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*Executive Director*  
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*University of California*  
*1111 Franklin Street, 12th Floor*  
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October 20, 2009

CHAIRS OF SENATE COMMITTEES  
CHAIRS OF SENATE DIVISIONS

Dear Division and Committee Chairs:

I am writing to transmit for your review the final report of the joint Senate-Administration Task Force on the Education Abroad Program, which was completed last summer. The report is accompanied by a two-page memo that identifies some issues related to implementation of the new EAP fee structure. Although the Senate office received the task force report in July, the Senate leadership decided that it would be more appropriate and practical for the report to be reviewed in 2009-10 than in the final summer months of 2008-09. Accordingly, I am transmitting the report now with the request that you complete your review by January 15. Please note that earlier dates are suggested in some of the enclosed documents but do not apply to this review.

The current fiscal emergency and the need to set fees before students make decisions about enrolling in EAP for the 2010-11 academic year have necessarily put near-term fiscal decisions on a fast track that could not wait for full Senate review. As a result, EAP is in the process of transitioning from central funding to a student fee-based budget model. However, many longer term decisions remain, as illustrated by the enclosed brief memo on issues related to fee implementation. In addition, the recommended formation of an oversight board appointed by the Provost is already underway. The systemwide Senate committees on international education, planning and budget, and educational policy have been consulted as these administrative decisions have been made.

In the meanwhile, one of the task force's most significant conclusions was its determination that EAP is an *academic* rather than a service program, with the result that EAP's programmatic decisions require review and approval by the appropriate Senate bodies. In addition, formal Senate review is essential to determine what kind of information about courses taken abroad is necessary for major credit, how to ensure adequate faculty oversight of programs with fewer study abroad centers, and whether any committees other than UCIE should be engaged in decisions about opening and closing programs. Comment on both the merit of the recommendations and how they should be implemented will feed directly into the decisions to be made by the newly forming EAP governing board and will be critical in shaping the future of EAP. In particular, concrete information on how the existing and proposed changes in EAP will affect student access to and participation in study abroad opportunities at individual campuses is essential.

Although comment on any aspect of the report is valuable, you may wish to focus your attention on the recommendations for which implementation will be on a longer timeline:

- Relocation of UOEAP to a campus (recommendation 3);
- Adoption of cost effective means of managing program and study center administration (recommendation 5);
- Elimination of UOEAP's role in providing information about EAP courses (recommendation 5);
- UCIE advice on decisions to open and close study centers (recommendation 6);
- A line item in UOEAP's budget for faculty involvement in overseeing program quality (recommendation 7);
- Clarification of the roles of campus faculty and administrative directors (recommendation 8);
- Monitoring and resolving issues related to and arising from different near term choices in implementation of the EAP fee.

Some questions arising from these recommendations most likely implicate data and insights that will come from the divisions: these include whether some apparent cost savings actually represent cost shifting from one location to another with what likely effects, the extent to which academic units rely on UOEAP for academic support services, and what campus services will need to be supported from EAP fees under the new funding model, as well as questions about the appropriate roles of campus faculty and administrative directors and under what conditions a division would urge its campus to house UOEAP. Other questions may be easier for committees to address, such as the nature and extent of oversight and management needed to ensure program quality and the kind of information and structures needed for meaningful Senate involvement in decisions to establish and close programs.

Although all Senate committees are invited to review and comment on this report, any committee may decline to do so. Please let me know if you need additional information. In the meanwhile, thank you for your assistance.

Sincerely,



Martha Kendall Winnacker, J.D.  
Executive Director, Academic Senate

Cc: Council Chair Henry C. Powell  
Council Vice Chair Daniel L. Simmons  
Associate Director Todd Giedt



OFFICE OF THE VICE PROVOST –  
ACADEMIC PLANNING, PROGRAMS AND COORDINATION

OFFICE OF THE PRESIDENT  
1111 Franklin Street, 11<sup>th</sup> Fl.  
Oakland, California 94607-5200

July 17, 2009

INTERIM PROVOST LARRY PITTS

Dear Larry,

I am pleased to transmit the final report of the joint Senate-Administrative Task force that you convened in April 2009 to advise you on the University-wide Education Abroad Program: its long-term design and strategic and business opportunities. I would be grateful if you could submit the report formally to Academic Council Chair Croughan to initiate a formal senate review.

At its initial meeting on April 7, 2009, the Task Force defined six issues whose resolution they agreed was essential to EAP's long-term success:

1. Clarifying UCEAP's mission and the role of UOEAP in advancing that mission.
2. Refining UOEAP's budgeting processes and budget model.
3. Clarifying governance, oversight, and decision rights with regard to UOEAP specifically, and also recognizing UOEAP's role and place in the context of broader internationalization efforts undertaken across the system.
4. Streamlining course review and articulation.
5. Clarifying the role(s) that UC faculty play in study center/program selection, study center/program closures, and the cost and budget for academic oversight.
6. Determining relative roles and responsibilities of UOEAP and campus EAP offices.

These issues are addressed in the body of this report and focus its nine recommendations.

I want in particular to thank all the members of the task force who worked well together and the members of the Systemwide Senate's University Committee on International Education (UCIE). Under chair Lobo's leadership the committee convened two sub-groups that provided valuable guidance with regard to budget and faculty issues.

With kind regards,

A handwritten signature in black ink, appearing to read "Daniel Greenstein".

Daniel Greenstein  
Vice Provost  
Academic Planning, Programs and Coordination

cc: Academic Council Chair Croughan  
EAP Task Force Members

# **Final Report of a Joint Senate-Administration Task Force on the University's Systemwide Education Abroad Program (UCEAP)**

July 17, 2009

## **I. Executive Summary and next steps**

**Recommendation 1:** UCEAP's mission needs to be clarified and made specific enough to direct UOEAP's (Universitywide Office of the Education Abroad Program) practical actions.

**Recommendation 2:** The Task Force recommends the establishment in July 2009 of a UOEAP Governing Committee appointed by the Provost with substantial representation from the Academic Senate, including ex-officio representation from members of the University Committee on International Education (UCIE), the University Committee on Planning and Budget (UCPB), and the University Committee on Educational Policy (UCEP). The Committee will act as the primary governing structure through which UOEAP will coordinate its activities with other UC internationalization efforts systemwide.

**Recommendation 3:** UOEAP will be relocated to a campus for FY 2010/11 when it will have achieved a level of financial and organizational stability.

**Recommendation 4:** The Provost shall invite the Vice Chancellors for Planning and Budget to establish a small budget working group (with staff from UOEAP, as well as UCOP, and members of UCIE and UCPB from the Academic Senate) to advise the Governing Committee in time for the 2010/11 budget appropriations process (September 2009-March 2010) regarding the development and implementation of a simplified UOEAP budget appropriations process, and an UOEAP fee.

**Recommendation 5:** Once the budget working group has reported, UOEAP, in conjunction with the Governing Committee and with advice from UCIE and UCPB, should undertake a thorough review of its policies and practices with the aim of achieving further cost efficiencies and savings while supporting the core goals of UCEAP. It should in particular:

- review UOEAP operations with a view to streamlining them;
- establish as a goal the reduction in transaction costs associated with all forms of articulation, so that UOEAP should, as soon as possible, cease UC credit course-by-course articulation; and
- adopt cost-effective administrative and business solutions to program and study center administration.

Given the costs inherent in articulation, the Task Force urges the Academic Senate in the strongest possible terms to review articulation requirements for EAP, as well as for other purposes.

