

University of California, Berkeley
Leadership Development Program

All Abroad!



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The Berkeley Study Abroad Experience Beyond EAP:
Improving the Advising & Enrollment Processes

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Executive Summary

Ensuring University of California, Berkeley (UCB) students are prepared for the global environment in which they will live and work is of paramount importance. International education and experiences are integral to achieving this objective. UCB's official study abroad program, the Education Abroad Program (EAP), has been and will continue to be an important part of this effort. Increasingly, however, UC Berkeley students are seeking study abroad opportunities outside of EAP.

All Abroad! is a research project conducted under the auspices of the 2008 UCB Leadership Development Program (LDP) to improve the advising and enrollment process for UCB students who study abroad via such programs; so called "non-EAP" programs.

The project objectives were to:

- 1) Identify the needs of undergraduate students who participate in non-EAP programs.
- 2) Examine UCB's current processes for administering services to these students.
- 3) Recommend improvements to these processes.

The *All Abroad!* team divided this project into three phases: research, analysis, and recommendations.

Research

Our research process consisted of data collection through a series of interviews with relevant UCB departments, peer institutions within and outside the UC system, peer institutions whose study abroad programs are popular with UCB students, UCB students who have participated in EAP programs, and professional organizations in the field of international education. In addition, our team conducted website reviews of each department, institution, and organization interviewed.

Analysis

Our data collection efforts resulted in a sound understanding of the challenges faced by students seeking to participate in non-EAP programs and by the UCB offices administering to them. For the first phase of our analysis, we identified the underlying causes of these challenges:

1. There has not been clarity among campus leadership about the need for UCB to provide comprehensive services, clear policies, and special procedures to support students who wish to study abroad outside of the existing EAP.
2. There has not been a designated office charged with providing these services. Consequently, there is no central ownership of this issue.
3. The Berkeley Program for Study Abroad (BPSA) Office, which was created specifically to be the resource center for the University of California Education Abroad Program (EAP), does not have the mandate or resources to provide advising and services to students who choose to study abroad in non-EAP Programs.

We then conducted further, in-depth analysis of the data and organized our key findings into five areas:

1) The UCB Student Experience

There is no clear, coordinated process at UCB for administering services to students who participate in non-EAP programs. Students do not have a clear starting point for this process, nor do they receive consistent or complete advice and guidance along the way. While some offices are clear about the specific requirements for and even offer extensive advice on their portion of the process, there is no “linking” of these steps into a clear, complete process for UCB students to follow.

2) Challenges and Gaps in UCB's Administrative Process

There is no mechanism for the university to track non-EAP students. Services offered to non-EAP students, such as advising, are inadequate. There is a lack of clarity regarding liability issues. Because the process is unclear and inefficient, excessive amounts of staff time are required to assist individual students who have missed steps or proceeded incorrectly. The current EAP office does not fulfill non-EAP student needs, and there is no program or process owner to assist students participating in non-EAP programs.

3) Current Processes at UCB that are Working Well

Some UCB offices, such as the Financial Aid Office (FAO), have created their own mechanisms to track students and have established a clearly articulated set of steps by means of which a student can complete their portion of the entire process. The administrative process for granting course credits, in place at the Office of Undergraduate Admissions (OUA), is also well established. BPSA provides access to a joint EAP and non-EAP resource room and computers. Staff advising liability is covered by UCB insurance. There is a general willingness by staff in all administrative offices to improve the non-EAP process.

4) Current Practices at Peer Institutions

There are common practices for administering to non-sponsored¹ program participants in the areas of student information, administrative processes, and advising. Most significantly, at every peer institution interviewed, the study abroad office serves as the starting point for students who choose study abroad through non-EAP or non-sponsored programs. The advising services include advising about the process students need to follow, and often extend to include advising about programs as well.

5) Best Practices

There are best practices for administering to students participating in non-EAP/non-sponsored programs, which include formalized institutional commitment, an established vision and mission statement, infrastructure to create new program options, clear and accountable policies and procedures, and staff and financial resources to implement them.

Recommendations

Based on our analysis and findings, the *All Abroad!* team recommends changes in the following areas:

¹ There are a variety of terms used by peer institutions to designate study abroad programs not administered by the home campus. At UCB, they are called “non-EAP” programs. We will use the term “non-sponsored” when referring to peer institutions’ versions of non-EAP programs.

Improving Student-Facing Processes

Create a standard packet of administrative forms that is easily available to students and a checklist for students of the steps they need to take to study abroad on a non-EAP program. Update and expand BPSA's website to include this information and designate it as the central online source of information for the non-EAP process. Update the websites of the administrative offices directly involved in the non-EAP process (the Registrar's Office, Office of Undergraduate Admissions, and Financial Aid Office) and encourage academic departments across campus to link to this central site. Integrate non-EAP students into the student advising, pre-departure orientations, and reentry activities currently being offered by BPSA.

Improving Administrative Processes

Create a special enrollment status for non-EAP students that: 1) eliminates the need for these students to withdraw and be readmitted, 2) allows them access to travel and health insurance, and 3) enables them to keep their CalNet ID active. Charge a fee for this status, which will help fund additional staff resources for administering to non-EAP program participants. Until the special enrollment status is implemented, continue the current initiative to track students via the re-admission form. Clarify staff liability in regards to advising on non-EAP programs and improve data sharing and communication amongst UCB administrative and academic departments.

Expanding Study Abroad Program Management

Begin collecting data to analyze trends in student preferences for non-EAP study abroad programs, locations, and other metrics. Use the results of these analyses to create process improvements and tailor EAP and non-EAP offerings. Begin gathering and sharing student evaluations and feedback regarding non-EAP programs. Create a database to begin tracking non-EAP study abroad courses for which students have previously been granted transfer credit. Develop a procedure to vet and establish affiliated non-EAP programs.

Establishing a Vision for non-EAP Study Abroad at UC Berkeley

Create an umbrella term for study abroad programs that are not administered by the EAP office that does not have the negative connotations of "non-EAP." Designate a central study abroad office for both EAP and non-EAP programs. Develop a clearly articulated and communicated vision and mission statement to include both EAP and non-EAP programs, and establish a mandate to fund this vision. Create

a Vice Chancellor position to provide advocacy and strategic planning in the area of international education.

Conclusion

The primary challenge faced by UC Berkeley in improving the advising and enrollment process for non-EAP students is simply the lack of a clear, consistent process. By implementing a standard, comprehensive non-EAP administrative procedure and making this information available online and at the primary administrative offices offering services to non-EAP students, our Sponsors can make an immediate and significant impact. Improving administrative processes by creating tracking mechanisms for non-EAP students, creating a new enrollment status for these students, and charging fees for administering these services would also make a strong impact and greatly improve service provided to students.

UC Berkeley has fallen behind many of our peer institutions in its service offerings to non-EAP students. Offering services to both sponsored and non-sponsored program (i.e., EAP and non-EAP) students from a central office is the strategy favored by UCB's peers and, we believe, the best strategy for our Sponsors to improve UCB's advising and enrollment services. Students should be able to make their decisions on study abroad based solely on their academic interest and needs. Students should know that, whether they choose EAP or non-EAP, UC Berkeley administration will be willing and able to guide them through the process.

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Introduction

Project Definition and Sponsors

All Abroad! is a research project conducted to identify ways to improve the advising and enrollment processes for students of the University of California, Berkeley (UCB) who wish to participate in study abroad programs that are not administered through the University of California's Education Abroad Program (EAP). *All Abroad!* is one of three project proposals developed under the auspices of UCB's Leadership Development Program (LDP) for 2008 and is sponsored by the following:

Executive Sponsors

- Harry Le Grande, Vice Chancellor for Student Affairs
- Susanna Castillo-Robson, Associate Vice Chancellor for Admissions and Enrollment
- Paolo Monteiro, Chair, Committee on International Education 2008-09
- Vincent Resh, Chair, Committee on International Education 2007-08

Functional Sponsors

- Cheryl Resh, Director, Financial Aid Office
- Anne De Luca, Registrar, Office of the Registrar

Project Team

The *All Abroad!* project team members are:

- Alfred Alipio Jocson, HR-Staff EEO Compliance
- Nelcy Dwight, HR-Records Management
- Merle Hancock, Goldman School of Public Policy
- Theron Klos, Physical Plant - Campus Services
- Jeffrey Makaiwi, IST-Infrastructure Services
- Veronica Ong, IST-Client Services
- Shirley Salanio, School of Information
- Tracy Weber, Summer Sessions

Background

The University of California's (UC) Education Abroad Program (EAP) is a UC-wide, centrally-administered program with 130 host institutions in approximately 35 countries and is recognized as the official UC Study

Abroad program. Since its inception in the 1960s, EAP has been the primary means by which UC students receive advice and select programs for studying abroad. UC Berkeley's local EAP office, Berkeley Programs for Study Abroad (BPSA), was created to work primarily with this program. Similarly, the administrative processes handled by UCB's Registrar's Office, Office of Undergraduate Admissions, and Financial Aid Office are optimized for study abroad students who participate in EAP programs.

Campus leadership, however, has recently become aware of a potentially large number of Berkeley students who choose to study abroad in programs not administered by EAP, so-called "non-EAP" programs. UCB's study abroad office (BPSA), Registrar's Office, Office of Undergraduate Admissions, Financial Aid Office, and college and departmental advising offices do not offer clear and consistent advising, withdrawal, re-enrollment, and financial aid processes and procedures. Consequently, these students are not reliably informed of the full array of study abroad options; how to select an appropriate non-EAP program from among those myriad options; the withdrawal, readmission, and transfer credit processes; the availability of financial aid; or the need for consortium agreements in order to receive said aid. More fundamentally, neither the entire process nor which office is responsible for which steps in the process is clearly delineated anywhere for the student; students do not know where to go for what information. A non-EAP student interviewed by *All Abroad!* sums up the experience as follows :

"There were a lot of different people I had to meet with and talk to all over campus. I felt like I was the first person to ever study abroad."

Project Scope

The objective of this project was to identify the needs of undergraduate UCB students who choose to participate in non-EAP programs and examine the administrative processes currently in effect at UCB to assist these students.

The *All Abroad!* project would then provide the following:

- process improvement recommendations
- research findings to support the recommendations
- cost estimates for the recommended improvements
- success metrics for the recommended improvements

Research

Developing the Research Plan

After receiving our assignment and agreeing to a weekly meeting schedule, we decided as a team that our first steps would be to familiarize ourselves with the topic and formulate a plan for research. We reviewed the project proposal² and supporting documentation prepared by one of our Sponsors, the Office of Admissions and Enrollment. This documentation included the summary results of a survey of non-EAP students, preliminary data on the methods used by other UC campuses to provide services to non-EAP students, and further background information on the history and desired future of non-EAP study abroad services at the University of California.

We arranged to have an in-depth follow-up meeting with our Functional Sponsors approximately one month after the initial project kick-off. Prior to this meeting, our team developed a Project Charter,³ which included our objectives, assumptions, scope, milestones and deliverables, roles and responsibilities, resources, and risks. We split into two subgroups, one of which finalized the Project Charter in preparation for the upcoming Sponsors' meeting and created a detailed work breakdown structure of all tasks to be completed, while the other began preliminary data collection.

Preliminary data collection involved gathering information from UCB websites and administrative offices through informal visits, with the goal of obtaining a fuller understanding of the issues, as well as to experience the search for non-EAP study abroad information from a student perspective. The Data Subgroup also developed an initial contact list of the people and organizations the team would interview during the formal data collection phase; this list included UC and UCB offices, peer institutions, professional organizations and students.

During July and August, we met with our Primary and Functional Sponsors to review the Project Charter we had developed. During these meetings, we came to an agreement with our Sponsors on the scope and deliverables with our Sponsors and gave them an opportunity to identify any areas of concern. We secured unanimous

² See Appendix A: Initial Project Proposal.

³ See Appendix B: *All Abroad!* Project Charter.

approval from our Sponsors to move forward with our intended strategy and an agreement on a final list of people and organizations to contact, our project objectives, and our deliverables.

Our strategy entailed conducting several interviews and website reviews to determine how peer institutions handle the administrative process for students participating in non-sponsored programs; to establish the best practices for advising and administering to these students; and to identify the challenges and potential solutions at UCB.

Our project deliverables would consist of a written report and a formal presentation to include:

- Recommendations for creating a seamless process to administer Berkeley undergraduate students who choose to use non-EAP programs for studying abroad.
- Recommendations for service improvements that may include areas in Financial Aid, Office of the Registrar, Office of Undergraduate Admissions and other campus offices that may assist these students.
- Research findings that support the recommendations and the methods used for such research.
- Cost estimates for the recommended improvements.
- Metrics for measuring the success of the recommended improvements.

In addition, we arranged to have a third meeting with our Sponsors in October upon completion of the data collection phase and the beginning of the analysis phase. The purpose of this meeting was to provide an update on our status and on the success of our data collection phase, and to discuss our preliminary findings. At each meeting, we presented an executive summary detailing our progress to date before conducting open discussion about the next steps we planned to take.

Data Collection

Prior to beginning the formal data collection phase of our project, our team identified a wide selection of resources to aid us in our research. We then developed a final list of people who we would interview and websites to review. Our Sponsors then reviewed and made some adjustments to this list.

Our strategy for data collection involved:

- interviewing UCB students who had participated in non-EAP programs in order to document the administrative processes from their perspective and identify obstacles and best practices they encountered;
- interviewing representatives from every office on the UCB campus that has a role in the administrative processes serving non-EAP students and reviewing their website in order to document UCB's current process and identify obstacles and best practices;
- interviewing representatives from peer institutions and reviewing their online resources in order to identify the spectrum of solutions adopted by other universities to serve their non-sponsored study abroad student population; and
- interviewing representatives from professional organizations that specializing in developing and improving education abroad in order to identify best practices.

Our team was divided into four subgroups to conduct these interviews and website reviews. In order to have a controlled data collection for each of our sources of information, we developed a set of interview questions and a standardized template for reporting the results in a matrix⁴. These questions focused on three broad categories: process, challenges, and improvements. Interview assignments were randomly assigned to each of the four subgroups.

Interviews were conducted in person or over the phone by a team subgroup of at least two persons. Most of the interviews lasted from 30 minutes to an hour. For each interview and website review, the subgroup was responsible for preparing a written report using the agreed-upon template.

Interviews of UCB Departments

Each of the UCB departments interviewed has some level of interaction with students who choose to study abroad on a non-EAP program. In interviewing at least one representative from each of these departments, we sought to document each office's role in UCB's

⁴ See Appendix F: Interview Template for UCB Offices and Peer Institutions and Appendix G: Interview Template for Students.

process for handling non-EAP program participants; to identify what services each office offered and the challenges they faced in offering these services; and to isolate overlapping areas that could be streamlined. Additionally, we sought to obtain suggestions from line staff on how to improve the process as it directly impacted their work. The UCB departments interviewed were the following:

- Admissions & Enrollment, Office of Associate Vice Chancellor
- Berkeley Programs for Study Abroad
- Campus Accounts Receivable Office
- College of Letters & Science
- Committee on International Education
- Financial Aid Office
- Office of the Registrar
- Office of Undergraduate Admissions

Interviews of UC Peer Institutions & Offices

We focused on interviewing UC campuses with notable reputations for providing services to students seeking opportunities to study abroad. In addition, we interviewed representatives from UC's Office of the President and the central UC EAP Office, both of whom offered us insight and historical knowledge of the origin and current vision for study abroad programs in the UC system. The following UC peer institutions and offices were interviewed:

- UC Davis
- UC Los Angeles
- UC San Diego
- UC Office of the President
- UC Office of the Education Abroad Program

Interviews of Comparable Peer Institutions

We identified a number of peer institutions of similar size, stature, and reputation to UC Berkeley by using the 2008 *U.S. News and World Report* rankings of the 'Top Public Universities.' With input from our Sponsors, the initial list was pared down, and Boston University and the University of Arizona were added as resource institutions due to their standing as popular providers of third-party (non-EAP) study abroad programs to UCB students. The peer institutions interviewed were:

- University of Texas, Austin
- University of Michigan
- University of Washington
- Boston University
- University of Arizona

Interviews of UCB Students

We interviewed four UCB students who had participated in non-EAP programs. Our goal was to obtain an in-depth understanding of the students' experience in navigating the UCB processes for providing services to non-EAP program participants. We also sought to obtain insights into challenges, successes, and recommendations to improve the process from the students' perspective. We obtained partial lists of UCB non-EAP students from several offices on campus, including the Financial Aid Office (FAO), College of Letters and Sciences (L&S), and the Committee on International Education (CIE). Each student on these lists was contacted via email and invited to be interviewed; a monetary incentive, provided by the Office of the Associate Vice Chancellor for Admissions & Enrollment, was offered as well. While our original intention was to have a larger sample, we only had a total of four respondents to our email inquiry.

Interviews of Professional Organizations

Members of the executive boards of two professional organizations, The Forum on Education Abroad and NAFSA: Association of International Educators were interviewed. The Forum on Education Abroad and NAFSA are established organizations within the field of international education that promote and advocate for international education, develop standards of best practice, and provide opportunities for professional development. In interviewing representatives from these organizations, we sought to identify industry-standard best practices and processes for working with study abroad students.

Website Reviews of UCB Units

A thorough review of the information available on the websites of each of the administrative offices involved in the non-EAP process and the websites of a representative sample of UCB's 14 colleges and schools and 100+ academic major departments was crucial to obtaining a full understanding of tech-savvy UCB students' experience as they

navigate the non-EAP process. We also sought to identify areas of strength and opportunities for improvement in UCB's online information offerings. The websites of the following UCB units were reviewed:

- Academic Major Departments
- Berkeley Programs for Study Abroad
- Colleges & Schools
- Financial Aid Office
- Office of the Registrar
- Office of Undergraduate Admissions
-

Website Reviews of UC Peer Institutions & Offices

An extensive website review of the UC institutions and offices that we interviewed was also conducted. Our goal was to further our understanding of the methods used by other UC's to serve non-EAP students and to identify the type of information that is commonly made available online to these students. The websites of the following UC peer institutions were reviewed:

- UC Davis
- UC Los Angeles
- UC San Diego
- UC Santa Cruz
- UC Office of the Education Abroad Program

Website Reviews of Comparable Peer Institutions

We also conducted extensive reviews of the non-sponsored program information available on the websites of the peer institutions we interviewed. Our goal was to identify the wide range of information made available online by UCB's peer institutions in service of their non-sponsored study abroad students. Website reviews of the following peer institutions were conducted:

- University of Texas, Austin
- University of Michigan
- University of Washington

Analysis & Findings

Analysis

We began our analysis by reviewing the data collected and compiling a preliminary list of the challenges faced by UCB in offering services to non-EAP participants. These challenges and gaps in service were then organized into five broad areas of concern: processes and procedures, management, online information, resources, and personnel.

We employed an Ishikawa diagram (also known as a “fishbone” diagram) to help identify the underlying causes of the problem.

An in-depth analysis of each of the five areas of concern was conducted. Through this process, we were able to identify three underlying causes of UCB’s lack of, and difficulty with, advising and administering services to non-EAP participants.

Underlying Causes

1. There has not been clarity among campus leadership about the need for UCB to provide comprehensive services, clear policies, and special procedures to support students who wish to study abroad outside of EAP.

The size of the non-EAP population is unknown, as there is essentially no method currently in place to track such students. Furthermore, the services needed by non-EAP participants are split among multiple offices on campus, with each office assisting a subset of the non-EAP population. The non-EAP student population essentially disappears into the much larger student population; the non-EAP student is just one of many students assisted by any particular UCB administrative office. Without the ability to track the non-EAP population, the lack of a holistic view of the needs of these students, or an analysis of the cost to the University of not providing services to them, it is understandable that the true extent of the problem has not been known to campus leadership.

