s committee. Not everyone on CIE was in agreement with all these points, but the overall impression is, I believe, shared by those who expressed an opinion.

1. It was clear to those of us who have followed the relevant discussions over the past couple of years that it is the intention of the President to make substantial cuts in the General Funds budget to UOEAP willy nilly, with little regard for Senate input on the matter or, indeed, for the probable negative impact on international education at UC despite frequently repeated rhetoric about the need for widening internationalization at all levels at UC. The timing of the present exercise alone is a sufficient indicator of this intention. Under these circumstances trying to second guess exact budgetary implications of the Cowan proposal seems secondary to registering our concern that actions with direct and possibly drastic academic implications for our students are being taken without appropriate faculty input and oversight.

2. If it is the intention to restructure EAP in ways that seem to be implied by the Kissler proposals associated with last year’s Joint Ad Hoc Committee’s Report on International Education—in the face of many worries expressed by last year’s Senate and its various subcommittees about both the report and the Kissler suggestions—we thought it important to separate those aspects of EAP’s operation that are clearly essential to international education at UC from those that might conceivably be handled in other ways. In particular, we identified two aspects of the existing EAP structure that simply cannot be dismantled without scuttling any attempts by the university to improve its rather dismal record in securing international opportunities for its students in general and severely undermining the efforts of campuses, like our own, which do relatively better at sending our undergraduates overseas. These are (a) the roughly 135 existing legal

agreements that over the years EAP has established with a varied and distinguished group of universities abroad which represent an enviable and unique patrimony of EAP as it has been constituted up until now; and (b) the expertise and centralized organization in certain essential practicalities of study abroad—monitoring and trying to guarantee the health and safety of our students, organizing application processes and payments, promoting study abroad opportunities with publicity, a coordinated web presence, and notably an enormous database of accredited courses and equivalencies. If EAP does not survive, as rumor apparently has it among education abroad specialists in the USA and also among many of our partner institutions abroad, and the agreements mentioned in (a) are allowed to lapse, they will be very difficult to reestablish, and partner universities abroad will be understandably less willing to risk collaboration with UC at any level in the future, from undergraduate to faculty exchanges, and from instruction to research. No single campus can maintain such a diverse body of relationships with foreign universities—at UCSD we certainly could not--and therefore the essential function of maintaining (not to mention developing and evaluating) these relationships is a central function of what must be a centralized UC-wide EAP. Similarly, both the expertise and the machinery for handling recruitment, applications, evaluations, enrollment, orientation, and eventual accreditation of individual students' education abroad programs are most appropriately and efficiently handled by a centralized EAP.

3. With respect to the budget proposal itself, there was considerable concern on the committee that we actually had no real numbers to work with. Cuts were proposed in several central areas (most obviously in the clearly costly faculty study center directors and associated staff), but with no detail about exactly how decisions would be made about what to cut and where. Furthermore, and perhaps of more immediate concern, the move to a funding model which involves a redistribution of MCOI and Education and Registration fees such that there will be a major “return to campuses” of student fees seemed to us almost to guarantee a collapse of existing education abroad programs on campuses. Unless these funds are explicitly earmarked for international education—a procedure which was not contemplated in the Cowan proposal, if, indeed, it is even possible—and thus channeled into campus offices which will have to assume a proportionately greater burden in recruiting, advising, administering, and evaluating students on education abroad programs, far from increasing the number of UCSD students who incorporate international education into their careers, the Cowan plan seems guaranteed to gut our existing programs and doom future initiatives. Because implementing any version of the Cowan or Kissler proposals will have a major impact on the offices that administer international education programs on all campuses, we considered several matters of workload—in advising and recruiting students, in evaluating alternative non-EAP options, in guaranteeing academic credit, and in academic advising and student services—for which we believe funding and staffing will simply not be available unless alternative funding arrangements are guaranteed. Without considerably more detail than we have been given about how current funding works and what happens to the MCOI of FTEs studying abroad in various modalities, we are simply unable to make reasonable estimates, much less calculations.

4. General concern was voiced about how the new funding model would affect equitable access to education abroad opportunities for all of our students, including those who depend on financial aid. Cowan's own claim on the subject (his point #3 states that "UOEAP will generate most of its revenues from student program fees in a manner that will not unduly discourage student participation in EAP programs") rings particularly hollow in this regard. As David Mares pointed out, at UCSD 40% of EAP students fall into the "high need" category compared with only 24% on non EAP programs, which suggests that the changes in the funding model can only penalize the most needy students by leaving education abroad out of their reach. (We briefly discussed alternative models in which EAP students no longer pay fees on a uniform schedule but instead pay fees that reflect the true costs of individual programs, without full enough discussion to reach a conclusion.)

5. Opinion on the committee was mixed with respect to how faculty oversight of academic quality in EAP would survive the proposed move to fewer if any UC faculty study center directors and increased reliance on local liaison officers, especially with reduced local support staff. Some expressed the view that existing study center directors did not earn their keep; others that local liaison officers are not able to deal adequately with our students' needs. However, there was general agreement that the Cowan plan (which is really more of a rhetorical presentation than a budget) left details of the proposed shift in academic responsibilities and workload entirely to speculation. How these changes might affect future possibilities for widened international cooperation for faculty and graduate students was also a concern.

6. We finally considered the nature of adequate "academic integration" of international education on our own campus. Although this is not a matter raised directly by the new EAP proposals, it is in fact the single most important conclusion that we reached about the current situation. We urge the Senate to take the initiative in asking our departments and programs to adopt as a matter of academic priority a series of measures to integrate opportunities for education abroad at all levels—from undergraduates, to graduate students, to faculty—into the basic structure of departmental majors and requirements. If the recent calls for internationalization are not to sound even emptier than they already do, only by making international education an explicit desideratum for department academic programs, via instructions to Deans and department chairs, can we directly incorporate internationalization into our curriculum and research—something that I think all of us realize is essential to modern education if not, in fact, to global survival—especially given the imminent threat to the existing EAP structure.

Cheers,

A handwritten signature in black ink, appearing to read "John B. Hawley". The signature is written in a cursive, flowing style with some loops and flourishes.

John B. Haviland
Prof. of Anthropology

University of California
San Francisco



Academic Senate
senate.ucsf.edu

Office of the Academic Senate
500 Parnassus Ave, MUE 230
San Francisco, CA 94143-0764
Campus Box 0764
tel: 415/514-2696
fax: 415/514-3844

David Gardner, MD, Chair
Elena Fuentes-Afflick, MD, MPH, Vice Chair
Mary J. Malloy, MD, Secretary
Jean Olson, MD, Parliamentarian

December 1, 2008

Mary Croughan, PhD
Chair, Academic Council
Academic Senate, University of California
1111 Franklin St., 12th Floor
Oakland, CA 94607-5200

Re: Proposed New Business Plan for the University's Education Abroad Program

Dear Dr. Croughan:

On behalf of the San Francisco Division, the UCSF Committee on Educational Policy and the UCSF Committee on Academic Planning and Budget reviewed the proposed new business plan for the University's Education Abroad Program.

Neither Committee had substantive concerns or comments to the revised EAP business plan, and while it is unfortunate that such a remodeling must take place in such a volatile economic climate, the San Francisco Division recommends approval of the proposed plan.

Thank you for the opportunity to review and discuss this proposal. If you have any further questions or concerns on this matter, please feel free to contact me at David.Gardner@ucsf.edu, or Senior Senate Analyst Wilson Hardcastle at wilson.hardcastle@ucsf.edu, or 415-476-4245.

Sincerely,

A handwritten signature in black ink, appearing to read 'David Gardner'.

David Gardner, MD
Chair, UCSF Academic Senate

cc: Martha Winnacker, Executive Director



UNIVERSITY COMMITTEE ON ACADEMIC PERSONNEL (UCAP)
Steven Plaxe, Chair
splaxe@ucsd.edu

Assembly of the Academic Senate
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200
Phone: (510) 987-9466
Fax: (510) 763-0309

November 10, 2008

MARY CROUGHAN, CHAIR
ACADEMIC COUNCIL

RE: The UC Education Abroad Program's new Business Plan

Dear Mary,

UCAP has reviewed the new business plan for the UC Education Abroad Program and has identified a number of concerns. There appear to be many unknowns in what is presented. The budget for the programs is very sparse and there is insufficient information detailing how the third party programs will be paid for to maintain the numbers. There appear to be many hidden costs in terms of faculty time needed to vet all the new programs. The proposed approach will require a more cost-intensive administrative structure on campuses that do not currently have the infrastructure to advise on third party programs.

UCAP is concerned that increasing student fees or relying on third party programs more will discourage students from studying abroad. UCAP also questions whether increasing the class size abroad to what it is in the UCs will diminish the existing quality of the program.

Finally, the presentation only in a Powerpoint form prevents laying out all choice points and justifications of options, making it difficult to thoroughly evaluate the proposal.

Sincerely,

Steven Plaxe, Chair
UCAP



UNIVERSITY COMMITTEE ON EDUCATIONAL POLICY (UCEP)
Stephen R. McLean, Chair
mclean@engineering.ucsb.edu

Assembly of the Academic Senate
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200
Phone: (510) 987-9466
Fax: (510) 763-0309

December 5, 2008

**MARY CROUGHAN, CHAIR
ACADEMIC COUNCIL**

Re: UC EDUCATION ABROAD PROGRAM BUSINESS PLAN

Dear Mary,

In the ever-growing climate of globalization, it is incumbent on the University of California to encourage our students to learn to think globally, by taking advantage of opportunities to study abroad, and by welcoming international students to our campuses. UC students who study overseas return to their home campuses as markedly more mature and self-confident individuals; and they typically have higher success rates, both as undergraduates and in acceptance by graduate and professional programs. At the same time, international exchange students enrich the diversity of our own campuses; they are often among the best and brightest from the foreign institutions; they contribute to our globalization in California; and often provide a source of future graduate students.

UCEAP has a great, and in at least two respects, **unique** reputation. 1. The UC **immersion programs** are often referred to as the 'gold standard' of overseas programs because they maximize the student experience in a foreign culture, while fully integrating their studies into UC curricula. 2. The principle of **equal access** for all students, irrespective of income, which has been a guiding principle of UCEAP since its inception 50 years ago.

