

**A Guide to
International Exchange Agreements
Office of International Programs
San Diego State University**

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**Brief Summary - Key Issues
Creating International Exchange Agreements
at San Diego State University**

What is an international exchange?

An international exchange is a reciprocal relationship through which students, faculty or staff of SDSU and one or more institutions outside the United States are able to trade places with each other. The heart of an exchange is the commitment of CSU resources for a visitor to SDSU in return for the opportunity for a SDSU partner to be provided access to similar resources at the partner institution abroad.

What forms do exchange programs usually take?

The concepts of “reciprocity” and “trading places” are central to exchange relationships; however, many other aspects of exchange projects can be shaped to fit the parties’ unique needs and circumstances. Exchanges are not always carried out on a one-for-one basis and do not always involve the exchange of the same category of individuals from each institution. Exchanges may also involve sending and receiving participants at different times.

Why are written agreements required for most exchanges?

Exchange agreements commit SDSU resources. In relation to our international partners, exchanges represent contractual obligations and must be created in ways that are unambiguous and accurate so that all parties can benefit from the agreement as intended. Internally at SDSU, carefully written agreements prevent unintended effects such as the unintentional commitment of a unit’s resources.

How are exchange project ideas translated into written agreements?

Typical exchange agreements include two types of documents. The first is a “Cooperative Agreement” that is an understanding between SDSU and a foreign institution to cooperate in areas of academic development. Examples of such activities include cooperative development of courses and academic programs, participation in joint scientific and/or technological research projects, and any other activity of mutual interest regarding academic or scientific and technological research matters. This general document is ideally accompanied by one or more *separate*, specific agreements that enable specific activities such as student exchanges or faculty exchanges.

Who should be the parties to an exchange agreement?

Viable exchanges most often grow from an existing collegial relationship rather than being proposed administratively when no previous relationship has existed between the institutions. Most working exchange projects are negotiated on a department-to-department or colleague-to-colleague level rather than on a broader institutional level. Agreements are signed by the only person with the authority to give final approval, the President of San Diego State University. Once signed, the agreements become “All-University” agreements, under which any faculty member and/or student from either institution may participate.

What is the OIP’s role?

The Office of International Programs (OIP) provides consulting assistance to SDSU faculty and those seeking to create exchanges. The OIP also reviews all international exchange agreements proposed at SDSU and coordinates the approval and signing process.

The OIP must always be consulted before an individual or unit develops an exchange agreement, which once drafted must be forwarded to the OIP for review and later to the President for final signature. The attached policies are intended to cover only reciprocal international exchange programs and are not intended to affect

relationships such as grant-funded projects and one-way projects such as visiting professorships or development and technical assistance projects.

Who authorizes and approves agreements?

All international exchange agreements are authorized at the unit (typically, school or college) level and are approved at the campus (OIP) level. The director or chairperson of the proposing unit and the dean responsible for the proposed agreement must authorize the relationship, in writing, before it can be considered for approval. Because exchange relationships are legal contracts, they must be approved at the campus level by the Assistant Vice President for International Programs, the Provost, and the President. The OIP coordinates this process as the President’s designee.

What issues should be considered before signing an agreement?

Besides obvious issues such as time commitment of one or more faculty members throughout the duration of the agreement, there are a wide variety of issues facing the originator of an exchange. These include matters such as determination of the international institution’s recognition status (i.e., is the university recognized by the country’s Ministry of Education), coordination of reciprocity, tuition payments, travel, housing, insurance, language, and visa requirements. A detailed discussion of these and other issues is provided in the attached Guide. It is also advisable to determine whether or not the institutions already have an existing agreement in place. The OIP serves as the campus repository for approved agreements and will assist with inquiries concerning the status of existing relationships.

Role of Faculty: It is expected that the faculty member who spearheads the effort to sign an agreement will provide pertinent information about the university at the time of submission of the proposed agreement. A template is provided in page 24. In addition, the faculty member is expected to coordinate efforts with the graduate and/or undergraduate advisor of the department to develop a listing of comparable courses between SDSU and the partner institution. Said listing would pertain only to courses in the faculty member’s department.

Need assistance?

