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**MEMORANDUM**

**To:** CSU Presidents  
CSU Provosts  
CSU Senior International Officers

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**Subject: Campus Compliance with Study Abroad Policy**

The results of an audit of Off Campus Activities in the system (California State University Audit Report 09-54) indicate that some policies have not been fully implemented on campuses. This memorandum is to highlight specific areas for attention. In addition, it will also provide clarification of policy in areas where campus practices were found not to be consistent.

**I. Documentation for Student Participation in Study Abroad:**

As a part of program operation, it is essential to have a system of administrative controls. One aspect of these controls is to maintain adequate documentation about the program and the participants. These documents should be retained for three years. This information should include:

- A. Basic student information including name, contact information, program, emergency contact information, date of birth, student ID number, and major.
- B. Medical Insurance: All students studying abroad are required to have medical insurance valid in the host country (Executive Order 998).

- C. Liability Releases: CSU policy now requires all students to sign a liability release and for campuses to maintain these on file (Executive Order 1051).
- D. Air Travel: A liability waiver and insurance are required for all off-campus programs involving air travel (Executive Order 1041).

## **II. Agreements:**

The authority to enter into agreements related to study abroad and exchange has been delegated to the Campus President. Campus processes should insure that appropriate review has taken place. If someone other than the President is to sign, a written delegation of authority should be on file (Executive Orders 744 and 745).

- A. Maximum duration of study abroad agreements: All agreements should have a “sunset” clause with duration of no more than five years before review and renewal.
- B. Maintain agreements on file: Campuses must maintain all agreements and other documentation for all study abroad and exchange programs.
- C. Delegation of authority and review of agreements: A delegation of authority must be documented in writing from the Presidents. Presidents should insure that agreements have been reviewed.

## **III. Exchange Reciprocity:**

Campus should maintain documentation and perform regular reviews of exchange reciprocity balances. Reciprocity for student exchanges should be balanced with students.

- A. Comparability: Education Code (89705) and Executive Order (605) allow for the waiving of fees in a “student exchange.” Campuses are encouraged to develop policies that define the equivalence between various term or session lengths and the period of time within which balance will be achieved. Comparable expenses to be considered part of a “student exchange” do not include faculty visits, staff visits, accommodation for university employees, or meals for visitors. The comparable expenses must be student instruction related on both sides.
- B. Documentation of Reciprocity: Campuses should maintain the necessary documentation on the balance of incoming and outgoing students participating in the exchange program.

**IV. Policy References**

Following are additional policy references:

EO 605	Delegation of Authority to Approve International Student Exchanges, Tuition Waivers for International Students, and Tuition Waivers for Nonresident U.S. Graduate Students
EO 744	State Funded Campus Based Study Abroad Programs
EO 745	Self Support Campus Based Study Abroad Programs
EO 775	Acquisition of Personal Property and Services
EO 849	California State University Insurance Requirements
EO 998	Study Abroad Programs
EO 1022	Study Abroad Through Non-CSU Program Providers
EO 1041	Student Travel
EO 1051	Use of Approved Waiver of Liability
AA-2007-25	Third-Party Program Provider Study Abroad and Administrative Safeguards

- c: Charles B. Reed, Chancellor  
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