**Recommendation 6:** UCIE should be asked, as part of the budget appropriations cycle (and on an ad hoc basis when required), to advise the Governing Committee about program selection and/or study center/program closure decisions, including the use of UC faculty in academic oversight, study center management, and program development roles. In framing their advice UCIE will be fully informed about UOEAP's budget and budget plans and its program proposals. In formulating its advice, UCIE is encouraged to use the Guidelines developed by the UCIE Budget Subcommittee (Appendix D).

**Recommendation 7:** UOEAP should have as a line-item component of its annual budget, funds to support faculty involvement as necessary to ensure the quality of the program. UCIE should be asked annually as part of the budget appropriations process to advise the Governing Committee about how such funds should be expended.

**Recommendation 8:** The Governing Committee will be tasked by the Provost to make recommendations about the respective roles and responsibilities of campus faculty and administrative directors, respectively.

**Recommendation 9 :** Campus representatives should be asked to discuss the benefits of a common calendar for selection of UOEAP students.

### **Next steps**

Upon the completion of this report, the Provost will:

- circulate the report to the Chair of the Academic Council and request its review by the Academic Senate;
- circulate the report to the Council of Chancellors and request its review by the Council of Vice Chancellors and other administrative bodies;
- appoint a UOEAP Governing Committee;
- convene a small budget task force to advise on various issues; and
- convene a joint meeting of the UOEAP leadership and the campus academic and faculty directors, respectively in order to describe and discuss the contents of this report and the future of UOEAP.

## **II. Introduction and background**

In April 2009 Interim Provost Pitts convened a joint Senate-Administration Task Force to advise him on UOEAP's long-term design, and its strategic and business opportunities. The program has recently undergone a number of reviews, but has not yet resolved essential issues having to do with its mission, budget model, governance, relationship between UOEAP and campus EAP offices, and the faculty's role in program administration and academic oversight.<sup>1</sup> These issues oriented the work of the Task Force whose charge and membership are included in Appendix A.

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<sup>1</sup> See the Report of the Joint Ad Hoc Committee on International Education; the Senate's response to that report; the EAP Business Plan prepared by EAP Director Michael Cowan in October 2008 and the Senate's comments on that plan; and an EAP Strategic Plan and Revised Business Plan, prepared by EAP Director Cowan in February 2009.

The Task Force met twice in person (April 7 and June 19, 2009). In addition, its members divided themselves into two working groups, each of which met by telephone on two occasions to discuss and make detailed recommendations about particular issues.

Input was also sought from the Academic Senate's University Committee on International Education (UCIE), the Council of Vice Chancellors, and the Committee of Campus EAP Faculty Directors. Members of these groups were specifically invited to comment on preliminary drafts of the Task Force report.

At its initial meeting on April 7, 2009, the Task Force defined six issues whose resolution they agreed was essential to EAP's long-term success:

1. Clarifying UCEAP's mission and the role of UOEAP in advancing that mission.
2. Refining UOEAP's budgeting processes and budget model.
3. Clarifying governance, oversight, and decision rights with regard to UOEAP specifically, and also recognizing UOEAP's role and place in the context of broader internationalization efforts undertaken across the system.
4. Streamlining course review and articulation.
5. Clarifying the role(s) that UC faculty play in study center/program selection, study center/program closures, and the cost and budget for academic oversight.
6. Determining relative roles and responsibilities of UOEAP and campus EAP offices.

The Task Force also developed a number of operating principles to guide its work.

- The Task Force anticipates that it will be the last body to review UOEAP for a number of years.
- A clear understanding of UOEAP's mission is essential to the successful work of the Task Force and the future of UOEAP.
- Issues that cannot be resolved by the Task Force should be set on a clear path so that their resolution may be achieved in an appropriate time frame.
- The general fund subsidy for UOEAP will likely be adjusted downward given the continuing financial challenges confronting the University. Accordingly, the Task Force will focus on refining the fee-based budget model developed for UOEAP and implemented in 2009/10, in order to ensure its development as a viable means for sustaining the program.
- The Task Force will take a functional approach in its review, recommending wherever possible the most cost effective means of fulfilling essential functions.
- The Task Force will focus on developing a management framework for UOEAP that ensures it is integrated into a broader UC internationalization effort that comprehends and ensures cross-fertilization of campus as well as systemwide international education initiatives.

### **III. Review of issues and recommendations**

#### **1. UCEAP's Mission**

### **Problem statement**

A business and strategic plan requires a clearer sense of purpose than is currently available for UCEAP.

Is UOEAP intended only to provide international exchange and academic programs for UC students, or is it also intended to foster and facilitate international exchange and research for UC faculty?

**Recommendation 1:** *UCEAP' mission needs to be clarified and made specific enough to direct UOEAP's practical actions.*

The Task Force recommends that the following mission statement be adopted.

*UCEAP is an academic program of the University of California. Its mission is to provide students with international learning opportunities to enhance their academic experience and to prepare them to be effective and responsible citizens of an increasingly interdependent global society. UOEAP coordinates summer, semester and year-long study abroad programs which combine high-quality academic experiences with immersion in the local culture; provides pre- and post-departure activities designed to help students gain the most from their international experiences; sponsors exchanges with international students; and helps to coordinate the efforts of individual campus EAP activities.*

## **2. Governance and oversight**

### **Problem Statement**

- Governance and oversight of UOEAP is currently fragmented, making it insufficiently accountable for a systemwide body that should serve campus objectives and is supported, at least partially, with central funds.
- The respective roles, responsibilities, and decision rights belonging to the Academic Senate, UOEAP, UCOP, and campus leadership need to be clarified.
- UOEAP suffers from a lack of direct interaction with campus leadership.
- UOEAP's location (adjacent to, but not part of, a UC campus), and its management from UCOP introduces inefficiencies.

**Recommendation 2:** *The Task Force recommends the establishment in July 2009 of a UOEAP Governing Committee appointed by the Provost and including substantial representation from the Academic Senate, including ex-officio representation from members of the University Committee on International Education (UCIE), the University Committee on Planning and Budget (UCPB), and the University Committee on Educational Policy (UCEP). The Committee will act as the primary governing structure*

*through which UOEAP will coordinate its activities with other UC internationalization efforts systemwide.*

The Governing Committee will be appointed by the Provost to ensure proper administrative and financial oversight for UOEAP. It will have membership from, and interact effectively, with the Academic Senate. The Governing Committee will advise the Provost on administrative, funding, organizational, and operational issues, including student services, health, and safety. It will have oversight of UOEAP's budget, and routinely receive reports on and evaluate UOEAP's operational and organizational effectiveness. The Governing Committee will also advise the Provost about the performance and rewards of the UOEAP Director. A draft charge for the Governing Committee is provided in Appendix B.

***Recommendation 3:*** *UOEAP will be relocated to a campus for FY 2010/11 when it will have achieved a level of financial and organizational stability.*

The Task Force believes that financial stability will be achieved in 2009/10 as a combination of three activities:

- organizational restructuring and administrative streamlining (ongoing since 2007);
- a change to a new and more rationalized budget model (from July 1, 2009); and
- stronger governance and oversight exercised through the Governing Committee (established July 2009).

Accordingly, the Task Force recommends that campus relocation be explored in 2009/10 with a view to implementation by FY 2010/11.

Campus relocation will provide two advantages:

- it will surround UOEAP with academic administration that is better suited than UCOP to manage an academic program; and
- it will enable and provide additional efficiencies and symetries for UOEAP's basic business, administrative and technical functions that it currently must supply for itself.