For assistance or more information please contact:

Office of International Programs
5500 Campanile Drive
San Diego, CA 92182-5102

phone: (619) 594-1354
(619) 594-0938
fax: (619) 594-0897
email: ois@mail.sdsu.edu
website: <http://ois.sdsu.edu/>

Checklist for the Development of Exchange Agreements

- Determine whether the country's Ministry of Education recognizes the international institution. Faculty are encouraged contact the OIP for assistance.
- Identify a contact partner at the international institution. Partners are generally from a department equivalent to that of the SDSU faculty.
- Determine whether the international institution might agree to sign an "All-university" agreement approved by its International Programs Office and President or Rector.
- Obtain written support from SDSU department/school and dean of college.
- Submit proposed agreement(s) with written support, and pertinent information about the prospective partner, to San Diego State University's Assistant Vice President for International Programs.
- After agreement approval and signature, develop a listing of comparable courses within the department, act as program adviser, and promoter of the exchange opportunity.

Part I Summary of Policies and Procedures

This document describes requirements and procedures for the creation of exchange agreements between any unit at San Diego State University and an institutional partner located outside the United States. The document describes policies and procedures for creating specific exchange agreements. Forms of international collaboration not covered by these policies are described below, in part II.

Part I of this document summarizes: when written agreements are and are not required; who is permitted to authorize and approve agreements; and who is permitted to sign agreements on behalf of SDSU. The section concludes with a step-by-step summary of the approval process for international agreements. Part II expands upon Part I and describes different types of international agreements. Part III discusses drafting issues such as elements to be included in all exchange agreements and other issues to consider when building agreements. Part IV provides several model agreements for illustrative purposes.

Scope and Applicability of Policies

These policies apply to all Cooperative, Faculty Exchange, and Student Exchange Agreements coordinated by the Office of International Programs at San Diego State University. Any questions about these policies and procedures may be directed to the Office of International Programs, 5500 Campanile Drive, San Diego, CA 92182-5102.

Requirement for Written Agreements. Whenever any unit of SDSU enters into an exchange relationship with a university or other institution located outside the territorial boundaries of the United States of America that involves, or might lead to, commitments of university resources of any kind, the SDSU unit must sign a written agreement with the partner university. Such agreements are referred to as "Exchange Agreements."

Authorization and Approval of Agreements. Exchange Agreements must be authorized at the school/department and college levels and approved at the campus level before the President signs them. As described below, agreements must first be authorized at the school, institute, department, or center level and college level because of the commitment of that unit's staff resources. All agreements must then be approved at the campus level. Agreements signed by SDSU and a party or parties abroad generally represent legally binding contracts.

Approval of Agreements at the School/Department/College Level. Before being presented for campus approval, Exchange Agreements must be authorized by an officer of SDSU who has academic authority over the undertakings contained in, and commitments made by, the agreement. The appropriate officials are typically the unit's chair/director and dean. The power to authorize exchange agreements may be delegated (e.g., a college dean delegating authorization power to an associate dean or to department chairs). Delegations of the authorization power must be made in writing and maintained on file by the parties.

The following university officials authorize specific types of exchange agreements on behalf of their unit or units:

Directors of Schools or Chairpersons of Departments provide initial approval to a proposed exchange agreement and present it to the dean of the college for further review.

Deans of Colleges (including directors of academic units reporting directly to the Provost) may authorize an agreement that involves one or more units within their college. Deans and directors may delegate the power to authorize to the units' department chairs or sub-directors as a matter of college/unit policy or on a case-by-case basis. The delegation must be memorialized in writing and transmitted to the Office of International Programs (OIP) along with the proposed agreement.

The Assistant Vice President for International Programs reviews all exchange agreements upon written confirmation of the support of the relevant colleges/units through their deans.

The Provost reviews all exchange agreements before they are sent to the President.

The President authorizes all agreements since they affect the entire university (“all-campus

In presenting an agreement for campus approval, the authorizing official has responsibility to ensure that the partner institution is recognized by the country’s Ministry of Education (through assistance from the OIP if necessary), that all affected units are consulted, that guidelines are observed, and all appropriate procedures followed. Exchange agreements must adhere to the academic standards of SDSU, and conform to the guidelines that are issued from time to time by the OIP. Particular caution should be used in making agreements so as to avoid undesirable spillover effects, i.e. binding a third party to an agreement without that party's knowledge or consent.

Campus Approval. After the appropriate official or officials authorize a proposed agreement, as described above, the document is transmitted to the Assistant Vice President for International Programs for approval. Faculty should also submit pertinent information about the prospective partner. A sample of appropriate information is provided in page 24.

Signing Agreements. By Executive Order No. 744 of the California State University, Office of the Chancellor, only the President has authority to sign international exchange agreements.