UCEP recognizes that the benefits of EAP come at a cost that must be scrutinized in the current difficult budget situation, and that EAP must be expected to shoulder its fair share of cuts that must be made. UCEP also recognizes that, up to this point, both UCOP and campuses have made every possible effort to protect academic programs, but this cannot continue, now that UC has reached the brink where it needs to cut the weakest programs rather than make further cross-the-board cuts likely to leave strong programs severely weakened or even ineffective. In this environment, UCEP addressed the question of how EAP's operations can be curtailed without destroying a successful and effective program.

Unfortunately, the new budget plan drawn up by UOEAP, as presented to UCEP, lacks the kinds of information needed for determining the actual costs of the program and its many elements – this is especially true for how changes will affect each campus. The presentation gives only the broad strokes, while the details of how funds are spent, and for which purpose, are impossible to discern. This is probably at least partially a result of the aggressive timeline to which EAP was held.

One major concern of UCEP is that it is not obvious whether the general funds that will be directed to the campuses will be restricted for use by the campus EAP programs or will be subsumed into general campus expenditures. Until now, fees have gone to campuses, but it is our understanding that not all of those funds

are used to support local EAP efforts. We are also concerned that, if the proposed transfer of general funds from UOEAP to the campuses occurs, that UOEAP does not also transfer activities and financial responsibilities to the campuses that will overwhelm their abilities to maintain effective EAP education. If the proposed model, or some revision of it, is adopted, it is crucial that campuses be held accountable for ensuring that general funds coming to each campus as a result of EAP participation are distributed to support campus EAP activities.

A second concern of UCEP is the recent trend of establishing and now raising **participation fees** (especially high for the 'Great Cities' programs), because it **threatens the equal accessibility principle**. UCEP feels strongly that this should be reversed on educational grounds alone. At the very least, financial aid *grants* for EAP students should be increased to cover all participation fees, including those for the Great Cities programs. Students from lower socio-economic strata are increasingly severely challenged to cover travel and housing costs that often exceed those at home; they should not also have to pay extra participation fees.

A third concern is with the proposal to reduce the numbers of Study Centers with UC faculty as directors. UCEP understands how difficult it is to assess the importance and value of the UC faculty serving as Study Center Directors, or to determine how reducing the number of such centers from 20 to 6 will affect the EAP mission. It will almost certainly reduce the level of advising in the field, and make assignment of realistic grades more difficult and probably less accurate. UCEP's concern is that this component may be cut disproportionately simply **because** it is so difficult to assess, rather than based on a robust cost-benefit analysis that considers educational as well as financial criteria. One suggestion that would reduce cost and still maintain longer term in-field UC faculty presence might be to combine study center directorships with sabbatical leaves. A two-year stint as SCD could be funded 50% by EAP and 50% as a sabbatical leave. This would reduce EAP costs, allow SCDs to pursue research projects (more than is presently allowed), and maximize savings from keeping the faculty member in the field for two years. Obviously less administrative work, student advising and teaching would be done, but it would be considerably more than having no SCD at all.

If it is a given that the EAP budget must be reduced, UCEP believes that cuts should be prioritized to protect the strengths of EAP. We provide the following list of priorities that we consider most important for maintaining the strengths and uniqueness of the UC EAP program:

First priority should be the immersion programs that provide the maximum cross-cultural experience and upon which EAP has made its global reputation.

Second priority should be the language and cultural instruction programs that enrich the experience of those students unable to participate in a full immersion program. Curtailing these instructional courses will probably lead to reduced incentives to participate in such programs.

Third priority may be the credit/grade-granting function of UOEAP. If EAP courses are accepted towards a student's major, their credibility depends on grades that are determined in ways that are consistent with both campus and UC expectations and practices. Unfortunately, we cannot determine the actual cost of this service, now performed by study center directors or UOEAP staff, and thus we cannot judge its cost to benefit ratio.

Fourth priority would be the UC-construct programs that involve teaching cohorts of UC students in English by UC instructors, much as would happen on our campuses but simply in an overseas environment.

Fifth (and) lowest priority would be any investment in participation in third-party programs.

A final question concerns how costs of EAP are estimated. Under the proposed business plan, will the per capita general funds spent on EAP students be substantially different from the per capita expenditures on UC students overall?

In conclusion UCEP feels that EAP is a program that is worthy of support and which deserves to have its strengths preserved in such a way that it can weather the current budget crisis. Although the program might survive at somewhat lower levels of service, it would be a mistake to starve this program to the point that it could not rebound quickly and flourish when the funding situation improves.

Sincerely,

A handwritten signature in cursive script, appearing to read "Stephen R. McLean".

Stephen R. McLean, Chair
UCEP



UNIVERSITY COMMITTEE ON INTERNATIONAL EDUCATION (UCIE)
Errol Lobo, Chair
loboe@anesthesia.ucsf.edu

The Assembly of the
Academic Senate
1111 Franklin Street, 12th Floor
Oakland, CA 94607-5200
Phone: (510) 987-9467
Fax: (510) 763-0309

December 15, 2008

MARY CROUGHAN, CHAIR
ACADEMIC COUNCIL

RE: EAP Budget Plan

Dear Mary,

UCIE has had the opportunity to review UCEAP's¹ proposed budget plan at its November 20, 2008 meeting. *While that committee acknowledges that the current budgetary climate mandates cuts to EAP programs, UCIE cannot endorse either the plan, or its time-line, as it is currently laid out in the budget documents.*

UCIE also reiterates many of the conclusions and recommendations reached by the 2007-08 Academic Council in its review of the Ad-Hoc Report. In its March 3, 2008 letter to Provost Hume, Academic Council stated that it "is concerned with the maintenance of quality of the Education Abroad Program's (EAP) academic program offerings..." In that same letter, Council went on to say that "While Council agrees that in the current budgetary climate a cut of some kind is necessary, all cuts should be done carefully to minimize impact on academic quality, and in consultation with the Academic Senate." Although UCIE has been apprised of some cost-cutting measures over the past year (e.g., singular program closures), members feel that the time-frame (less than one month) given to review such a significant change to EAP's funding model is neither reasonable nor appropriate. At minimum, the Senate should be given the standard two months necessary to thoroughly review this important proposal. That said, UCIE engaged in a thoughtful discourse over the proposed budget plan at its November meeting and raised the following philosophical and pragmatic concerns:

Academic Quality and Oversight

EAP has long been considered, first and foremost, a rigorous 'academic' program, and has historically distinguished itself from many other external programs of dubious academic quality offered by third-party providers. Its academic identity is emphasized in a number of ways: 1) the Academic Senate has a long-standing history of academic oversight authority over EAP programs, which were delegated by The Regents; 2) UCEAP's funding is derived from the Marginal Cost of Instruction (MCOI), which are generally used to fund 'academic' programs; and 3) its academic integration/articulation into students' UC upper-division major

¹ The acronym UCEAP refers to the systemwide office of EAP, also sometimes referred to as UOEAP.

curriculum/degree requirements. However, the move away from funding UCEAP with MCOI to student fees fundamentally restricts and transforms UCEAP from an “academic program” to a student services provider. Indeed, registration fees cannot be used for academic purposes, but must be used for student services. ***Therefore, UCIE cannot endorse any funding model that moves UCEAP away from its status as an academic program.***

UCIE also feels that the motivation behind this budget plan is a simple cost-cutting measure, as opposed to a thoughtful plan that would maintain, and even increase, EAP’s academic quality. Members indicated that this seems to be a knee-jerk response to a budget crisis; the first indication of this is the short three-year implementation plan for the budget proposal. ***UCIE recommends that at a minimum, UCEAP be given a five-year time frame to implement a new funding model, allowing for cost-cutting measures and stream-lining reforms.*** Another problem with the proposed funding model is that it is not very flexible when it comes to program cost changes, or enrollment dips and spikes. The cost of international programs can change in response to a number of factors, in particular to changes in exchange rates. It is important to note as well that often the most popular locations are also the most expensive (e.g., Europe). The funding model also does not provide a good base for developing long-term academic programs either. As the new funding model depends on student fees, which is a reflection of current enrollments, UCEAP’s income from one year to the next can rise and fall as its enrollment changes. This can be compared to a funding model based on MCOI, which builds in past enrollments into UCEAP’s base budget, and is thus, far more stable. To make matters worse, UCEAP has no control, or even influence, over enrollments, as recruitment (excluding promotional materials) is done through the campus offices. The budgets for the campus offices, which per this plan would be funded from the General Fund, would still be under control of the local EVCs (see below).

Campus Funding

UCIE notes that the EAP campus offices have been historically and chronically under-funded. The campus offices are the life blood of EAP, as they recruit students, identify student issues (both academic and behavioral), and conduct pre-departure orientations. Without the campus offices, EAP would not exist. However, the campus offices have been chronically under-funded their local campus authorities (e.g., local EVCs), even in the best of times. The proposed plan would now fund the campus offices from the General Fund, but such funding would still be under the control of the EVCs. Members commented that such a funding model contains a number of pitfalls. If campus offices are not appropriately funded by their respective EVCs to support recruitment, then UCEAP will not receive the funding it needs to support EAP programs. What is more, UCEAP is cutting back on its expenses and services, and a number of services (that were previously provided to the campus offices) are being lost. Even with appropriate funding, it is hard to imagine a scenario where the campus offices can replace many (or all) of the services that UCEAP currently provides the campus offices. ***Therefore, some sort of system of accountability would need to be instituted if the University were to adopt this funding model. Relying on the generosity and goodwill of the local EVC is simply not adequate.***

Elimination of the Study Center Model

UCEAP should be praised for the cost-cutting that it has accomplished over the past year. UCEAP’s budget was reduced by 15% and its staff reduced by 20%; UCEAP’s budget may suffer another cut of approximately 10% this year. In the first round of cuts, 85% of them were made in the systemwide office; EAP study center costs may need to be reduced to meet these

additional cuts. The proposed budget plan would markedly reduce study center costs through the elimination of some study centers and consolidations of others. Essentially then, this proposal represents a philosophical decision to move away from the study-center model of international exchange, which has played a significant role in EAP's historical reputation for academic quality and rigor. In short, UC faculty study center directors have provided on-site face-to-face academic oversight, as well as rapid response to health and safety emergencies.