### **3. UOEAP's budgeting and budget model**

#### **Problem statement**

- The costs of education abroad programs – including campus-based as well as systemwide – are unknown. The UOEAP budget model needs to be determined in light of those total costs.
- UOEAP's budget model was changed in 2009/10 so that UOEAP is primarily supported through fees paid by participating students. It also receives some general fund subsidies (\$4.1 million in 2009/10). The fee-based budget model requires further development in a variety of areas.



- The costs inherent to the system in retaining reciprocity agreements are unknown.
- The UOEAP budget process is inadequately transparent.
- It is presently impossible to know or compare the true costs of systemwide and campus international education efforts, making it impossible to conduct essential cost benefit analysis of systemwide programs.

**Recommendation 4:** *The Provost shall invite the Vice Chancellors for Planning and Budget to establish a small budget working group (with staff from UOEAP and UCOP, as well as members of UCIE and UCPB from the Academic Senate) to advise the Governing Committee in time for the 2010/11 budget appropriations process (September 2009-March 2010) regarding to the development and implementation of a simplified UOEAP budget appropriations process, and an UOEAP fee.*

The Task Force agreed to the following:

- UOEAP's budget needs to be simplified,
- UOEAP's revenues should consist primarily of *an EAP fee* paid by students participating in UOEAP programs and a small subsidy made up from UCOP's distribution of general fund money and/or campus co-investment.
- Students participating in an UOEAP program should pay the EAP fee. Those students would not pay the Education or Registration Fees that would otherwise apply for the duration of their study abroad program.
- The UOEAP fee should have a return-to-aid component.
- The UOEAP fee and any general fund appropriation to UOEAP should be set annually by the Provost upon the recommendation from the Governing Committee as part of a transparent and consultative budget appropriations process managed according to a standard calendar.

The Task Force also identified a variety of issues requiring detailed analysis or further development by the budget task force, including:

- refinement for 2010/11 of the EAP fee and the mechanisms for its collection and distribution;
- development of a budget template capable of showing costs of UOEAP programs, that may be used on the campus to show costs there;
- evaluation of financial controls needed by UOEAP at the regional centers in support of the above; and
- determination of the costs and benefits to the system and the continued financial viability of maintaining UOEAP reciprocity agreements.

**Recommendation 5:** *Once the budget working group has reported, UOEAP, in conjunction with the Governing Committee, and with advice from UCIE and UCPB, should undertake a thorough review of its policies and practices with the aim of achieving further cost efficiencies and savings while supporting the core goals of UOEAP. It particular it should in particular:*

- *review UOEAP operations in order to streamline them;*

- *establish as a goal the reduction in transaction costs associated with all forms of articulation, so that UOEAP should, as soon as possible, cease UC credit course-by-course articulation; and*
- *adopt cost-effective administrative and business solutions to program and study center administration.*

With regard to course articulation and review, the Task Force discussed these challenges at length, and agreed that the processes for articulation are highly redundant and no longer affordable. Currently, articulation processes exist on three levels:

- evaluation of the overall curricular quality of the universities that partner with UOEAP or host UOEAP students;
- the review and articulation of courses taken by participating students; and
- the assignment of grades (and grade points) to students for courses taken on an EAP program, and their inclusion as UC courses, and as part of the student's grade point average, on the student's UC transcript.

Accordingly, the Task Force recommended that the University establish the goal of reducing transaction costs associated with all forms of articulation.

In addition, it advised that UOEAP, as soon as possible, cease UC credit course-by-course articulation, and instead focus on making course information available via web-based services in order to inform departmentally based decisions about the transfer of credit earned towards a major while studying abroad.

Curricular review of partner and host institutions is an essential means by which the quality of UOEAP programming is assured. The costs entailed in this kind of review are borne by UOEAP and need to be curtailed. Given the high standing of most of our host and partner institutions, these savings ought to be achieved easily. The Task Force turns to UCIE and the Academic Senate to determine how.

With regard to articulation for the purposes of UC degree credit, UOEAP will continue to work with leading universities worldwide ensuring, through a variety of cost effective means, an appropriate level of quality control.

- "Self-Construct" programs, or academic programs that are wholly managed and maintained by UOEAP, will continue to be developed in partnership with leading universities worldwide and along with key third-party partners, will remain under the oversight of the Academic Senate.
- In establishing these partnerships, UOEAP may require that partner institutions submit to periodic academic reviews and/or furnish the Academic Senate with information that enables routine periodic evaluation to ensure that credits earned in all courses may be used towards students' UC degrees.
- With regard to course articulation, and for the purposes of credit towards a student's major, UOEAP's role is the support of articulation decisions made on

the departmental level. To fulfill this role, UOEAP should gather and make available in an online format the following basic information, preferably in some kind of database:

- standardized information, which has been translated into English, about the courses taken by UC students (e.g. course title, description, syllabus);
  - a record of decisions taken at the departmental level on specific campuses, showing which courses were approved for credit (or not) towards a student's major.
- UOEAP should engage appropriate technical expertise, whether via partnership or some other means, and launch a pilot project in September 2009 to determine how its 'MyEAP' service can be developed in support of the above objective, with a view towards implementing a live operational service by September 2010.

Given the costs inherent in articulation, the Task Force also urges the Academic Senate, in the strongest terms possible, to review and reconsider articulation requirements for EAP and for other purposes.

#### **4. Role(s) of UC faculty in UOEAP**

##### **Problem statement:**

UC faculty ensure the quality of UOEAP programs through academic oversight. They provide general program oversight, govern course articulation, and are involved centrally in a variety of academic operations. As study center directors, UC faculty have also been involved in study center administration, including student advising and a variety of health, safety, and other services.

Two principle challenges exist:

- clarifying the faculty's role in study center/program selection (and/or study center/program closure), and
- the cost of academic oversight, including faculty involvement in the management of study centers.

In support of this Task Force's review, UCIE created two sub-committees to look respectively at each of these areas. Reports from these sub-committees are available in Appendices C and D. They have been received and adopted by the Task Force and their substance is used to frame the following two recommendations.

**Recommendation 6:** *UCIE should be asked as part of the budget appropriations cycle (and on an ad hoc basis when required) to advise the Governing Committee about program selection and/or study center/program closure decisions, including the use of UC faculty in academic oversight, study center management, and program development roles. In framing their advice UCIE will be fully informed about UOEAP's budget and budget plans and its program proposals. In formulating its advice UCIE is encouraged to use the Guidelines developed by the UCIE Budget Subcommittee (Appendix D).*

***Recommendation 7:** UOEAP should have as a line-item component of its annual budget, funds to support faculty involvement as necessary to ensure the quality of the program. UCIE should be asked annually as part of the budget appropriations process to advise the Governing Committee about how such funds will be expended.*

## **5. Relationship between systemwide and campus-based education abroad efforts**

### **Problem statement**

The respective roles and responsibilities of systemwide and campus-based study abroad efforts remain unclear and are occasionally in conflict.

Recruitment to UOEAP study abroad programs presents a particular challenge because it requires a clear division of responsibility and a close working relationship between UOEAP and campus EAP offices. It is further complicated by the fact that campuses use different calendars for final selection of their UOEAP students.