2. There has not been a designated office charged with providing services to non-EAP students. Consequently, there is no central ownership of the issues they face.

The process a student must follow to participate in a non-EAP program – securing financial aid, withdrawing or canceling registration, securing transfer credit, applying for readmission, etc. – involves different offices on the UCB campus. During this process, a student might visit and be assisted by the Office of the Registrar, the Financial Aid Office, the Admissions Office, the Berkeley Programs on Study Abroad Office, his/her college, and his/her major department. None of these offices, however, *must* be visited. Some steps can be bypassed depending on the student's needs. For example, a student who doesn't want transfer credit for courses taken abroad might skip the Admissions Office. Additionally, some steps can be accomplished at more than one office. For example, a student can submit an enrollment cancellation or withdrawal form to the Registrar's Office or his/her College.

There is not one office in charge of ensuring non-EAP students understand and complete all the steps necessary to successfully participate in a non-EAP program. This lack of a central point of contact is the source of much confusion and frustration experienced by students as they try to figure out what they need to do to successfully cancel registration, maintain eligibility for readmission, apply for financial aid, transfer credit, etc.

3. The Berkeley Program for Study Abroad Office was created specifically to be the resource center for the University of California Education Abroad Program (EAP), and does not have the mandate or resources to provide advising and services to students who choose to study abroad in non-EAP Programs.

The UC Education Abroad Program is effectively UCB's preferred and recommended means for students to study abroad. When the EAP program was originally conceived and implemented, and for many years after, EAP's program offerings undoubtedly satisfied the majority of UCB students who wished to study abroad. Presently, however, EAP's offerings do not meet the needs of a large percentage – possibly as high as 50%⁵ – of UCB's study abroad participant population. Despite this change, the Berkeley Programs for Study Abroad's (BPSA) primary mission remains advising and administering to EAP participants. BPSA is the logical office to serve non-EAP study abroad students, but it does not have the mandate or the resources to do so.

⁵ See Appendix I: Estimate of the Number of UCB Students Participating in Non-EAP Programs.

In-Depth Data Analysis

After our initial identification of challenges for non-EAP participants, *All Abroad!*'s next step was an in-depth analysis of the data to produce a clear set of documented findings. We focused our analysis on five areas:

1. The UCB Student Experience

- What process does a student go through when s/he decides to study abroad in a non-EAP program?
- What sources of information does s/he seek out?
- What offices and websites does s/he visit?
- What information and instructions does s/he receive?
- How clear or confusing is this process?

2. Challenges and Gaps in UCB's Administrative Process

This was an expansion of the work done in part one of our analysis.

- What themes emerge when we examine students' concerns and complaints about the process?
- What problems have staff members in each service office identified?
- Of the challenges identified by UCB's peer institutions, which are also of concern to UCB?

3. Current Processes at UCB that are Working Well

Although there are challenges to address, there are also several successful systems and procedures already in place at UCB to assist non-EAP participants.

- What is working well in UCB's processes that we can build on?

4. Current Practices at Peer Institutions

There are different models for administering services to non-EAP students that we can draw on to emulate and implement best practices.

- What methods are UCB's peer institutions using?
- Which methods are most popular and why?

5. Best Practices

There are best practices for administering to students participating in non-EAP/non-sponsored programs.

- What are the best practices and standards in the field?
- What do UCB's peer institutions and third-party providers identify as best practices?

Our final step in the analysis process was to map the issues identified (#1 and #2 above) to the best practices (#5) that might be used to identify and support potential solutions. After documenting these findings, we moved on to crafting recommendations.

Findings

The UCB Student Experience

All Abroad! sent a request for an interview via email to every non-EAP student identified with the assistance of FAO, L&S, and CIE. We originally sought to interview 10 students, but were only able to secure interviews with four. The difficulty *All Abroad!* experienced in locating non-EAP students was instructional in and of itself, emphasizing UCB's current inability to identify this population of students and highlighting the need to track them.

Based on the student interviews, interviews with UCB administrative office representatives, and our own experiences in attempting to gather information from campus offices and websites, we were able to obtain a clear understanding of the frustrations and confusion experienced by UCB students seeking to complete all the necessary steps to participate in a non-EAP program. One theme that was consistently relayed during interviews was the lack of a clear start-to-finish process for students to follow. Students often felt confused by the myriad avenues that they were directed to in order to find more information. As one student said, "I had to run back and forth a lot." Said another, "My college didn't agree on where students go to for what." Other students commented that, "There was no clear process," and "It was confusing."

Because there is no obvious starting point, students try several different access points, including Berkeley Programs for Study Abroad, UC's central EAP office, the Financial Aid Office, Undergraduate Admissions, the Registrar, and their individual college and major advising offices.

Berkeley Programs for Study Abroad (BPSA)

One starting point many students try is the BPSA office. BPSA gives students a one-page flyer discussing the differences between EAP and non-EAP⁶ and directs them to an in-house resource library of materials containing both EAP & non-EAP program information. The resource library also contains two computer workstations where students can conduct further independent research. BPSA does not offer advising for non-EAP programs, and only very limited advising on the non-EAP administrative process. Their website states, "At this time we do not have staff resources to provide advising for non-EAP programs." Following this statement, the BPSA website offers three links to non-EAP information: one leads to the Undergraduate Admissions informational packet described below, the second leads to a very brief list of non-EAP study abroad program websites, and the final link leads to the flyer mentioned above.

Students' reasons for choosing non-EAP over EAP was outside the scope of this project, but the subject often came up during both student and administrative office interviews. One student interviewee said she had considered both EAP and non-EAP programs, but she eventually chose a non-EAP program because the process of going abroad seemed less complicated; however, after returning to UCB, she experienced difficulty transferring credit for her coursework and getting accurate advising to facilitate the credit transfer. Another student indicated he chose a non-EAP program because EAP deadlines were too early, and he was not ready to make a decision that far in advance. For example, an EAP study abroad program in Paris he considered required an application be submitted 10 months in advance. Other students mentioned the limited space available for select EAP programs.

Financial Aid Office (FAO)

FAO is another entry point for non-EAP students. FAO offers detailed information on the process to secure financial aid to study abroad in a non-EAP program. FAO provides students with a thorough, well-designed packet⁷ of forms including that which must be completed and submitted to FAO in order to receive funding. There is dedicated staff responsible for handling non-EAP financial aid requests, and extensive

⁶ See Appendix K: Differences between EAP & Non-UC Sponsored Programs.

⁷ See Appendix L: UCB Financial Aid Office Form Packet.

knowledge of the *full* non-EAP administrative process. This results in offering non-EAP students fairly extensive advising regarding non-EAP study abroad concerns not directly related to financial aid.

Although FAO's part in the overall non-EAP administrative process is very clear and the current staff are knowledgeable about this process, it is not formally linked to all the other tasks a student must complete before studying abroad. Additionally, *All Abroad!* was unable to find any guidance or forms for non-EAP students on the FAO website. Generally, students who make it to the Financial Aid Office in their search for assistance regarding the non-EAP receive more advising and are better prepared than students who do not. One student, however, did express frustration with the lead time necessary to apply for financial aid.

Office of Undergraduate Admissions (OUA)

Similar to FAO, OUA also maintains a checklist and packet of forms⁸ that are given to any student who visits their office and is seeking information on how to participate in a non-EAP study abroad program. The checklist includes information on how to obtain transfer credit, how to make an appointment with an advisor, what to bring to an appointment with an advisor, what the student needs to do while studying abroad, and how to prepare for the eventual return to UC Berkeley. This information includes canceling registration while studying abroad, submitting an application for readmission, and ordering transcripts from the non-EAP program for submission to OUA.

OUA also has a form for evaluating the student's proposed non-EAP program and coursework, which is used by an OUA study abroad advisor to determine whether a student's "proposed course work is likely to transfer." OUA's informational checklist is extensive; it covers OUA's portion of the non-EAP administrative process quite thoroughly and includes some references to the financial aid and major/college transfer credit processes. As with the Financial Aid Office, however, the OUA informational packet is largely concerned with OUA's portion of the non-EAP administrative process. There is no formal linkage to the full process and no guarantee that a student visiting OUA will obtain information on other steps necessary to successfully participate in a non-EAP program. In addition, *All Abroad!* had difficulty locating

⁸ See Appendix M: Information for UC Berkeley Students Planning to Study Abroad in Non-UC Sponsored Programs.

OUA's informational packet for non-EAP students on their website; we were only able to find it by following the link from BPSA's website. Search terms such as "study abroad" or "non-EAP" produced no results.

Regarding his interaction with OUA, one student felt the process was "confusing." One source of this confusion is the often misunderstood difference between UCB transfer credit and credit towards one's major or college breadth requirements. Another student indicated that he did not necessarily want credit—UCB *or* college/major credit—for his non-EAP study abroad program, but was concerned about the academic gap on his transcript.

OUA is also the office responsible for processing readmissions. All students must withdraw or cancel their registration and then be readmitted upon returning from a non-EAP program. The readmission application is easily located on the OUA website or by visiting OUA. The readmission application has recently been updated to include a checkbox for students to indicate if they are being readmitted after participating in a non-EAP program. Counting readmitted non-EAP students is a useful first step towards tracking these students. However, when *All Abroad!* visited OUA as recently as October, the printed copies of the readmission form we were given did not have the checkbox.

Office of the Registrar (OR)

The Registrar's Office provides forms and advising on the process to withdraw or cancel one's UCB registration, a necessary step for students participating in non-EAP programs. Students withdraw or cancel their registration for many reasons, so these forms do not make specific mention of non-EAP study abroad. A reference to non-EAP study abroad on the Registrar's website would be useful; however, there is currently information on the Registrar's website indicating withdrawal/cancellation is a required process for students who wish to study abroad in non-EAP programs.

In addition, there is confusion regarding the correct location to submit petition to withdraw or cancel enrollment. When visiting the Undergraduate Admissions Office, *All Abroad!* team members were instructed to go "next door" to the Registrar's Office to obtain information on the withdrawal/cancellation process. The OR advisor we

then spoke with said that although “students come to us for everything,” the student’s college or major department was the correct place to have a withdrawal/cancellation petition processed.

Specific College or Major Departments

The amount of information available on department and college websites varies. Some have very detailed instructions for students, while others do not mention study abroad in general and non-EAP study abroad in particular, at all. For example, the Haas School of Business has an excellent website for students interested in non-EAP programs. It includes a complete overview of the non-EAP administrative processes students must navigate and includes links to necessary forms.

Most of the college and major department websites reviewed, however, refer students to either BPSA’s or UCOP EAP’s websites, and do not specifically mention non-EAP options. The information is often not consistent.

According to one College of Letters & Science undergraduate advisor interviewed, it is a “fluke” if students seek assistance in navigating the non-EAP administrative process. When such students ask for assistance, they are referred to BPSA. Major department advisors are generally knowledgeable about where and when students are participating in non-EAP programs. The non-EAP administrative process, however, is likely as confusing to major department advisors as it is to students. One student said that the staff in his major department did not agree on where the student needed to go to obtain information.

Challenges & Gaps in UC Berkeley’s Process for Non-EAP Students

Based on our interviews with UCB administrative offices, including the Financial Aid Office, Office of the Registrar, Admissions and Enrollment, Undergraduate Affairs and Berkeley Programs for Study Abroad, *All Abroad!* identified a number of challenges and gaps in service in UCB’s process for administering to non-EAP students.

No mechanism to track non-EAP Students

There is currently no tracking mechanism for non-EAP students. This has prevented the monitoring of the changing size and needs of this population. UCB lacks crucial data to analyze students’ preferences, such as: program type, country of choice, and reasons for their

choices. This information is crucial if the University seeks to adjust its programs and services to better fit student needs. The lack of a tracking mechanism for non-EAP students also prevents UCB from offering assistance regarding students' health and safety while abroad. There is currently no information on how and where to reach these students in cases of emergencies.

Inadequate Services & Information for non-EAP Students

There is currently little or no advising given by UCB to non-EAP students before, during, or after their time abroad. Departmental major advisors are unaware of the non-EAP administrative process and cannot advise their students appropriately or consistently. Administrative office personnel are generally able to advise only on their portion of the process. The information available to students online is inconsistent and incomplete.

Students currently have to withdraw in order to participate in a non-EAP program, and then apply for readmission when they return. This causes a gap in student services. The student is not able to access email, obtain information via BearFacts such as a Degree Audit Report, or access electronic library resources or any resource requiring a CalNet authentication. There is no way to determine which students have withdrawn or cancelled their registration for non-EAP study abroad reasons.

Students experience difficulty navigating the administrative process before going abroad and after returning because the overall process and offices involved are not clear to them. This reflects the lack of a transparent process used by the administrative offices concerned, as well as the lack of a formal mechanism for these offices to communicate. As a result, students are unsure about where they should start. They have difficulty applying their study abroad coursework to their major requirements, as well as applying for and receiving financial aid for the program. Due to this obscure process, errors are more likely to occur. Opportunities are missed and time is wasted by both students and administrators. This could be prevented if the process is more clearly defined at the outset.

UCB's Official Study Abroad Program

The UC-wide Education Abroad Program was created in the 1960s and served as the primary source for study abroad programs for UC. In the ensuing decades, the EAP office has not kept up with evolving student needs and demands, as evidenced by student interviews and other sources⁹. Many students are interested in a study abroad experience that may not be traditionally offered by the EAP program. EAP programs have a limited number of spaces available. Applications can be lengthy and are often competitive; students may not get into the program of their choice. Students often are attracted by the easier and more predictable route to studying abroad offered by non-EAP programs (perhaps without understanding potential difficulty in withdrawing, securing financial aid, re-admission, and transfer credit). Students are attracted to destinations and type of programs offered by non-EAP programs, as well as a higher level of customer service. Students who want to study abroad for personal or career reasons but do not need the credit for these courses are likely also to use non-EAP programs.

No Process Owner

Despite the increasing demand for non-EAP programs, there is no office designated to offer services to non-EAP students. BPSA is the logical choice for such an office and is the primary office that students visit. It is also the primary office to which department and college advisors refer students for all matters related to study abroad. BPSA, however, does not have the mandate or resources to handle administration or advising for non-EAP. The BPSA website explicitly states that they do not offer advice or support for non-EAP due to a lack of staffing resources.

The different administrative offices that provide service to non-EAP students (EAP, FAO, RO, OUA, A&E, Depts) report to different VCs, leading to a lack of overall direction, strategy and funding.

Liability & Favoritism

Staff members in nearly all UCB administrative offices indicated they were concerned about issues related to liability and favoritism. The University's liability in regards to students studying abroad on non-EAP programs, especially in areas where the U.S. State Department has

⁹ See [Report of the University of California Join Ad Hoc Committee on International Education](#), November 2007 and Appendix I: Estimate of the Number of UCB Students Participating in Non-EAP Programs.

issued a travel warning, was mentioned repeatedly. Personal and University liability for unintended consequences resulting, even indirectly, from staff advice on non-EAP program participation was another concern. Finally, staff were troubled about the possibility of appearing to endorse or recommend specific non-EAP programs; numerous staff mentioned a recent *New York Times* article¹⁰ on improper financial arrangements between colleges and 3rd party study abroad providers and the resulting legal inquiries and investigations. Staff are aware of these issues, but have not received clear guidance on how to approach them.

Current Processes at UC Berkeley that are Working Well

While many challenges and gaps in service were identified, there are also several processes that are working well. These can serve as a foundation upon which UCB can improve and expand services. *All Abroad!* identified several processes and procedures already in place at UCB that could be built on when implementing improvements to the advising and enrollment process for non-EAP students. These processes and procedures are in the areas of advising and administration:

Advising

BPSA provides students with a resource room that includes non-EAP brochures as well as computer access. BPSA provides non-EAP students with basic information and is pro-active in its student outreach efforts, including offering drop-by advising services on Sproul Plaza. Additionally, there is a willingness by BPSA staff to provide advising on non-EAP programs.

In terms of advising liability, UCB insurance covers staff actions if performed within the course and scope of their job descriptions, according to the Office of Risk Management.

Administrative Process

UCB has established well-designed processes for non-EAP course credit transfers as well as for financial aid. These processes include forms and checklists for students and for internal, department use.

¹⁰ Diana Jean Schemo, [In Study Abroad, Gifts and Money for Universities](#) (The New York Times, August 13, 2007).

There has been some progress in terms of non-EAP student tracking. The Office of the Registrar added a reason code to capture data on students withdrawing from the University in order to study abroad via non-EAP. The Office of Undergraduate Admissions recently added a checkbox in the re-admission form for students to enter the reason for re-admission. The re-admission forms are being kept and will eventually be entered into the student data systems. The systems improvements needed to tally non-EAP withdrawal and re-admission are expected by Fall 2009, in order to meet a reporting deadline mandated by the UC Office of the President. The Financial Aid Office keeps a log of non-EAP students who apply for aid.

UCB employs a “low-touch” approach with students, whereby students are expected to independently become aware of the multiple options that are available to them, and are limited by very few restrictions. This freedom is in line with the Berkeley culture and appeals to independent-minded Berkeley students.

There is an overall willingness and interest on the part of UCB administrative office staff to improve the current process in order to best serve non-EAP students.

Current Practices at Selected Peer Institutions

The level of service and resources varied among the peer institutions we interviewed. Detailed information on these specific findings can be found in Appendix H: Common Practices at Peer Institutions.

A summary of these findings include:

Organizational Structure

- With the exception of UCB and UCSC, most institutions have a centralized office that is responsible for providing administrative support for all students intending to study abroad, regardless of whether they are on a sponsored or non-sponsored program.
- The number of full-time personnel in each office ranges from three to six advisors to handle 400 – 2200 students annually.
- Most campuses do not have integrated systems or lines of communication with the administrative offices involved with students studying abroad. Several campuses hold meetings on an ad-hoc or on-demand basis.
- UCD held several departmental meetings throughout their campus in the course of a year and a half in order to garner

support for a mandate to centralize the study abroad office processes for both EAP and non-EAP students.

Administrative Processing

- A fee ranging between \$100 and \$400 per term is charged by some universities to students participating in a non-sponsored program. Other universities do not charge any fee for the services they offer to students studying abroad in non-sponsored programs.
- Some institutions require that students who plan to study abroad fill out forms before they leave as a prerequisite to obtaining benefits such as financial aid, email address, etc. This allows the institution to track students, to communicate with them while abroad, and to integrate at least a minimum level of advising into the process.
- Most institutions require students cancel their registration or withdraw in order to participate in a non-sponsored program. However, several campuses have a special enrollment status designated for these students. For example, UCD uses the "Planned Education Leave Plan" (PELP). UW has a similar status, which they call "concurrent enrollment." UCSD previously had students enroll in a placeholder course until it was disallowed by UCOP.
- Many institutions that have a special enrollment status do not require students to go through the re-admission process upon their return to campus.
- Most institutions require students to complete a standard waiver of liability. UCD and UCSD also have a "super waiver" for students who intend to travel to locations under a State Department Travel Warning. Two of these institutions, UM and UW, make reasonable efforts to render assistance as emergency or urgent situations may be required, but explicitly state that they will assume no responsibility for the safety of non-EAP students traveling to countries with a travel warning.
- Students on a sponsored program are usually required to complete check-in procedures upon their return, to debrief their experience abroad and to reintegrate them to home campus life. This is not required of students on non-sponsored programs.