At its last meeting, UCEAP consultants *began* to brief members on some possibilities for more cost-efficient ways to maintain quality over EAP programs. These options include part-time faculty study center directors, non-UC faculty resident directors, liaison officers (who are usually faculty at EAP partner universities), and increased roles for professional staff. While some of these possibilities may hold merit, the committee feels that it will take much longer than a month or two to evaluate them. Beyond that, their implementation will vary from site to site, and will require a certain amount of experimentation. It should also be noted that one cannot remove study center directors at will. This must be done 1) when contracts are completed; and 2) when the on-site conditions are appropriate for such changes. ***Once again, UCIE recommends extending the implementation of the agreed-upon proposed budget plan to five years, rather than the existing three-year implementation.***

In closing, UCIE wishes to emphasize both the tangible and intangible value of UCEAP. The experience and expertise, as well as the numerous partner institution agreements that have been completed over the years, are invaluable. This value should not be minimized. The committee feels that in the rush to reorganize the Office of the President, UCEAP may be marginalized and deconstructed. Once this budget crisis has passed, the costs of rebuilding the structures necessary to run rigorous academic international programs, either on the campuses or elsewhere, will prove to be costly.

Thank you for the opportunity to comment on this important report. If you have any questions, please let me know.

Respectfully submitted,



Errol Lobo
Chair, UCIE

cc: UCIE
Executive Director Martha Winnacker



UNIVERSITY COMMITTEE ON PLANNING AND BUDGET (UCPB)

Patricia A. Conrad, Chair

paconrad@ucdavis.edu

Assembly of the Academic Senate

1111 Franklin Street, 12th Floor

Oakland, CA 94607-5200

Phone: (510) 987-9466

Fax: (510) 763-0309

December 15, 2008

MARY CROUGHAN, CHAIR
ACADEMIC COUNCIL

Re: UCPB Analysis of the Proposed UC Education Abroad Program Business Plan

Dear Mary,

The University Committee on Planning and Budget (UCPB) has reviewed the Education Abroad Program's (EAP) Business Plan and the accompanying proposed budget. UCPB has grave concerns that the proposed budget cuts compromise the integrity of EAP's academic mission and may threaten the viability of the program, UCPB believes EAP can survive, streamline its operation, and thrive, however, if some fundamental errors in the budget are corrected and the cuts spaced out over five years, rather than three years, and applied equally to the UC Study Centers and the systemwide EAP office (UOEAP) in Goleta (see enclosed spreadsheet). To that end, UCPB recommends that UOEAP revise the proposed budget according to the attached spreadsheet, and submit a plan for review by Academic Council and UCOP for implementing the proposed cuts in year three to five, in order to preserve EAP's academic mission with a leaner operation.

UCPB reviewed the business plan with a number of principles and goals in mind. First, we strongly support the principle of international education and the mission of UCEAP. Since 1962, studying overseas through EAP has been a life-changing cultural and academic experience for tens of thousands of UC students, exposing them to new languages, cultures, and global perspectives. UCPB also supports the goal of increasing the number of students going abroad and of encouraging the participation of a broader population of UC students in EAP. In particular, we believe that EAP should expand its reach beyond the humanities and social sciences to involve more science and engineering students as well as more graduate and professional school students. Finally, we support the need to economize UCEAP's operations to the greatest extent possible without damaging academic quality.

Although the current plan will probably put EAP on a sounder financial basis, the short implementation time-span and two fundamental errors in funding appropriations threaten to undermine EAP's academic mission if the plan is implemented as written. UCPB recommends the following three modifications, which will ensure that academic mission is preserved in the

transition so that EAP will be in a position to respond to increasing demand for participation in international programs at both the undergraduate and the graduate level.

1. The plan to switch General Funds and Student Fees, with general funds going to the campuses and Fees to UOEAP instead of the other way around, as is currently the case, should be implemented over five years, rather than three years. Our modified revision of the specific business plan budget (attached) extends budget projections from three to five years, to 2012-13, outlining a path to bring EAP into fiscal health in a far less dramatic way. We believe this timeline is more reasonable and has a better chance of putting the program on a sound fiscal basis while preserving academic quality.
2. The campuses should cover the instructional cost of foreign reciprocity students, including the cost of an increasing number of reciprocity students in the future, with their increased (General) funds.
3. UCOP should now mandate that campuses, rather than UOEAP, cover the salaries of an increased number of EAP campus advisors from their increased funds.

In response to the above changes, UOEAP should conduct a thorough two-year review of its current Study Centers, staff, and directors, and more importantly its own academic, instructional, and administrative expenses. In particular, UOEAP should renegotiate reciprocity agreements to find the additional savings that will be implemented in years three to five. This will give UOEAP time to negotiate new agreements that take advantage of existing opportunities for international education exchanges with the European Erasmus Program and others.

We note with some concern that the new proposal abandons the old principle that the cost of EAP to the student should be equivalent to the cost of a year on campus regardless of the specific costs associated with the study abroad location, and opens up the possibility of charging more for some programs. We acknowledge that it may not be feasible to operate the same quality EAP program we have without charging more for the opportunity, but also note that this new self-supporting model will make it more difficult for some students to access these opportunities, particularly those on financial aid and middle income families without financial aid who can barely afford the regular UC fees without financial aid. It is imperative that the return to aid funds that UCOP will provide to the financial aid offices of the campuses goes toward enabling students that otherwise would not be able to participate in EAP to do so. UCPB recommends returning this return to aid to the campuses with the stipulation from UCOP that it must be used to aid students participating in UCEAP.

UCEAP is the one of the world's largest and most respected international education programs, possibly second only to Erasmus, the European Union exchange program, which is to some extent based on the EAP immersion model, the core of the program. Supporting these programs are courses developed with the participation of UC faculty that prepare UC students for immersion at foreign universities and satisfy the general education requirements of the UC curriculum. These high quality courses are very successful and there are sound academic reasons for retaining them. Thus while offering international education opportunities through EAP may require more resources, it also allows UC to ensure the highest quality education, especially compared to third-party international study abroad programs, which often seem to be little more than travel programs with some cultural and language content. The few third-party international programs truly comparable to EAP programs are twice as expensive.

The overseas Study Centers and their UC faculty directors are keys to the success of EAP's international programs and the main reason for the higher rating of the EAP by participating students than other international programs. The directors are familiar both with UC academics and the academic program of the host institution and thus play a key role in ensuring that the UC student experience is valuable and the academics credits they earn at the host institution receives proper credit at UC. We have to ensure that UC faculty continue to have oversight over the academic content of the EAP programs to the greatest extent possible.

There was broad support for modifying UCEAP's current agreements with its partner institutions overseas, including reciprocity formulas, which do not adequately reflect the changes that have taken place in international education in the past decade. Many institutions now offer services to international students and programs that EAP might take better advantage of at a lower cost. Also, given the high caliber of our partner institutions, UC should be more willing to accept the courses offered at these institutions and encourage the reciprocal exchange of students (the Erasmus model). This would greatly facilitate the process of evaluating courses and make UC a truly international institution with a large and varied body of students. The advising of UC students at their home campuses must also be improved to ensure that they are provided with a plan for EAP study that does not delay their progress to a degree. These efforts could ease the administrative burden that is currently shared by EAP, campus satellite offices, and individual departments, and may facilitate greater student participation.

A very practical concern with the proposed business plan is whether the fungible monies provided to campus EVCs for EAP will actually be used for international education. There should be some mechanism to guarantee that this amount of funding will be provided to the campuses with a tag for international education and EAP. We should also be sure to separate the issues of the central office, which could be managed more economically, and the campus office operations, which are relatively lean.

Our conclusion is that the overseas Study Centers can streamline and cut costs by taking advantage of the support services offered by the host institution instead of duplicating them. Over the span of five years, this should result in savings of several staff and advising positions. Although some Study Center Directorships can probably be consolidated, their reduction to 6 from 20, as proposed in the Business Plan, will ruin the academic programs currently administered through the Study Centers. It is doubtful that programs administered remotely from Goleta without UC faculty oversight at the host institution can retain their current level of excellence. Thus the EAP's international infrastructure should not be cut, but offset by the fee (item 2 above) paid by UOEAP for reciprocity students, which should be moved to the campuses and paid for by the increase in funding to the campuses. The balance should be paid for by well-planned cuts to both the Study Centers and UOEAP in years three to five.

The campus EAP offices currently depend on an annual contribution of \$933,000 (item k on the proposed budget) from UOEAP funds. Since this support pays for the advisors that currently support campus recruitment efforts, current EAP enrollment is highly dependent on these advisors. If the campuses get increased funding they must pay for these expenses, otherwise EAP enrollment will drop rather than increase. It is therefore essential (item 3 above) for UCOP to mandate that sufficient support is provided by each campus administration to their EAP office specifically to fund EAP's recruitment effort. The campuses must also pick up item 2 (above) on the proposed budget, Instructional Payment to Campuses for Reciprocity Students. The

campuses will have to pay the fees of the foreign reciprocity students from the increase in funds they will receive.

UCPB respects the current budget reality of the University of California, but we note that UCEAP is being asked to take a much larger cut than other programs. We should not forget that UCEAP is a key academic program, not a student service. UCEAP should become more streamlined and efficient, but the program is enormously important for the University, and we should give it adequate time to make improvements. The University's plan to implement a more sound and vibrant financial basis for UCEAP should employ a budgetary model that seeks greater efficiencies and economies of scale, but also preserves existing academic quality, access, and affordability.

Sincerely,

A handwritten signature in black ink, appearing to read 'Patricia Conrad', written in a cursive style.

Patricia Conrad
UCPB Chair

cc: UCPB
Martha Winnacker, Senate Executive Director

UCPB Attachment 2

Explanation of Proposed Changes to Budget Spreadsheet

UCPB's main change to UCEAP Director Michael Cowan's budget proposal spreadsheet is to extend the timeline for transitioning the change in funding source (from general funds to student fees) from three years to five years. We have added two columns (highlighted in grey) extending the budget transition plan two additional years to 2012-2013, which implements the cuts gradually in year three to five, rather than abruptly mostly in year two and three.