Several of the recommendations made elsewhere in this report begin to address these issues:

- The establishment of a Governing Committee and a transparent appropriations process will ensure that the extent and cost of services offered by UOEAP in support of campus internationalization efforts is kept continually under review.
- The establishment of an open budgeting process will clarify the academic programs and support services that UOEAP will provide on a year-to-year basis
- A streamlined approach to articulation which sees UOEAP informing departmental credit transfer decisions and the joint work proposed to define requirements for and distribution of student services, will address areas of particular concern.

Three issues remain to be addressed:

- the relative roles and responsibilities of campus faculty and administrative directors;
- the timing of campus selection decisions; and
- the communication about the outcome of this Task Force.

***Recommendation 8:** The Governing Committee will be tasked by the Provost to make recommendations about the respective roles and responsibilities of campus faculty and administrative directors, respectively.*

***Recommendation 9:** That campus representatives discuss the benefits of a common calendar for selection of EAP students*

## **Appendix A. Membership and Charge of the EAP Task Force**

### **1. Membership**

Bjorn Birnir, Professor (UCSB)  
Ian Coulter, Professor (UCLA)  
Michael Cowan, Interim Executive Director EAP (UCOP)  
Glyn Davies, Associate Vice Chancellor Planning and Budget Davies (UCLA)  
Daniel Greenstein, Vice Provost (UCOP)  
William Ladusaw, Vice Provost and Dean (UCSC)  
Errol Lobo, Professor (UCSF)  
Christina Maslach, Vice Provost (UCB)  
Joel Michaelsen, Professor (UCSB)  
Lawrence Pitts, Interim Provost and Executive Vice President (UCOP)  
Scott Waught, Executive Vice Chancellor and Provost (UCLA)  
John Yoder, Professor (UCD)

### **2. Charge as indicated in the letter sent by Interim Provost Pitts inviting member participation**

Dear Colleagues,

March 5, 2009

#### **Invitation to join a joint Senate-administration task force advising on EAP's strategic plan ("Last" EAP Task Force)**

I appreciate your willingness to participate in what I hope is the "last" (for the foreseeable future) joint Senate-Administrative task force to review the University's Education Abroad Program (EAP). As you know, EAP has had a number of *ad hoc* reviews in the past few years and, for 2009/10, has implemented a new revenue model to fund its operations. I expect this current review will build upon these previous ones and will offer advice about the program's long-term design, and strategic and business opportunities.

I look forward in particular to advice from the task force on at least five issues that have emerged during the Academic Senate's review of the three-year budget and outline business plan that EAP Acting Executive Director Michael Cowan prepared in October 2008 (attached). He has now submitted a fuller strategic plan and revised business model in February 2009 (attached) that he hopes will inform the task force's consideration of these issues.

- 1. Use and level of student fees** –Under the new (2009-10) budget model, the cost of EAP study abroad programs is offset by participating students' education and registration fees (less return to aid), plus any additional fees that UOEAP may charge for specific programs or to offset the cost of administration.

- How and to what extent are practices adopted by EAP in setting program specific and administration fees aligned with those adopted by campuses with regard to campus-specific fees?
- Should campuses charge campus-specific fees to EAP students beyond those directly attributable to services provided by the campuses to those students during their time away from the campuses on EAP?
- How should Education and Registration fee revenues be distributed to EAP by the systemwide budget office? Should EAP, for example, be excused in a way that campuses are not from contributing a fraction of their education and registration fee revenue to sustain systemwide programs or meet immediate systemwide objectives?
- Are fee revenues adequate to sustain the cost of study abroad programs offered by EAP and, if not, how might they be supplemented?
- The 2009-10 budget draws on the Marginal Cost of Instruction income only for definable services rendered to EAP students (see 2. below). Should any other MCOI funding be directed to the EAP program?

**2. Level and extent of systemwide subsidy** –Under the 2009-10 budget model, EAP receives general and opportunity fund subsidies totaling \$4.1m to offset the cost of services that EAP offers in support of campus-based EAP programs. Such services extend to the maintenance of reciprocity agreements, health and safety provisions, insuring program quality, etc. The view is that these services are required by campuses in support of their EAP programs but are not cost effectively mounted by each campus operating independently.

- What range of services might campuses want to obtain from EAP in support of their study abroad programs?
- How can campuses review such services on an ongoing basis in order to ensure responsiveness with regard, for example, to their extent, cost, and quality?

**3. Program priorities** are crucial if EAP is to maintain an affordable mix of high-quality programs that constitute distinctive offerings within a crowded market place of study abroad providers.

- What is the optimal mixture of and balance between EAP programs, campus programs, and third party programs that should be made available to UC students?
- On what grounds would specific programs be considered for elimination?
- What criteria would be used in deciding where and how to start up new programs?
- Which existing or potential EAP programs could profit from the participation of non-UC students or from formal partnerships with other colleges and universities?

**4. Governance, oversight, and responsibility**—Authority for the oversight and administration of EAP programs and of other study abroad programs for which UC

students receive academic credit must be clearly allocated between three entities: the Academic Senate, UOEAP, and the campuses.

- How can transparent performance standards and accountability measures be established for all study abroad programs for which UC students receive academic credit?
- How can credits for study abroad most efficiently be applied to a student's record?
- What processes are most effective to ensure ongoing review of program cost and academic quality of these programs?
- How can each entity involved in the governance and administration of these programs be held accountable for its stewardship of its particular oversight and administrative responsibilities? What accountability measures or standards should be established for each entity, and by whom should they be established?
- Are there programs currently offered by EAP or by the campuses that would be better served by reorganizing their administrative oversight?

5. **Study Center Administration** -- EAP's UC faculty study center directors have met a variety of inter-related needs including program oversight and quality control, and have had opportunities to spend time abroad furthering their research and developing opportunities for scholarly collaboration on an international scale.

- What role should UC faculty play in the future in the administration and oversight of study centers and their programs?
- What value do/can faculty study center directors contribute to EAP, and at what cost?
- What alternatives exist for supporting study center operations? What are the benefits and limitations of these alternatives?
- Should study centers serve other campus and systemwide interests in addition to the administration of EAP programs?

I am hopeful that the task force can complete its work and submit its recommendations by *May 31, 2009*. The timeline is tight but I very much want to end a period of continued upheaval and uncertainty for this program. We are planning two all-day face-to-face meetings of the task force with two or three shorter teleconferences in between. Since slightly more than half the group resides in southern California, the meetings probably will be in Los Angeles (UCLA campus or LAX). Yvonne Perrelli from my office will be in touch with you shortly to find the best times for us to meet.

I look forward to receiving the Task Force's advice and to participating where we can be useful in its deliberations.

Yours sincerely,

Lawrence Pitts

Interim Provost and Executive Vice President, Academic Affairs

cc: Vice Provost Greenstein

Interim Director Cowan

## **Appendix B. Proposed Charge for a Governing Committee of the UC Education Abroad Program**

It is recommended that the Provost appoint a Governing Committee for the University of California's Education Abroad Program (UCEAP) to advise on the program's strategic, financial, and organizational direction and to keep the program's performance, and that of its central administration (UOEAP) and director, under administrative review.

The Governing Committee would include ex-officio representation from and be advised by the Academic Senate (e.g., UCIE, UCPB, and UCEP) which maintains responsibility for and oversight over UCEAP's academic programs.

It is also proposed that it would consider convening or interacting with a new committee formed by the Executive Vice Chancellors, each of whom would designate a single representative from each campus, would speak for the campus' internationalization efforts generally. This group is to ensure a coordinated approach to planning for campus and systemwide internationalization.