Tracking Students

- There are different methods for tracking students, but the primary method used is an intent form through which the student informs the home campus prior to departure of the intent to study abroad in a non-sponsored program. UCD, UCSD, UM, UT, and UW all use such a mechanism. However, this form is not necessarily mandatory, and therefore the level of accuracy can be unreliable.
- UC students who study abroad through EAP programs are tracked by the UOEAP office, as well as by their local campus EAP office.

Student Services

- The level of support ranged from high-touch to low-touch (i.e., hands-on to none). Some institutions advise students not only about process but also about specific programs, and advising is integrated into the steps students must complete to study abroad on a non-sponsored program. They may even have a list of non-sponsored programs that have been vetted by faculty or study abroad staff. At other institutions, staff provide information but do not advise about specific non-sponsored programs.
- Most of the institutions interviewed provide students with a checklist of procedures to follow in order to participate in a non-sponsored program. They also have extensive information available on their websites.
- Since most campuses administer all study abroad programs through a centralized office, the flow of processes is systematic. In cases where there is no centralized office, such as UCB and UCSC, the information available is not consistent or comprehensive.
- Most institutions only maintain communications with students on sponsored programs. This is done primarily via phone or email. For institutions that do not have a mechanism to track non-sponsored students, communications are minimal to non-existent. Non-sponsored students who completed documentation of their intent to study abroad can easily be contacted.

Student Benefits

- Students enrolled in a sponsored program often are covered by a university health insurance plan. Students in non-sponsored programs do not have access to health insurance coverage through their university.
- There are usually no rights or resources available to students on a non-sponsored program, except at universities that offer a special enrollment status for such students. The primary benefit extended to these students is continued email access and access to health insurance coverage, for which there is often an additional fee.

Best Practices

Two professional organizations involved in promoting and advocating for international education, the Forum on Education Abroad and NAFSA: Association of International Educators, have identified best practices that support international education and study abroad¹¹. *All Abroad!* interviewed a representative from each of these organizations and reviewed their extensive online resources in order to identify best practices for offering services to non-sponsored study abroad students. Key findings include:

First, the University must have a demonstrated institutional commitment to study abroad. This includes having a mission statement for study abroad, integrating study abroad in long-term academic planning and ensuring a financially sustainable plan to support study abroad. There also needs to be clear accountability to ensure proper monitoring and communications across all of the stakeholders and service providers.

Second, there must be infrastructure for study abroad programs. This includes processes to approve courses, transfer credits, track students from the time they are preparing to go abroad to their safe return, evaluate programs, and adjust offerings regularly based on trends. These processes should be documented and easily found and understood by students, faculty, staff, third-party providers, and other interested stakeholders.

¹¹ See Appendix C: The Forum on Education Abroad “Standards of Good Practice for Education Abroad” and Appendix D: NAFSA’s “Criteria for Effective Management of Study Abroad”.

Third, universities with strong international education and study abroad programs must provide the resources needed for a high quality program. This includes having a sustainable business model to secure funding to maintain staffing and programs and offering financial aid and other funding to encourage student participation.¹²

¹² NAFSA: Association of International Educators. "Strengthening Study Abroad: Recommendations for Effective Institutional Management for Presidents, Senior Administrators, and Study Abroad Professionals." Report of NAFSA's Task Force on Institutional Management of Study Abroad January 2008.
<http://www.nafsa.org/_/File/_/final_imsa_taskforce.pdf> and
Forum on Education Abroad. "Standards of Good Practice for Education Abroad." 2008
<<http://www.forumea.org/documents/ForumEASStandardsGoodPrctMarch2008.pdf>>

Recommendations

A Plan for Change

The *All Abroad!* team has developed a set of recommendations, which we have organized into four areas for improvement: student-facing processes, administrative processes, study abroad program management, and vision (strategy/policy). Following is an overview of the recommended improvements, with suggested timing and office of primary responsibility for implementation.

Recommendation	When	Priority	Responsible
Recommendations for Improving Student-Facing Processes			
A Well-Defined Procedural Checklist for non-EAP Students	Short	High	A&E, BPSA
A Standard Packet of Administrative Forms	Short	High	A&E, BPSA
Expand & Update Information Available Online	Short	High	A&E, BPSA
Orientation Sessions	Medium	Low	BPSA
Recommendations for Improving Administrative Processes			
Tracking Study Abroad Students	Short	High	A&E, Admissions
Create Special Enrollment Status for non-EAP Students	Medium	High	CIE, A&E, BPSA, ORM, OGC
An Administrative Fee for Non-EAP Study Abroad	Medium	High	CIE, A&E, BPSA
Resolve Liability Issues	Short	High	ORM, OGC, BPSA, A&E
Improve Data Sharing between Departments	Long	Low	A&E, BPSA, colleges
Improve Communications between Departments	Medium	Low	A&E, BPSA, colleges
Recommendations for Expanding Study Abroad Program Management			
Analyze Trends	Medium	Low	CIE, BSPA, A&E
Database of Approved Courses for Transfer Credit	Medium	Low	A&E, BPSA
Database of Student Evaluations/Feedback for non-EAP Programs	Medium	Low	A&E, BPSA
Affiliated Programs	Long	Low	CIE, BSPA, A&E
Recommendations for Establishing a Vision for non-EAP Study Abroad at UC Berkeley			
Define a New Term for non-EAP Programs	Short	High	BPSA, A&E
Establish a Central Office to Offer All Study Abroad Programs	Medium	High	EVCP, VC Student Affairs
Develop a Vision for non-EAP Study Abroad	Long	Medium	CIE, EVCP, VC Student Affairs
Create an International Education Vice Chancellor Position	Long	Low	Chancellor

Time Frame Definitions

- Short – Implement within the next year.
- Medium – Implement within the next one-to-three years.
- Long – Implement within the next three-to-five years.

Priority Definitions

- High – Needs to be considered for immediate implementation.
- Low – Will have measurable benefit to campus, but due to the nature of the change or the complexity of the issue, may not be quickly or easily implemented.

“As study abroad continues to grow, and as demand for study abroad expands, it is the responsibility of institutional leadership to undertake a deliberate and proactive approach to developing and supporting this important component of the education of today’s college students.”¹³

Recommendations for Improving Student-Facing Processes

The improvements proposed in this section provide direct benefits to students who wish to study abroad via non-EAP programs. They remove barriers to study abroad by making it easier for students to navigate the administrative processes required. *All Abroad!* recommends the following:

A Well-Defined Procedural Checklist for non-EAP Students

A&E and BPSA should work together to create a comprehensive procedure for non-EAP students to follow as they plan and execute their study abroad experience. This procedure should be made available to students online as a checklist of decisions and tasks.

The primary purpose for this checklist is to clarify the full sequence of steps, from start to finish, that a student needs to take before going abroad. This addresses both campus-specific administrative needs as well as student-specific pre-departure preparations. Some of the procedures used by EAP students may also be applicable to non-EAP students, especially in the areas of travel preparations, travel

¹³ NAFSA: Association of International Educators. “Strengthening Study Abroad: Recommendations for Effective Institutional Management for Presidents, Senior Administrators, and Study Abroad Professionals.” [Report of NAFSA’s Task Force on Institutional Management of Study Abroad](#) January 2008.

warnings, passport information, insurance, and re-entry to the U.S. and to the University; already established resource materials detailing these procedures could be made available to non-EAP students relatively easily.

All Abroad suggests specifying the steps involved in each of the following:

1. Attending appropriate orientations
2. Meeting with advisors
3. Researching and selecting a program
4. Registering intent to study abroad
5. Obtaining course credit preapproval from college/dept and campus
6. Applying for financial aid – consortium agreement
7. Submitting liability waiver(s)
8. Changing enrollment status
9. Travel prep, passport, insurance, etc.
10. Communicating with home institution while abroad
11. Evaluating program

Note, some of these steps assume implementation of recommendations explained elsewhere in this report.

The procedure should be subject to the approval of all departments referenced in the checklist. Contact information for each department mentioned should be included.

All Abroad! considers creation and communication of a well-defined, comprehensive process for non-EAP students to follow to be the most important of all our recommendations. Information outlining every step a student needs to take before studying abroad should be available online, in print form, and consistently communicated by UCB administrative and advising staff. Clarifying this procedure will obviate a significant portion of the frustration and confusion experienced by students seeking to participate in non-EAP programs. Additionally, it will provide clarity for administrative and advising staff who assist these students and facilitate a more efficient administrative process, saving critical staff time.

A Standard Packet of Administrative Forms

A standardized packet of information containing all necessary administrative forms related to studying abroad on a non-EAP program should be made easily accessible to students. The first page(s) of this packet should be the checklist described above.

The BPSA office should serve as the main point of contact for distributing the packet, but all offices involved in the non-EAP administrative process (FAO, RO, and OUA) should be aware of and be able to give a copy of this packet to any non-EAP student visiting their office. Academic advising offices need not keep copies on hand, but should be aware of the packet and be able to access it online.

A sample packet of administrative forms is included in Appendix N. The information assembled was largely based on an exemplary sample provided by UC Davis' Education Abroad Center. UCD generously gave *All Abroad!* verbal permission for UCB to emulate their procedure. The top page includes a summary of the steps and forms students need to complete before going to study abroad. The procedural checklist should cover the following areas:

1. Checklist
2. Transfer Credit Pre-Approval form
3. Study Abroad Leave (NUCSA) form
4. Financial Aid forms
5. Liability Waiver

Consolidating a checklist of steps and all necessary forms for participating in a non-EAP into a single packet will further alleviate student confusion and effectively streamline procedures for both students and staff.

Expand & Update Information Available Online

The information currently available on the BPSA website for non-EAP students is extremely limited, consisting of a link to OUA specifically focused on the transfer credit process, an outline of the differences between EAP and non-EAP programs, and a list of five general resource sites of third-party program providers.

BSPA and A&E should work together to create a more robust website for non-EAP information by building on the existing BPSA site. This can be done at a fairly low cost, using existing technical support services or

website administration staff, and the changes can be implemented immediately. The site should allow internal staff to make on-going changes or expand on the information accordingly.

The websites for all offices involved in the non-EAP administrative process (FAO, RO, and OUA) should direct students to the central BPSA website. College and academic major departments across campus also should be encouraged to link to this central site. By referencing the BPSA website in different venues, the information will be efficiently distributed while being centrally maintained.

The suggested additions to the website focus on four areas:

- Checklist and Procedures
- Forms
- A General Handbook
- Other Resources

Checklist & Procedures

This is where students will go to find the latest and most comprehensive information on how to study abroad as a non-EAP student. The primary feature should be an online version of the procedural checklist described above.

The site should include a Frequently Asked Questions section to address issues and problems encountered by students. It should be updated at least once per semester.

A sideline of quotes and testimonials from selected non-EAP student participants would give students a better understanding of the overall process and experience.

Forms

Students and staff should be able to download a PDF version of the packet of forms described above. In addition, there should be direct links to PDF versions of each individual form. Administrative and academic department websites should refer students to the BPSA site, rather than having the packet uploaded to their own website.

General Handbook

A PDF version of a booklet detailing the non-EAP process before, during, and after going abroad should be made available to students. Students will be able to take a printed or an electronic copy with them abroad or refer to the online copy while they are overseas. The booklet should contain all essential information listed on the website in a condensed format. The University of Michigan has an exemplary sample that can serve as a reference for BPSA¹⁴.

Other Resources

This includes information on non-EAP study abroad programs, an online orientation, information on travel insurance, the visa process, emergency contact and health and safety procedures, and the latest news on travel warnings.

The section should also contain information regarding return to the U.S. This includes suggestions on how to deal with reverse culture shock, forms to complete upon returning to campus and an opportunity to provide feedback on their programs. This will help smooth the re-entry process administratively and will provide a method for gathering qualitative information about study abroad programs.

A Note on Staffing:

Creations of the 'General Handbook' and 'Other Resources' website sections described above will necessarily take more time than the relatively quickly implementable 'Checklist & Procedures' and 'Forms' sections and may require considerable staff time to compile. *All Abroad!* recognizes that many of our recommendations will require additional staff resources and/or the assignment of additional duties to existing staff in a climate of already heavy workloads.

We are especially cognizant of the fairly extensive additional duties we are recommending the Berkeley Programs for Study Abroad (BPSA) be assigned. BPSA staff and leadership have expressed their interest in and willingness to expand BPSA's service offerings to non-EAP students, however, they and *All Abroad!* agree that many of the improvements we are recommending will not be possible without funding to hire additional staff.

¹⁴ See <<http://www.lsa.umich.edu/oip/PDF/non-um-handbook06-07.pdf>>

Orientation Sessions

Orientations are an essential feature to adequately prepare non-EAP students for their study abroad. We recommend providing four types of orientations:

- **General Orientation:** Introduce the general process, including all the steps needed to participate in a non-EAP program.
- **Pre-departure:** General information session that can be for both EAP and non-EAP students. The focus should be on travel insurance, airport transportation, immunizations, general health and safety, emergency contacts and procedures, obtaining a passport and culture acclimation.
- **Country-specific:** Non-EAP programs or countries that are historically known to have larger populations of students participating can have specific orientations. Existing materials designed for EAP program participants can be generalized to incorporate non-EAP students.
- **Re-entry:** General information session that can be for both EAP and non-EAP students. Students fill out evaluation forms to provide feedback on a specific program or country/region during this orientation. Re-acclimation information and activities can also be provided.

Orientations could be offered in a “face-to-face” format as well as online. Temporary or work-study staff could assist BPSA staff in the logistical preparations required to create online versions of these orientations. BPSA may currently offer some or all of these orientations for EAP students, in which case non-EAP students could be integrated into these existing orientations, as applicable.

Recommendations for Improving Administrative Processes

Administrative processes relate to tasks, systems or goals that have a direct impact on administrative personnel and units at UCB. They lead to improvement in services provided to students as a result of the qualitative changes in the underlying administrative processes.

Tracking Study Abroad Students

All Abroad! recommends two methods for tracking students studying abroad on non-EAP programs:

- Tracking via the Re-Admission Process (reactive, after-the-fact).
- Tracking via Statement of Intent to Study Abroad (proactive, occurs in advance or concurrent with the study abroad period).

Tracking Study Abroad Students via Re-Admission Process

Admissions and Enrollment should continue the current initiative to gather information about students returning from study abroad via the re-admission form. The information, while historical in nature by the time it is acquired, will serve to establish a baseline for the population of students studying abroad outside of the EAP programs.

Historical data enables the following:

- Compliance with UCOP mandate for annual reporting of the numbers of students studying abroad.
- Analysis of destinations to identify trends and mismatches in service offerings vs. student interest.
- Provision of a reasonably accurate count of the total population of non-EAP students, which can be used to develop cost models for expansion of services for this cohort.

This method of collection has several limitations:

- Students who graduate immediately after their term abroad will not be readmitted and thus will not be counted.
- Data will be up to 6 months out-of-date relative to the current term.

Tracking via Special Enrollment Status and Statement of Intent To Study Abroad form

To provide more immediate services to the non-EAP student population, it is necessary to know where they are studying concurrent with their time abroad. The institutions we interviewed used the following methods to track student locations before and during their time abroad:

- Special enrollment status – changing enrollment status is a prerequisite to study abroad and provides an up-front way to gather the information that is consistent and well-defined for all

students. (See the recommendation “Create Special Enrollment Status for non-EAP Students” below for additional details about this option).

- “Intent to Study Abroad” form – a form that captures the key information about where a student plans to study, what they plan to study and other information that allows the campus to keep track of students during the term or terms in which they are abroad.

Gathering information about the destinations and plans of students in advance of their departure enables the following:

- Improved accuracy of annual study-abroad population counts to UCOP.
- Improved accuracy in current enrolled student counts, which is relevant to agreements with the City of Berkeley and to matriculation goals.
- Current-term trend analysis of popular/favored destinations. This may allow for expansion of EAP program areas to new hot-spots for subsequent terms.
- Creation of current-term contact lists for use in emergencies (i.e., travel alerts, family issues, etc).

Caution must be taken in design of this form and process since some students may view it as an intrusion on their independence. It is not intended as an obstacle for students, but as a pro-active means to improve the ability of campus to provide services to students while they are studying abroad.

Create Special Enrollment Status for non-EAP Students

Admissions and Enrollment should create a new enrollment status for students who leave the University to study abroad outside of the EAP program. This new enrollment would serve two purposes:

- Tracking students who choose to study abroad, which facilitates annual reporting to UCOP as well as makes it possible for the campus to contact students while they are abroad (for travel alerts or other emergencies).
- Allowing students who study abroad to retain access to campus resources such as CalMail, eligibility for University health and

travel insurance, financial aid, and access to online registration systems such as TeleBears or BearFacts.

Several UC campuses (Davis, San Diego, and Santa Cruz) make use of Non-UC Study Abroad (NUCSA) Leave of Absence or Personal Education Leave Program (PELP) for their non-EAP student cohort.

For any of these approaches to work, the students must proactively announce their intention to study abroad. Most of the UC campuses interviewed, as well as other peer institutions, make use of a form commonly referred to as a Statement of Intent to Study Abroad (SISA) or Intent to Study Abroad Form (ISAF). The form includes basic information about the student, intended destination, courses the student plans to take, and contact information. Most forms also have places for signatures by campus and major advisors.

An Administrative Fee for Non-EAP Study Abroad

A&E and BPSA should jointly evaluate the addition of an administrative fee to be paid by non-EAP students to cover the costs of advising and administering to the non-EAP student body. The fee should be tied to the special enrollment status discussed above. UCB should incentivize payment of this fee by emphasizing the benefits maintained by a student who pays the fee and is put on the special enrollment status.

Most institutions interviewed charge an administrative fee for services rendered to students who choose to study abroad in non-sponsored programs. In exchange for these fees, the students are given access to study abroad-specific advising and retain access to services available to regularly enrolled students, such as email, health insurance, and student informational systems.

At non-UC peer institutions, such as the University of Texas, Austin and the University of Washington, students who study abroad are provided with a full range of services by a central study abroad office. The administrative fees range from \$300 to \$400 per term. These institutions review their rates on an annual basis, assessing local costs as well as comparing themselves with the rates charged by institutions of equivalent size around the country.

UC Davis currently charges students \$300 for a NUCSA-Leave and \$60 for a PELP. UC San Diego is considering implementing a \$100 / term administrative fee for their OAP (non-EAP) students. Both of these

campuses provide a full range of advising and services to their non-EAP students. A sample NUCSA-Leave Form from UC Davis can be viewed in Appendix N.

At UC Berkeley, the recommended administrative fee will help fund the additional staff required to administer services to non-EAP students. Our estimates¹⁵ show projected income based on the number of students in the non-EAP cohort that would be the consumers of the services being paid for by this administrative fee.

At UC Berkeley, the recommended administrative fee will be used for the following:

- Additional Student Affairs Officers to handle the increased advising workload in BSPA
- Additional FTE equivalents for various functions within A&E, OR, OUA and FAO to cover additional work load in those units.

Revenue models based on number of students and the dollar amount for the administrative fee can be found in Appendix J: Fee Analysis.

To accurately determine the dollar amount for the administrative fee, UCB must do the following:

- Obtain an accurate count of the number of non-EAP students (see **Tracking Study Abroad Students**).
- Determine the number of additional advisors or material resources BSPA will need to support the projected number of students.
- Determine the additional FTE or resources required by the central administration offices to support any new work related to the non-EAP student cohort.

Resolve Liability Issues

BPSA and select administrative staff have expressed concerns about advising non-EAP students due to lack of clarity regarding liability coverage for themselves and for the University when providing advice to students outside of the EAP program.

¹⁵ See Appendix J: Fee Analysis.

An official communication from the Office of Risk Management should be issued to clarify the liability coverage for this type of advising. BPSA and A&E should file a request for clarification of the liability issue with the Office of Risk Management within the next 6-12 months to initiate the process.