In addition the following changes were made to the Cowan spreadsheet:

1. Cut to International Directors and Staff reductions, item (I) 1: the devastating cuts of \$2.5 million to the Study Centers are removed and replaced with more moderate cuts of \$1 million implemented gradually in year 3-5. We start with a smaller cut in year 3 and build up to a permanent cut of \$1 million in year 5.
2. Expense item: Instructional Payment to Campuses for Reciprocity Students, item (I) 3, is eliminated. This was a subsidy to the campuses for receiving students from partner institutions that the campuses now must absorb using their increased funding.
3. Cut to International Office/Instructional /Academic Expense, item (I): a cut of \$1 million will be implemented gradually in year 3-5. We start with a smaller cut in year 3 and build up to a permanent cut of \$1 million in year 5.

The rationale for points 1 and 3 is that the Study Centers and operations of the EAP systemwide office can be streamlined to achieve similar but slightly smaller cuts than what is proposed in the Cowan budget (\$2 million instead of \$2.5 million) in a more gradual manner that better preserves the academic integrity of EAP and preserves its valuable international infrastructure.

Column 4, Net Impact to Campuses 2011-12, still shows a big benefit to the campuses of \$9,401,000 per year, but the campuses must be prepared to pay for the expenses of the campus EAP office and the increased number of reciprocity students in the future, out of this amount.

(UCPB PROPOSED REVISION OF) EAP Business Plan Appendix A
Assumes reduction of general funds in equal decrements

Net Impact to
Campuses
2011-12

		2008-09			2009-10	2010-11	2011-12	Net Impact to Campuses 2011-12	2012-13	2013-14
(a)	2007-08 Deficit Carry Forward Revenue:	(\$1,188,783)	(a)	Carry Forward Revenue:	(\$1,534,475)	\$4,036,168	\$6,010,267		\$4,428,719	\$3,597,172
(b)	Appropriations		(b)	Appropriations						
	General Fund	\$19,330,834		General Fund	\$19,330,834	\$19,330,834	\$19,330,834		\$19,330,834	\$19,330,834
	Reduction in General Fund	(\$3,000,000)		Reduction in General Fund	(\$7,443,611)	(\$11,887,222)	(\$16,330,834)	\$16,330,834	(\$16,330,834)	(\$16,330,834)
	Opportunity Fund	\$1,131,666		Opportunity Fund	\$1,131,666	\$1,131,666	\$1,131,666		\$1,131,666	\$1,131,666
(c)	EAP Scholarships	\$1,039,280	(c)	EAP Scholarships	\$261,780	\$261,780	\$261,780	\$777,500	\$261,780	\$261,780
	General Fund Debt Repayment	\$0		General Fund Debt Repayment	\$0	\$0	\$0		\$0	\$0
	Subtotal	\$18,501,780		Subtotal	\$13,280,669	\$8,837,058	\$4,393,446		\$4,393,446	\$4,393,446
(d) thru (g)	Fees		(d) thru (g)	Fees						
(d)	Student Fees	\$5,892,504	(d)	Student Fees	\$17,824,497	\$19,025,006	\$19,931,170		\$19,931,170	\$19,931,170
(d)	Educational	\$0	(d)	Educational	\$11,320,320	\$12,114,432	\$12,114,432	(\$7,304,854)	\$12,114,432	\$12,114,432
(d)	Registration	\$1,588,708	(d)	Registration	\$1,605,120	\$1,765,632	\$1,765,632		\$1,765,632	\$1,765,632
(d)	Summer	\$1,827,767	(d)	Summer	\$1,955,710	\$2,092,610	\$2,929,654		\$2,929,654	\$2,929,654
(d)	Summer Pgrm-Specific Fee Component	\$391,468	(d)	Summer Pgrm-Specific Fee Component	\$391,468	\$391,468	\$391,468		\$391,468	\$391,468
(d)	Pre-ILP/ILP	\$6,392,504	(d)	Pre-ILP/ILP	\$1,063,218	\$1,137,644	\$1,137,644		\$1,137,644	\$1,137,644
(e)	Participation	\$806,000	(e)	Participation	\$1,100,160	\$1,134,720	\$1,203,840		\$1,203,840	\$1,203,840
(f)	Supplemental Program	\$284,900	(f)	Supplemental Program	\$388,500	\$388,500	\$388,500		\$388,500	\$388,500
(g)	Campus	\$0	(g)	Campus	\$0	\$0	\$0		\$0	\$0
(h)	Cooperative Program	\$200,000	(h)	Cooperative Program	\$200,000	\$200,000	\$200,000		\$200,000	\$200,000
(h)	STIP	\$300,000	(h)	STIP	\$300,000	\$300,000	\$300,000		\$300,000	\$300,000
(i)	Less: Return To Aid	\$0	(i)	Less: Return To Aid	(\$4,166,722)	(\$4,530,563)	(\$4,809,578)		(\$4,809,578)	(\$4,809,578)
	Total Revenue	\$24,894,284		Total Revenue	\$27,438,444	\$23,831,500	\$20,015,038	\$9,803,480	\$20,015,038	\$20,015,038
(j)	Expenses:		(j)	Expenses:						
	UOEAP Salaries	\$4,728,716		UOEAP Salaries	\$4,255,844	\$4,255,844	\$4,255,844		\$4,255,844	\$4,255,844
	Benefits	\$993,030		Benefits	\$893,727	\$893,727	\$893,727		\$893,727	\$893,727
	Supplies & Expenses	\$802,250		Supplies & Expenses	\$771,730	\$739,989	\$706,979		\$706,979	\$706,979
	Equipment (IT UO & Study Centers)	"		Equipment (IT UO & Study Centers)	"	"	"		"	"
	Consultants/Prof. Services (Legal)/Other Services	"		Consultants/Prof. Services (Legal)/Other Services	"	"	"		"	"
	Other	"		Other	"	"	"		"	"
	Rent	\$763,000		Rent	\$793,520	\$825,261	\$858,271		\$858,271	\$858,271
	Less: Sub let to UCSB	(\$153,000)		Less: Sub let to UCSB	(\$260,000)	(\$270,400)	(\$281,216)		(\$281,216)	(\$281,216)
	Total UOEAP Expenses	\$7,133,996		Total UOEAP Expenses	\$6,454,821	\$6,444,421	\$6,433,605		\$6,433,605	\$6,433,605
(k)	Scholarships	\$1,271,780	(k)	Scholarships	\$261,780	\$261,780	\$261,780		\$261,780	\$261,780
"	Campus Financial Support	\$933,000	"	Campus Financial Support	\$0	\$0	\$0		\$0	\$0
(l)	Int'l. Office Academic / Instructional / Admin. Expenses	\$13,692,000		Int'l. Office Academic / Instructional / Admin. Expenses	\$13,692,000	\$13,692,000	\$13,692,000	\$602,000	\$13,192,000	\$12,692,000
	Int'l. Office Reciprocal Expenses (Reg & campus fees)	\$2,209,200		Int'l. Office Reciprocal Expenses (Reg & campus fees)	\$2,209,200	\$2,209,200	\$2,209,200		\$2,209,200	\$2,209,200
	Subtotal	\$15,901,200		Subtotal	\$15,901,200	\$15,901,200	\$15,901,200		\$15,401,200	\$14,901,200
	Expenses Total	\$25,239,976		Expenses Total	\$21,867,801	\$21,857,401	\$21,596,585	(\$401,500)	\$20,846,585	\$19,846,585
	Surplus/(Deficit)	(\$1,534,475)		Surplus/(Deficit) - Current Year	\$5,570,642	\$1,974,099	(\$1,581,548)		(\$831,548)	\$168,452
				Surplus/(Deficit) - Cumulative	\$4,036,168	\$6,010,267	\$4,428,719	\$9,401,980	\$3,597,172	\$3,765,624
	Per-FTE	(\$652)		Per-FTE	\$2,585	\$916	(\$701)		(\$812)	(\$812)
	Enrollment:			Enrollment:						
	Participants	4,030		Participants	3,820	3,940	4,180		4,180	4,180
	FTEs:			FTEs:						
	Regular Academic Year	1,950		Regular Academic Year	1,760	1,760	1,760		1,760	1,760
	Summer Stand alone	250		Summer Stand alone	250	250	350		350	350
	Pre-ILP/ILP	155		Pre-ILP/ILP	145	145	145		145	145
	Total FTE	2,355		Total FTE	2,155	2,155	2,255		2,255	2,255
	Reciprocal Students Inbound (FTE)	1,115		Reciprocal Students Inbound (FTE)	1,115	1,115	1,115		1,115	1,115

Key Elements of Change in Funding Model:

UCOP removes \$16.3 M in General Fund appropriations or 85% by 2011-12
UCOP removes \$0.8 M in General Fund and other scholarship appropriations
Included in fund reductions are amounts previously paid by UOEAP in support of campus EAP offices (\$1M) & scholarships (\$.7M) to student participants
UCOP passes reductions in appropriations to campuses who realize a total net financial benefit of \$11.4 M in 2011-12
EAP will no longer collect / remit campus fees => campuses who so elect, will charge students directly.
EAP transitions to fee based model in 09-10 collecting / retaining all fee income (excl. campus fees) less return to aid
EAP retains a total base budget of \$4.4 M (\$3 M in General Funds, \$1.1 M in Opportunity Funds, and \$0.3 M in scholarships)

Notes:
2008-09

Assumes:

- (1) Appropriations reflect general ledger adjusted balance on July 1
- (2) The Opportunity Fund is not reduced
- (3) The outstanding deficit from the prior year carries forward; there is no repayment of the original deficit
- (4) For modeling purposes all fees are shown as line items

Notes:
2009-10 and subsequent years

Assumes:

- (1) Incorporates assumptions for 2008-09 unless otherwise noted.
- (2) Introduction of fee-based financing in 2009-10. Educational, Registration, most Summer fees reflect UC-wide projected amounts
EAP retains all fees and remits Return-to-Aid
- (3) Enrollment projected to drop in 2009-10& 2010-11 as EAP program changes take hold. Modest rise in 11-12 (summer enrollment)
- (4) Reflects historic 4% reduction in Educational/Registration/Participation fees due to attrition