### **THE GOVERNING COMMITTEE**

A. The Governing Committee shall be appointed by the Executive Vice President and Provost (The Provost) of the University of California and consist of voting members, to be selected from amongst the following groups.

- Council of Executive Vice chancellors and Provosts (one to chair the Governing Committee)
- Academic Senate (UCIE, UCPB, and UCEP)
- Campus EAP directors
- Council of Vice Chancellors for Planning and Budget
- Undergraduate Deans
- Systemwide International Leadership Council

And possibly one or two members external to the University (e.g. emeritus director of another education abroad program, someone from a global or international business, etc)

Appointments shall be staggered but normally be for renewable terms of three years.

B. The Governing Committee shall have the following responsibilities pertaining to the selection and retention of the Director:

1. When a vacancy exists, the Governing Committee shall submit to the Provost a list of possible candidates to be considered for the position of Director, and a recommendation for the appointment of Director.
2. The Governing Committee shall review the administrative performance of the Director and shall forward to the Provost a summary of the administrative



performance review along with such recommendations as it deems appropriate pertaining to the employment or termination of the Director. If the Governing Committee recommends termination of employment of the Director, the University shall, if it concurs, proceed with termination following the usual policies and procedures for comparable positions. Nothing contained in this section shall limit the power of the University, following consultation with the Governing Committee, to take action respecting the employment or termination of the Director at any time.

- C. The Governing Committee shall be responsible for the following matters:
1. Review and approval of the organization, structure, and funding models for UOEAP's education abroad programs;
  2. Annually review and approval of UOEAP's updated strategic plans and its budget and operational objectives for the next fiscal year;
  3. Review of recommendations from the Director about the level(s) of the EAP fee and other fees, and the recommendation of any fee increases or decreases to the Provost;
  4. Approval of recommendations from the Director on the overall operation of UOEAP;  
and
  5. Approval of UOEAPs long term plans for investment and new program and service operations.

D. The Governing Committee may formulate rules pertaining to its own operation and may create such subcommittees as may be necessary from time to time.

The Governing Committee shall meet with such frequency as it deems appropriate, but no less than two times a year.

E. The Governing Committee will, on or before May 15<sup>th</sup> of each calendar year, approve and recommend to the Provost an annual operating plan for the following financial year.

The Governing Committee will, on or before September 15, approve and then forward to the Provost a report dealing with the previous year's operations.

## Appendix C. Report of the UCIE Sub Committee on the Role of UC Faculty in EAP

### The Roles and Functions of EAP Study Center Directors as Academic Program Leaders

*Submitted by the University Committee on International Education to the Joint Senate-Administration Task Force on the Education Abroad Program, July 2009. Note: Items noted in **bold** are those functions that cannot be done by local faculty or non-faculty staff.*

#### Student security, safety, and welfare

- A. Risk advising. General orientation to the location, especially for women students.
- B. Episodic and individual security issues (sexual harassment, assaults), medical emergencies.
- C. Legal and police issues.
- D. Emotional and mental health problems. Many directors spend 20 hours at least doing straight informal psychotherapy with anxious or depressed students. They are a small minority but very time consuming (and often among the best students).
- E. Financial problems.
- F. Various other emergencies (parents who think their kid is depressed, homestay families who think the student is misbehaving).

Faculty study center directors play an important role in student security, safety, and welfare. While their role in emergencies (e.g., earthquakes, terrorist attacks, etc.) should not be discounted, it is possible that these functions could be transferred to properly trained local staff whom students trust and have an on-going relationship with. That said, there have been a number of cases in which students' lives have actually been saved due to the actions of quick-thinking study center directors.

Beyond natural disasters, students who study abroad must deal with a much higher level of stress than they would normally encounter if they stayed on their home campuses. This stress has to do with the effects of culture shock, language learning, new academic requirements/difficulties, and differing social expectations, to name a few. In particular, a certain subset of the student population will develop emotional and mental health problems while studying abroad. As a result, many directors spend at least 20 hours performing informal psychotherapy with anxious and depressed students. In extreme cases, suicide prevention is an important element of the study center director's role (e.g., knowing when to take proactive action and when not to). Sexual harassment, and even some forms of assault, with female students is another issue that many faculty study center directors are adept at handling. One issue is that the American concept of "sexual harassment" is sometimes not understood or even known at many locations abroad. In such cases, agreed upon policy (between the two partners) is of little use because either the partner institution's conception of sexual harassment is significantly different than that of the University of California, or because of enforcement issues. Therefore, the mediation of faculty study center directors is often necessary in such cases, as local staff do not have the adequate cultural knowledge to address such problems.

Beyond mental health and psychological issues, all faculty study center directors are called upon to address student behavioral problems, especially related to substance abuse. Although some local staff may be adept at handling these situations, faculty often have greater insights into the behavior of UCEAP students by way of their knowledge of American culture, etc. These problems manifest themselves differentially, but they can have significant consequences at certain locations due to local culture and laws. Some examples include:

- France: The study center director had to talk with several students about their behavior. Some took the warnings to heart, a small minority continued to prioritize “having a good time”, with often noisy, and occasionally disruptive partying. In a few cases this also produced failing grades and incompletes.
- Russia: The environment in Moscow is different and more challenging than most study abroad locations for many students. As one study center director said, ““Moscow is a large, diverse city with underdeveloped health infrastructure, an extremely active and accessible nightlife, and a very different set of social conventions from those that are natural to most American students.” Such a combination poses specific challenges with which every study center director has to deal with. This includes monitoring security and health risks (and effectively communicating these risks to students), as well as trying to optimize student contact and immersion into the Russian culture by facilitating weekly meetings with the students at restaurants or cafes with several student clubs in Moscow.

#### Academic Operations

A. Preparation of study lists at the local university.

B. ***Academic advising on relation of coursework abroad to student's UC studies.***

Usually, study center directors need to advise each student twice for approximately one hour per session.

C. Preparation and translation of course descriptions for UOEAP.

D. ***Risk management in student coursework articulation.***

E. ***Mediation between students and home departments / advisors where necessary.***

F. ***Independent studies.***

G. ***Course grade translation.***

Study center directors perform a significant service in terms of the academic advising that they perform. For instance, students claim that unit transfer risk is the Number One reason that interested students who did not go abroad decided to stay home. If they have a highly-structured major, or can't afford an extra course or quarter, or have family pressures to finish as soon as possible, they decline the risk of losing units to study abroad. UOEAP guarantees the transfer of credit to graduation, but students know they bear ALL of the risk of petitioning to cover requirements—especially for credit in the major. The study center director helps prepare materials and strategies for the petition process while the course is in process. It would be very difficult for local staff to perform well in this role unless they have an intimate knowledge of UC's academic system.

It is worth noting that in terms of academic advising, the grading system in other countries often varies from the US. For example, France grades on a scale of 0-20, and grades vary widely from professor to professor and field to field. The study center directors know the UC system so they can keep students from getting assigned the wrong grade. In addition, the personal knowledge that the study center directors has of each student allows them to keep grades in context. For example, one student had a professor who wanted to date her. She politely declined, he said OK, and then gave her an 8/20 for the course, which would have been a D. Since this was out of line with her other grades, and the study center director knew the story, the study center director could adjust her grade, avoid a lengthy appeals process, and a bad rap for EAP. There is an important fairness function here.