BPSA staff should begin providing advising about process to non-EAP students as much as current staffing limitations allow. Once the liability issue is clarified, staff should expand advising to include program selection. It should be noted that some peer institutions interviewed indicated that they felt the potential for liability issues was greater if staff did *not* advise students about program selection and quality.

The University's liability in regards to students studying abroad on non-EAP programs in areas where the U.S. State Department has issued a travel warning is another area of concern. BPSA & A&E should file a request with the Office of Risk Management for a more rigorous liability waiver form to cover these situations. UCSD has such a waiver in addition to their standard waiver of liability; they refer to it as a "super waiver."

Improve Data Sharing between Departments

Online data management systems currently in use by departments and colleges are not integrated, which makes data sharing difficult if not impossible. Data sharing, where it occurs, is currently done manually and requires staff time in the sending organization for report preparation and staff time in the receiving organization for filing or data entry. Integration of the data systems would have the following benefits:

- Reduce work load in the sending organization by eliminating data extraction and reporting work
- Reduce work load in the receiving organization by eliminating filing and data entry work
- Improve availability and consistency of data by providing access to a single, centrally managed information set

The Office of the Registrar has already identified the key data elements that need to be gathered for students who study abroad. BPSA has additional information requirements that deal with qualitative aspects of study abroad programs and student experience. These requirements should be presented to the Student Systems 2012 and

Kuali projects for inclusion in future Student Information Systems at UCB.

Improve Communications between Departments

Colleges, Academic Major Departments, BPSA and the central campus administrative offices currently deal with students who study abroad in a decentralized manner. Each organization has its own set of procedures and practices, which may or may not be in alignment with other entities on campus. This results in a disjointed or confusing experience for students attempting to navigate the administrative processes.

Meetings of the administrative and academic units that provide services to students who study abroad should be held each semester to coordinate activities, bring information and procedures into alignment, and to identify and work through issues related to students who study abroad.

The CIE seems to be the ideal candidate as the sponsor for this initiative, since they have already established a working model for this type of inter-departmental meeting on the academic side of the house.

Recommendations for Expanding Study Abroad Program Management

The items in this section are tools, systems or processes that make operations for the administrators of the study abroad program easier and more efficient. They also facilitate the expansion of existing services.

Analyze Trends

The data gathered to track where and when students study abroad should be reviewed periodically (at least annually, if not each term) to check for trends and/or changes in areas of interest.

Ideally, this information should be stored in a decision support/statistical data warehouse accessible by all campus units that need access to the information. If such a system is not available, then the reporting unit should maintain an interim system to provide reporting and decision support capabilities until a centrally-managed and accessible system is available.

Review and analysis of this data can be used for the following purposes:

- Report study abroad statistical information to UCOP, CIE, IIE's Open Doors report, and other interested units or organizations.
- Identify gaps between available courses/programs (supply) and the destinations that students want to visit (demand)
- Tailor program offerings to better meet student needs based on supply-and-demand analysis.
- Determine appropriate levels of staffing required to support the students who choose to study abroad.
- Better reporting for use with housing needs, City of Berkeley student population cap, IIE's Open Doors report, and other published surveys.

Appendix P: Success Metrics includes a list of possible metrics that could be used to monitor study abroad and to provide the basis for strategic decisions with regard to study abroad.

Database of Approved Courses for Transfer Credit

The results of course evaluations performed by OUA should be stored in a central database to grow a body of "known/approved" programs and courses. The database should include at least the following information:

- Program name
- Program provider
- Course name
- Course designation (Number)
- Number of Credits transferrable

In the short-term, this information should be kept manually via standardized paper or electronic forms. As soon as is feasible, it should be stored in an online database.

The information should be made available to students for use as they make their study abroad plans. The database should be linked to the Student Evaluation/Feedback system (see **Database of Student Evaluations/Feedback for non-EAP Programs**) proposed later in this report.

Retention of this type of information in a persistent database will have the following benefits:

- Reduce workload on course evaluators by eliminating or reducing repetition in evaluation of identical courses.
- Improve consistency between course evaluations.
- Reduce variation in course evaluations due to staff retirement or turn over (succession management).

Database of Student Evaluations/Feedback for non-EAP Programs

In addition to assessing the technical criteria and merits of specific programs for transfer credit suitability, BPSA staff and members of the CIE in particular expressed a desire for student feedback on programs in which they have participated. Feedback would be useful to BPSA staff for tailoring their advising services, to students deciding which study abroad program to pursue, and to CIE in advocating for international education opportunities for the student body.

Students should be contacted upon return from their non-EAP program and asked to complete an evaluation of the program and their experience. This process could be made part of the Re-entry Orientation proposed above.

Affiliated Programs

UC Berkeley should develop a list of vetted and approved study abroad programs provided by third parties. They should make use of the Forum and NAFSA guidelines in developing the review/vetting process.¹⁶

The review process should address the following elements:

- Standard consortium agreements for financial aid to students
- Scholarships and equitable distribution of them to the UC Berkeley non-EAP student body
- Credit transfer approval at a UC Berkeley campus level
- Formal affiliations between UC Berkeley and the third-party providers (e.g. Memorandums of Understanding)

¹⁶ See Appendix O: Sample Affiliation Agreement Form from UCSD.

- Remain mindful of ethical considerations while crafting agreements
- Avoid the perception of favoritism
- Leverage the power of ten UC campuses

CIE is the ideal organization to lead the development of the process to vet and approve study abroad programs. They should sponsor the creation of a new committee to perform the vetting function.

Successful implementation of this program will result in a growing, but manageable list of known non-EAP programs. Selection of pre-vetted, affiliated programs by students would reduce staff time required by BPSA, OUA and FAO to administer to students because the program content, the financial aid, and the transfer credit issues would already have been resolved.

Recommendations for Establishing a Vision for non-EAP Study Abroad at UC Berkeley

The recommendations in this section pertain to clarifying and strengthening UC Berkeley's commitment to study abroad and promoting integration and communication across campus and at the highest levels in order to ensure that strategic planning efforts reflect the importance and educational value of study abroad.

Define a New Term for non-EAP Programs

BPSA, in coordination with administrative offices, should designate a term for study abroad programs not administered by the EAP office that does not have the negative connotations of "non-EAP." Study abroad programs that are not under the EAP umbrella are not officially recognized and are referred to only as "non-EAP." One way to legitimize these programs is to create an official term for them. For example, UCSD uses the term "Opportunities Abroad Program" (OAP) to distinguish non-EAP programs from EAP programs and treats students participating in those programs similarly to EAP program students; OAP students receive the same administrative and advisory services as EAP students. One suggestion for a new term is "Global Opportunities for Connecting And Learning" (GOCAL).

Establish a Central Office to Offer All Study Abroad Programs

UCB leadership should designate BPSA as UCB's central study abroad office for both EAP and non-EAP programs. BPSA is the logical choice for such an office and is already the primary office students seeking

non-EAP information visit, as well as the primary office to which department and college advisors refer students for all matters regarding study abroad. Furthermore, at every peer institution interviewed by the *All Abroad!* team, the study abroad office serves as the starting point for students who choose study abroad through non-EAP or non-sponsored programs.

BPSA does not presently have the mandate or resources to offer administration or advising for non-EAP students. The number of non-EAP students¹⁷ is estimated to be equivalent to or greater than the number of students who study abroad within the EAP program each year. The EVCP should mandate expansion of BPSA's administrative and advising services to better serve current student needs for studying abroad and identify funding for the additional staffing resources necessary; *All Abroad!* recommends implementation of the administrative fee discussed above (see **An Administrative Fee for Non-EAP Study Abroad**).

Develop a Vision for non-EAP Study Abroad

UCB must develop a clearly-articulated vision for study abroad at UCB Berkeley; establish policy to implement this vision; communicate this policy to the campus; and provide adequate financial and personnel resources to support it. CIE should lead this effort; implementation, however, will require authorization from the EVCP and other campus leadership.

“Study abroad programs provide opportunities for learning that are critical to the education of American college students and, over the long term, to the ability of the United States to lead responsibly, collaborate abroad, and compete effectively in the global arena. Such learning includes foreign language skills, cross-cultural understanding, and an appreciation of our diverse and interconnected world—essential tools of citizenship and leadership in the 21st century.”¹⁸

¹⁷ See Appendix I: Estimate of the Number of UCB Students Participating in Non-EAP Programs.

¹⁸ NAFSA: Association of International Educators. “Strengthening Study Abroad: Recommendations for Effective Institutional Management for Presidents, Senior Administrators, and Study Abroad Professionals.” [Report of NAFSA's Task Force on Institutional Management of Study Abroad](#) January 2008.

Create an International Education Vice Chancellor Position

Given the growing trend of students studying abroad, UC Berkeley should consider creating a Vice Chancellor position (similar to UCB's VC of Equity and Inclusion) to provide advocacy and strategic planning for international education, including study abroad programs (both EAP and non-EAP). For comparison, UC Davis has a "Vice Provost - University Outreach and International Programs" position to provide leadership for the coordination of campus international initiatives and academic outreach activities and programs. The following units report to the Vice Provost: UC Education Abroad Program, UC Davis Quarter Abroad Program, UC Davis Summer Abroad Program, Fulbright Scholar Programs, Hubert H. Humphrey Fellowship Program, International Alumni Relations and Services for International Students and Scholars. Similarly, an "Associate Vice Chancellor - International Affairs" position was recently created and filled at UC San Diego.

Conclusion

The primary objective of this project was to identify ways to improve the administrative and advising process for non-EAP students. *All Abroad!* suggests multiple recommendations ranging from the practical to strategic, and from short-term to long-term. Of these recommendations, we believe that our Sponsors can make the most immediate impact by implementing a standard, comprehensive non-EAP administrative procedure and by making this information available online and at the primary administrative offices offering services to non-EAP students: BPSA, OUA, FAO, and RO. Another area of significant impact will be to improve administrative processes by creating tracking mechanisms for non-EAP students, creating a new enrollment status for these students and charging fees for administering this service.

A recent report by the UC Joint Ad Hoc Committee on International Education¹⁹ agrees that “EAP enrolls a diminishing share of those going abroad,” and *All Abroad!*'s research clearly indicates that UC Berkeley has fallen behind many of our peer institutions in its service offerings to non-EAP students. Offering services to both sponsored and non-sponsored (i.e., EAP and non-EAP) students from a central office is the strategy favored by UCB's peers and, we believe, the best strategy for our sponsors to improve UCB's advising and enrollment services. UCB is currently behind many of our peer institutions in our services to non-EAP students. We found from these institutions that the best model is to offer sponsored and non-sponsored (i.e., EAP and non-EAP programs) equally to students from a central office. Students should select a study abroad program based on what is truly best for them, rather than on the administrative hoops through which they need to jump.

UC Berkeley students understand that we are living in a global society. The study abroad experience is an important aspect of their education and future career, and, in increasing numbers, they are seeking opportunities outside the realm of EAP. UCB has an obligation to respond to this trend and demonstrate its commitment to international education by expanding services to non-EAP students.

¹⁹ Report of the University of California Joint Ad Hoc Committee on International Education, November 2007.

Glossary & Abbreviations

Glossary

Admissions & Enrollment (A&E): Division consisting of Undergraduate Admissions, the Registrar, and Financial Aid.

Berkeley Programs for Study Abroad (BPSA): UC Berkeley resource center for the University of California Education Abroad Program (EAP).

Committee on International Education (CIE): Campus committee of UCB faculty convened to examine issues related to study abroad as well as the status and welfare of international students and scholars.

Consortium Agreement: Document indicating that the foreign university has accepted the student to be enrolled, what the costs of the institution are, and that the home school will be notified immediately when the student withdraws from the program; a completed consortium agreement is required for a student participating on a non-EAP program to receive financial aid.

Education Abroad Program (EAP) or University of California Education Abroad Program (UCEAP): Study abroad student exchange program in the University of California system that originated in 1962 and is administrated by University Office of Education Abroad Program (UOEAP) with advice and selection of programs assisted at the campus level.

The Forum on Education Abroad: Membership organization established in 2001 serving the field of study abroad, focusing on developing and implementing standards of good practice, encouraging and supporting research initiatives, and offering educational programs and resources to its members; its 300+ members include US colleges and universities, overseas institutions, consortia, agencies, and provider organizations; its mission is to help to improve education abroad programs to benefit the students that participate in them.

Home Institution: Institution where student is matriculating.

Host Institution: Institution where a study abroad program is held.

International Institute of Education (IIE): Independent nonprofit founded in 1919 as an international education and training organization; produces annual Open Doors Report.

NAFSA: Association of International Educators: Association serving international educators and their institutions and organizations by setting standards of good practice, providing training and professional development opportunities, providing networking opportunities, and advocating for international education.

Non-EAP: Refers to programs not sponsored by UC EAP and the students who study abroad on such programs.

Open Doors: Annual report produced by the Institute of International Education (IIE) providing comprehensive information on the international students in the United States and on the U.S. students who study abroad as part of their academic experience.

Third-Party Provider: Entity that provides logistical support systems for students to study abroad at an institution of higher education; may be non-profit or for profit.

Abbreviations

A&E - Admissions and Enrollment
AIE - Association of International Educators
BPSA - Berkeley Programs for Study Abroad
CARS - Campus Accounts Receivable System
CIE - Committee on International Education
CIEE - Council on International Educational Exchange
CLL - Campus Life & Leadership (formerly Office of Student Life, formerly Student Activities and Services)
EAC - Education Abroad Center
EAP - Education Abroad Program
EVCP - Executive Vice Chancellor and Provost
FAO - Financial Aid Office
FAQ - Frequently Asked Questions
FTE - Full Time Equivalent/Employee
HE - Higher Education
HR - Human Resources
IIE - Institute of International Education
ISAF - Intent to Study Abroad Form
IST - Information Systems Technology
L&S - College of Letters & Sciences
LDP - Leadership Development Program
NAFSA - National Association of Foreign Student Advisers (historical name)
Non-EAP - Non-Education Abroad Program
NUCSA - Non-University of California Study Abroad (UCD's term for non-EAP)
OAP - Opportunities Abroad Program (UCSD's term for non-EAP)
OGC - Office of the General Counsel
OR - Office of the Registrar
ORM - Office of Risk Management
OSR - Office of Student Research
OUA - Office of Undergraduate Admissions
PELP - Planned Educational Leave Program
SA - Student Affairs (control unit)
SISA - Statement of Intent to Study Abroad
UA - University of Arizona
UC - University of California
UCB - University of California, Berkeley
UC EAP - University of California Education Abroad Program
UCLA - University of California, Los Angeles

UCSB - University of California, Santa Barbara
UCSC - University of California, Santa Cruz
UCSD - University of California, San Diego
UCUES - University of California Undergraduate Experience Survey
UM - University of Michigan at Ann Arbor
UOEAP - University Office of Education Abroad Program (administers services to UC EAP students)
UT - University of Texas, Austin
UW - University of Washington

Selected Resources

Best Practices

The Forum on Education Abroad's "Standards of Good Practice for Education Abroad"
<<http://www.forumea.org/documents/ForumEASStandardsGoodPrctMarch2008.pdf>>.

NAFSA's Task Force on Institutional Management of Study Abroad "Strengthening Study Abroad: Recommendations for Effective Institutional Management" Report
<[http://www.nafsa.org/ /File/ /final_imsa_taskforce.pdf](http://www.nafsa.org/File/ /final_imsa_taskforce.pdf)>

NAFSA Resources for Institutional Management of Study Abroad
<http://www.nafsa.org/knowledge_community_network.sec/international_education_4/chief_international_education/practice_resources_14/internationalizing_the/institutional_management>

Links to real-world examples of effective institutional management of study abroad.

Data

IIE's Open Doors Report
<<http://opendoors.iienetwork.org/>>

Information on international students in the United States and on U.S. students who study abroad.

Templates and Other Resources

NAFSA's Guide for Senior International Officers and Education Abroad Directors
<http://www.nafsa.org/knowledge_community_network.sec/international_education_4/chief_international_education/practice_resources_14/internationalizing_the/imsa_action>

Information for senior administrators on how to evaluate campus study abroad, including links to tools and strategies from various institutions and a sample presentation for a campus dialogue.

NAFSA's "By Example: Resources for Education Abroad Offices and Advisers" and "Abroad By Design."
<http://www.nafsa.org/knowledge_community_network.sec/education_abroad_1/managing_an_education/publications_30>

Sample forms and informational material.

Sample documents

NAFSA's Administrative and Financial Models for Education Abroad
<http://www.nafsa.org/knowledge_community_network.sec/international_education_4/chief_international_education/document_library_9/strategies_for_internationalizing/financial_model_excerpt>

Identifies several financial models, with pros and cons for each.

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- Appendix A: Initial Project Proposal
- Appendix B: *All Abroad!* Project Charter
- Appendix C: The Forum on Education Abroad “Standards of Good Practice for Education Abroad”
- Appendix D: NAFSA’s “Criteria for Effective Management of Study Abroad”
- Appendix E: List of Contacts
- Appendix F: Interview Template for UCB Offices and Peer Institutions
- Appendix G: Interview Template for Students
- Appendix H: Common Practices at Peer Institutions
- Appendix I: Estimate of the Number of UCB Students Participating in Non-EAP Programs
- Appendix J: Fee Analysis
- Appendix K: Differences between EAP & Non-UC Sponsored Programs
- Appendix L: UCB Financial Aid Office Form Packet
- Appendix M: Information for UC Berkeley Students Planning to Study Abroad in Non-UC Sponsored Programs
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Appendix A: Initial Project Proposal

“The Berkeley Student Study Abroad Experience: Examining the Advising & Enrollment Process”

Sponsors:

- **Vice Chancellor for Student Affairs Harry Le Grande**
- **Associate Vice Chancellor for Admissions & Enrollment Susanna Castillo-Robson**
- **Committee on International Education 2007-08 Chair, Professor Vincent Resh** (*until August 2008*)
- **Committee on International Education 2008-09 Chair, Professor Paulo Monteiro**

Functional Sponsor(s):

- **Financial Aid Office, Director Cheryl Resh**
- **Office of the Registrar, Registrar Anne De Luca**

Background

Traditionally, UC Berkeley students who choose to study abroad go to the UC Education Abroad Program (EAP) office for advice and selection of programs. EAP is centrally administered at the UCOP EAP office located on the UC Santa Barbara campus. There are 130 host institutions in about 35 countries participating with UC EAP. Berkeley students may choose the EAP program since it is the official UC study abroad program, students can apply all of their financial aid awards and loans to this academic experience, and/or students may find it easier to use their services since there are EAP advisors on the UC Berkeley campus.

In recent years, there have been an increasing number of students who choose non-EAP programs and seek these programs without the assistance of EAP or other offices. The Berkeley campus does not have consistent advising, “disenrollment” procedures and the financial aid procedures that assist students who choose to enroll in non-EAP programs are not well understood on campus. Students who go through non-EAP programs may not be informed of such matters as the full array of study abroad programs, the withdrawal process, and the need for financial aid consortiums with the program they select in order to

receive aid that term. It is even confusing to students what aid is available if they take this option.

This project proposes to examine the experience of Berkeley students when they choose a study abroad program provider, enroll in the abroad program, finance the experience, go through the Berkeley withdrawal process, matriculate through the study abroad program, and then re-enter Berkeley for continued study. Examining best practices for non-EAP programs at other UC campuses is also proposed.