<p>(a) GL deficit (2007-08) carried forward excluding del Amo/donations/campus scholarships/rent encumbrance</p> <p>(b) Based on 2008-09 (OP) Funding Plan reducing State General Funds (only) by \$3,000m. Assumes no new block grant provided in 2008-09 (\$740K received in 2007-08), or debt repayment</p> <p>(c) Reflects fund appropriations</p> <p>(d) Actual Registration, Summer Stand alone and Pre-ILP/ILP fees for 2008-09. Educational Fee remitted to UCO Summer unit fee for 2008-09 is \$158. Additional non-unit fee revenue charged to break even : : Madrid \$919, Cambridge \$893, Sussex \$896 Fall Registration and Participation Fees multiplied by 1.3 for spring participants reflecting recent levels of participation</p> <p>(e) \$200 per participant (fee excludes Pre-ILP/ILP enrollment). Participants net of historic 4% attrition.</p> <p>(f) Supplemental Program Fee of \$1,100 per participant for " Great Cities Programs"</p> <p>(g) Campus fees remitted (passed through) to UC campuses</p> <p>(h) Excludes one-time Cooperative Program Income (from US partner universities) accrual of \$335k</p> <p>(i) Return to Aid covered by Educational Fee remittance</p> <p>(j) Reflects projected budget proposed by UCOP Rent includes partial year contribution from space sub let to UCSB Total expenses compare to \$7.984m in 2007-08</p> <p>(k) Includes \$777k in appropriations, an additional supplement in 08-09 of \$233k in scholarship funds from UO, a \$262k for Lowenhaupt reciprocity scholarships Campus support is made by a general fund transfer of funds</p> <p>(l) Field Office + Reciprocity reflects proposed budgeted figures provided by UCOP. Includes all field expenses and payments to UC campuses Total Compares to \$17.008m ledger amount for 2007-09</p>	<p>(a) Reflects prior year operating balance</p> <p>(b) General Fund appropriations reduced down to \$3 million in equal decrements No annual block grant or debt repayment</p> <p>(c) Only Lowenhaupt Scholarship (reciprocity) maintained at funded appropriation levels. Other appropriated scholarships returned to campus.</p> <p>(d) Educational Fees increased 7% per year, Registration Fees by 10% per year through 2010-11 (Governor's compact) 2008-09 Registration Fee = \$864, Educational Fee = \$6,262. 2009-10 Registration Fee = \$950, Educational Fee = \$6,700 2010-11 Registration Fee = \$1,045, Educational Fee = \$7,170. 2011-12 Registration Fee = \$1,045, Educational Fee = \$7,170 Summer and Pre-ILP/ILP fee increases by 7% per year</p> <p>(e) Participation Fee increased to \$300 per participant for all three years</p> <p>(f) Supplemental Program Fee of \$1,500 per participant for "Great Cities Programs"</p> <p>(g) Campus fees no longer collected and remitted to campuses. Fees charged at the discretion of the campuses</p> <p>(h) Cooperative Income and STIP remain constant</p> <p>(i) In 2009-10, Return to Aid is 28% of Educational/Registration/Summer/Campus Fees In subsequent years, it is the base year amt + 33% of year-over-year Ed. / Reg. / Summer fee incr., PLUS 25% of Campus fee increases</p> <p>(j) Personnel expenses are initially capped at 2008-09 level and then reduced Rent increased 4% per year (per escalation clause in agreement); reduced by UCSB sub let contribution</p> <p>(k) A total of \$777k in appropriations for scholarships may now be borne by UC campuses. Only \$262 for reciprocity scholarships will remain (ref. (c) above) Campus EAP support will henceforth be determined by the campuses</p> <p>(l) 1-3 Field Office Director positions reduced by 3, then 8, then 14. Assumes phased reduction in staff FTE. (l) 1 Assumes a Liaison Officer position replaces each elim. FOD @ salary of \$40k (l) 2 Program Instructional Expenses reduced by 10% in total (l) 3 EAP pays approx. \$900 per reciprocity FTE to campuses to offset instructional cost.</p>
---	--

RECONCILIATION TO LEDGER OF CARRY FORWARD FROM 2007-08 (\$ 000)

FIELD OFFICES	<u>APPROP.</u>	<u>EXPEND.</u>	<u>ENCUMBRANCE</u>	<u>\$Bal.</u>
UO	25,409	26,187		##
APP. CONTROL	8,709	7,984	789	##
SCHOLARSHIPS	(902)	16		##
ADJUSTMENT	1,061	1,253		##
TOTAL	0	0	(763)	##
	34,277	35,440	26	##

Includes all ledger accounts except for del Amo/donations/campus scholarships
Adjusted to exclude encumbrance for 2008-09 UO rent

RECONCILIATION OF DEFICIT CARRYFORWARD TO G/L BALANCE

GENERAL LEDGER	(\$1,536,667)
Add donated funds that reduced deficit (they are committed funds):	
UCB SCHOLARSHIP	\$1,505
UCSD SCHOLARSHIP	\$6,000
UCSB SCHOLARSHIP	\$157
WISE SCHOLARSHIP	\$66,781
DUTTENHAVER SCHOLARSHIP	\$300,655
EAP LONDON SCHOLARSHIP	\$33,914
ALLAWAY SCHOLARSHIP	\$5,146
JACOBS FAMILY FUND	\$106
DEL AMO FUND	\$852
Sub Total	\$415,116
Deduct 08-09 Rent Encumbrance booked in 07-08 (Incr'd. deficit):	\$763,000
CARRY FORWARD FOR MODELING	<u>(\$1,188,783)</u>

TO: Patricia Conrad, Chair, UCPB

FR: Christopher Newfield, English, UCSB and EAP Lyon-Grenoble
Michael Parrish, History, UCSD and EAP Edinburgh

RE: Evaluation of EAP Business Plan

DT: December 2, 2008

We write as former chairs of the University Committee on Planning and Budget (UCPB) and as current Study Center Directors in UC's Education Abroad Program (EAP). We are also professors in humanities disciplines with decades of experience with undergraduate education on two UC campuses. We are in the unusual position of having direct knowledge of the UCOP budgeting and planning process, the recent history of EAP's budget, the origins of the current budgetary framework, and now the concrete, everyday issues that EAP study centers face in the field.

We were members of UCPB when EAP's initial budget deficit came to light. At the time, it seemed a short-term problem prompted by two things: an ill-advised office move, and increased costs incurred by new programs that had successfully responded to shifts in student demand and doubled EAP enrollments during the first five years of this decade. Obvious immediate steps included a payback plan, cost containment, pricing changes, temporary surcharges, and continuous operational improvements. Once these were in place, a thorough academic and operational review could analyze longer-term issues and suggest major enhancements.

In November 2007, a Joint Ad Hoc Committee on International Education, with major Academic Senate participation, produced a report that offered many ambitious recommendations. It called on "enlisting faculty and student research, instruction, and public service in a collaborative mode across national borders in a global learning network."

Implementing this vision would of course require rigorous budgetary and operational analysis and a great deal of inspiration, as it aimed to make UC a leader in 21st century international education. The Senate's Academic Council correctly noted the absence of a funding model in the Ad Hoc report, and this was indeed where the renewal process was breaking down. For a funding model had been produced on a separate track, via an outside consultant, Jerry Kissler, whose parallel report also appeared in the fall of 2007. The Kissler analysis was a very helpful first step; the Kissler Budget Model that accompanied it was suggestive, but flawed and preliminary. And yet the Kissler Budget Model became the template for the "business plan" President Mark Yudof passed on to EAP Acting Director Michael Cowan in a letter of instruction last summer (Yudof to Cowan August 18, 2008).

We have now reviewed the resulting Business Plan that has been forwarded from EAP Acting Director Michael Cowan to UCOP, EAP directors, and the Academic Senate. Our overall conclusion is that this proposal will inevitably degrade the academic quality of EAP. It will weaken EAP's most distinctive features, particularly its "immersion" model of education that combines novel classroom challenges with real-world relationship that, in requiring adaptive improvisation in a defamiliarized environment, is well out in front of standard college practice. The business plan eliminates most if not all UC faculty participation in the field, which will

impair current operations while preventing EAP from developing the graduate and research exchanges that are now being actively sought by UC's competitor universities, and that are the obvious next phase in EAP's development. Rather than helping EAP compete with peer research institutions in global markets for higher education services, the business plan will force EAP to flee "downmarket" to try to compete on terms *outside* its strategic advantages of academic quality, tangible learning outcomes, and innovative educational services.

The current business plan puts the budget cart before the planning horse. It is an inadequate substitute for the integration of academic, operational, and budgetary analysis that would allow EAP to improve the good and cut the bad in a rational, nuanced way. It sets up permanent austerity conditions that will skew or block such planning in the future. Finally, the business plan downgrades the one, systemwide educational program that has centered on faculty and students in the humanities and social sciences. It does this in spite of the fact that financially it is a small program (its General Fund share is 0.6% of UC's state General Fund revenues) that successfully links the humanities and social sciences to the personal capacities and vocational skills required for successful employment in today's economy.

These conclusions derive from our analysis of seven major flaws in the proposed financial model. At the end of our presentation, we recommend next steps.

1. **The proposed model locks in steady, multi-year declines in total revenue for EAP, preventing the program from achieving financial solvency and stability.** We are acutely aware of the state's and the University's budgetary problems, but radical budget cuts predate the current downturn. The current business plan centers on a further 3-year, 85% cut in General Fund support. These cuts are clearly disproportionate even in times of shared financial sacrifice: next year's cuts to EAP's General Fund revenues are 7 times larger than its share of the General Fund, and 15 times larger than its share of "core campus funds."¹ We

¹ The University as a whole is again losing a portion of its state General Fund revenues and raising student fees. Like all other academic programs, EAP would naturally participate in budgetary savings. For 2008-09, UC General Fund revenues were initially nearly flat (down \$45 million on a base of about \$3.2 billion), and are now expected to experience a mid-year cut of another \$65 million (UC Newsroom, November 20, 2008), or about 3.6% of GF revenues overall. Coupling the cuts with enrollment growth and inflation, campuses are generally planning for 5% cuts in the current year. In past periods of decline, campuses generally protected academic programs with smaller-than-average cuts, making larger cuts in other areas. Since the EAP business plan calls for a reduction of \$4.44 million moving from 2008-09 to 2009-10, it is slated to provide 4.0% of the state GF savings for the 10-campus system. UC "core funding" for campuses was calculated by UCPB for the "Futures Report" as about \$7.1 billion from sources including student fees for 2008-09 (defined Appendix A, <http://www.universityofcalifornia.edu/senate/reports/AC.Futures.Report.0107.pdf>, p. 37). EAP's General Fund share is 0.27% of "core campus funds." What has happened instead are disproportionate cuts in GF support for EAP— 15% for 2008-09, 22% for 2009-10 in the EAP business plan, and similar cuts of 15%-20% a year for each subsequent year.

believe such cuts are unprecedented for an academic program whose instructional quality has been neither reviewed nor disputed and that is not being disestablished. These cuts force a minimum 20% reduction in overall program revenue. This reduction will support neither steady enrollment nor program improvement.