Many students undertake some form of independent studies while studying abroad, given the myriad of opportunities available, which is one of the reasons for studying abroad in the in first place. Basically, there are two kinds of independent studies: 1) Advanced work on a special topic not offered locally; and 2) additional units for a course that needs to be done for credit. This creates a number of academic credit problems, as foreign universities all have different unit systems, even in the same city. In Lyon, France, for example, Lyon 2 offers upper division courses for 2.5 units and UC assumes 4. The overall amount of work is similar, and EAP is happy to add 2.5 units to the overall "units to graduate total." Then the student goes to his or her History department at UCSD and the department says "This course in Russian history looks fine, but it's not a whole course." If the student does an extra long paper and reading, which the study center director supervises, it helps the articulation process.

It's worth nothing that there is one good reason why UC's foreign partners don't have offices at UC—they do not subject everything to academic quality review. If a Science major from a European University studies at a UC campus, the European Science department accepts everything the student did at UC (course for course), no questions asked. Basically, these costs are incurred for UC by the 400 departments which have 400 opinions about which courses are good enough for them and which are not. Study center directors can be very useful here.

#### Relations with partners, institutions and research

##### **A. Reciprocity applications - a kind of admissions function.**

##### B. Negotiation of Partner Agreements

C. Negotiation of contracts for language instruction, etc. The study center director really helps, though is not indispensable. In one example, the presence of a study center director in a meeting with accountants got the accountants to admit a mistake and pay for it because the study center director could present himself as representing a large university.

D. **Academic events, exchange and partnerships.** These are low-key at the moment, but establish UC as an academic presence. Most study center directors feel that this can be improved considerably.

E. **Development work (in-kind trades like internships, local UC community fundraising - especially but not only, in London).**

- F. **Negotiation of academic standards and solutions to academic problems.** There were a lot of lost classes this year due to strikes at some universities. Some of the study center directors got the local partners to pressure their faculty to offer make up classes, release grades, not push exams beyond the normal date of UC students' departure, and so on.
- G. **Relations with UOEAP.** Study centers are generally just told what to do by UOEAP staff, which does not address their specific needs or make use of their local knowledge, which is often very useful. The study center director has what it takes to at least get a hearing.

The term “academic oversight” can be difficult to understand (especially the on-sight academic oversight performed by study center directors). While all programs are approved by UCIE and are reviewed every five years by a formal review committee<sup>2</sup>, periodic adjustments need to be made on-site to ensure that the program continues to meet UC standards. Sometimes, these adjustments are necessary due to an external action that is outside of the study center’s control (e.g., a strike), but other times it results from the incongruence between the academic cultures of the two institutions. The faculty study center director’s “academic” expertise in these situations is invaluable. Examples of academic oversight, as well as mending institutional partnerships (which is related), include:

- France: At Bordeaux, the study center director addressed several problems with the quality of teaching at DEFLE, which is one of the institutions from which students take French language. The Director found that student experiences with DEFLE courses were more positive, as evidenced by many fewer complaints than in 2006-07.
- Germany: The study center director successfully negotiated the move of the study center from Göttingen to Free University (FU). This involved negotiated three rooms with FU’s dean of international education, and hiring staff for the new study center. The Director also had to smooth over relations with other Berlin universities, which understandably want the study center located at one of their universities. Finally, much work needed to be done at GAU, which understandably felt that UC was “abandoning” Göttingen with the move to Berlin and the retirement of the long-time administrator at Göttingen.
- Russia: Academic oversight is extremely important in Russia, given the nature of the host institution, International University, Moscow (IUM). While IUM is admittedly a second-tier institution (by the study center director’s own admission)<sup>3</sup>, IUM has considerable experience operating programs for foreign students studying the Russian

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<sup>2</sup> UCIE has a representative on the formal review committee and approves the final report of this committee.

<sup>3</sup> IUM is a university only in name; by American criteria, it is much more like a business school. They have a specific student community: the students have little interest in foreigners and are not prone to develop a friendly rapport with UC students. Besides, IUM does not have any academic program of its own in literary studies, film or history; it does not have strong specialists in social sciences. Though the number of heritage speakers among EAP students is slowly growing and, in principle, they would be able to attend IUM regular courses, it is not easy to recommend to them some of the IUM courses. This is one of the reasons why the course in Russian history of the twentieth century taught in English does not meet UC standards. Though last year we made some efforts to improve this situation (see below), it cannot be done quickly or radically while preserving the affiliation with IUM.

language; its administration is excellent in solving UC problems relating to visas, registration, money transfer, hiring of faculty, payment of salaries, etc.

Reciprocity can be thought of as “admissions” for foreign student (mostly graduate), who come to study at UC campuses. In short, it is good to have a UC faculty member reviewing students who are going to be taught by UC faculty. While UC’s partners are excellent (and often first-class), they don't know the UC system. Examples of reciprocity work include:

- France: For Paris, part of the study center’s duties is on the reciprocity side, as the Director noted that there are a number of obstacles in the application process on the UC side for foreign students. At Bordeaux/Toulouse, the Director noted that reciprocity requires quite a bit of work, but it is well worth it given the high quality students that they are able to recruit for UC.
- Germany: In the 2007-08 academic year there were about 56-57 reciprocity applications from Göttingen (GAU). Each prospective student received a 15-minute interview with the study center director, a professor in his or her primary field of study, and either a staff member from the study center or another administrator in the international office at GAU.

#### Program Development

While program development, as a specific function required of all study center directors, has been underutilized traditionally, a number of faculty study center directors have undertaken it. Here are a few examples:

- France: At Paris, the study center director had to deal with shifting administrative conditions (e.g., shifting of responsibilities from the UC-Paris Study Center to ACCENT), including the closing of some programs (AUP and Critical Studies). That said, the Director was asked to develop a number of new programs that would align well with the local institutions and the new financial realities. These included a proposal for a new Humanities program in Paris, which would require renegotiation of a lapsed agreement with Paris III, or negotiation for a new agreement with Paris IV. The Director was also charged with developing a new summer program.

#### Program Upheaval

Many programs and study centers are experiencing significant upheaval as a part of the budget crisis. Programs are being discontinued; in other cases, study centers are being closed and/or moved. Faculty study center directors have played important roles in this process:

- Germany: The study center director oversaw the move of the main study center from Göttingen to Berlin; the redefinition and expansion of the Berlin Coordinator position; and the expansion of the Berlin Study Center. The study center director also supervised the transition from paper to online study lists and grades, as well as transfer of the Göttingen first-year Language and Culture program to Potsdam, thereby combining it with the second-year Potsdam Spring program.
- Netherlands: A decision was made last year to downgrade this study center from one that had a faculty study center director to one with a *liaison officer*. This has had an

effect on how UCEAP is perceived in The Netherlands, and particularly at Utrecht University.<sup>4</sup>

### Logistical Issues

It is certainly true that in many cases, logistical issues (such as housing) can be handled by local staff. However, study center directors are sometimes called upon to develop or mend institutional relationships (or relationships with non-academic entities) that can be part of the solution in addressing these issues:

- The Netherlands: Although in many cases/countries, housing issues could be handled by the local university's international office, this may not work as well in The Netherlands where the contract is between the student and the landlord, not the university. Therefore, the study center plays a useful role in these situations. Although successfully navigating the housing environment does not require a faculty perspective, having someone that has a real sense of what American students are going through is helpful (e.g., culture).<sup>5</sup>

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<sup>4</sup> The decision to no longer have a UC faculty SCD in The Netherlands also has affected how our Dutch partners perceive EAP in the Netherlands—this despite reassurances that UC remains committed to its Netherlands exchanges. The sense is that UCEAP will now have a diminished presence. As one host administrator explained, it has been useful to have a SCD present with whom issues could be discussed and worked out. In short, there is a perception that EAP has downgraded its involvement in the NL, and there is a wait and see attitude: What is going to happen? How are relationships going to work? This is an attitude felt most strongly in Utrecht because of the now defunct UC “Umbrella Agreement” with Utrecht University and because the SC office is located on the UCU campus, which has feted the UC connection as a feature of UCU's public self-promotion and image. Providing the SCD's house has also been a mark of the importance UCU has placed on the UC/University College relationship. At UCU and UU, EAP has been accorded the status of premier American exchange program—and the exchange has been treated that way in Utrecht—in the future it is not clear that UCEAP will continue to be given the same standing or priority. Rest assured, the news has spread throughout the NL academic community.