Scope

The LDP project is designed to examine the administrative processes of students when they choose a non-EAP study abroad program, enroll in the abroad program, finance the experience, go through the Berkeley withdrawal process, matriculate through the study abroad program, and then re-enter Berkeley for continued study. The project will consist of the following:

A. Research and Analysis

The LDP team will:

1. Conduct research and analysis. The LDP team will analyze the following:
 - a. how other peer HE institutions deliver study abroad services in order to identify best practices,
 - b. document the Berkeley student experience in study abroad programs,
 - c. compare experiences and practices at other institutions to the Berkeley student study abroad experience, and
 - d. examine the best practices of the EAP program.The LDP team should employ various methodologies to arrive at its analysis, such as implementing a survey and interviewing peer institutions.
2. Provide recommendations (based on research and analysis). The LDP team will develop recommendations on improving the Berkeley service to students studying abroad, estimate costs to deliver such services, and develop metrics on how to measure the success of student services improvements.
3. Prepare a final report. The LDP team will prepare a final report documenting the methods used by the group, the findings on the above research, and listing recommendations for improving service to Berkeley

undergraduate students who study abroad. In preparing its final report, the LDP team should focus on the following key transition points for students: 1) obtaining advice, 2) taking a formal leave, and 3) returning to campus. The team should identify any administrative hurdles that may exist within both the Admissions & Enrollment offices (Financial Aid Office, Office of the Registrar, and Office of Undergraduate Admissions) and other campus offices that could assist students in these critical transition points.

B. Recommendations (based on research and analysis)

The LDP team will:

1. Identify the needs students have identified in terms of their choosing and enrolling in a study abroad program.
2. Identify the level of satisfaction of EAP and non-EAP students with their study abroad advising and administrative processes (enrollment, financial aid, etc.).
3. Prioritize which areas in Admissions & Enrollment should be modified or enhanced to achieve an environment in which students have a seamless study abroad process.
4. Develop recommendations on improving services to non-EAP students.
5. Estimate costs to deliver such services.

C. Report

The LDP team will:

1. Prepare a final report documenting the methods used by the group, the findings on the above research, listing recommendations for both short-term and long-term, and estimating costs to deliver such services.
2. Share the final report with the sponsors and the Berkeley EAP office.
3. Make a presentation to the entire LDP program, including sponsors and guests.

Appendix B: *All Abroad!* Project Charter

A. General Information

Project Title:	The Berkeley Student Study Abroad Experience: Examining the Advising & Enrollment Process (also known as “ <i>All Abroad!</i> ”)		
Brief Project Description:	UC Berkeley must identify the needs of undergraduate students who choose to use study abroad programs that are not administered by UC’s Education Abroad Program (EAP) and effectively administer services to these students.		
Prepared By:	Alfred Alipio Jocson, Nelcy Dwight, Merle Hancock, Theron Klos, Jeff Makaiwi, Veronica Ong, Shirley Salanio, Tracy Alexandra Weber		
Date:	July 17, 2008	Version:	0.5

B. Project Objective:

<p>This project seeks to</p> <ul style="list-style-type: none">• identify the needs of undergraduate students who choose to use study abroad programs that are not administered by UC’s Education Abroad Program (EAP),• examine current processes for administering these students and• recommend improvements to these processes.

C. Assumptions

<ul style="list-style-type: none">• This project is concerned with students’ experience of UC’s administrative processes, not whether or not they enjoyed the particular program they participated in.• We can get student contact information easily.• We will be able to get enough students to participate in the surveys and interviews.• The UC offices and peer institutions we interview will cooperate and participate.• Student satisfaction and UCOP directive are the main drivers for this project.• We can use online survey tools.• Online tools will be available and working when we need them, especially bSpace.• We can put our regular jobs on hold as needed.

D. Project Scope

In Scope:

1. Report

The All Abroad! project team will produce a written report and share this report with the sponsors and the EAP Office. The report will provide the following:

- Recommendations for creating a seamless process to administer Berkeley undergraduate students who choose to use non-EAP programs for studying abroad. Recommendations for service improvements may include areas in Financial Aid, Office of the Registrar, Office of Undergraduate Admissions and other campus offices that may assist these students.
- Research findings that support the recommendations and the methods used for such research.
- Cost estimates for the recommended improvements.
- Metrics for measuring the success of the recommended improvements.

2. Presentation

- The All Abroad! project team will make a presentation based on the report to the entire LDP program, including sponsors and guests.

Out of Scope:

The following activities or deliverables are beyond the scope of this project:

- Interviewing or surveying non-UCB students.
- Assessing the satisfaction of students regarding their enjoyment or experience with the academic aspects of the various study abroad programs in which they participated.
- Creation of a database containing ranking and rating data on third-party study abroad programs.

E. Project Milestones

Milestones	Deliverables	Date
Develop plan for research.	project plan, project charter	06/24/08-7/25/08
Complete data collection.	survey and interview results, best practices documentation	7/26/08 - 9/12/08
Mid point meeting with sponsors	meeting and status update	7/26/08 -9/12/08
Analyze data and make recommendations	first draft of report	9/13/08 - 10/23/08
Prepare presentation	final meeting with sponsors	10/24/08-11/14/08
Submit report to sponsors and Inette	final draft of report	11/14/08
Final presentation	final presentation	11/20/08

F. Impact Statement

Potential Impact	Units Impacted
Change in business process.	Registrar
Change in business process.	Admissions
Change in business process.	Financial Aid
Change in business process.	Education Abroad Program

G. Roles and Responsibilities

Describe the roles and responsibilities of project team members followed by the names and contact information for those filling the roles. The table below gives some generic descriptions. Modify, overwrite, and add to these examples to accurately describe the roles and responsibilities for this project.

Sponsors:	
Name	Email / Phone
Susanna Castillo-Robson, Associate Vice Chancellor for Admissions and Enrollment	scr@berkeley.edu 510 642-7117
Professor Paulo Monteiro, Committee on International Education 2008-09 Chair	monteiro@ce.berkeley.edu 510 643-8251
Professor Vincent Resh, Committee on International Education 2007-08 Chair	vresh@nature.berkeley.edu 510 642-3763
Project Manager:	
Name	Email / Phone
This role rotated among All Abroad! team members	
Team Members:	
Name	Email / Phone
Alfred Alipio Jocson	jocson@berkeley.edu • 643-6508
Nelcy Dwight	ndwight@berkeley.edu • 642-5470
Merle Hancock	mah@socrates.berkeley.edu • 643-7394
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Name	Email / Phone
Cheryl Resh	chaigh@berkeley.edu • 642-0645
Anne De Luca	adeluca@berkeley.edu • 642-2261
Subject Matter Expert:	
Name	Email / Phone
Jocelyn Surla Banaria	jocebanaria@berkeley.edu • 642-8879

H. Resources

Resource	Constraints
Project Budget	\$
Printing Budget for final report	

I. Project Risks

Identify the high-level project risks and the strategies to mitigate them.

Risk	Mitigation Strategy
Sponsors may have conflicting motivations and may not agree.	Have a project charter; have clear communication and clarify sponsor's priorities.
Difficulties in scheduling – both due to team members and others' schedules.	Schedule way in advance.
Low student participation in surveys and interview.	Have incentives for surveys/interviews. Make participation mandatory.
Not getting everything done we believe necessary due to severe time constraints.	Pay attention to timeline. Adhere to scope of project.

Appendix C: The Forum on Education Abroad “Standards of Good Practice for Education Abroad”

The Forum on Education Abroad “Standards of Good Practice for Education Abroad”:

1. **Mission:** The organization, with respect to education abroad, has a formally-adopted mission statement for its overall operations and for its individual programs that is known to and accepted by its faculty and staff.
2. **Student Learning and Development:** The organization has stated educational objectives that foster student learning and development, and has established, and regularly utilizes, internal and external review processes for assuring that its programs accomplish these objectives.
3. **Academic Framework:** The organization maintains clearly stated and publicly available policies on academic matters related to education abroad.
4. **Student Preparation for the Learning Environment Abroad:** The organization provides advising and orientation support that is consistent with the program’s mission and student needs.
5. **Student Selection and Code of Conduct:** The organization maintains, and makes publicly accessible, its commitment to fair and appropriate policies regarding student selection and code of conduct.
6. **Policies and Procedures:** The organization has in place policies and procedures that govern its education abroad programs and practices.
7. **Organizational and Program Resources:** The organization provides adequate financial and personnel resources to support its programs.
8. **Health, Safety and Security:** The organization has established and continuously maintains effective health, safety, security and risk management policies, procedures and faculty/staff training.
9. **Ethics and Integrity:** The Organization educates its employees in and adheres to its own code of ethics and/or to the ethical principles of the Forum’s Code of Ethics for Education Abroad.

For the complete document, go to

<<http://www.forumea.org/documents/ForumEAStandardsGoodPrctMarch2008.pdf>>.

Appendix D: NAFSA’s “Criteria for Effective Management of Study Abroad”

Institutional Commitment

1. Institutional planning has established and embedded study abroad as an integral element in the academic offerings of the institution.
2. A financially sustainable plan is in place to support the study abroad office.
3. Study abroad is integrated into the academic life of the institution.
4. Systems and processes are in place to provide institutional oversight.

Study Abroad Infrastructure

5. There is a structured approach to program planning and a faculty-driven process for course approval and credit transfer.
6. Study abroad options are regularly updated to respond to academic opportunity and student need.
7. Clear institutional policies guide study abroad credit transfer.
8. Programs promote the health and safety of students studying abroad, and manage institutional risk.
9. Programs are regularly evaluated, and evaluation leads to improvements.

Adequate Resources

10. The institution actively seeks and retains knowledgeable and experienced personnel to lead and operate the study abroad office.
11. Financial aid policies and fundraising practices encourage student participation in study abroad.
12. Policies and practices are in place that control the costs associated with study abroad programs.

Clarity and Accountability

13. Critical information related to study abroad is communicated to all stakeholders.
14. Clear contracting and auditing procedures exist, including conflict-of-interest policies.

For the complete document, go to <http://www.nafsa.org/ /File/ /final_imsa_taskforce.pdf>

Appendix E: List of Contacts

Contact	Title & Department	College or University
Aczon, John	Administrative Analyst, Financial Services, Billing & Payment Services	UC Berkeley
Adams, Diane	Associate Director, Education Abroad Center	UC Davis
Banaria Jocelyn	Principal Policy Analyst, Office of the Assoc VC of Adm & Enrollment	UC Berkeley
Burton, Kim	Director, Programs Abroad Office Associate Director, International Center Region XII Team	UC San Diego UC San Diego NAFSA
Chan-Gee, Rose	Principal Administrative Analyst, Office of the Registrar	UC Berkeley
Davis, Rebecca Lewis	Program Analyst, Financial Aid Office	UC Berkeley
Dick, Hadyn	Executive Director, International Education Office	UCLA
Dullaghan, Joshua	Regional Advisor, Berkeley Programs for Study Abroad	UC Berkeley
Finkhous, Joe	International Programs Director, Institutional Relations	Boston University
Frieders, Zachary	Education Abroad Program Manager	UC Davis
Frisch, Cameron	Assistant Director, International Programs and Exchanges	University of Washington, Seattle
Galvin, Jim	Director of Opportunities Abroad and Faculty Led Program, Programs Abroad Office	UC San Diego
Gerdes, Nadine	Student Affairs Officer II, Study Abroad Programs	UC Berkeley
Griggs, Renee	Sr. Program Coordinator, Office of Study Abroad and Student Exchange	University of Arizona
Hinkson, Avis	Director of Undergraduate Advising, Letters and Sciences Undergraduate Advising	UC Berkeley
Kieling, Jan	Administrative Directory, Study Abroad Programs	UC Berkeley
LeBlanc, Nicole	Assistant Director, Office of International Programs	University of Michigan
Leshner, Charles	Faculty Director, Education Abroad Center	UC Davis
Low, Russell	Senior Administrative Analyst, Office of the Registrar	UC Berkeley
McElhinney, Scott	Student Affairs Officer II, Study Abroad Programs	UC Berkeley
Smith, Lindsey	EAP Coordinator, Office of International Education	UC Santa Cruz

Contact	Title & Department	College or University
Spears, Evera	Associate Director, Office of Undergraduate Admissions	UC Berkeley
Stuart, Anna	OIE Administrative Coordinator, Office of International Education	UC Santa Cruz
Thompson, Heather	Assistant Director for Policy and Information Systems, Study Abroad Office	University of Texas, Austin
Trinidad, Christine	Office Manager, Programs Abroad Office	UC San Diego
Um, Khatharya	Director, Berkeley Programs for Study Abroad	UC Berkeley
Whalen, Brian	President and CEO	The Forum on Education Abroad
Yuen, Anthony	Student Affairs Officer, Study Abroad Programs	UC Berkeley

Appendix F: Interview Template for UCB Offices and Peer Institutions

Question	Response
Institution or Office:	
Interviewer/Researcher:	
Date of interview/research:	
<p>What is your process for handling non-EAP (3rd party provider) Study Abroad students?</p> <ul style="list-style-type: none"> • beginning point, end point • enrollment procedures (withdrawals, re-enrollment, student status) • approvals for the program and course credit • forms or checklists for students • financial aid • keeping track of students • fees • liability • ability to communicate with students during program (e.g. travel alert) 	
<p>What information do you need to effectively provide services to non-EAP (3rd party provider) students - e.g. forms, data flow process?</p> <ul style="list-style-type: none"> • from students • from other administrative offices 	
<p>What kind of information do you need to provide - e.g. forms, data flow process?</p> <ul style="list-style-type: none"> • to students • to other administrative offices • (to federal government – FAO) 	
<p>What challenges or obstacles do you encounter in serving students who participate in non-EAP (3rd party provider) programs?</p>	
<p>What improvements would you like to see?</p> <ul style="list-style-type: none"> • in your department • in other departments/campus • systemwide (UC only) • best practices (Peers) 	
<p>May we contact you with follow-up questions? Best method (phone or email?)</p>	

Appendix G: Interview Template for Students

Question	Response
Contact	
Email	
Phone	
Year / Dept/Major	
Study Abroad Program	
<p>What was the process you went through for your non-EAP Study Abroad program?</p> <ul style="list-style-type: none"> • beginning point, end point • enrollment procedures (withdrawals, re-enrollment, student status) • approvals for the program and course credit • forms or checklists for students • financial aid • fees 	
What are your challenges or obstacles? What improvements would you make to the system?	
What kind of information did you need? Where and how did you obtain them?	
What kind of information did you need to provide other administrative offices?	
May we contact you with follow-up questions? Best method (phone or email?)	

Appendix H: Common Practices at Peer Institutions

Abbreviations & Terms

- UCB = UC Berkeley
- UCD = UC Davis
- UCLA = UC Los Angeles
- UCSC = UC Santa Cruz
- UCSD = UC San Diego
- UM = University of Michigan at Ann Arbor
- UT = University of Texas at Austin
- UW = University of Washington
- Non-sponsored = Third-party provider programs = Non-EAP

Does the institution have a central office that provides services to students who study abroad on non-sponsored programs?	
UCB	No. There is a central office only for students participating in the Education Abroad Program (EAP).
UCD	Yes. The study abroad office has recently become inclusive of EAP and non-EAP students. The office has been renamed "Education Abroad Center" (EAC).
UCLA	Yes. UCLA recently reorganized their study abroad program to incorporate management of all international programs, including EAP into a single central office.
UCSC	No. There is a central office only for students participating in the EAP.
UCSD	Yes. There has been a single office for approximately 15 years that handles both EAP and non-EAP. The non-EAP programs are administered collectively under the title of "Opportunities Abroad Programs" (OAP).
UM	Yes. The Office of International Programs (OIP). OIP is similar to UC's EAP, but is operated as a decentralized system rather than as a federal system.
UT	Yes. There has been a single office to handle all study abroad programs for approximately 15 years.
UW	Yes. The International Programs and Exchange (IPE) office manages all study abroad programs for the UW.

What level of administrative support does the institution provide to students who study abroad on non-sponsored programs?	
UCB	Minimal to none. Information is provided on various websites, including the BPSA website, but it is not comprehensive, consistent and sometimes inaccurate. Some offices offer fairly thorough assistance with their portion of the process.
UCD	Administrative support for all study-abroad students is provided by the Education Abroad Center (EAC).
UCLA	Administrative support for all study-abroad students is provided through the International Education Office (IEO). Students are advised about procedures. Specific programs are not endorsed.
UCSC	Minimal to none. Information is provided on the Office of International Education (OIE) website.
UCSD	Administrative support for all study-abroad students is provided by the Programs Abroad Office (PAO) within the International Center.
UM	Minimal to none. The UM study abroad office is not set up for providing services to students doing non-sponsored programs.
UT	Administrative support for all study-abroad students is provided by the Study Abroad Office.
UW	Administrative support for all study abroad students is provided by the International Programs and Exchanges Office.

Does the institution have any pre-requisite forms for non-sponsored study abroad?	
UCB	No, except for financial aid recipients.
UCD	Yes. The Student must meet with a Study Abroad advisor in order to acquire some of the forms. Pre-requisite forms include some or all of the following: <ul style="list-style-type: none"> ▪ NUCSA information sheet ▪ Program Leave Form ▪ Statement of Intent to Study Abroad Form ▪ Academic Information and Review ▪ Major/Minor Depart Approval Form ▪ Waiver of Liability ▪ Financial Aid, Consortium Agreement.
UCLA	An electronic set of forms is being developed. Students will be able to track progress electronically.
UCSC	No.

Does the institution have any pre-requisite forms for non-sponsored study abroad?	
UCSD	Yes. Pre-requisite forms include some or all of the following: <ul style="list-style-type: none"> ▪ Intent Form ▪ Academic Planning form ▪ Consortium agreement – if seeking financial aid ▪ Waiver of liability ▪ Super Waiver – if going to area State Dept warns against
UM	Yes. Statement of Intent to Study Abroad (SISA) form. The form is not mandatory.
UT	No. There is a required form for receipt of transfer credits, but it can be filled out upon return.
UW	Yes, students who choose to enroll concurrently at UW while studying abroad must submit a packet of forms in advance of their study abroad. This packet includes the following forms: <ul style="list-style-type: none"> ▪ Statement of Intent to Study Abroad ▪ Credit verification form for fees ▪ Photocopy of program acceptance letter ▪ Concurrent enrollment forms

Does the institution have any administrative fees for students who study abroad using non-sponsored programs?	
UCB	\$60 readmission fee for students upon return.
UCD	\$60 for readmission (for student who do not use one of the other options – see below). \$60 / quarter for PELP (1 quarter only). \$300 for NUCSA Leave (for 1-3 quarters).
UCLA	No, not for the present time. UCLA does not want to provide any disincentive for students to participate in study abroad. They will reassess the need for a fee at a later time.
UCSC	No. The campus currently provides only EAP, which is handled through normal campus fees and registration procedures.
UCSD	The campus is considering a \$100 / term administrative fee. OAP students must also pay “some” regular, incidental UCSD fees to continue access to certain services such as the career center. If a non-EAP student needs to be readmitted (which occurs if they go abroad for more than one quarter), the re-admission fee is waived.
UM	No.

Does the institution have any administrative fees for students who study abroad using non-sponsored programs?	
UT	\$400 / term. They re-evaluate the fee each year based on the amounts charged by other institutions of similar size. This fee applies to sponsored and non-sponsored programs.
UW	\$200 / quarter, \$300 / semester or \$600 / year.