SDSU Parties to an Exchange Agreement

| <i>Originating Unit</i> | <i>Authorizing Officials</i> | <i>Approving Official</i> | <i>Final Approval</i> | <i>Signatory</i> |
|----------------------------------|--|---|---|------------------|
| Individual Faculty or Department | Department chair/School director AND Dean of College or designee | Assistant Vice President for IP | Provost and Vice President for Academic Affairs | President |
| College | Dean of College or Dean's designee | Assistant Vice President for International Programs | Provost and Vice President for Academic Affairs | President |
| 2 or more Colleges | Deans of Colleges or designees | Assistant Vice President for International Programs | Provost and Vice President for Academic Affairs | President |

In addition to the official signatory, individuals such as the unit's dean, or party that is actually responsible for day-to-day implementation of the agreement (e.g. department, center, lab) may be added as a signatory for reasons of ceremony or comity.

The Approval Process: A Summary

1. The Originating Unit (see table above) consults with its Dean (the party that will commit the resources) and with the OIP (for assistance with drafting suggestions and interpretations of campus policies).
 2. The Originating Unit produces a draft agreement, which is forwarded to the OIP for review.
 3. After review, the Originating Unit prepares final copies for signing and transmits them to the OIP along with the required letter or letters of authorization from the Dean(s).
 4. The Assistant Vice President for International Programs reviews the agreement on SDSU's behalf and recommends it for signing to the Provost and President.
- The signed agreement is forwarded to the parties and the original copy is filed with the OIP.

No agreement will be implemented without the approval of the authorizing official(s) (the dean or deans) and the signature of the President. The OIP will keep signed copies of agreements in a master file and will serve as the repository for all SDSU exchange agreements.

Part II

Background and Explanation of Policies and Procedures

The Role of the Office of International Programs :

The Office of International Programs (OIP) provides consulting, review, and approval services for any SDSU unit seeking to formalize an exchange relationship with an international counterpart. The various academic entities of SDSU, individual faculty and staff, research groups, departments, schools, and colleges are in the best position to determine the merits and desirability of any particular relationship. Such entities are the engines that drive the establishment of relationships and that sustain them both intellectually and in terms of administrative support.

The OIP serves two basic roles in assisting academic units: 1) to provide support for academic units in establishing beneficial agreements, and 2) to review and approve all SDSU exchange agreements. Specifically, the OIP:

- Consults with academic entities on the establishment and terms of international agreements;
- Provides assistance in drafting of agreements and in developing negotiation strategies;
- Assesses proposals to protect the proposing unit and the institution from unforeseen financial and administrative consequences;
- As the President's designee, serves as the main review and approval authority for international exchange agreements.

When Are Written Agreements Required?

Except as described below, any SDSU entity seeking to establish a collaborative effort with an international counterpart must formalize the relationship through a written agreement if the relationship will require, or might lead to, the commitment of institutional resources. While there is no specific standard to determine whether a commitment is "significant," it is generally wise to formalize a relationship if it involves:

1. The assignment of administrative staff, faculty, or graduate student (research assistant or project assistant) support on an ongoing basis;
2. The commitment of institutional funds (departmental, school, or college funding) on an ongoing basis;
3. The exchange of faculty, staff, or students;
4. Extramural funding for research collaborations that presume/require specific institution-to-institution agreements.

What Relationships Are Not Included Under These Policies?

The policies in this guide have been developed to cover exchange agreements only and are not intended to include the following types of arrangements:

Development of projects for assistance and technical assistance related to research.

Relationships described and approved in their entirety through another campus agency, e.g., grant-funded projects.

Visiting professorships and lectureships, e.g., Fulbright program.

Brief visiting lectureships or informal exchanges, e.g., guest departmental lectures even though an honorarium is provided to the visiting speaker.

Relationships in which departments/units do not commit more than hospitality or the volunteer efforts of faculty or staff.

Questions about the applicability of these policies to specific proposals or projects that are not exchange agreements may be addressed to the OIP contact person listed at the conclusion of Part III.

Types of International Agreements

There are three key variables that shape most international exchange agreements:

1. Exchange agreements versus non-exchange relationships. Does the agreement stipulate an actual exchange of students, faculty, and/or research activities, or, does it anticipate a more general collaboration without specific exchange components? In the later instance, an exchange agreement is likely not a necessary document to establish a relationship.
2. Specific agreements versus cooperative agreements. Does the agreement implement a specific project and commit SDSU resources, or does it merely express a desire to explore the feasibility of a project or an intent to make future commitments? In the later instance, a Cooperative Agreement, and not a Faculty Exchange Agreement or Student Exchange Agreement, is likely the most appropriate document to memorialize the agreement. A Cooperative Agreement is utilized to establish general collaboration between SDSU and the prospective partner. Student and Faculty Exchange Agreements define and enable specific activities. For example, if a department wishes to begin a program for cultural studies, a Cooperative Agreement would be required to establish a relationship with the institution, and a Student Exchange Agreement would be required to delineate each institution's responsibilities. As described below, signing a legal contract that is merely exploratory and does not implement a specific project, a Cooperative Agreement only, is strongly discouraged except in specific circumstances.

