

International Education Committee Minutes
April 9th, 2010

Committee members present: Gareth Barkin, Becca Davidson, Lisa Ferrari, Mark Harpring, Diane Kelley, John Lear, Janet Marcavage, Donn Marshall, Jannie Meisberger, Mei Rose, Peter Wimberger (Chair), Jessy Arends, and Don Share. Dean Kris Bartanen was also present for the first part of the meeting.

Meeting convened by Peter at 2pm.

Kris Bartanen attended the first part of the meeting to address the committee's charge to establish criteria for study abroad, should the budget prevent some students from going.

Kris stated that the IEC had asked two questions:

- A. Are we trying to limit the number of students studying abroad?
- B. Are we trying to maximize the number of students studying abroad?

The Big Context:

The study abroad budget has been increasing at an unsustainable rate. Over the fiscal years 2005 – 2008, a total of \$1.2 million has been added to the budget (an increase of 70%) bringing the total study abroad budget to \$2.93 million, where it is being held steady for fiscal years 2009, 2010 and 2011. There is a modest inflation factor estimated in the long-range financial plan for the university to support study abroad. Furthermore, chief financial officer Sherry Mondou is committed to using savings reserved from the 2008-2009 budget to support study abroad for the larger first-year class of 2009 when they are juniors.

The budget has been affected by multiple factors:

- a) Increased student participation.
- b) Increased program costs.
- c) Increased financial aid (both dollars meeting student financial need and dollars provided as merit aid above need); for example, this year the university budget increased 1% while the financial aid budget increased 10% and next year the university budget will increase 1.75% while the financial aid budget will increase 12%.
- d) A pattern of students without need enrolling directly in "approved" programs (thus, not enrolling at Puget Sound) with the result that there is no tuition income to the university from those students;
- e) A pattern of students with need enrolling in "partner" programs and transporting their institutional as well as state and federal financial aid; the average "tuition discount" for students on partner programs is 42%, markedly above the average for the student body.

Factor (d) has been addressed by moving to a single program pricing model. Factor (e) has been addressed by allowing students to transport all aid dollars that go toward FAFSA demonstrated need, but not aid dollars that are above FAFSA determined financial need.

One conceptual approach to managing a limited budget is to consider an average program cost, given the average level of student participation, and then model how many participants can be supported in higher cost, moderate cost, and lower cost programs. The committee discussed how this might occur, including the possibility that a quota might be set for the available seats in highest priced programs and that students would select a back-up program, if needed. The IEC, in this approach, could suggest

academic criteria to be considered in decision-making if there were limited seats available in particular programs.

The committee raised a number of questions about its role in study abroad decision-making, including:

Going forward, what is the committee's role in decision making? Kris responded that the Dean's office and International Programs would value input from the IEC on academic concerns to be addressed in recommending university policy about study abroad.

How will IEC recommendations figure into university policy-making about study abroad? This question remains open, since the process for implementing the program pricing policy is still being identified. The committee expressed interest in knowing more about this process as it is currently conceived and in having a voice in addressing remaining questions about formulating the process. Committee members were particularly concerned about the creation of a rigid process that would preclude some students' studying abroad. They wanted to make sure that the IEC, as a strong advocate for academic concerns, would be influential in the process. Kris hoped that the IEC would be willing to have a voice in the process, rather than leaving the decisions to others.

How can the IEC best carry out its academic mission, given the financial nature of much study abroad decision-making? Committee members requested more information about the IEC's ability to make financial recommendations. Kris stated that the IEC is being asked to participate in the process, not asked to make financial decisions.

Kris noted that the Class of 2013 is much larger than anyone had anticipated in the long-range budgeting process. However, the university has committed to making up for that shortfall by using surplus funds from the recent Pac Rim program.

Committee members also requested information about the budget implications of the new, single study abroad deadline, February 15. Kris answered that the new deadline was established to help with the logistics of allocating finite funds fairly. Kris noted that these allocations could become quite complicated, depending on whether study abroad applications increase at a predictable rate. Committee members reiterated their concern that the budget be adequate for all applicants to study abroad. The committee is concerned that maintaining a list of high-quality programs is undermined when students' access to those programs becomes limited.