2. **The premise of the current budget project - that EAP is a bloated, high-cost program - is incorrect.** The premise derives from the Kissler report, to which we return below, and it spread the idea in UCOP that EAP is an educational Club Med that will function better if it closes the clubhouses and fires the entertainment directors. This premise is contradicted by the budgetary reality of most study centers, which are bare bones operations: Edinburgh spends \$1100 per student FTE, while Lyon-Grenoble, which must offer intensive language courses to every UC student, spends \$4680 per student FTE, exclusive of reciprocity costs and of the director salary that the university would pay anyway. Repeated annual budget cuts are already forcing cuts in core operations, such as the supplemental language instruction UC students need to survive in their programs in host universities. UOEAP is likely to move one of Lyon's programs to Bordeaux in order to save \$750 per student in instructional costs, at the price of doubling language class size. Our study centers do not have an extra \$100 to buy a train ticket for a guest speaker: their budget problem is not too much money for educational activities, but too little. Further annual cuts will continue to degrade essential academic services from an often rudimentary base.
3. **The proposed business plan has a misplaced focus on the funding source swap.** It envisions trading out the current source, 70% of state general fund monies, for student fees minus financial aid. EAP's main revenue question is not whether state funds or student fees should be used to fund EAP activities. The main question is why EAP cannot use both together to cover necessary costs as does every other UC academic program. Since the state pays UC around \$10,000 per student, and students generally pay fees that come to over \$8000, it is hard to understand why a student who brings something like \$18,000 to the table (excluding financial aid) is being spoiled by \$1100-\$5000 or even by \$10,000 in core services in the field. Under normal allocation processes, it would seem entirely reasonable to spend 1/3 of \$18,000 on combined advising, housing, registrar, instructional, and public safety services via the study centers, and another decent proportion at UO mediating between centers in 31 countries and hundreds of UC academic departments. EAP certainly needs to answer concrete questions about how it can use its resources more efficiently to provide even better services. But the program also needs to know why it gets a relatively small proportion of the revenues its students generate. Why, in this new business plan, do the campuses get most of the student's revenues while EAP bears all of the student's educational and related costs? This question has not been asked or answered. Until it is successfully resolved, all but a few EAP student centers will remain austere operations with no chance for development, assuming they are not closed entirely.
4. **Nothing in the business plan or in the Kissler Report on which it is modeled helps to solve real operational problems.** As we have noted, the Kissler Report set the terms for the budgeting parameters that President Yudof instructed EAP Acting Director Cowan to follow. UCOP appears to have set aside that report's clear limitations. One of these was Mr. Kissler's inflammatory, incorrect claim that EAP spends 12-28x more in "discretionary

funds” than do other study-abroad programs, a punch line that may have soiled the program in UCOP as a wasteful extravagance.²

In the absence of operational analysis or educational assessment, the Kissler Report made the value judgment that every EAP unit was bloated and should be cut. It stated that UO should go from 100 to 50 FTE – that half of its personnel were expendable. Reciprocity students – who pay their home-country fees to attend UC for a term or a year, plus unwaived campus fees (paid by EAP) - could be eliminated, and replaced by foreign students who could afford out of state fees. Most if not all faculty directors could be eliminated without any noticeable loss of quality. EAP could both expand enrollments and upgrade to include research and graduate exchanges with a downsized and cheapened infrastructure. The one area that needed an infusion of money was that of the campuses, which would voluntarily break with their historic practice of spending only a fraction of EAP-generated fees on EAP offices, and support those offices fully. No evidence was provided for these assertions.

In tallying up costs for each budget category, the Kissler Report never asked the question, “costs to accomplish what?” If you are going on a vacation to Martinique and need to order food and get directions in French, you do not need to spend \$2500 on an intensive French course, since a \$25 basic language book will do. But if you are going to study International Relations in a French university and then market yourself after graduation to international companies who need multilingual personnel, that \$2500 course is a reasonable investment. Academic and operational outcomes need to be clearly defined if budget tallies are to have any meaning. But neither the Kissler Report, nor any related document, has defined the outcomes against which costs could be assessed.

The absence of operational and academic analysis has meant that EAP’s real-world operational issues are no closer to being solved now than they were three years ago. Here are two examples taken from our field experience:

(A) Growing enrollments without growing per-student costs. In the late 1990s, EAP doubled enrollments by accepting that much of its potential market was linguistically unqualified to participate. It and constructed programs in cities like Rome, Madrid, Paris, and Lyon for beginning language students. Each of these beginning students costs EAP more than an immersion student: in Lyon, for example, overall average language instruction costs \$1400 per student, while “Language and Culture” courses cost \$2500 per student. On the other hand, without a great deal of extra help, these students simply do not study abroad. These students are bright and motivated, and they make rapid, exciting process in the language. But they are for much of their semester helpless in stores, restaurants, and nearly all social

² Slide 8 of the Kissler presentation “UC Study Abroad Programs” (October 2007). EAP cannot possibly spend 12-28 times more than a *comparable* program. This number can only rest on a comparison of UC’s instructional immersion program with basic student expenses on a short-term travel program: Mr. Kissler was perhaps comparing the “full cost” of one year at one of EAP’s most expensive instructional programs (the Great Cities “construct” in Rome, Italy), at \$32, 800 (slide 13), with the price of airfare and a dormitory room for a 4-6 week summer program abroad (perhaps about \$1200).

situations. In order to buy the cell phones through which the study center maintains emergency contact with them, they must be accompanied to the phone store. Language and Culture students are unable to communicate with police, fire, or other emergency personnel; they cannot understand medical instructions or communicate with doctors, or even call for a medical appointment. They cannot find their own lodging, or in most cases express personal needs or views with their host families; the director and office staff spend hours each week sorting out normal misunderstandings. Language and Culture students are more disoriented than immersion students, and directors may find themselves routinely spending at least some of their hours each week offering informal psychological assistance in English. The question is, how can these programs, which broaden access to language and cultural study and seem to produce excellent language progress (real assessment needed!), in fact be offered for much less than they already are? Those of us in the field would like real answers to this question, ones that would save us time and money. But these answers will require empirical study.

(B) Managing risk in course credit transfer. Our students have told us that the number one reason why their friends didn't come with them on their EAP year, or why they themselves cannot stay a full year, is that they cannot – or even might not – be able to get credit for courses taken abroad for their major or their distribution requirements. EAP has a complex system for evaluating courses, translating grades, and conveying the grades to registrars and on to hundreds of departments. The work starts in the study centers, where every course description needs to be translated, matched with a UC course, assigned a number, organized on the student's study list, and then, when the course is completed, translated from the foreign to the UC system on the basis of two different course curves. Only at this point can the work of UO personnel really begin. EAP performs enormous labor, and yet every individual student shoulders individual risk for every course transfer that needs to satisfy a specific requirement. The cost of this system needs to be assessed, but in relation to the actual work that it does, and then the workload needs to be reduced where possible even as the transfer outcomes are *improved*. Given the amount of work, are current costs really too high? How can we improve the course "take rate," lower student risk, get the word out, and thus increase enrollments – all while simplifying the workflow? Once again, those of us in the field (and in UO) who really do this work would really like to know the answers. Answers to such questions require integrated operational and academic analysis, and not has so far been forthcoming. The imposition of reduced aggregate budget targets and revenue formulae are not going to help.

5. **Even as EAP services to students decline, the business plan makes student fees by far the largest source of EAP revenues.** Student fee revenue is supposed to triple in 3 years. The business plan does not explain how this tripling will not require a massive increase in program fees. In addition, scholarship funding is cut by 80% in one year and stays at a very low level. It is wishful thinking to believe that shifting nearly all costs to fees will not damage enrollments or student diversity.

The reality is that many EAP students are already struggling. One of us recently received an email from a student in our program that read as follows:

I was thinking about going home. I'm really stressed out about money. Also, if I stay I will be behind in my major and will have to stay in school longer which

will lead to me taking out more loans. Of course it would be nice to stay but I feel like this may not be a good time for me.

The director then spent part of that evening with this student in order to help her with her personal budget. Adding together her financial aid and several loans and a \$1000 EAP scholarship got her to an income of about \$500 /month for the last six months of the program. Her need is nearly \$1200 /month, given the current exchange rate, meaning she will have to borrow another \$4200 to complete the program. She is African American, her mother recently lost her job, Sallie Mae rejected a loan application with her mother as cosignatory because of her poor credit rating, and her stepfather can give her exactly \$100 a year. This particular student is extraordinarily determined and wants to continue to make personal sacrifices. How does the new business plan meaningfully help retain other students like her – first-generation college, or from underrepresented racial groups, or low income - and encourage more like her to apply?

- 6. The business plan's continuous cuts will force the dismantling of much of EAP's global infrastructure.** The new plan envisions the closure of an unknown number of Study Centers, further reduction in outlays that will affect core language instruction, and the elimination of most if not all UC faculty from participation in the field. The effects will be a) reduced present educational quality and b) prevention of the development of an "EAP 2.0" that redevelops the "immersion" vision of leading-edge education and that competes successfully with UC peer institutions.

The business plan asks EAP to look down the road at becoming a Me-Too program that offers nothing special to its "customers." In contrast, study center services are a crucial differentiator in market terms, and have a clear value in academic terms: they provide the essential foundation for study abroad that leads to meaningful language competence and cultural comprehension for a diverse rather than preselected range of UC students. The study centers created the conditions for EAP's trademark, linguistic and cultural immersion that produces true cross-cultural and multi-linguistic functionality. The study centers enable this linking of academic and institutional guidance to general orientation, intensive language training, housing assistance, educational excursions, ongoing academic advising and various kinds of counseling. The result of a good study center is a distinctive combination of stability, complexity, and intellectual depth in an unfamiliar environment. The combination increases learning rates and creative improvisation within a range of new relationships. It would be hard to find an EAP student who did *not* note the major increase in the rate of language acquisition. Confidence, academic clarity, and the development of new intellectual projects – the general capacity to *initiate* projects – are all precisely what UC says it offers through undergraduate education, and what the study centers do offer. In the future we will see even more need than we already do for the ability to initiate projects in hybrid cultural and institutional situations – multiple nationalities, different kinds of universities, different types of institutions, all having to operate in unfamiliar environments that need to link specific, local knowledge to global systems. This is where EAP needs to go.