These variables are described in more detail below:

1. Exchange agreements versus non-exchange relationships

An exchange is a project in which individuals trade places with counterparts from a partner institution for the purpose of teaching, research, or taking courses. The heart of an exchange is the provision of SDSU-funded resources for a visiting partner, whether tuition, housing, research laboratory space, and/or access to courses, in trade for the right to enjoy equivalent resources at the partner institution. Exchanges may or may not be implemented on a one-for-one basis and may or may not be limited to trades of like classes of individuals, i.e. undergraduates for undergraduates, or undergraduates for graduates. Brief visits between institutions on a non-reciprocal basis do not generally constitute exchanges. One-way placements or purchases of access to resources at other institutions are not true exchanges (even though a written agreement may be useful to the relationship).

These guidelines provide detailed suggestions for the creation of exchanges. Because other types of collaboration are too varied in form or specific in nature to be codified, we have not developed similar instructions for non-exchange agreements. The OIP is prepared to provide case-by-case assistance for promoters of non-exchange projects. However, all persons involved in international projects should review this guide as a way to identify parallel issues to be considered in building a non-exchange collaboration.

2. Specific agreements versus cooperative agreement:

Often, parties seek to formalize an agreement when their intent and initial level of commitment is simply to explore mutual interests together. The party interested in pursuing the relationship should ask the question: Does the agreement sought merely express an intention to create a relationship, or does it actually implement a project of collaboration and exchange? Specific agreements detail and implement an actual project, that is,

a specific program of exchange or collaboration. They involve a commitment of resources. Except in extraordinary circumstances, the parties should refrain from signing a formal document until it is possible to implement such an actual project.

In contrast, parties sometimes seek only to record their shared interest in exploring projects together or in pursuing funding or other arrangements that may lead to specific projects in the future. These documents are ceremonial and serve primarily to reflect or promote good will between the parties. Such ceremonial agreements may be attractive because they are a tangible indicator of friendship and allow a visitor to participate in a signing ceremony during a visit. However, such agreements are still legally binding contracts subject to the same authorization and campus approval policies as more specific agreements, which implement projects. Experience suggests that ceremonial agreements, which do not implement an actual project, can result in the creation of unrealistic expectations on the part of one or both of the parties. In some cases, an informal document expressing interest in working toward an agreement will serve the purpose of establishing a relationship and will avoid the entanglements of a more formal agreement that is not ready for implementation. Exploratory agreements signed by the parties should always be avoided except in the following types of circumstances.

Occasionally, situations arise that require formal documentation but that will not immediately implement an actual project or exchange. The appropriate instrument in such cases is a Cooperative Agreement. A Cooperative Agreement is to be used only when an actual plan of exchange is certain to occur but when specific circumstances prevent the immediate implementation of the detailed agreement implementing the project. Additionally, international partner institutions may require such an agreement to qualify for governmental or institutional funding before proceeding with more concrete projects or in order to qualify for the submission of a multi-institutional extramural funding proposal. One model of a Cooperative Agreement is included in Part IV.

It should be noted that specific agreements that implement an actual exchange bring the parties the same benefits of ceremony, reflecting mutual good will and establishing a tangible manifestation of collegiality, as the Cooperative Agreement. At the same time, these agreements allow the parties to reflect, in a thorough way, the actual commitment each is willing and able to make. Thus, a well-written specific agreement is always preferable to a Cooperative Agreement because it reflects a genuine relationship, implements a real collaboration, and tends not to generate unrealistic expectations or misunderstandings between the parties. One model of a specific agreement for the exchange of students is included in Part IV.

Part III

Guidelines for Drafting Exchange Agreements: A Working Guide

This section is divided into two parts: (1) A discussion of issues that should be addressed in any specific agreement (and considered in the framing of a Cooperative Agreement that will lead to a specific exchange agreement); and (2) a discussion of internal SDSU administrative issues that must be considered before entering into an exchange agreement. Sample “form” exchange agreements are provided in Part IV of this document and can be used as a template for many exchange agreements.

1) Mandatory elements to be included in every exchange agreement: At minimum, every exchange agreement should address the following issues (each of which corresponds to a section of the sample agreement provided in Section IV):

Parties: The agreement must accurately reflect the parties to be bound by the agreement. The parties should be listed by their official titles.