Does the institution have any special enrollment status for students who are studying abroad on non-sponsored programs?	
UCB	No, but the campus is considering implementing a PELP (Planned Educational Leave Program). Currently students must withdraw or cancel their registration and be admitted upon return. Students who participate in EAP remain regularly enrolled UCB students.
UCD	Non-UC Study Abroad (NUCSA) Leave to retain student status, Planned Education Leave Plan (PELP) for 1-quarter or withdrawal (if over 1-quarter in duration). Students who participate in EAP are considered enrolled at UCD.
UCLA	Yes, in effect. They have a status that maintains email, etc, but students still need to be readmitted when they return. Students who participate in EAP are considered enrolled at UCLA.
UCSC	No, students who study abroad on their own must cancel or withdraw. Students who participate in EAP remain regularly enrolled UCSC students.
UCSD	Yes, in effect. UCSD effectively has a special enrollment status for students who are studying abroad in their OAP program which allows continuation of some benefits. Students who go abroad for one quarter can just "not enroll" and come back the following quarter without having to be readmitted. For more than one quarter, they must apply for re-admission, but the readmit application fee is waived. Students who participate in EAP remain regularly enrolled UCSD students. <i>Note:</i> In the past, students enrolled in a placeholder course (OAP50) and remained enrolled at UCSD while studying abroad. This practice was disallowed by UCOP.
UM	No. Students who study abroad on their own must cancel or withdraw.

Does the institution have any special enrollment status for students who are studying abroad on non-sponsored programs?	
UT	No. 98% of all UT students who study abroad remain enrolled due to the wide breadth of the offerings available through the centrally managed exchange and affiliated 3 rd party programs. For those small numbers of students who choose to study abroad completely on their own, they must withdraw for the duration of their study abroad.
UW	Students can enroll concurrently in UW while studying abroad. They also have the option to withdraw.

What resources are available for students who while they are studying abroad on non-sponsored programs?	
UCB	Full access to all resources for students within EAP. None for non-EAP, as they are not enrolled at UCB during their study abroad.
UCD	Students retain access to most campus resources under the NUCSA Leave and PELP programs. For students who withdraw, resources available to that category of student remain available.
UCLA	Full access to all resources for students within EAP. Student advising is integrated and available for all students who study abroad. Specific programs are not endorsed.
UCSC	Full access to all resources for students within EAP. None for non-EAP, as they are not enrolled at UCSC during their study abroad.
UCSD	Full access to all resources for students within EAP. Students keep their UCSD email account. "A place is saved for them" (with respect to re-admission/re-enrollment) No UCSD fees or tuition while studying abroad (on OAP)
UM	Full access rights to all resources for students in a UM sponsored program. Students earn in house credits and may use financial aid awarded through UM. Students on non-sponsored programs are not eligible for UM financial aid.
UT	Full access to resources for the majority of students, since such a high percentage study abroad through centrally-managed programs. Students who withdraw for 1 term or less retain access to email and a number of other campus-provided services.

What resources are available for students who while they are studying abroad on non-sponsored programs?	
UW	<p>Student who are enrolled concurrent at UW while studying abroad have access to the following resources:</p> <ul style="list-style-type: none"> • maintain scholarship and financial aid eligibility • earn regular, graded UW credit while abroad • satisfy residency requirements for graduation • retain access to a variety of campus-provided resources <p>There is no special access to campus resources for students who choose to withdraw during their study abroad.</p> <p>Advising services are available to all students who study abroad, regardless of their enrollment status.</p>

Does the institution require readmission for students after they return from study abroad?	
UCB	For non-EAP students, most must readmit. It depends on the length of the absence and whether or not they cancelled or withdrew.
UCD	Only for those that choose to withdraw. PELP and NUCSA leave do not require re-admission.
UCLA	Yes. They have a status that maintains email, etc, but students still need to be readmitted when they return.
UCSC	For non-EAP students, most must readmit. It depends on the length of the absence and whether or not they cancelled or withdrew.
UCSD	For non-EAP students, it is currently necessary to readmit.
UM	If the student was gone for more than 24 months since the last complete term.
UT	Only for the very small percentage of students that actually withdraw to study abroad.
UW	For students who choose to withdraw rather than maintaining concurrent enrollment.

What types of liability waivers does the institution have and/or use?	
UCB	Standard UC release of liability waiver.
UCD	Standard UC release of liability waiver. This campus also has a "super" waiver for use by students who intend to travel to

What types of liability waivers does the institution have and/or use?	
	locations that have a State Department Travel Warning.
UCLA	Standard UC release of liability waiver.
UCSC	Standard UC release of liability waiver.
UCSD	They have a standard waiver for all students doing OAP programs. If the student goes to an area with an existing State Dept travel warning, they must sign a "super waiver".
UM	The University of Michigan assumes no responsibility for the safety and health of UM students attending non-Michigan programs, but will make reasonable and appropriate efforts to render assistance as emergency or urgent situations may require them.
UT	Standard release of liability form regardless of location.
UW	Depending on level of Department of State announcement, a program may or may not be eligible for concurrent enrollment. If a program is not eligible, and a student participates anyway, he or she does so independently; the study abroad office will not allow concurrently enrollment.

What types of advising services does the institution provide to students who choose to study abroad on their own?	
UCB	Minimal to none. BPSA staff will provide general guidelines on how to select a program, but do not actually provide advising.
UCD	General guidance, similar in nature to the advising provided to participants in the EAP.
UCLA	Advising about process similar in nature to advising provided to EAP students, but without program-specific recommendations.
UCSC	Minimal to none.
UCSD	General guidance, similar in nature to the advising provided to participants in the EAP.
UM	Minimal to none. They provide information online to guide students through the decision making process.
UT	A full range of advising options for all students who study abroad. Due to the high ratio of students to advisors, UT takes a very lean, efficient, perhaps even ruthless approach to advising students. They try to organize group orientations for commonly asked questions rather than holding one-on-one sessions.

What types of advising services does the institution provide to students who choose to study abroad on their own?	
UW	UW involves department/college advisors in many steps of the process of selecting and approving study abroad.

Does the institution provide list of approved third-party or affiliated programs?	
UCB	No.
UCD	No. Davis states will not endorse, recommend specific programs, but do offer resources for referral to non UC programs available at EAC.
UCLA	No. UCLA will not endorse specific programs but they do offer general advising about process. They recognize that EAP programs do not meet all needs, so they cover Summer Travel Programs and 3 rd Party traveler programs.
UCSC	No.
UCSD	Yes. They maintain several affiliation agreements using a standard model.
UM	Yes. However, their website indicates that their office does not endorse these specific programs. However, they are endorsed or sponsored by other units within UM.
UT	Yes, they provide an extensive list of 3 rd -party study abroad opportunities. They maintain contracts with the vendors on their list and vet the programs. Any 3 rd party program they offer is guaranteed to provide transfer credit to the UT campus.
UW	Website is fairly comprehensive, with search capabilities for affiliated exchanges and programs by country, by language, and by term. For unaffiliated programs, less info exists, but students can learn about concurrent enrollment process and access appropriate forms online.

Does the institution provide a comprehensive procedure for students to guide them through the study abroad experience?	
UCB	No. The BPSA website provides a comparison between EAP and non-EAP programs that serves as a reasonable checklist for the steps that need to be taken to study abroad.

Does the institution provide a comprehensive procedure for students to guide them through the study abroad experience?	
UCD	The UC Davis EAC website contains extensive and detailed information on steps a student should take to apply for any form of study abroad (EAP, QAP, SAP or independent).
UCLA	It is currently under development.
UCSC	A high-level overview of the tasks that need to be performed by the student.
UCSD	Yes. They have a well-defined set of steps which are clearly delineated on their website and communicated by their advisors.
UM	Yes.
UT	Yes.
UW	Yes. They have a well-defined set of steps with associated packet of forms available on their website.

Does the institution provide a website with complete information on the processes and procedures students must follow in order to study abroad on their own?	
UCB	No. The BPSA website provides a one-page flyer detailing the differences between EAP and non-EAP programs, however, that a non-EAP student could use as a sort of checklist for the steps s/he needs to take.
UCD	The UC Davis provides a simple nine-step procedure for students that choose to study abroad on their own. The information available is limited in comparison to the information available for the three centrally-managed program offerings (EAP, Summer Abroad Program, and Quarter Abroad Program).
UCLA	Not presently. It is under development.
UCSC	The UCSC OIE website provides moderately complete information describing the procedures that students must follow to arrange for their own study abroad programs.
UCSD	Yes. They have a very thorough website which opens with their clearly delineated set of steps.
UM	The UM website has very detailed, in-depth instructions on how to apply for all of their study abroad programs.
UT	Yes. It includes online selection tools and a step-by-step procedural checklist. The pre-requisite form is not available online.
UW	Website is fairly comprehensive, with a clear process and packet of forms for non-sponsored students as well as search capabilities for affiliated exchanges and programs by country, by language, and by term.

How does the institution keep track of students who study abroad?	
UCB	The office of the registrar recently added a checkbox to the re-admission forms to attempt to track students returning from non-EAP study abroad. This does not account for students who study abroad in their last term.
UCD	Non-EAP students who do so via NUCSA are tracked. Students participating in the EAP are tracked by the UOEAP office as well as by the local campus EAP office.
UCLA	Tracking for non-EAP is in development. Students participating in the EAP are tracked by the UOEAP office as well as by the local campus EAP office.
UCSC	There is no tracking of non-EAP student. Students participating in the EAP are tracked by the UOEAP office as well as by the local campus EAP office.
UCSD	Non-EAP students who do so via OAP & Global Seminars are tracked. Students participating in the EAP are tracked by the UOEAP office as well as by the local campus EAP office.
UM	UM maintains and International Travel Registry in which students traveling abroad are expected to register.
UT	All students who study abroad are required to file an Intent to Study Abroad Form or to justify their absence from the university. The Study abroad office reports near 100% compliance and tracking of all students who study abroad via this method.
UW	UW has multiple touch-points at which they collect information from students regarding their intent or experience with a study abroad program. Students must submit an "Intent to Participate" form if planning to participate in an unaffiliated foreign study opportunity. Students must submit a Credit Verification Form in order to maintain concurrent enrollment.

Does the institution provide insurance or access to insurance for students who study abroad in a non-sponsored program?	
UCB	Not for non-EAP programs. Yes for EAP students.
UCD	Yes. For all students who participate in EAP or in one of the other sponsored programs.
UCLA	Not for non-EAP programs. Yes for EAP students.
UCSC	No.
UCSD	OAP students are advised to purchase International Health

Does the institution provide insurance or access to insurance for students who study abroad in a non-sponsored program?	
	Insurance.
UM	The University offers a low-cost health insurance policy for international travel. This insurance is required for undergraduates participating in any UM-sponsored international activity. It also is strongly recommended for all other travelers, including faculty, staff, and other students. To purchase the University's travel abroad health insurance policy, travel information must be registered first.
UT	Full access to all University resources for a majority of students since 98% of study abroad activity falls within the range of programs officially supported by UT.
UW	Yes, for students who choose to participate in the non-sponsored program by enrolling concurrently.

How does the institution communicate with students while they are studying abroad on non-sponsored programs?	
UCB	There is no contact with students except occasionally in the case of financial aid recipients; students who receive financial aid are currently the only non-EAP students for whom UCB has contact information while they are abroad. There is an International Travel Registry where any traveler can submit itinerary and contact information, but it doesn't appear to be widely known about or used by non-EAP.
UCD	UCD maintains contact information for students who are on NUCSA and for students who choose to register their intent to study abroad in advance of departure.
UCSC	There is no contact information available for non-EAP students and hence, no contact.
UCSD	Via phone or email for all participants in EAP, OAP or Global Seminars programs and for students who choose to register their intent to study abroad in advance of departure. There is also an online system "MyPAO" (My Programs Abroad Office) which students can keep in touch with the UCSD.
UM	UM maintains an International Travel Registry where any traveler can submit itinerary and contact information. Faculty and students traveling abroad as a group are required to register.

How does the institution communicate with students while they are studying abroad on non-sponsored programs?	
UT	UT maintains a comprehensive list of all students who are studying abroad, even those who do not use the centrally managed or provided programs. This includes email, phone and physical locations for all students.
UW	UW maintains contact information for those non-sponsored students who choose to concurrently enroll.

Does the institution “check in” with non-sponsored students upon their return from studying abroad?	
UCB	No.
UCD	The EAC office recommends students check in with an EAC advisor upon their return.
UCSC	No.
UCSD	They encourage students to check in with their office or at one of the numerous returnee activities offered. A newsletter for returning study abroad students – both EAP and non-EAP – is produced every term.
UM	Yes. They are encouraged to visit the Registrar’s office upon return.
UT	There is a “strongly recommended” re-entry session and surveys about the student’s experience in their study abroad program.
UW	Minimal to none.

Describe the procedures that the institution requires students to follow when the study abroad on their own. Characterize the approach on a scale between “low-touch” (students do the work) and “high-touch” (institution leads student through process).	
UCB	Below low-touch. Some information available via websites. Questions answered by departments and administrative units if student investigates and asks questions. The students are given little guidance and must navigate the administrative offices on their own.
UCD	Low-touch. Well-defined (and new) process with helpful online documentation, but students must navigate the process on their own and there is no advising on program content or selection.

Describe the procedures that the institution requires students to follow when the study abroad on their own. Characterize the approach on a scale between “low-touch” (students do the work) and “high-touch” (institution leads student through process).	
UCLA	Medium-touch. They must meet with a study abroad advisor, who initiates a packet of forms that gets circulated and signed by appropriate departments electronically. This is still under development. Students are given advising about process, but not about specific programs.
UCSC	Low-touch. Information and guidelines are available online for student reference but no administrative support is provided.
UCSD	High-touch. Extensive guidance and administrative assistance is provided.
UM	Low-touch. Students are provided with the information necessary to navigate the system on their own.
UT	Medium/High. “Open Waters” approach to study abroad. Students are encouraged to use UT-provided programs, but are not required to do so. This is a medium/high touch program despite references to lack of obstacles. Students are forced to visit the central office in order to acquire a copy of the application form.
UW	Low-touch. Students receive administrative guidance, but do not receive advising on program content or selection.

Does the institution have integrated data systems for the Financial Aid, Registrar, Admissions and Enrollment, Undergraduate Affairs and Study Abroad offices?	
UCB	No. Data systems are separate and some are synchronized once a day. Other data is transferred between offices and departments manually.
UCD	Yes. The EAC office is the central office, but they route the forms to the necessary offices.
UCLA	Yes. They are developing a system to move electronic forms through all offices and departments that participate in study abroad preparations for students.
UCSC	No. They handle ensuring services for students studying abroad are continued by manually informing each office that needs to know; they prepare a list of OAP (non-EAP) students which they send three times <i>per quarter</i> to these offices.
UCSD	No. Data systems are separate and are synchronized manually.
UM	Yes. They have both online systems, and paper forms (with links to the PDF versions) available.

Does the institution have integrated data systems for the Financial Aid, Registrar, Admissions and Enrollment, Undergraduate Affairs and Study Abroad offices?	
UT	Moderately.
UW	Yes. They use paper forms routed between offices.

Appendix I: Estimate of the Number of UCB Students Participating in Non-EAP Programs

How many UC Berkeley undergraduates study abroad every year?

Ideally, that question would be answered using data from some tracking system. Examples of a tracking system include: a count of re-admissions or withdrawal or registration in some travel abroad system. There are administrative and system changes being made to track and count non-EAP students by the admissions and registrar's office, but **official non-EAP counts will not be available until Fall 2009**. For now, we have to estimate counts of non-EAP students.

The only firm UCB non-EAP count is the **average of 50 students who complete "Consortium Agreement" paperwork** with their department and other administrative offices in order to receive financial aid towards their study abroad. (See "UC Berkeley Consortium Agreement, Non-EAP Students Count by Academic Year" below.) There are likely many more non-EAP students who do not receive financial aid.

UCB may have **around 738 non-EAP students every academic year, equivalent to the number of EAP students**. (See "UCEAP Participation by Campus, Academic Years 2002/03 to 2006/07" below.) Several individuals we interviewed, including Kim Burton of UC San Diego and NAFSA, Margaret Heisel of UCOP, and Heather Thompson of University of Texas, indicated that the count of first-party (like UC EAP) and third-party affiliate (like non-EAP) study abroad are roughly equal. (See "UC San Diego EAP & non-EAP Counts, 2006-2007" below).

The number of UCB readmitted undergraduate students (see "Count of Returning Undergraduates" below), suggests that around 738 non-EAP students per year is possible. Every UCB undergraduate not enrolled for one semester must withdraw or cancel their enrollment and be readmitted. The number of non-EAP students who study during the fall or spring cannot exceed the number all readmitted undergraduates. There have been a minimum of 1000 readmitted upper-division undergraduates over the last six years. (While sophomores may also study abroad, over 95% of EAP students who study abroad are upper-division students and we assume a similar proportion on non-EAP students are upper-division.) About 250 lower-division students are

readmitted every year due to academic, financial, or other personal reasons. If a similar number of upper-division students are readmitted for similar reasons, then the remainder, 750 (1000-250) may have studied abroad as non-EAP or pursued an internship or education elsewhere in the United States.

UC Berkeley Consortium Agreement, Non-EAP Students Count by Academic Year

“Consortium Agreement” indicates that the students completed paperwork with their department and other administrative offices in order to receive financial aid while they study abroad.

Academic Year	Count
2006-2007	47
2007-2008	52
Average	49.5

Source: UC Berkeley Office of Financial Aid

Third-Party Providers to Consortium Agreement, Non-EAP Students

For Fall 2006, Spring 2007, Fall 2007, and Spring 2008
Sorted in descending order by number of students

non-EAP Program	Count
C.E.A. - ARIZONA	24
SCHOLAR SHIP	12
A.I.F.S. - CONN.	8
I.S.A. - BUTLER UNIV.	5
UNIV. OF VIRG. S@SEA	5
A.S.A. - BOSTON	4
I.H.P. - BOSTON UNIV.	4
AM. UNIV PROVENCE	2
CIEE- SPELMAN	2
I.S.A. - TEXAS	2
NY UNIV.	2
S.A.I.- TEXAS	2
WELLS COLLEGE- NY	2
25 other providers, each serving 1 student each	25
Grand Total	99

Source: UC Berkeley Office of Financial Aid

UC San Diego EAP & non-EAP Counts, 2006-2007

	EAP	OAP (non-EAP)	Total Study Abroad
Number of Students	586	506	1092
Percentage of Students	54%	46%	100%

Source: UC San Diego, Programs Abroad Office

UCEAP Participation by Campus, Academic Years 2002/03 to 2006/07

Campus	Year					Five Year Average
	2002/03	2003/04	2004/05	2005/06	2006/07	
Berkeley	622	790	748	744	787	738
Davis	342	350	435	391	404	384
Irvine	422	522	507	494	467	482
Los Angeles	582	710	559	540	465	571
Riverside	137	161	185	223	231	187
San Diego	494	559	559	607	583	560
Santa Barbara	558	658	704	704	726	670
Santa Cruz	478	491	511	444	453	475
Total	3,635	4,241	4,208	4,147	4,116	4,067

Source: UCEAP, Research, July 2007.

<http://eap.ucop.edu/common/reference/statistics/2006-07_statistics/partxcampus.pdf>

Count of Returning Undergraduates

Academic Year	Returning Lower Division	Returning Upper Division	Total Returning
2007-2008	236	1052	1288
2006-2007	233	1049	1282
2005-2006	228	1029	1257
2004-2005	212	1022	1234
2003-2004	245	1069	1314
2002-2003	244	1000	1244
Minimum	212	1000	1234
Maximum	245	1069	1314
Average	233.0	1036.8	1269.8

Source: UC Berkeley Office of Student Research, Registered Student tables: Count of Returning Undergraduates. Note: "Returning" and "readmitted" are equivalent terms.