<sup>5</sup> When an EAP student has a problem with their housing such as a clogged drain, a broken appliance, or a window needing repair, they must contact the landlord directly and in most cases the landlord will schedule the needed repair. When the problems are larger and involve a housing unit as a whole, experience suggests that the affected Dutch and international students organize themselves as a group and write a joint request. IO offices may help mediate such interactions between students and the landlord, but they don't have much direct influence over the landlord. There is a similar situation with the Dutch Language and Culture (DLC) program, where housing quality is sporadic, and the campus does not control student housing on the UCU campus that is available for EAP DLC housing. Consequently, the Dean of UCU lacks any authority to arrange housing for our DLC students, and arranging student housing remains fraught with uncertainty. Past experiences with DLC housing have been problematic. However during 2007-2008 the DLC housing our EAP students were provided was excellent. During the year, I tried hard to regularize how DLC housing is allocated so that by agreement our students would always be given either housing on the UCU campus (Kriekenpit Plein) or on the UU Uithof campus at Cambridgelaan (Bisschoppen and Cambridgelaan). Both the Dean of UCU and Caspar de Bok of UU agreed that regularizing DLC housing was desirable and that it should be part of our agreement with UCU/UU, but in the end no formal agreement could be reached.

## Appendix D. Report of the UCIE Budget Sub Committee

### UCEAP General Budget Principles

*Submitted by the University Committee on International Education to the Joint Senate-Administration Task Force on the Education Abroad Program, July 2009.*

The Systemwide Senate's University Committee on International Education (UCIE) acknowledges and praises UOEAP for doing a number of things well academically and operationally for the past several decades. That said, and despite the dramatic budget cuts made over the last couple of years, it is still clear that UOEAP needs to streamline itself even more, and the Santa Barbara office still contains a number of redundancies that could be done more effectively elsewhere—such as on a campus, at UCOP, or at study centers. UCIE also recognizes that reductions in the cost of operating UOEAP at Santa Barbara are only one-half of the battle—dramatic and drastic cuts to UCEAP's study center operations are also needed if UC study abroad programs are to survive. This memo lays out a series of guiding principles to address the current UOEAP budget crisis.

#### UOEAP Budgetary Cuts/Savings

While UCIE applauds the cuts that UOEAP has already made to its Santa Barbara operations, it remains skeptical about claims that further cuts cannot be made. The committee is heartened by UOEAP Director Michael Cowan's plans to further cut staffing by 5% at UOEAP in 2009-10, as well as an additional 5% staff cut in 2010-11. In light of the discussions that are ongoing within the task force (e.g., a transfer of UOEAP to a campus, further study center cuts, and a re-evaluation of UOEAP's marketing/recruitment and course articulation processes), it seems that further cutting is not only possible but necessary to streamline UOEAP's operations. In fact, UCIE is fairly confident that if a survey of other administrative support centers of international education providers were done (both of third-party providers and other academic institutions), the results would show that UOEAP's administrative support structure is still overly large given the functions it performs. Towards the end of further restructuring and streamlining UOEAP's administration, UCIE offers the following principles:

- **First**, *UOEAP will eventually be moved to a campus, so much of the administrative support that it currently provides can be outsourced as well.* This principle impacts both administrative services in general, and reciprocity student support specifically.
- **Second**, *UOEAP's registrar and admissions functions need to be thoroughly revamped.* This means that much of the course articulation work that is done at the "front-end" (e.g., before the student leaves) is redundant with the "back-end" work that takes place within the academic departments, and should be eliminated.
- **Third**, *much of UOEAP's work in terms of its marketing/print materials can and should be outsourced.* It makes little sense to "re-invent the wheel" when this work can be outsourced to either UCOP's external relations unit or a similar unit on a campus.
- **Fourth**, *all program development needs to be halted.* On this point, UCIE is continually surprised by new proposals for program development brought forward by its UOEAP consultants over the last couple of years of budgetary distress. Even if



costs for each of these program enhancements is very small (as the committee is told by its UOEAP consultants), in sum these costs add up. Also, there are costs associated with planning such program enhancements.

- **Fifth**, *student affairs and safety/security should be considered functions that UOEAP performs extremely well, and cannot be outsourced.*
- **Sixth**, *UOEAP's Technology and Information Services unit should be reduced wherever possible, and projects (e.g., an enhanced "MyEAP") should be contracted out to minimize costs.* While UCIE recognizes that UOEAP must provide basic computing and server support, it believes that the current FTE dedicated to this support is too high. The committee feels that UOEAP should maintain a minimal, yet sufficient, infrastructure and should contract any special projects that are deemed absolutely necessary in these times of economic hardship.
- **Seventh**, *where advisable and with consultation with UCIE, it is recommended that UOEAP shorten some of its year-long immersion programs to semester-long programs. This would do two things: 1) Increase the appeal of its immersion programs to students who are interested in short-term offerings; and 2) reduce costs by shortening faculty study center director appointments by 50%.* Shortening these programs in many cases would not preclude the possibility of students extending to the year either, as much of the faculty study center support would be needed in the first months of the program. That said, it is advisable that study center directors be paid a stipend as necessary to travel back (from their home campus) to certain sites to address academic issues that may arise. It is assumed that emergency crises (in the second semester) could be handled by local staff, with consultation with the study center director and UOEAP.

#### Study Center Budgetary Savings/Cuts

UCIE recognizes that UCEAP cannot be saved through reductions at the Santa Barbara office alone; painful cuts in UCEAP's study centers also need to be made. However, in order to maintain its status as an "academic" program, some form of academic oversight by the faculty of the University of California must be retained. Therefore, a wholesale elimination of all study center director positions is not warranted. Instead, UCIE takes the view that while significant cuts to its study center operations are necessary, but UCEAP needs to maintain a faculty study center presence in order to ensure academic oversight. As a general principal, UCIE proposes the following points towards a balanced approach to study center cuts:

- **First**, *UCEAP should maintain a "presence" (no matter how small) in a number of key areas or regions.* In short, redundancies and financial loss-leaders in countries/regions where UCEAP operates at multiple locations must be eliminated. For example, if it is deemed that UCEAP should maintain a presence in France, it should pick one study center that can offer/coordinate the most programs at the lowest possible cost, thereby giving UC students the "most bang for their buck". Cost considerations may include free office space, programs that require the least amount of micro-management by both UOEAP and study center staff, ease of entry for students (which reduces the administrative burden and cost at UOEAP), etc. That said, UOEAP should do whatever is possible to maintain its relationships with those institutions currently housing UCEAP programs that will be cut in the hope that they

can be reopened at some future point in time. Maintaining institutional agreements and allowing/promoting faculty-to-faculty relationships (e.g., research collaborations) might be one low-cost way to do this.