Exchange officers: The OIP is noted as the official representative of SDSU; however, Student Exchange Agreements should identify specific “exchange officers” responsible for day-to-day operations. The agreement must require each party to identify an official representative for the exchange. This “exchange officer” should be a person involved with, or responsible for, the program's day-to-day administration. The “exchange officer” serves as the first point of contact for the institution in terms of correspondence, managing quota balances, and compliance with university regulations affecting the exchange. Exchange officers do not have final authority to authorize a new agreement or a modification to an existing agreement. All proposed agreements and modifications must be approved by the OIP.

Quotas: For student and faculty exchanges, the agreement should provide a specific range or “quota” for the level of exchange expected. The agreement should describe the quota in terms of the academic calendar and be qualified with specific language concerning the number of months involved and actual dates of the exchange (i.e., semester).

Balance of quotas: The agreement must specify that the exchange will balance in terms of numbers of participants. In most cases, each partner institution should host and send the equivalent numbers of participants each year. If this is not possible, the relationship must balance over its term (typically, 5 years). Every agreement should include language addressing the mechanism whereby an imbalanced exchange will be brought back into balance. It should be noted that the authorizing college has an obligation to SDSU to ensure reciprocity over the term of the agreement.

Duration: Agreements must be of finite duration. Most agreements are made for a period of five years.

Degree status: Generally, exchange visitors do not have the right to earn a degree at SDSU. The agreement should clearly state that participation in the exchange does not in itself entitle the participant to enter a degree program at SDSU. Typically, the visiting exchange students will have the same rights and responsibilities as a regular SDSU student.

Work plans: The agreement should address the parties' expectations concerning the submission of a statement of the participants' academic plans. Relevant components might include information regarding the individual's previous background and training for work in a particular field, course work, the individual's goal while on the exchange, curriculum vitae, transcripts, and so forth.

Language ability: The agreement must state the partner institutions' expectations concerning language preparation. In student exchanges, students inbound to SDSU must meet the California State University requirements concerning minimum TOEFL scores or an accepted alternative. Information regarding TOEFL requirements may be obtained from the Graduate Bulletin, for incoming graduate students, or the General Catalogue, for incoming undergraduates.

Tuition: For student exchanges, regular SDSU registration fees must be paid to the Cashiers Office by one outgoing SDSU student to cover the cost of one incoming visitor. The amount of registration fees due is the amount set by the Trustees of the California State University for the term in which the SDSU student participates. The SDSU student pays based upon full-time regular tuition and/or registration fees category (California Resident, Non-Resident) and academic level (undergraduate, graduate). One SDSU tuition paid (regardless of the SDSU student's academic level and tuition category) purchases one spot for an international visitor.

Access to university resources: The agreement should describe any rights or limitations presented to participants while at the host institution. In general, "university-wide" agreements limit an exchange student's access to certain departments and/or classes as would be the case for regular SDSU students, including access to graduate courses (if an undergraduate student), upper division courses (if exchange student's level is equivalent to lower-division), and access to courses only when the student has met all prerequisites. An individual entity developing an exchange should not draft an agreement that allows or encourages inbound participants to concentrate in high demand, or impacted, academic course sequences without the express permission of the SDSU department involved.

Limitation of financial commitment: Each agreement should include language limiting the institutions' financial commitment to available funding and to the agreement's specific terms.

Stipends/Salary: If any compensation for participants is involved, such provisions must be stated clearly in the agreement. For faculty exchanges, the responsibility for salary support must be addressed as well as the terms of any additional compensation (such as summer salary, funding of fringe benefits, honoraria, displacement allowance). In certain cases funding mechanisms for staff may create FTE position availability problems and raise issues pertaining to academic personnel/hiring guidelines. Additionally, payments to non-CSU employees can have federal tax implications. Contact Faculty Affairs for information.

For students, compensation can create issues concerning the continued availability of prior financial aid packages and scholarships. For all participants, incoming and outgoing, compensation can raise general taxation issues such as whether awards constitute taxable income or not.

Travel: Whether or not travel is provided as part of the exchange, the question of responsibility for participant travel must be addressed. If any portion of travel (for students or faculty) is to be provided by SDSU, the provider must follow SDSU travel regulations and purchasing guidelines. For information concerning travel guidelines, contact the Office of Accounting Services, Travel Information.