The faculty director performs a wide range of duties within this system. This includes regular office hours in order to do the kind of troubleshooting described above, and these easily involve 5 hours a week (or 10 hours a week for directors with multiple centers) in non-emergency situations. Language and Culture students require additional

meetings in groups and as individuals. In addition, directors provide the kind of academic advising that is well known to improve learning outcomes. For example, at Lyon-Grenoble, the director has met each of 84 students (fall 2008) twice for 45 minutes to an hour apiece, and one-third of these for a third time. The purpose is to develop a specific study plan, explain the institutional strategies that will implement the plan in the new academic environment, and link the study plan to the student's overall intellectual trajectory, which is in most cases just starting to take shape. This intensive face-to-face consultation increases each student's chance of successful navigation of unfamiliar and shifting terrain, where they need to build new relationships from scratch, often while studying in a foreign language. Regular follow-ups are scheduled with all interested students. Bringing together the office manager's institutional knowledge with the faculty director's academic expertise unites skills sets that rarely meet in higher education today.

In addition, the faculty director reviews reciprocity applications and works with local partners to select finalists for interviews. The director then works with the office manager to prepare each dossier for transmission to UOEAP and eventual review on the campuses. At Lyon-Grenoble, the director reads 100 files, interviews 70 candidates for half an hour apiece, and then meets again with each of the 50 or so candidates finally selected to finalize the dossier. The outcome is the best possible group of foreign students to help internationalize UC campuses. There are additional meetings with local university officials, municipal and business partners, instructors and heads of instructional programs, and other routine administrative duties that include the laborious grade transmission process described earlier.

There are no doubt functions that could be streamlined: we would like to spend more of our directorship time developing research networks, persuading local companies to offer internships to our students, working with local governments to put on joint programs, and generally spreading the word about UC while building new academic and national relationships. Based on our experience, we simply cannot see how the current study center director labor can be eliminated without a major impact on the quality and functioning of the centers that have been scaled around them. Empirical analysis would need to be conducted to see if this is actually possible and desirable in operational terms.³

7. The business plan seems unaware that EAP's current immersion practice is the foundation of the higher education of the future. The irony of the current skepticism

³ The argument in the Kissler Report for eliminating most SCD's consists of the following sentence: "Only 2 of 10 Study Centers are currently headed by a UC faculty member. Even fewer UC faculty should be appointed in the future and only under special circumstances (e.g., initiating a new academic site) (slide 11)." This is like saying: "I read about 10 cities and noted that only 2 have light-rail transportation systems. Therefore, almost no cities should have light-rail transportation systems." It should also be pointed out that 8 of the 23 current SCDs are in the four countries (the UK, Italy, Spain, and France) that account for over half of EAP's five-year enrollments (http://eap.ucop.edu/common/reference/statistics/2006-07_statistics/partxcountry.pdf). Though costs need to be examined rigorously and cut where possible, SCDs may actually be efficient in market terms.

about the study center's value is that it assumes an outdated vision of low-cost mass instruction at the exact moment in which both education and the economy reject these wherever possible, and have jumped wholeheartedly towards immersion models for advancing education, business, and society itself.

Immersion means intensity in language instruction, but it also means a conjunction of classroom and real-world experience, problem-solving in unfamiliar environments, ease in international and multi-lingual contexts, confidence with hybrids of technological, web-based and face-to-face relationships, knowledge of flexible networks that are replacing predictable hierarchies, insight into "wikionomic" collective intelligence in which every participant is a knowledge producer, capability with massively multi-user environments that impose new challenges of cultural capacity and negotiation, and comfort with "crowdsourcing" and decentralized flows of information. Such skills are central to the new humanities and to the contemporary economy. They require international learning networks that assist with relationship-building across multiple environments facilitate them.

EAP is not there yet. But it does understand *immersion* and has learned over several decades about how to support it. Leading technologists are using language immersion as a model for creating the next generation of "richly visual, immersive, three-dimensional simulations [that] will help students master complex topics."⁴ EAP immersion already offers the first part of this— immersion in a language, immersion in an unfamiliar world in which relationship-building across linguistic and cultural barriers is the difference between success and failure. "EAP 2.0," if it is allowed to exist, will link the current basic immersion structure with new technologies, new institutions, new businesses, and new sociopolitical environments. None of this will happen if EAP is forced to cut back to a model of standardized information delivery in passivated environments, with fewer resources to support it.

Similarly, instead of defining the faculty directors as a surplus cost, the business plan should transform them into hybrid network and relationship builders, designers of learning systems that link inside and outside, classroom and world, technological and social environments in countries in which UC has an interest. As suggested above, a simple step would be freeing up some director time to cultivate local firms that would send representatives into language courses; the last third of the language course would be an internship in a local company. A further step would be developing research networks that visiting faculty and graduate students could step into, with no additional effort, in such a way as to increase their research efficiency.

However the details are decided, they should emerge from rapid analysis and ongoing debate. There is enormous potential in EAP's existing global network, and it should be sustained and streamlined for the moment when the resources and vision are there to take the next steps.

⁴ John Seely Brown, "How to Connect Technology and Passion in the Service of Learning," *Chronicle of Higher Education* October 17, 2008, <http://chronicle.com/weekly/v55/i08/08a09901.htm>

RECOMMENDATIONS: We recommend that

1. that the Senate reject this business plan because it violates the core principle articulated by Academic Council last year: “one of the University’s principal priorities [should] be the maintenance of EAP’s high quality academic programming.”

2. that the Senate create a partnership with UCOP and UOEAP to undertake an intensive and systematic analysis of EAP’s academic and operational functions, to run from January to June 2009, with a report delivered September 1, 2009.

3. that this analysis include outside experts in international education on the model of a standard, mandatory UC academic program or department review. This review should also involve intensive consultation with EAP personnel worldwide, including study center staff, whose insights and experience have not yet been heard.



AKOS RONA-TAS
DEPARTMENT OF SOCIOLOGY, 0533

(858) 534-4699 OFFICE
(858) 534-4753 FAX

488 SOCIAL SCIENCE BUILDING
9500 GILMAN DRIVE
LA JOLLA, CALIFORNIA 92093-0533

December 14, 2008

TO: Professor Mary Croughan, Chair, Academic Council
RE: New Business Plan for the University's Education Abroad Program

Dear Council,

All of us appreciate the enormous financial problems UC is currently facing. Rethinking various aspects of UC's operation is imperative. The Education Abroad Program in my own limited experience, as well as by the judgment of the Cowan Report, has been a success and rethinking EAP is motivated primarily by our financial crisis and not by quality concerns. The question is how to reorganize EAP so that it can survive current adverse economic conditions, which are likely to drag on for the next few years. The Cowan Report proposes one plan for the survival of EAP. I would like to suggest an alternative. I propose that we turn UC EAP into a platform that services not just our students but also students from other institutions.

The Cowan Report begins with the statement that Professor Cowan "in deference to President Yudof's instructions" focuses on the next three years and "(t)hat focus also means virtually no attention to EAP's longer-term planning for the period after 2011-12." My sense is that Professor Cowan too sees that as a major limitation of his report. The business plan that follows reflects this short term perspective. There are two elements of this plan I would like to address. The first is the shifting of resources and responsibilities to the campuses; the second is cutting funding for EAP.

The Cowan Report states our challenge succinctly "How can EAP retain its quality and reputation in a much more cost effective manner?" A solution would have to reconcile these two objectives: retaining quality and achieving efficiency. The decentralization suggested by the Cowan plan not only does not reconcile the two goals but actually makes them incompatible. It is hard to see how the forty-nine study centers in thirty-one countries can be effectively administered -- let alone led -- from each campus and how this solution will create economies (rather than duplications and waste) at the same time. Decentralization (together with cutting funds) is an invitation for the campuses to abandon EAP and replace it with third party providers who can underbid EAP. This will move our study abroad program from an "immersion model" to a "world tourism model": short courses taught by UC faculty in a foreign country, they often don't know very well. I support the idea to give our students cheaper, shorter and lighter options for study abroad, but I oppose denying them the option to take the more demanding, one or two semester long immersion that is the current backbone of our EAP. With decentralization efficiency may triumph but only by vanquishing EAP with its current philosophy.

Cutting funds does not make the program more cost effective either. Cutting funds will result in lower enrolment and fewer students will make the program less cost effective. A study center that serves 20

students is less cost effective to operate than one with 60. To make the program more cost effective we should not shrink it but expand it.

The proposal I ask the Council to consider seriously is to expand EAP by offering our Study Centers to other colleges and universities. This would simultaneously create additional income and would cut per-student costs of the program. Charging non-UC students out-of-state tuition would bring considerable extra revenue to UOEAP. Given that even our out-of-state tuition is well below what most private institutions charge, the students will save money as well. And the participating college or university can offer an EAP for their students. This service will be especially attractive to smaller colleges but larger universities may be interested too.

This business model has been quite successful. For instance, in Hungary, Bard College channels undergraduates to Budapest, through a series of bilateral contracts with institutions such as Oberlin, Swarthmore, Cornell, Duke and Harvard. Bard has only three global studies sites (Budapest, St. Petersburg and Johannesburg) but still runs a profitable enterprise. It is hard to see if Bard College together with the likes of Arcadia and Butler University can prosper in this market why UC could not, with its far more prestigious brand name and superior infrastructure.

Expanding EAP would have additional benefits. It would raise the visibility of the UC brand in the world, establish a robust global UC presence, facilitate student and faculty exchange programs, and offer a research base for UC faculty on foreign research leave. Outsourcing EAP to third party providers, the most likely consequence of the Cowan plan, would provide none of these advantages.

Professor Cowan's plan proposes increasing student fee revenues "in a manner that will not unduly discourage student participation in the programs." In the model I propose, non-UC students would effectively subsidize UC students and EAP may even become a net source of revenue for the UC. Because we already have the infrastructure, I suspect we could begin the expansion with very little upfront investment.