- **Second**, UCEAP should balance out the savings to be found by eliminating its highly redundant and expensive locations (e.g., Europe) with maintaining and preserving its study centers in locations that are deemed highly valuable for strategic or political reasons. Examples of such ‘strategic’ study centers include those in China, Egypt, India, Israel<sup>6</sup>, Russia, and Taiwan, to name a few. Although UCIE acknowledges that all too often these programs are also very expensive, it feels that in terms of EAP’s strategic regional priorities, they are important to save whenever possible.
- **Third**, EAP should adopt a regional study center director (SCD) model, utilizing local liaison officers and staff wherever possible. By “regional”, UCIE does not necessarily mean the four administrative regions that currently exist within UOEAP. “Regions” should be re-envisioned with respect to workload, academic issues, safety/security issues, etc. For example, Europe could be divided as follows: Northern/Central Europe (France, Germany, The Netherlands, and Hungary) and Southern Europe (Italy, Spain, and Turkey), with one study center director devoted to each region. In another example, UOEAP could employ one faculty study center director for all of Asia (China, Singapore, and Taiwan). In other high-risk study centers/countries, such as Russia, it would be advisable to keep a part-time SCD (Russia only operates in the fall). While this would involve some travel on the part of SCDs, it allows the faculty to maintain academic oversight over the programs and curriculum. Finally, UOEAP’s budgetary process should allow for periodic funding and de-funding of certain study centers as the need arises.
- **Fourth**, and related to the third principle, UOEAP should dedicate a line-item amount of money to faculty who may participate as SCDs or positions that are similar to SCDs (e.g., regional SCDs). In addition, a stipend in the amount of \$40,000 could be offered to faculty going on sabbatical who have an interest in performing some or all SCD or pseudo-SCD functions. The \$40,000 stipend would be supplemental to their sabbatical salary, which would be paid by their home-campus departments. The stipend would be provided by EAP in part to defray the cost of living expenses.
- **Fifth**, program development (when it is deemed appropriate for program development to begin again) should be largely outsourced to faculty SCDs and/or campus-based faculty working groups/task forces. As program development is a key component of academic oversight of the programs, it should be retained in the hands of the faculty. A formalization of program development as a key responsibility of faculty study center directors would also reduce program development costs at UOEAP. Indeed, a number of SCDs already engage in program development, but formal recognition of this responsibility is needed.
- **Sixth**, UOEAP should adopt the principle that it cannot be all things to all people. In UCIE’s view, UCEAP has been hurt by not specializing in activities that it does best (e.g., programs that emphasize immersion in the culture/language acquisition). For example, it has spent a tremendous amount of time and money trying to create programs that appeal to a narrow segment of the market (e.g., science and technology

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<sup>6</sup> Note that a faculty study center director is not required at the Israel study center.

students). It may be best to eliminate these programs across the board, as they produce very little value to UCEAP and alternatives are available through third-party providers. For instance, by all accounts, UCEAP has an excellent record of providing summer intensive language programs (ILPs) to bring students up-to-speed in terms of their language skills. It may be wise to invest what little capital UCEAP has in its strategic strengths rather than continually wasting its resources on loss-leaders.

- ***Seventh***, where advisable and with consultation with UCIE, it is recommended that UOEAP shorten some of its year-long immersion programs to semester-long programs. This would do two things: 1) Increase the appeal of its immersion programs to students who are interested in short-term offerings; and 2) reduce costs by shortening faculty study center director appointments by half. Shortening these programs in many cases would not preclude the possibility of students extending to the year either, as much of the faculty study center support would be needed in the first months of the program. That said, it is advisable that study center directors be paid a stipend as necessary to travel back (from their home campus) to certain sites to address academic issues that may arise. It is assumed that emergency crises (in the second semester) could be handled by local staff, with consultation with the SCD and UOEAP.

## **Glossary of Terms**

**UCEAP** – University of California Systemwide Education Abroad Program

**UCEP** – University Committee on Education – a committee of the Systemwide Academic Senate which considers the establishment or disestablishment of curricula, colleges, schools, departments, institutes, bureaus, and the like, and on legislation or administrative policies involving questions of educational policy.

**UCIE** – University Committee on International Education – a committee of the Systemwide Academic Senate which oversees all academic aspects of the UC Education Abroad Program

**UCOP** – University of California Office of the President

**UCPB** – University Committee on Planning and Budget – a committee of the Systemwide Academic Senate which discusses and acts on systemwide budgetary, planning, and resource allocation issues.

**UOEAP** – University wide Office of the Education Abroad Program, located in Goleta, CA

# The EAP Fee Implementation Issues for Consideration

September 22, 2009

## 1. Background

In FY 2010/11, the University of California's Education Abroad Program (EAP) will transition to a funding model based largely on fees paid by students participating in EAP programs (a so-called EAP fee). Students participating in an EAP program and paying an EAP fee will not pay the Education or Registration Fees that would otherwise apply for the duration of their EAP program.

A joint administrative-Senate task force assembled in spring 2009 to review EAP's strategic directions evaluated and agreed to the fee-based approach as part of its work. The task force also recommended that

- the EAP fee should have a return-to-aid component and that
- the EAP fee should be set annually by the Provost upon the recommendation from the Governing Committee as part of a transparent and consultative budget appropriations process managed according to a standard calendar.

The task force finally sought clarification on certain implementation issues for example pertaining to the setting and distribution of the EAP fee and asked that this be presented as a set of concrete recommendation to the Governing Board when it convened initially in fall 2009.

This document outlines those implementation issues and seeks input as to how best to address them. It is framed as a proposal with issues represented in *italic*.

The document is being circulated to the Academic Senate leadership, the Executive Vice Chancellors, and Vice Chancellors for Planning and Budget in order to gather input from appropriate sources.

Feedback is requested *no later than Monday October 12, 2009* All feedback received will be summarized and incorporated into an options paper that will be taken to the first meeting of the EAP Governing Committee for its consideration in mid October 2009.

It is intended that a decision about how the EAP Fee will be implemented will taken by the Provost in October 2009 upon advice from the Governing Committee.

## 2. EAP Fee implementation issues

1. The EAP fee will be set annually by the Provost upon advice from the Governing Committee (as recommended by the Task Force), with the Board of Regents being informed as part of the normal reporting on budget and fee items.

2. EAP will collect fee income from participating EAP students.
3. EAP fee income will be taxed by the Office of the President at a rate of approximately 2% comparable to the rate that applies to Education and Registration Fee revenues generally.
4. The EAP fee will have a return to aid component (as recommended by the Task Force)
5. EAP may also assign the following miscellaneous fees to be approved annually by the Provost upon advice from the Governing Committee
  - a. a supplemental program fee as needed, reflecting the different costs involved in study abroad programs in different locations;
  - b. a non-refundable application fee

*Issues:*

- a) *At what level will return to aid on the EAP Fee be set? At the same level that applies to the Ed and Reg Fees (28%)?*
- b) *How will the level of return to aid be set? In the same manner as applies to return to aid generally?*
- c) *If the EAP Fee exceeds the Ed and Reg Fees, will return to aid be calculated based on the lower value of the Ed and Reg Fees?*
- d) *How will return to aid paid on all or any portion of the EAP Fee be used? Will all or any portion of it be used specifically for students studying abroad on EAP programs? Will it be allocated to campuses in accord with EAP participation during the prior year or by some other formula?*