Accommodations: How participants will be housed, who is responsible for the cost, and who is responsible for the procurement of housing must be addressed in the agreement. It is highly desirable that each exchange participant be given the opportunity to determine whether on-campus or off-campus housing would be most suitable. If housing is to be provided by or through SDSU, appropriate guidelines must be followed by the proposing unit, as the OIP does not provide housing for visitors. For information concerning housing procedures, contact the Housing and Residential Life Office.

Insurance: All participants, including incoming and outgoing students and researchers and faculty, must have adequate health insurance that will be in force while the exchange takes place. Exchange visitors to SDSU are encouraged to participate in the CSU insurance plan for international students. Details concerning the plan's applicability, terms, and costs are available through the International Student Center. Should an individual not plan to purchase the CSU plan, she/he must contact the International Student Center to determine whether her/his present insurance supplies the required coverage. For information concerning purchasing procedures, contact the International Student Center.

Review: The agreement must address the parties' plans for a review of the exchange program at appropriate intervals to assess the extent to which the program has met its academic and fiscal goals, the desirability of continuing the program, and whether amendments are advisable.

2) Additional considerations in negotiating and drafting exchange agreements:

In negotiating exchange agreements, makers need to be aware of institutional policies or other special considerations that might affect or shape the exchange's terms. Several of these considerations are presented here:

The special difficulty of funding graduate student exchanges: Exchange projects including SDSU graduate students can present special difficulties because of the manner in which many graduate students fund their education. Both tuition remissions and benefits packages are tied to teaching, research, and project assistantships. Non-resident graduate students receive a remission of the difference between non-resident and resident tuition and health insurance coverage based on the award of a TA or GA appointment at the appointment level. Traditionally, departments find it difficult to provide such an award to students attending or conducting research at an international institution as part of an exchange program. However, the students' financial aid award or loans may be utilized, for one year, during an exchange.

Departmental fellowships and many scholarships do continue to apply to graduate students on SDSU sponsored exchange programs because the student remains registered as a full time SDSU student for the term abroad. Other opportunities for funding graduate student activities may be available. Information describing such opportunities is available through the Scholarship Office.

“Unbalanced” exchanges concept and elements: Some exchange programs can be designed to be reciprocal in a general sense but will not exchange participants on a “one-for-one” basis. An unbalanced exchange may allow the implementation of an exchange project when the partners have fundamentally different economic situations or funding structures.

In an "unbalanced exchange," the making unit at SDSU leverages the project's financing by negotiating the right to place more participants at the partner institution than the number of participants it hosts at SDSU. To the extent that an exchange is carried out on a one-for-one basis, each outgoing SDSU student's registration fees are paid to the Cashiers Office to cover the instructional expenses of the corresponding student. To the extent that outgoing placements exceed incoming placements, records will be kept by the OIP to assure that during the term of the exchange incoming students can benefit.

In the event that SDSU units are unable to establish or maintain necessary project goals, the agreement may be terminated with the consent of both institutions.

Units contemplating an unbalanced exchange project are encouraged to contact the Office of International Programs for more information.

Immigration issues: Both incoming and outgoing participants typically need visas issued by the host country in order to participate in an exchange program. Visa application procedures can be detailed and often require significant lead time that might affect application deadlines and scheduling. For participants inbound to SDSU, the International Student Center and the Office of Admissions and Records administer visa requirements and procedures. Upon admission to SDSU, incoming students are issued an IAP-66 form that is mailed to them in order to obtain a J-1 visa.

Immigration requirements can also influence and be influenced by other issues such as compensation, duration of stay, ability to hold employment while participating on the exchange, and proof of financial responsibility. Some countries also require submission of materials such as police reports or HIV tests.

All questions regarding immigration issues should be directed to the International Student Center.

Admission to SDSU and Housing: Students inbound to SDSU must be admitted as exchange students. The most common and preferred housing option for exchange students is on-campus housing. Typically exchange students must search for and pay for their own accommodations.

Administrative support: The unit or units developing an exchange agreement are responsible for some administrative support necessary to sustain the relationship. Examples of responsibilities include (1) identifying SDSU students interested in taking part in the exchange and (2) providing advising to both incoming and outgoing students regarding academic options. The International Student Center (ISC) will

provide administrative support in the form of processing of applications and providing general assistance, including the coordination of information sessions, departure preparation, and assistance in dissemination of program availability. In making an assessment of the resources necessary to maintain a relationship, the maker should consider the following issues:

Management: The entity implementing an exchange project is responsible for maintaining reciprocity and for advising issues.