Kris noted that the long-range budget plan includes incremental increases in the budget for study abroad instructional costs. Since the budget affected by economic factors both internal and external to the university, it is impossible to guarantee that this budget line will increase indefinitely. However, the intent of the Dean's Office is to advocate through the Budget Task Force to provide support for study abroad that is reasonable within such constraints.

Peter asked whether it would be possible to roll over funds from one fiscal year to the next. If the university expends less on study abroad than was budgeted for this year, could that money be banked and used to pay study abroad costs next year? Kris responded that the university budget process does not allow for such a practice.

Committee members continued to express their concern that a new system of allocating access to study abroad programs would shut out some students from the programs most suited to their needs, or from studying abroad altogether.

Committee members requested that the university model the impact of a 5% budget shortfall on study abroad applicants. While the committee claimed no expertise to conduct such a study, members suggested that Student Financial Services, perhaps in combination with the Office of Institutional Research, would be able to do the appropriate analysis. The committee would be happy to receive and consider the report on such a modeling exercise. Committee members hoped to determine the adequacy of the current study abroad allocation before the money is spent on students going abroad next year. Committee members offered several comments on the process of creating academic criteria for study abroad selection:

Such criteria could help to limit the overall number of students studying abroad, but not balance the number of applicants between expensive and less expensive programs.

Jannie noted that the university currently does not have quotas on the number of applicants for programs. This means that adding such limits on applicants might be a difficult task.

If financial concerns limit students' access to programs, that must be made clear to students at the outset of their application process.

The academic criteria may help decide who gets first choice of programs, not who can and cannot study abroad at all. The committee found this a workable place to begin. Committee members agreed that, with a finite budget, the university needs to tell students that everyone cannot go to the most expensive programs.

Kris left the meeting for another commitment. Jannie noted that the most expensive program to which students may currently apply is ICCS Rome, which costs more per semester than does Puget Sound. In general, program costs are closely linked to the cost of living in a particular country. Mark noted that when the committee reviewed programs, it could have eliminated the more expensive programs in the same region. However, committee members were not aware of costs. He asked whether the committee should revisit the program reviews. Jannie noted the ethical issues of making decisions purely on cost. The committee has to look at what the programs have to offer.

Committee members asked whether International Programs can present students with a list of programs grouped, based on cost, into Tier A and Tier B to let students know what they are applying for.

Members suggested asking departments if there are alternatives for expensive programs. A concern, however is that if we eliminate programs, we may be eliminating high-quality, more expensive programs even when there is not a budget limitation.

Peter took up other committee business.

The committee approved the minutes from March 26, 2010.

Peter shared a memo sent by Kris to the Department of Foreign Languages and Literature, in response to a memo from that department expressing concern with restrictions on the use of merit-based financial aid under the new billing system. Kris' memo indicated that the restriction on use of merit aid does not apply to certain scholarships because of the terms in the memoranda of understanding establishing those awards. Diane noted that most of the scholarships mentioned in the memo are for Asian Studies.

Committee members again raised the issue of rolling over funds from one fiscal year to the next. If funds could be rolled over from Pac Rim to cover the needs of the Class of 2013 two years from now,

why could other study abroad funds not be rolled over? Lisa replied that the Pac Rim funds were being used from a one-time contingency fund, but that such accounting practices were not sustainable over the long term.

Peter opened the topic of identifying selection criteria by listing (without prioritizing) those that the committee had already discussed. He suggested that we first identify a process by which to allocate students to programs in years with budget constraints and then work out the logistical pieces (e.g. additional parts of the application process):

1. Program cost – quota
2. Limit number of Programs
3. Limit semesters of FA
4. Major
5. Language (Foreign Immersion)
6. Class Standing (Year)
7. G.P.A.

Last resort: Lottery

Diane noted that the criteria could not reasonably be applied in a rigid hierarchy in considering individual applications. For example, some students with lower GPAs might appropriately be given priority over students with higher GPAs based on the salience of other factors to the application. Lisa suggested that the first three criteria should be stated explicitly and individually on students' application forms. The remaining criteria could be applied on a case-by-case basis, but need not be listed by priority on the form. For example, the application form could say, "Other selection criteria include GPA, class year, major..." The committee agreed that students must be aware of the selection criteria.

Peter adjourned the meeting at 3:00pm.

Respectfully submitted by Janet Marcavage