Guidelines and Procedures in Establishing Bilateral Programs Between CSU, Chico and Overseas Institutions of Higher Learning

The guidelines and procedures in this document are intended to guide and facilitate efforts in establishing bilateral exchange programs between CSU, Chico and overseas institutions of higher learning. It helps set a clear line of responsibilities and proper levels of authority in the process of establishing such programs. It provides a checklist of issues that needs to be considered when developing an MOU (memorandum of understanding) or MOA (memorandum of agreement) for a formal international partnership with an overseas institution or institutions. Different types of programs are defined; various types of documents that are required are described; a timeline of approval after a proposal has been submitted is given; and names and contact information for administrators and staff members who can provide assistance are included in this document.

Types and Levels of Programs

A. Types
   1. Student exchange
   2. Faculty collaboration and exchange
   3. Collaborative degree (3+2, 2+2, 1+3, etc.)

B. Levels
   1. Departmental
   2. College
   3. University
   4. Consortium

Documents Required

1. Letter(s) of intent from overseas institution(s)
2. Proposal for establishing the program (from proposing department/unit or college)
   A. Rationale for and nature of the proposed program
   B. Target student and/or faculty population
   C. Background information about the partner institution(s)
   D. Feasibility of the proposed program, particularly with an eye on complementing (rather than competing with) existing programs on campus regarding maintaining a healthy exchange balance
   E. Expected outcomes and benefits
   F. Recommended plan of action
3. Draft of MOU or MOA

Timeline and steps for Proposal Approval by the Chancellor’s Office and the President
1. Coordinator of Study Abroad and International Exchange reviews proposal and gives feedback
2. Departmental approval
3. College dean review and approval (this level includes the RCE dean if RCE is involved)
4. Risk Management review and approval
5. Director of International Education and SIO review and approval
6. Provost’s review and approval
7. University President’s Review and approval
8. Chancellor’s Office approval
9. University President’s signature

Names and contact information for administrators and staff for assistance

OIED Office, SSC 440
Study Abroad and International Exchange Programs Coordinator: Jennifer Gruber
Director of International Education and SIO: Frank Li

Checklist for Developing an Agreement

Value

1. Establish the value of the collaboration to relevant stakeholders (department(s) and/or unit(s)), the university, students, and community in terms of benefits it is expected to bring.
2. Outline the rationale, goals, and objectives of the partnership.
3. Describe the potential of the collaboration to complement existing programs, if any, and to support and enhance university strategic priorities.

Planning

1. Summarize planning and communication activities that have already taken place for the proposed program.
2. Articulate concrete outcomes and activities that will result from the program.
3. Define the structure of the program, including the title of the program, name of degree or certificate that will result from the program if applicable, duration of the program and program agreement, accreditation status or quality of the participating institutions and relevant programs.
4. Define terms that may be interpreted differently, such as academic calendar, length of semester/quarter, academic credit/unit, lower/upper division courses, full-time enrollment, etc.

Legal Issues

1. The host institution is expected to provide visiting scholars, students and faculty with the necessary documentation required to apply for the appropriate visa. It is
up to the visitor to apply for and secure the proper visa required for entry and temporary residence. Define legal rights and responsibilities of the partner institutions (e.g., proprietary issues regarding intellectual property and profit resulting from the partnership).

2. Specify institutional rules and policies that participating students must abide by at the hosting institution, and terms and procedures of disciplinary actions.

3. Define legal rights and responsibilities of faculty members participating in the program.

Student Exchanges

Recruitment, Admissions and Curriculum Issues

1. Establish criteria for participation in the program and describe mechanisms through which eligibility for and admission to the program will be determined.

2. Establish equivalencies of academic credit units awarded by the partner institutions.

3. Describe courses, projects and/or thesis requirement and their supervision and defense.

4. Specify modes and language of course and subject matter delivery.

5. Describe graduation requirements and mechanisms for awarding credit, certifying student work, credit transfer and transcript policy and procedures.

6. Specify responsibilities of hosting institutions for recruiting participants for the program.

Resources and Financing

1. Describe the funding structure of the program (e.g., facilities, faculty, administrative support staff, cost of the program (such as tuition and fees, travel expenses, room and board, research and instruction expenses, etc.).

2. Specify the cost of the program and identify the funding source(s).

3. Establish terms and resources of student advising, including academic advising, psychological counseling, visa support services, and student access to facilities (e.g. housing arrangements, course registration, airport pick-up, on-site orientation, etc.)

4. Establish student responsibilities and expenses (e.g., registration, tuition and fees payment, living expenses payment, immigration compliance, health insurance and medical expenses, etc.)

Program Assessment and Review

1. Determine number of students to be exchanged and timeline for keeping the exchange in balance (when necessary)

2. Specify conditions and time period within which agreement may be renewed or terminated with the mutual consent of the partner institutions.
3. Specify the process for delivering official transcript to the student’s home campus.

Faculty Collaboration and Exchanges

Resources and Financing

1. Describe the funding structure of the program (e.g., access to facilities, administrative support staff, out-of-pocket cost to visiting faculty (such as travel expenses, room and board, research and instruction expenses, etc.).
2. Identify any possible funding source(s).
3. Describe all support offered to visiting faculty and specify their responsibilities (e.g., office space, campus resources, housing arrangements, airport pick-up, health insurance and medical payments, resources for family members, etc.)

Program Assessment and Review

1. Establish benchmarks for program success.
2. Describe methods and timeline for program evaluation and assessment of outcomes.
3. Specify conditions and time period within which agreement may be renewed or terminated with the mutual consent of the partner institutions.

Collaborative degree (3+2, 2+2, 3+1, 1+2+1, etc.)
(These are essentially articulation programs involving the arduous process of articulation.)

Recruitment, Admissions and Curriculum Issues

1. Establish criteria for participation in the program and describe mechanisms through which eligibility for and admission to the program will be determined.
2. Establish equivalencies of academic credit units awarded by the partner institutions.
3. Describe courses, projects and/or thesis requirement and their supervision and defense.
4. Specify modes and language of course and subject matter delivery.
5. Describe graduation requirements and mechanisms for awarding credit, certifying student work, credit transfer and transcript policy and procedures.
6. Specify responsibilities of hosting institutions for recruiting participants for the program.

Resources and Financing
1. Describe the funding structure of the program (e.g., facilities, faculty, administrative support staff, cost of the program (such as tuition and fees, travel expenses, room and board, research and instruction expenses, etc.).
2. Specify the cost of the program and identify the funding source(s).
3. Establish terms and resources of student advising, including academic advising, psychological counseling, visa support services, and student access to facilities (e.g. housing arrangements, course registration, airport pick-up, on-site orientation, etc.)
4. Establish student responsibilities and expenses (e.g., registration, tuition and fees payment, living expenses payment, immigration compliance, health insurance and medical expenses, etc.)

**Program Assessment and Review**

1. Establish benchmarks for program success.
2. Describe methods and timeline for program evaluation and assessment of outcomes.
3. Specify conditions and time period within which agreement may be renewed or terminated with the mutual consent of the partner institutions.
4. Specify the process for awarding degree(s)

All MOUs must have a sunset clause. Only the University President has the authority to sign MOUs. All MOUs must use the template provided by the Chancellor’s Office. Any deviations from the template must be clearly indicated during the drafting process. All of the rules in EO 1080 must be followed in developing, approving, and signing MOUs. EO 1080 can be found at [http://www.calstate.edu/eo/EO-1080.html](http://www.calstate.edu/eo/EO-1080.html).