Student Services: The hosts of the exchange project are responsible for providing a variety of appropriate student services. Particularly, the hosts must: advertise/market the opportunity, recruit and select participants, provide orientation and advising for outgoing students, develop materials such as participant handbooks (for both incoming and outgoing participants), serve as mentors for visiting participants, provide general assistance with course registration, and coordinate the evaluation and awarding of academic credits. For SDSU, the ISC provides assistance to both the exchange officer and the exchange students. The Exchange Program Coordinator at the ISC will assist faculty members with issues related to student services.

Outgoing students also need access to SDSU officials while abroad. Consequently, provision should be made to ensure that adequate channels of communication are available, that students have adequate academic advising before departure, and that the exchange officer is in a position to coordinate inquiries from abroad for assistance in relaying information/inquiries between the participant and persons such as faculty members, advisors, academic deans' offices, and financial aid officials. The Exchange Program Coordinator at the ISC provides consultation and assistance. All faculty members are encouraged to contact the Coordinator as soon as they are aware of student interest.

Inbound participants need assistance with matters as far-ranging as establishing bank accounts, finding housing, locating medical services and other campus resources, negotiating campus busses, deciphering timetables, registering for courses, and a variety of other such activities. A number of campus entities already provide such services for visiting international students (i.e., International Student Center). However, the exchange program's makers must be available to incoming students to provide general assistance. The ISC generally has resources available to provide such services for all exchange participants.

Further assistance:

For further information or assistance, contact the Office of International Programs:

5500 Campanile Drive
San Diego CA 92181-5102

Phone: (619) 594-1354
(619) 534-0938

Email: oiip@mail.sdsu.edu

Website: <http://oiip.sdsu.edu/>

(April, 2001 - OIP)

D. Sample Format for Pertinent Information: The following document pertains to an existing exchange program. It provides a model for the types of information that faculty will need to gather regarding a potential exchange partner for SDSU. This is the sort of information that will be need for review by the OIP and that will also serve to inform students and faculty about the partner institution. As needed, additional information may be included.

Pertinent Information on the Exchange Program Between

**San Diego State University
and
Örebro University, Sweden**

PROGRAM CONCEPT

The exchange program with Örebro University (OU) provides San Diego State University (SDSU) students with the opportunity to study a variety of courses, taught in English, although the main focus of the program is in Women's Studies. OU takes an active part in the development of the region with strong contacts with industry and the community and is also a national and international center for knowledge. OU is now going through its most expansive phase since its formation in 1977. They are in the midst of creating a campus that in the widest possible sense gives the students, staff and guests an excellent intellectual, social and physical environment. Seven out of nine departments are located in buildings on campus, as is the library and cultural center, the administrative building, cafés, restaurants, bookstore and a large sports complex with a state-of-the-art workout center, and residential areas.

INFORMATION ON THE COOPERATING INSTITUTION

OU is situated in Almbj, three kilometers (c. 1.5 miles) from the center of Örebro. Surrounded by woods and fields, the campus also adjoins a Viking Age burial site. OU came into existence as a result of the 1977 higher education reform in Sweden. The university includes the former annex of Uppsala University, the School of Social Work and Public Administration, The Training College for Nursery School Teachers, the College of Physical Education and the College for the Training of Music Teachers. In January 1999 OU was granted full university status and offers master's degrees in 16 disciplines and Ph.D.s in eleven. In addition, the Student Union is located on campus and is the natural meeting place for all students. The Student Union is also the home of the student magazine and the students also have their own radio station, broadcasting every day. Campus activities also include concerts, sports events and public lectures. Signs of the characteristic campus spirit of openness, exchange and collaboration are the many multidisciplinary research teams and the informal atmosphere between students and staff. The University is fair-sized, with about 11,500 students and 850 staff. It is big enough for there always to be quite a few extra activities going on, such as lectures, concerts, sports events and so on. Still, it is not too big to have a friendly atmosphere. Every semester there are about 100 exchange students on campus. Further information may be obtained from the OU web page, at: <http://www.oru.se/english/index.html>. Detailed information about Sweden is available at the following Internet sites: <http://www.gosweden.org> and <http://www.goscandinavia.com>

COURSE INFORMATION

SDSU students will have the opportunity to enroll in courses, ranging from Restaurant and Culinary Art to Computer Science, Economics and Statistics. Students will receive approximately 12 units for completed work based on the number of classroom hours, contact hours, research work, etc. OU does not provide language courses to exchange students, but offers a wide array of courses taught in English.

A detailed list of courses offered by OU is available at the OU web site (<http://www.oru.se/english/index.html>), and at SDSU at the International Student Center (ISC). A listing of course equivalencies is also available at the ISC.