Appendix J: Fee Analysis

All Abroad! recommends creating a new fee to be charged to non-EAP students. Revenue raised by the new fee would help fund the additional staff and programs required to provide a higher level of service to non-EAP students. A final determination of the fee amount should be tabled until official counts are available in Fall 2009. The table below displays the possible revenue based on fee amount and number of non-EAP combinations. The equivalent of two or more Student Affairs Officer II positions could be funded with a fee of \$300 and at least 500 non-EAP students.

Projected Fees Collected to Serve Non-EAP Students

Fee	Number of Non-EAP Students			
	250	500	750	1000
\$100	\$25,000	\$50,000	\$75,000	\$100,000
\$200	\$50,000	\$100,000	\$150,000	\$200,000
\$300	\$75,000	\$150,000	\$225,000	\$300,000
\$400	\$100,000	\$200,000	\$300,000	\$400,000
\$500	\$125,000	\$250,000	\$375,000	\$500,000

Shaded cells indicate that the combination of non-EAP students and fee could provide funding for **one** or **two or more** Student Affairs Officer II position(s) at the salary midpoint.

Cost Projection for Student Affairs Officer II and III Positions

At UC Berkeley, the cost of positions to the budget is equal to the base pay plus 24% fringe (which includes medical benefits, vacation leave, and other personnel costs). The midpoint in the salary range is typically used when costing out vacant positions.

4353 Student Affairs Officer II

Salary	Minimum	Midpoint	Maximum
Base	\$40,764	\$58,488	\$76,200
fringe (24%)	\$9,783	\$14,037	\$18,288
Total	\$50,547	\$72,525	\$94,488

4355 Student Affairs Officer III


Salary	Minimum	Midpoint	Maximum
Base	\$44,808	\$64,320	\$83,820
fringe (24%)	\$10,754	\$15,437	\$20,117
total	\$55,562	\$79,757	\$103,937

Appendix K: Differences between EAP & Non-UC Sponsored Programs

This flyer is given to UCB students who visit the Berkeley Programs on Study Abroad Office seeking information on how to participate in a non-EAP Program.


Differences between EAP & Non-UC Sponsored Programs		
<p>If you are considering a non-UC sponsored program, be sure to read this sheet in conjunction with the Office of Undergraduate Admissions flyer: Information for UC Berkeley Students Planning to Study Abroad in Non-UC Sponsored Programs. http://students.berkeley.edu/files/Admissions/Study%20Abroad_0808.doc http://studyabroad.berkeley.edu/Programs/noneap.htm</p>		
Issue	EAP (UC Education Abroad Program)	Non-UC Sponsored Programs
Grades	Grades from EAP are posted on UC Berkeley transcripts and calculated into your overall GPA.	Grades from non-UC sponsored programs and host institutions are not posted on UC Berkeley transcripts and are not calculated in your overall GPA. Students should order transcripts before the end of the study abroad program.
Coursework	EAP courses are listed individually on UC Berkeley transcripts.	Courses are not listed individually on UC Berkeley transcripts. If you would like transfer credit for your program, consult the Office of Undergraduate Admissions, 110 Sproul Hall.
Units	EAP units are listed for each course on your transcript and are included in overall unit totals.	As with all transfer credit, only the total units granted for non-UC sponsored courses are posted on UC Berkeley transcripts, along with the name of the institution and date of completion. These units are included in overall unit totals.
Registration Status	EAP participants have UC Berkeley continuing student status during EAP participation.	Students cancel their registration for the period of study abroad by filing a Notice of Cancellation with the Registrar's Office and must file a re-admission petition by the stated deadline to attend a future semester. Re-admission status puts the student back into the system so that TeleBears information can be issued and CARS billing statements are reinstated.
Financial Aid	EAP participants' financial aid status continues while abroad. The Financial Aid Office adjusts the amount of the award to the cost of living on each particular EAP program, using the official EAP student budget.	Participants may not be eligible for UCB institution aid (Regents Scholarship, etc.) or outside scholarships (it's up to the lender). Students may be eligible to use Federal financial aid and California State aid (Cal Grants) provided certain conditions are met. Obtain an application for Off-Campus Enrollment from the Financial Aid Office, and direct questions to them about transferability of aid.
University, College & Major/Minor Requirements	EAP courses automatically count as credit toward graduation. Department major advisers determine which EAP courses fulfill major or minor requirements; college advisers (L&S, etc.) determine which courses fulfill university or college requirements. Check with your department and college or school about specific rules and regulations.	Transfer credit for courses taken abroad is determined by Admissions Evaluators in the Office of Undergraduate Admissions. As with EAP programs, department major advisers determine which courses will fulfill major or minor requirements; college advisers (L&S, Engineering, CNR, etc.) determine which courses fulfill university or college requirements. Check with your department and college or school about specific rules and regulations.

Appendix L: UCB Financial Aid Office Form Packet



UNIVERSITY OF CALIFORNIA, BERKELEY

Certification of Approval for Off-Campus Enrollment



• Please use *black ink* (no fine point).
 This form must be returned to the Financial Aid Office, *sixty (60) days prior to the enrollment dates of the Program* and all departments must complete their appropriate sections.

To be completed by Student

Student Name _____ SSN# _____
 Current Address _____ Phone () _____
 Berkeley College or School _____ SID# _____
 E-mail _____
 Name of and address of host institution where you plan to enroll in the United States _____

 Country where you will study _____
 Enrollment Dates: From: _____ To: _____
month day year month day year
 Proposed Program: Indicate course title, number and units.
 Term 1 _____ Term 2 _____

I have attached the course descriptions(s), with English translations, and have included any other pertinent documentation that will assist Admissions with the evaluation process (i.e., information on lecture hours, labs, tutorials, etc.). I understand that the Admissions Office cannot guarantee the transferability of units if I change my program or course load. I also understand that I am *required* to request a transcript of the above courses be sent to my home institution within thirty (30) days of completion of the program. All course work must be posted to my transcript within six months of completion of the program or I may be billed.

I understand that this form must be returned to the U.C. Berkeley Financial Aid Office by _____ in order for me to receive financial aid.

Student Signature _____ Date _____

To be completed by Credit Evaluator (Rm 110 Sproul)


The above-named institution is accredited: Yes No
 The course(s) to be taken are transferable: Yes No

Evaluator's Signature _____ Phone # _____ Date _____

To be completed by Department Advisor or Other Official

I have reviewed the above student's plan to enroll at the above-named institution and the course evaluation. The department, by signature, approves the above academic program for the student's degree program.

Print Name and Title _____ Phone # _____ Date _____
 Advisor/Department Official's Signature _____



% 3 1 0 9 1



Financial Aid Consortium Agreement

• Please use black ink (no fine point).

As allowed in Part 668.19, Student Assistance General Provisions, part 690.0, Pell Grant Program, Code of Federal Regulations, this Consortium Agreement is entered into between the institution or agency listed below for the purpose of providing federal financial assistance to the named student.

This Agreement is entered into between The University of California, Berkeley (the home school) and (the host consortium school or agency) for the benefit of:

Student's Name: _____ Student Identification Number: _____

Mailing Address: _____ Phone: () _____

E-mail: _____ Program Course: _____

Enrollment Dates: From: _____ To: _____
month / day / year month / day / year

This Agreement applies to: Pell Cal Grant ACG/SMART Federal Direct Loan
 Direct PLUS Alternative Loan

To be Completed by Host Consortium School or Agency

Annual Pell Grant Cost of Education: _____ Dept. of Ed. School Code: _____

Length of Program in semesters/quarters: _____ School Phone Number: () _____

Number of semester/quarter units enrolled _____. The above-named student must be enrolled at least **half time**.

Will the consortium school or agency be giving the student a scholarship? No _____ Yes _____ Amount _____

Cost of Program: \$ _____
 Tuition and Fees: \$ _____
 Room and Board: \$ _____
 Air Fare: \$ _____
 Other Expenses: \$ _____
 Total: \$ _____

Host Consortium School, Agency, or Financial Aid Office Address:

 Attn: _____ E-mail: _____

Certification

- A. The consortium school or agency certifies that the student listed above has been accepted for enrollment in the program listed.
- B. The consortium school or agency agrees not to pay, or to disburse to the student Title IV or other Campus Based funds administered or processed by the consortium school. Further, the consortium school or agency **agrees to notify the home school immediately when it receives notification that the student withdraws from the program.** Satisfactory conclusion of the program will be evidenced by an academic transcript upon written request of the student.
- C. The consortium school agrees to provide confirmation of enrollment or reduction of course load within thirty days to the home institution.
- D. This form must be returned to the U.C. Berkeley Financial Aid Office by _____ (date) in order for the student to receive financial aid for the 2008-2009 academic year.

SIGNATURES: Regulations permit signatures of Financial Aid Officers and abroad program agency officers.

UC Berkeley FAO Officer _____
 Signature: _____
 Title/Date _____ / _____

Consortium School/Agency Officer _____
 Signature: _____
 E-mail address _____
 Title/Date _____ / _____
 Name/Phone # _____ / _____

University of California, Berkeley, Financial Aid Office, 250 Sproul Hall #1960, Berkeley, CA 94720-1960



UNIVERSITY OF CALIFORNIA, BERKELEY

Certification of Enrollment and Payment Disbursement



Please use black ink (no fine point).

Instructions This Certification of Enrollment and Payment Disbursement form must be returned to the home institution before disbursement of funds to the student.

To be Completed by the Student

Student's Name: SSN: SID #:

Name of Host Consortium School or Agency: Phone: ()

Enrollment Dates (approx.): From To

Program Course(s): units: semester quarter

To be Completed by Consortium School, UCB Staff, or Agency

The above-named student is enrolled in the above program (courses and units) at the consortium school:

The program is considered to be: Fulltime Three-quarter time Total number of course units Half-time Less than half-time

The above-named student is not registered at the consortium school for the above enrollment period.

The above-named student will receive the following payments from UC Berkeley deposited to the students designated bank account ten days prior to the begin date of the program after receipt of this signed document to the home institution.

Table with 2 columns: Type of Payment to be Disbursed, Amount. Rows 1) through 5).

SIGNATURE: (Regulations permit signatures of Financial Aid officers or designated officials)

Consortium School/Agency: Title/Date:

Print Name: Phone Number:

UCB Confirmation: Date Confirmed:

University of California, Berkeley, Financial Aid Office, 250 Sproul Hall #1960, Berkeley, CA 94720-1960



Consortium Financial Aid Disbursement Acknowledgement



• Please use black ink. Do not use a fine point.

Instructions Complete only Section 1 of this form. Upon completion, submit your request to the appropriate Financial Aid Unit. Note: if you are receiving Direct Student Loan check(s), YOU MUST COMPLETE YOUR MASTER PROMISSORY NOTE (MPN) and entrance interview in advance of any loan check(s) being disbursed to you. Loan checks will not be disbursed without this document.

Section 1 (Please print)

1. Student Name (last, first, mi.): _____
2. SSN: _____ - _____ - _____
3. E-mail: _____ Phone: _____
4. Have you changed your address? ___yes ___no Have you signed up for EFT? ___yes ___no
5. SID: _____
6. Award to be sent by EFT for: Fall 2008 Spring 2009 Summer 2009
7. Award to be sent by EFT for: Pell Direct Loan Alternative Loan PLUS Loan
 Cal Grant ACG/SMART Other: _____
8. Name of an Emergency Contact: _____
Street address/P.O. Box _____ Phone _____
City, State, Zip/Country _____
9. Please read, sign and date: I understand that my financial aid award(s) will not be disbursed until ten days prior to the begin date of the session and my file is complete, all blocks removed, my current registration at UCB has been cancelled, and any balance on my CARS account has been paid in full. Also, I understand that I must complete a Direct Loan MPN in advance of receiving a Direct Loan.
10. By signing I also understand that I am responsible for all payments to the host institution or agency and that I will contact my home institution if I drop or withdraw from all or any of the approved courses and may be billed for any aid received if I withdraw, cancel or drop courses.
11. I understand that all approved course work must appear on the UC Berkeley Transcripts system within six months or I may be billed for aid received.

If you have any questions regarding your EFT deposit, contact the Billing and Payment Services Office, 140 University Hall, (510) 642-3190, or log on to <http://bearfacts.berkeley.edu>.

Student Signature _____ Date _____

Section 2 For Office Use Only

- UNIT: _____ Fall 2008 Spring 2009 Summer 2009
- Direct Student Loan disbursed dated _____, \$ _____
 - Parent loan check dated _____, \$ _____
 - Pell Grant check date _____, \$ _____
 - Other check date _____, \$ _____
 - FAO Approval _____ Date _____



Appendix M: Information for UC Berkeley Students Planning to Study Abroad in Non-UC Sponsored Programs

Berkeley

University of California

Office of Undergraduate Admissions

INFORMATION FOR UC BERKELEY STUDENTS PLANNING TO STUDY ABROAD IN NON-UC SPONSORED PROGRAMS

PART I: CHECKLIST

Choose your study abroad program. Thoroughly read PART II: TRANSFER CREDIT RULES AND GUIDELINES on the back of this sheet. Research prospective programs utilizing resources such as the Berkeley Programs for Study Abroad (BPSA) Library, 160 Stephens Hall, The Study Abroad Fair sponsored by BPSA in October, and the Internet. Ask for references from various sources (e.g. ask program representatives for references of other UC Berkeley students who have attended their programs). Also discuss your planned courses with your college or major advisor if you have questions about how the course(s) might fulfill specific college or major requirements.

Complete both sides of the attached PART III: STUDY ABROAD PROPOSED PROGRAM EVALUATION form and make copies of all the information that you will need to take to your appointment (see below).

Make an advising appointment with a Study Abroad Advisor. Appointments can be made in-person at 110 Sproul Hall or by calling 510-642-3175 between 9 a.m. and 12 noon or 1:00 and 4:00 p.m. Appointments must be made at least one day in advance. Appointments are 10-15 minutes long. The appointment schedule is as follows:

Tuesday: 9:30 a.m. – 11:00 a.m.
Thursday: 9:30 a.m. – 11:00 a.m.

Bring to the appointment

- your completed STUDY ABROAD PROPOSED PROGRAM EVALUATION form
- photocopies of course descriptions for all proposed courses
- copies of information about the program or university
- copies of information confirming the name and status of the institution that will issue an official transcript
- any forms that require a signature of a study abroad advisor, including financial aid forms

The purpose of the appointment is to review the information about the proposed program and courses, and to advise you in advance about transfer credit policies and potential transfer credit for the courses. The meeting is informational – it does not obligate you to attend the program. We will keep your Proposed Program Evaluation form on file, along with the copies of the program information and course descriptions. We will also give you a copy of the Proposed Program Evaluation form for your records.

When you are sure of your study abroad plans, cancel your registration for the future term at <http://telebears.berkeley.edu/>

Submit an Application for Readmission in 110 Sproul Hall before you leave for your study abroad program. (The form must be received by June 1st for readmission for the fall semester and by November 1st for the spring semester.)

Order official transcripts at the conclusion of your program, to be sent directly to the Office of Undergraduate Admissions. See Part II on the back of this page for the exact address.

PART II: TRANSFER CREDIT RULES AND GUIDELINES

Status of the Institution or Program

The college or university that offers your proposed courses must be accredited by one of the U.S. regional accrediting associations or officially recognized as a higher education institution by the appropriate education authorities in the country in which it is located. If the program is not an educational institution, but a study abroad program or private school, courses will only be considered for transfer credit if they are transcribed by a regionally-accredited U.S. university or college as residence credit, or by an officially recognized university in the country. If you are unsure about the status of the institution that offers the courses you wish to take, be sure to bring information about the institution to your appointment with a study abroad advisor. ****We are no longer accepting credit directly from an IES transcript. IES is not an accredited university institution.****

Course Content

The courses taken must be comparable in scope, content and level of instruction to those taught at one of the eight University of California campuses. Credit will not be given for any course that duplicates course work that you have already completed at UC Berkeley or any other university or college.

You should bring to your study abroad appointment a description for every course you propose to take. In addition, save all course materials you accrue in the course, such as syllabi, notes, papers, journals, reports, examinations, etc. These may need to be reviewed to determine course content when you return to Berkeley. This is especially true of courses such as "Independent Study," "Internship," "Directed Studies," or "Special Topics," which we generally cannot pre-approve because the actual course content is not determined until the student begins the course.

Official Transcripts

Transfer credit will be considered only for courses that are recorded on official university or college documents. If you attend a foreign university as a directly-enrolled student, you must submit the official record as it is issued to students in the country. Transfer credit will **not** be considered for courses recorded on a "Certificate of Attendance." If you have any questions about the document required, consult a study abroad advisor in the Office of Undergraduate Admissions.

The official transcript must be sent directly from the institution to the following address:

**ADD CREDIT: STUDY ABROAD
Office of Undergraduate Admissions
110 Sproul Hall # 5800
Berkeley, CA 94720-5800**

You may also want to request a copy to be issued directly to you in a sealed envelope, which you can submit in the event that there is a delay in receiving your official transcript directly from the institution.

Evaluation of Transfer Credit and Posting of Credit to Your UC Berkeley Record

Final decisions regarding transfer of credit are made on the basis of official documentation. Upon receipt of an official transcript, the Admissions Office will evaluate your transcript for appropriate transfer credit and forward the results to the Office of the Registrar for posting on your UC Berkeley record. With the exception of regular courses taken at another UC campus, only the name of the sponsoring institution and the number of transferred units will appear on your UC Berkeley record.

Evaluation of transfer credit is based on UC system-wide guidelines. Credit will only be considered for courses in which you have earned a passing grade, as defined by the University that transcribes the courses. There are limitations of credit in certain areas: professional courses in journalism and law are not transferable; lower division business courses are rarely transferable; upper division courses are transferable only if the student completed the stated prerequisites for the course prior to enrolling in the course. Unit value for credit granted will be determined by the Office of Undergraduate Admissions. You may not negotiate for credits, nor may you choose whether or not you wish to receive credit.

Please allow at least one semester's time for receipt of transcripts, evaluation and posting of credit. The Admissions Office processes a high volume of requests for addition of credit. Depending on the time of receipt, this process may not be completed prior to scheduling of classes for the term in which you are readmitted. Therefore you should not rely on this credit in determining your UCB course schedule or unit load.

PART III: STUDY ABROAD
PROPOSED PROGRAM EVALUATION

We ask that you provide the following information to assist us in reviewing your academic records for possible transfer credit upon your return.

Name: _____ Date: _____
 Last First M.I.

UCB SID #: _____ DOB: _____ First term at UCB: _____

College: _____ Major: _____

Mailing Address: _____
 Street

_____ City State Zip Telephone (including Area Code)

E-mail Address: _____

- Country in which you plan to study: _____
- Name of institution: _____
- Dates of attendance: From: _____ To: _____
- If study is sponsored by an accredited U.S. college or university, please specify name of institution:

- Who will issue official transcripts of record? _____
(*Transcripts must be issued by an accredited university/college-level institution to be considered for credit.*)
- If you plan language study, what courses in that language have you already completed at UCB or other U.S. institutions?

Appendix N: Suggested Forms & Resources for Non-EAP Students

The suggested forms on the following pages come straight from UC Davis or with minor modification. Several of the universities that we interviewed shared their forms with us.

Also, NAFSA offers the following publications, which include sample documents: "By Example: Resources for Education Abroad Offices and Advisers" "Abroad By Design."