What I ask the Council and the Senate is to give serious consideration to this alternative. To decide how this may work, UC needs to draw up a real business plan that reviews the current structure of the study abroad market, identifies our comparative advantages and potential partner institutions, estimates demand and calculates costs. Such an expansion cannot be carried out in a decentralized system. It requires systemwide leadership and administration. It also balances the budget with more revenue rather than less expenditure. If UC is serious about internationalization, short term thinking that puts what the Cowan Report calls "the "gold standard" for university based international exchange programs in the United States" in serious jeopardy is a mistake.

Sincerely,



Akos Rona-Tas
Associate Professor of Sociology
University of California, San Diego

Cc: Harry Powell, Vice Chair
Daniel Donoghue, San Diego Divisional Chair

TO: Academic Council (via Mary Croughan and Martha Winnacker)

FROM: Professor Kum-Kum Bhavnani, London Study Centre Director,
UCEAP

QuickTime™ and a
decompressor
are needed to see this picture.

DATE: 13th December 2008

THE FUTURE OF UC EAP

Following the helpful analysis sent out by Chris Newfield and Michael Parrish on UCEAP's future and funding, I offer brief thoughts for the UC Academic Council discussion of the UOEAP Business Plan (October 2008) submitted by Interim UCEAP Director, Michael Cowan. Previously, I have been Vice-Chair and Chair of the Divisional CPB at UCSB, as well as Vice-Chair of the Divisional Academic Senate from September 2006 to July 2008. I arrived at UCSB in 1991.

- 1. The proposed Business Plan offers such a dramatic re-structuring of UC EAP finances that it is imperative that the UC Senate, through its committees, be given more time to have discussions with UCEAP colleagues. Such discussions would include current and previous UCEAP Study Centre Directors, whose field knowledge of the workings of UCEAP is considerable.**

It is impossible for the UC Senate (including the UCIE and Academic Council) to be able to explore fully the implications of such a restructuring in a period of a few months. Chris Newfield and Michael Parrish have offered very detailed and helpful analyses to the proposed Plan. The UC needs time to discuss the proposed Plan and those comments. Therefore, the period over which any restructuring of UC EAP finances occurs should be at least five years.

In the recent period there have been a number of decisions made, or attempted, without proper consultation of the UC Academic Senate. I am deeply concerned that in pushing through a series of decisions about UCEAP, the UC Regents and the UC administration will feel able to implement other decisions, also without adequate discussion.

- 2. EAP is an academic programme, not a service provider. To that end, its funding structure ought to mirror the funding structure of other UC Academic programmes.**

Again, more time and discussion is needed to analyse how best to develop an adequate funding structure for such a large academic programme – UCEAP – in a period of intense budgetary constraints. I note that the UC Education Abroad Programme is the envy of many US universities, who model some of their international education offerings on the UCEAP.

3. I am concerned that a substantial cutback of General Fund support for UCEAP might be discriminatory.

Over 60% of all US students studying abroad are women, and close to 20% of the students are not white. Thus, cutting back on a large academic programme the majority of whose students are women, could be seen as discrimination.

There is no reason to think that the percentages for the UC are much different to those for the US as a whole. (Apologies, I have not been able to confirm the UCEAP statistics.) If that is the case, then turning EAP into an academic programme mostly based on student fees rather than on General Funds could lead to allegations of discrimination on the part of the UC.

Further, the top five areas of study by all US undergraduate students going abroad are: social sciences, business and management the humanities, fine or applied arts, and physical/life sciences. Chris Newfield and Michael Parrish make good and strong points about the consequences for these students and areas of study if General Funds support for UCEAP is cut back by the 85% proposed in the Plan.

4. The use of Third Party international education providers is not at all desirable as a general strategy.

I say this knowing that some Third Party educational providers are outstanding – indeed, I work with one such provider. My point is, however, that to redirect UCEAP towards a Third Party provider model of international education could lead to a lessening of the educational standards, accountability and transparency, of which the UC is rightly proud. The hallmark of UCEAP is that the high standards of a UC education are upheld through the present structure of Study Centres, and through the UC faculty who are Study Centre Directors. While the numbers of such appointments, and their length could be examined at this time, it would be foolhardy to eliminate the majority of these 20 SCDs and rely on distant committee structures and/or Third party providers. In so doing, there is a danger of creating a “second class” education for undergraduates who study abroad. Thus, any restructuring has to have in place a strong guarantee that UC educational standards will be upheld through close, direct and *in situ* UC faculty oversight.

5. The number of US students studying abroad has increased by almost 150% in the past 10 years (statistics from *Open Doors* published by the Institute of International Education). International Education ought not to be a “luxury”, to be experienced only by those who can afford it.

UCEAP was set up at a time that was rather different to the present period. The globalisation of economies in the past decade has meant that cultures, politics and social relationships are now conducted in a context of a globally intertwined planet. The perils and solutions for climate change/global warming are but one example of this international interdependence. Thus, in the 21st century, international education for undergraduates is a necessity, not a luxury.

There is, simultaneously, clear interest in studying abroad by UC undergraduates. In 2006-07, five UC campuses were in the top 20 of doctoral institutions sending

undergraduates abroad for long term (one academic year) study. Two years ago, approximately 20% of UC undergraduate students did a period of Study Abroad during their undergraduate degree, and close to 50% of these went through UCEAP (UC Joint Ad Hoc Committee on International Education, circulated November 2007). It is important that all who wish to study abroad are able to do so without compromising the quality of their education. The framework of the proposed Business Plan does not adequately allow for this.

6. Over 4500 UC students studied abroad last year. That is the size of a small Liberal Arts College.

In view of these numbers, a radical re-structuring as proposed in the October 2008 Business Plan needs much more time, so that we may think through the consequences of different structural and funding scenarios for UCEAP.

In 2006-07 universities including Duke, NYU, Stanford, UNC Chapel Hill, Vanderbilt, Princeton, Brandeis, Brown, University of Chicago, University of Pennsylvania, Northwestern and Yale sent, overall, more students (this includes students on long term, medium term and short term programmes) to study abroad than did the UC. If the UC is to retain its comparative advantage with other universities, its support for international education through UCEAP, must, at a minimum, be maintained.

7. International educational opportunities for UC graduates students?

Finally, little has been said about how best to build up opportunities, through UCEAP, for graduate students wishing to pursue their studies with academics outside the USA. Undoubtedly, this is a major area of necessary development for the UC.

I am sorry I cannot be at the discussion on Wednesday, 17th December.

-----Original Message-----

From: Giorgio Perissinotto [<mailto:giorgio@spanport.ucsb.edu>]
Sent: Monday, December 15, 2008 1:24 AM
To: Mary Croughan; Mark G. Yudof
Subject: EAP Financial Plan and Its Future

Dear All,

I predict--or rather hope--that the analysis of the EAP Business Plan by EAP Study Center Directors Chris Newfield and Michael Parrish will make senior leaders at UC pause and reflect.

Lest this message go unnoticed where it matters, like previous ones, let me introduce myself: Giorgio Perissinotto, Professor at UC Santa Barbara (Spanish and Portuguese) for 32 years and EAP Madrid Study Center Director for two year plus 6 months to go. I have therefore witnessed and lived through many of the convolutions of fortune of EAP and its budget(s). I oversee several programs in Madrid: Year-long immersion at the Complutense, Semester at Alcalá de Henares, Fall and Spring Semesters at Carlos III University (Hispanic Studies plus a modicum of immersion), a new Fall Program at the Complutense starting Fall 2009 (Immersion with support with UC organized courses), and a Summer Language and Culture Program through ACCENT. The total number of students is well over 200.

I admire those directors who can actually offer academic advice to all their students. I simply cannot and rely heavily on experienced staff. But, and here is one important lance to be broken for UC faculty presence, even a long time local advisor cannot offer the insight--knowledge actually--that a UC faculty has when it comes to issues of transfer credits, major and minor requirements, letters of recommendation, consultation with both UC and local university officials who insist on dealing with faculty at the highest possible level, etc. I am sure SCD have all had different but also similar experiences. No need to dwell on them here.

You may not be aware that my successor in Madrid will also have under his jurisdiction a year-long program in Granada plus a Fall only one, a semester program in Córdoba and a Pre ILP in Cádiz. Staff of 5 for all of Spain. I will let the reader decide if this is surplus or extravagant spending given the onus of the charge.

As a SCD I could easily send a strong but simple letter in support of the reasoning and recommendations of the authors of the "Counter Plan" (perhaps an inappropriate label), but that is not where I want to add my contribution, because I am simply not even conversant with the many aspects and variations of EAP programs. I have made it a point of learning a bit about the other programs in Spain and in Europe in general, but I am continually amazed by my own ignorance of the inner workings of the budgeting process. I suspect that several other SCD are as ignorant as I am on these topics and should have been trained and informed before taking the post. This is a serious criticism. But I think I am a good reader and have taken Chris and Michael's analysis and recommendations as sound and knowledge-based. I have also been on many systemwide committees over the years, and I think I was on UCPB at one point when the climate was better.

I did chair the systemwide CCGA (Coordinating Committee on Graduate

Education) for a number of years and with it, sat in several other committees and a number of Task Forces. I would like to think of myself as informed on Academic Programs.

EAP is, beyond any doubt, an academic program. I am befuddled by the process that seems already in place to reduce an academic program to rags in such a cavalier fashion and with practically no Academic Senate consultation. To abduct an academic program of such history and standing and strip it of much of its immersion aspects to convert it, if that, to a Language and Culture enterprise and without any UC faculty presence strikes me as not only short-sighted, but also putting in peril the image of the University of California abroad and in leading universities of the world. Those of us who believe in immersion, reciprocity, interinstitutional agreement beyond fee-for-service, and who are also suspicious of consortia where UC is thrown into the same bag as institutions of much less standing as consumers of a dusting of language and a thin, very thin coat of culture, lament the lack of consultation of those who really know what education abroad is about.

Vox clamantis in deserto? I hope not.

I stand ready to supply any information regarding any aspect of the presence of the University of California in Spain.

Sincerely,

Giorgio Perissinotto
Professor and Director
Centro de Estudios de la Universidad de California Facultad de Ciencias
Políticas y Sociología Universidad Complutense de Madrid (Somosaguas)
Despacho N 1601, 1er Piso
28223 Madrid, Spain

TEL.: (34) 91 352 2402
FAX: (34) 91 352 1099
CELL: (34) 609 985 964
E-Mail: giorgio@spanport.ucsb.edu