<http://www.nafsa.org/knowledge_community_network.sec/education_abroad_1/managing_an_education/publications_30>

Non-UC Study Abroad Checklist

University of California at Berkeley



Participating in a Non-UC Study Abroad (NUCSA) Program

Checklist:

- 1. Check Out Your Options at the BPSA
- 2. Get a Passport
- 3. Travel Warnings
- 4. Choose a Program
- 5. Meet with an Advisor
- 6. Grades and Credits
- 7. NUCSA Leave
- 8. Insurance & Liability
- 9. Financial Aid
- 10. Study Abroad!
- 11. Order Official Transcripts
- 12. Share Your Experience

Step 1. Check Out Your Options at the BPSA

Before signing up for a non-UC study abroad program, check out all of your options online or at the BPSA office located at 160 Stephens Hall. Meet with a study abroad advisor and attend available orientations if you are not sure of what your UC options are. If none of our Education Abroad Programs can fill your needs, investigate non-UC providers. Should you decide to participate in a non-UC program, there are many critical issues about financial aid, registration status, residence requirements, and transfer of course credit, which you must understand completely. The BPSA does not specifically endorse or recommend any non-UC programs but is available to provide general advising and guidance through the administrative process.

Step 2. Get a Passport

To travel abroad on any program, you will need to have a valid passport. If you don't have a passport, visit <http://travel.state.gov> or get an application at the main post office. If you already have a passport, check the expiration date. It should be valid for 6 months after your projected return. If it expires before then, renew it now.

Step 3. Travel Warnings

Your safety and security is of the utmost importance. While we encourage UC Berkeley students to participate in educational opportunities throughout the world, when there are recognized regional dangers, instabilities, or severe health risks, we strongly recommend that they not participate in study abroad programs in those specified areas. U.S. State Department Travel Warnings can be found online at: <http://travel.state.gov/travel/warnings.html>. Please check this website for information on travel safety and travel warnings for the country/region of interest. If you choose to go to a country with a State Department Travel Warning, you will need to sign a form releasing the University of California of liability. You are advised not to enter countries or regions with an existing U.S. State Department Travel Warning and when a Travel Warning is issued while abroad, we recommend that you withdraw

from the program immediately, even if the program continues to operate in that country.

Step 4. Choose a Program

Use online search engines or visit the BPSA office to explore your options. The University of California does not endorse or otherwise recommend any of the programs found on these general resources sites.

Study Abroad.com - <http://www.studyabroad.com/>

Go Abroad.com - <http://www.goabroad.com/>

IIE Passport - <http://www.iiepassport.org/>

Diversity Abroad.com - <http://www.diversityabroad.com/>

National Registration Center for Study Abroad - <http://www.nrcsa.com/index.jsp>

Step 5. Meet with a BPSA Advisor

We recommend that you meet with a BPSA advisor to discuss your decision to study on a NUCSA program and work with them to fill out the appropriate.

Step 6. Grades and Credits

The courses that are accepted will appear as units on your UC Berkeley transcript without course titles or grades. Once a course is accepted, you can get approval from your departmental academic advisor to receive credit towards your major/minor degree. Note that all units taken abroad count towards your unit-cap.

Step 7. NUCSA Leave

There are several ways to participate in a Non-UC Study Abroad Program. The NUCSA Leave option is specifically designed to enable students to participate on a Non-UC program while still maintaining their UC Berkeley student status. You may petition for this leave at BPSA. This will require a \$300 administrative fee. Students on NUCSA leave have access to UC-administered travel and health insurance and retain activation of their student/CalNet ID; NUCSA students also have their Berkeley email accounts active and have access to numerous University resources such as online library resources and BearFacts.

Step 8. Insurance & Liability

Students on NUCSA leave who have paid the administrative fee and an additional travel insurance fee are covered 24 hours a day, worldwide, for a wide variety of accidents and incidents. You will need to register your study abroad travel at www.uctrips-insurance.org to ensure coverage. Students on NUCSA leave who choose not to acquire travel insurance through UC Berkeley are required to sign a standard waiver of liability. All students on NUCSA leave who choose to go to a country with a State Department Travel Warning will need to sign an additional waiver form releasing the University of California of liability.

Step 9. Financial Aid

Financial aid is available to students on NUCSA leave. Meet with a Financial Aid Office advisor to determine which portions of your financial aid package can be used to study abroad. You will receive a Consortium Agreement form which you will need to work with your 3rd-party study abroad program representative to complete.

Step 10. Study Abroad!

Keep in touch while you're away. Your UC Berkeley email account will remain active

as will your access to UC Berkeley's online library resources and student systems such as BearFacts.

Step 11. Order Official Transcripts

At the conclusion of your program, transfer credit will be considered only for courses that are recorded on official university or college documents. If you attend a foreign university as a directly-enrolled student, you must submit the official record as it is issued to students in the country. Transfer credit will not be considered for courses recorded on a "Certificate of Attendance." If you have any questions about the document required, consult a study abroad advisor in the Office of Undergraduate Admissions.

The official transcript must be sent directly from the institution to the following address:

ADD CREDIT: STUDY ABROAD
Office of Undergraduate Admissions
110 Sproul Hall
Berkeley, CA 94720-5800

Step 12. Share Your Experience

After you return from your study abroad experience, submit a program evaluation form to BPSA. Your feedback helps future UC Berkeley students and BPSA staff. Also, consider serving as a peer advisor – you can have a direct impact in ensuring other UC Berkeley students have the best study abroad experience possible!

Non-EAP Academic Course Form



Academic Information and Review

Instructions to student

1. Please indicate courses you intend to take while abroad (choose 8 per term to allow for flexibility in scheduling).
2. Submit completed form along with accompanying documentation to the Education Abroad Center. You must include the following documentation: (1) course descriptions and (2) transcript and credit policy information from the study abroad provider.
3. After review by Admissions, meet with your Major/Minor advisor to determine if your units abroad have the potential to count towards your degree. For GE credit, please visit your College Dean's office advisor.

Student to complete		Major/Minor Advisor(s) to complete		UC Davis Admissions	
Courses to be taken abroad (NUCSA program academic courses, not UCD courses)		Potential UC Davis Equivalent Course or Major/Minor/GE Requirement		Transferability and UC Davis unit value	
Title	Number	Units	Major/Minor	Transferable?	Units
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					

DRAFT

To be completed by Major/Minor Department(s)

The student and I have discussed the above plan in relation to his/her major/minor program. This course of study is approved provisionally based on course titles and descriptions. Student must petition courses upon return, and submit supporting documentation, including syllabi, reading list, class notes, exams, papers, etc. The courses should deal with a segment of knowledge that is comparable in purpose, scope and depth to courses taught at the undergraduate level at the University of California. The student understands that there is a Senior Residence Requirement which states that 35 of his/her final 45 units must be taken on the Davis campus. Exceptions may only be granted by approval the student's Dean's Office.

Comments (Major #1):

Signature of Major/Minor Advisor: _____ Date: _____
 Print Name: _____ Major: _____

Comments (Major #2 or Minor):

Signature of 2nd Major/Minor Advisor: _____ Date: _____
 Print Name: _____ 2nd Major/Minor: _____

To be completed by the Office of Undergraduate Admissions

Undergraduate Admissions recognizes this coursework as taught through an accredited host university: YES NO Accreditation _____

Signature: _____ Date: _____
 Print Name: _____

Final Approval and NUCSA Leave Authorization (EAC)

Signature: _____ Date: _____
 Print Name: _____

For Office Use Only		
EVENT	DATE	Initials
NUCSA form sent to UGA for review		
NUCSA form approved by UGA		
NUCSA leave authorized by EAC		
Notice to OUR and FAO		
Fee charged to student account		
Program start date _____		

This form is only available after you meet with an Advisor at the Education Abroad Center. Please contact the EAC if you would like to make an appointment to begin your NUCSA Leave process.

EAC 207 Third Street Suite 120, Davis, CA 95616
 (530) 297-4633 <http://eac.ucdavis.edu>

Waiver of Liability Form

Waiver of Liability, Assumption of Risk & Indemnity Agreement

Personal Travel
Department Class/Activity

Waiver: University policy strongly discourages travel to countries subject to U.S. Department of State travel warnings, in this case to [insert country] _____

(see attached State Department warning).

Nevertheless, it is my intention, as a matter of personal choice, and my sole responsibility, to travel to [insert country] in order to take classes and pursue my education, independent of any University program or activity ("the High Risk Travel"). In exchange for campus services being made available to me in connection with the High Risk Travel, I, for myself, my parents, guardians, heirs, assigns, agents, and all those in privity with me, **do hereby release, waive, discharge, and covenant not to sue** The Regents of the University of California, its officers, employees, and agents from liability from any and all claims including the negligence of The Regents of the University of California, its officers, employees and agents, resulting in personal injury, accidents, assaults, kidnappings, or illnesses (including death) and property loss arising from, but not limited to, participation in the High Risk Travel.

Assumption of Risks: Due to the security situation in this country, I understand that the U.S. Embassy may temporarily close or suspend public services for security reasons in a Travel Warning country. As a result, their ability to provide emergency assistance, should I require it, may be extremely limited. I understand that if there is a need to evacuate the country, in certain emergency situations, flights may be suspended, and other departure options may be limited. Participation in the High Risk Travel carries with it certain inherent risks that cannot be eliminated regardless of the care taken to avoid injuries. Participation in the High Risk Travel carries with it certain inherent risks that cannot be eliminated regardless of the care taken to avoid injuries. The specific risks vary, but the risks include 1) minor and major physical injuries inflicted accidentally or intentionally by third parties; 2) emotional and psychological injuries inflicted either accidentally or intentionally by third parties; 3) catastrophic injuries including paralysis and death.

I have read the previous paragraphs and I know, understand, and appreciate these and other risks that are inherent in the High Risk Travel. I hereby assert that my participation is voluntary and that I knowingly assume all such risks.

Indemnification and Hold Harmless: I also agree to INDEMNIFY AND HOLD The Regents of the University of California HARMLESS from any and all claims, actions, suits, procedures, costs, expenses, damages and liabilities, including attorney's fees brought as a result of my involvement in the High Risk Travel and to reimburse them for any such expenses incurred.

Severability: The undersigned further expressly agrees that the foregoing waiver and assumption of risks agreement is intended to be as broad and inclusive as is permitted by the law of the State of California and that if any portion thereof is held invalid, it is agreed that the balance shall, notwithstanding, continue in full legal force and effect.

Page Two

Waiver of Liability, Assumption of Risk & Indemnity Agreement

Student's Name: _____

Acknowledgment of Understanding: I have read this waiver of liability, assumption of risk, and indemnity agreement, fully understand its terms, and **understand that I am giving up substantial rights, including my right to sue.** I acknowledge that I am signing the agreement fully and voluntarily, and **intend by my signature to be a complete and unconditional release of all liability** to the greatest extent allowed by law.

Signature of Participant Print Name of Participant Date Age (if Minor)

Signature of Parent/Guardian of Participant if Minor Print Name of Parent/Guardian of Participant if Minor Date

June 2007

161975.1

Non-EAP Leave Form



Non-UC Study Abroad (NUCSA) Leave Form

NUCSA Information

The Non-UC Study Abroad Leave (NUCSA) is defined as leave for students wishing to study abroad on a program not offered by the University of California. NUCSA makes it possible for you to suspend your on-campus academics while pursuing studies at an overseas university.

Eligibility

Registered undergraduate students at UC Davis are eligible to enroll in the NUCSA Leave. Students on NUCSA Leave do not satisfy UC Davis Senior Residence Requirements (see the UC Davis General Catalog for complete information). Undergraduate students may elect one NUCSA Leave during their undergraduate career from one to three quarters in length. While on leave, students must be enrolled in a recognized study abroad program and maintain a full-time course load during the entire term abroad.

Transfer Credit

Undergraduate Admissions is responsible for deciding whether courses taken outside UC Davis are transferable. The college or university you attend while abroad must be recognized by the Ministry of Education in that country or be accredited by a regional accrediting authority recognized by the University of California in order for transfer credit to be considered. The coursework must also be comparable to courses offered within the University of California in order for credit to be transferred. It is your responsibility to ensure that official transcripts are sent directly to UC Davis Undergraduate Admissions within 120 days of the completion of your study abroad program.

Returning to Classes

Readmission is guaranteed assuming you resume regular academic work on the agreed-upon return date and satisfy any holds on your registration. You are considered a continuing student following your NUCSA Leave and your registration appointment information will be available through SISWeb. Also, enrollment information will be emailed to your UC Davis email address. If you fail to return or enroll in courses on the agreed-upon quarter, you will be automatically withdrawn from the university.

Financial Aid

If you are granted NUCSA leave status, you may be eligible to use some of your Financial Aid for your study abroad program. If you are not a Financial Aid recipient and you would like to apply, please visit the UC Davis Financial Aid Web site: <http://financialaid.ucdavis.edu> for information regarding the process. Financial Aid recipients must maintain a full-time course load while abroad and ensure that courses will transfer back to UC Davis, otherwise aid may be revoked (even if already disbursed).

Availability of University Services

If you are enrolled in the NUCSA Leave, you are not considered a regular UC Davis student during the time of your leave and are not eligible to receive normal university services except for the following:

- **Email.** You will have online access to email, MyUCDavis, and SISWEB. It is important that you plan to register for classes before your return to UC Davis during your normal pass time.

Health Services

While participating on a NUCSA program, you will not be covered by UC Davis SHIP health insurance or services. You will be responsible for acquiring adequate health insurance coverage while abroad and between terms. Many study abroad providers include coverage, some have elective coverage, and some may require students to provide their own insurance coverage. You must contact the provider directly for more information. You should also be aware that you may have a lapse or "Gap" in insurance coverage between your last day at UC Davis and your NUCSA program start date, and/or between your NUCSA program end date and when you return to UC Davis. For example, if your NUCSA program ends in August, you may not be covered between August and the first day of Fall Quarter at UC Davis. You are responsible for securing "Gap" insurance for coverage during this time.

Deadlines

The completed NUCSA form is due to the Education Abroad Center office the first two weeks of the quarter prior to your program start date.

Appendix O: Sample Affiliation Agreement Form

The affiliation agreement form on the following pages comes from UC San Diego. The form is completed by UC San Diego staff and kept on file in case questions arise regarding the selection of third-party study abroad providers.

Affiliation Agreements
UCSD Programs Abroad Office
Updated February 2008

In selecting affiliates and signing affiliation agreements, UCSD is committed to a transparent process that embodies our due diligence efforts.

Principles of Affiliation:

- UCSD will not enter into any exclusive agreements.
- Affiliates may not set a minimum for the number of UCSD students who will participate in the affiliate's programs.
- UCSD staff and faculty will continue to provide ethical program selection advising for students that is based on the students' personal, academic, and career goals and financial situation. Students are free to choose any program they wish.
- So that we can ensure program quality and advise students appropriately, we view participation in site visits and site reviews as part of our due diligence.
- UCSD welcomes the following from affiliates: program fee reductions for students; scholarships for students; funding to cover the expenses of UCSD staff and faculty members' participation on boards, site visits, and site reviews.
- UCSD staff and faculty may serve on affiliate's boards and participate in site reviews and site visits but affiliates will not pay UCSD staff or faculty a salary for their participation.
- UCSD expects to participate every two years in a site review of one of the affiliate's programs abroad to affirm program quality and oversight.
- The Programs Abroad Office staff member who reviews an affiliation agreement will not currently be serving on the affiliate's board, but is urged to consult with staff members who serve or have served on the board, and/or participate in an affiliate's site review or site visit.
- Affiliation agreements will be reviewed at least every 5 years.
- UCSD has the right to terminate an affiliation agreement at any time without any penalty.
- Dean of International Education will sign all affiliation agreements after successful conclusion of rigorous affiliate review by the Programs Abroad Office staff according to these guidelines.

Affiliate: _____
Head Quarters/Corporate Office: _____

Enrollment:

- What is the five year history of UCSD student enrollment in this program?
- Does the affiliate agree to provide data for annual report in a timely fashion?

Program quality:

- Does the affiliate have an advisory board of directors? Is faculty included on this board?
- Does the credit transfer to UCSD?
- Do other peer universities accept credit from this program?

- Does the program have a good reputation in the field?
- How long has the program sponsor been in operation?
- Are the program sponsor's programs of special interest to our students?
- Does the affiliate agree to provide all UCSD students with evaluations on an annual basis?
- Is the affiliate committed to collaborations on academic integration?
- Would our affiliation affect our status as a university or as a study abroad office?
- Is the affiliate a member of an appropriate professional association in the field (for instance, the Forum on Education Abroad and/or NAFSA)?

Conditions of affiliation:

- What does the affiliate require of us?
- Have Programs Abroad Office staff and/or UCSD students had favorable or unfavorable interactions with the staff of the affiliate?
- Are there any financial costs of affiliation?
- How would the affiliate use the UC San Diego name? (For publicity or as an indication of our strong preference or endorsement?)
- Does the affiliate offer programs similar to those already offered through EAP? If so, what is the justification for affiliating and sending students with this affiliate?
- What would we require of the affiliate?
- Does the affiliate have a written agreement we are comfortable signing or do we need to propose changes in wording?

Potential benefits and who benefits? (Not all areas required.)

- Does the affiliate have a "school or record," making it easier for Admissions to deal with this program?
- Can we confirm that there is no financial benefit to PAO or UCSD staff and faculty? (Scholarships and fee reductions for students are welcome.)
- Could affiliation hurt our students' access to financial aid?
- Are there useful conferences and resources available to us as a result of affiliation?

- Does the program sponsor produce printed or electronic publications that we could use in our office, library, or link for our web site?
- Are there opportunities for UCSD faculty and staff for involvement in seminars, conferences, site reviews and/or site visits?
- What are the potential academic collaborations for our faculty?
- Are there classes that UCSD faculty could teach abroad as a result of affiliation?
- Will the affiliate collaborate with UCSD on faculty-led programs abroad?

Program Costs and Scholarships:

- What scholarships are available for our students?
- How do the program costs compare with EAP and other comparable programs?
- Has or will the affiliate notify us annually of all scholarships they award UCSD students?
- Does the affiliate offer a fee reduction to participants?

Workload for us:

- Are we required to make selection decisions for our students?
- Do we need to keep special records of our students going on their program?
- Are there any other procedures to put in place?
- Do we need to write evaluations of their programs?

The person whose signature appears below has reviewed the Affiliate and the Affiliation Agreement and has compiled this report.

Signature

Date

Print Name

Affiliation Agreement reviewed and signed by:

Dean of International Education (signature)

Date

Print Name

Appendix P: Success Metrics

Currently, UCB lacks data on non-EAP study abroad. As UCB develops the infrastructure to gather information on and serve non-EAP students, it will be useful to have metrics to monitor participation levels and satisfaction levels for advising and administration. Metrics may also be used to evaluate whether program changes are needed, such as adjusting options in certain countries or in certain fields. Some possible metrics to consider are listed below.

Possible Data Source: Surveys, including University of California Undergraduate Experience Survey (UCUES) or other surveys

- ratio - students who plan to study abroad : all undergraduates
- rating - students' ease of finding information they need to complete and turn in paperwork before departure
- rating - students' ease of completing & turning in paperwork before departure
- rating - students' ease of finding information they need to complete and turn in paperwork after return
- rating - students' ease of completing & turning in paperwork after return

Possible Data Source: Admissions & Enrollment Data

- distribution - students by family income level and participation in EAP, non-EAP, summer abroad
- distribution - study abroad by year in school and participation in EAP, non-EAP, summer abroad
- distribution - study abroad by major and participation in EAP, non-EAP, summer abroad
- trend - number of students study abroad EAP, non-EAP, summer abroad per term and per academic year
- workload trend - number of international transcript evaluations per year due to non-EAP study abroad

Possible Data Source: Study Abroad Data

- distribution - destination countries for EAP, non-EAP, summer abroad students
- distribution - destination countries/cities for EAP, non-EAP, summer abroad students
- distribution - program types (academic courses, research, internship, etc) for EAP, non-EAP, summer abroad students
- distribution - third-party providers for non-EAP