CURRICULUM PLAN

The current exchange program is designed to be a one-semester or one–academic-year program in which SDSU students are required to carry a full semester unit load that will allow students to remain eligible for financial aid. Upon approval from OU and SDSU, students may extend the length of stay at OU for up to one period of exchange. SDSU students will not be eligible for a degree conferred by OU.

ORIENTATION

SDSU students are required to attend the pre-departure tour that is held once per semester at the ISC.

The academic institutions in Sweden follow the two-semester system, the autumn (fall) semester and the spring semester. The autumn semester runs from the end of August/beginning of September to mid-January, the spring semester runs from mid-January to the beginning of June. There is usually a teaching break at Christmas, even though there is no official break during the academic year. (Students should check with each department if they want to know if and when there is a teaching break.)

The autumn semester 2001 starts September 3 and ends January 20, 2002. The spring semester 2002 starts on January 21 and ends on June 9. Before the courses start all new exchange students at OU are invited to partake in an “Orientation Programme.” During these introduction weeks students get to know the university and its associations, the city of Örebro and its surroundings, among other things. The purpose is to help the student get settled more quickly and easily. For more information on the “Orientation Programme,” please refer to the special material that students receive in the information package.

Autumn semester 2001:

“Orientation Programme” begins August 20 and ends September 1, 2001.

Spring semester 2002:

“Orientation Programme” begins January 21 and ends February 3, 2002.

It is not mandatory to participate in the “Orientation Programme” but it is highly recommended as it facilitates the international student's integration into Swedish academic and social life. The cost of the “Orientation Programme” is 500 SEK. The cost includes a weekend with bed and board in the "Blue Mountains" outside Örebro, excursions by bus in Örebro and the region (meals included), a Smörgåsbord (Swedish buffet), a traditional crayfish party and lots of other activities.

Those planning to study at university or college in Sweden for longer than three months require a residence permit. The permit must be entered in the student's passport before arrival in Sweden. For a stay of less than three months, no residence permit is required. Some foreign nationals must in such cases have visas in order to enter Sweden. For a complete list of nationalities requiring entry visas, please consult with the Swedish Consulate. Normally, visas are granted for three months.

INFORMATION ON FACULTY AND STAFF

The relation between students and teachers can be described as informal. There is no need to address your teacher as Sir/Mrs. or his/her last name. Both students and teachers like to consider one another as equals. This, however, does not imply that the teachers will expect anything but the student's best performance in classes and examinations. Students are also encouraged to ask questions both in and out of the classroom. Students need not hesitate to ask a question about things you do not understand or comment on things you disagree with.

The teachers expect to be informed if you plan to be absent from classes. Attendance is not always mandatory at Swedish universities, but it is expected. In case of illness students should inform the secretary at the department of any absence.

INSTRUCTIONAL FACILITIES AND SUPPORT

The building of the University Library was inaugurated in 1996 and there is space in the library both for group work (27 rooms), and individual studies (770 seats). The library has a wide range of literature of approx. 250,000 volumes, and a special department for course literature. The library also works through a

network where it is possible to receive literature from other university libraries in Sweden. Students are able to look for information on different subjects on several CD-ROM databases as well as using Sunet and the Internet. The number of journals and periodicals, both Swedish and foreign, is around 4,000 and approx. half of these are electronically accessible. The library is also an appointed European Documentation Centre (EDC), which means that the library receives all information published by the European Community, and has access to the EC's databases. Daily newspapers are available in English and weekly magazines in English, German and French. The university provides computers (IBM) with word processing and spreadsheet programs and access to laser writers. Students also have access to the Internet and e-mail and will receive their own e-mail address through the University's computer department. During the "Orientation Programme" students will receive their Log-in ID and e-mail address. Please note that this e-mail address will be the University's means of communication while the student is attending OU as an exchange student. At the reception in the hall of Långhuset students can receive a key-card to the computer rooms. Students will need a certificate from the International Office stating that they are a student at OU and must pay a deposit of 60 SEK.

The University bookshop can be found in the Entrance building of the University. If the book the student requires is not available at the time, the shop will order it. There is a printing office, Repro, at the University where students can get help with printing and copying. Students can also buy a card, which gives them a discount when doing one's own copying. Telephone cards for slot-telephones can also be bought there and the reception is also the "lost and found" department.

HOUSING FACILITIES AND SUPPORT

All exchange students are guaranteed accommodation on condition that the Application for Housing form is filled out and sent to the International Office. The deadline dates are June 1 for the autumn semester and November 1 for the spring semester. After these deadlines it is possible to make a request for housing but we cannot guarantee a student room. For students on exchanges that start later in the semester the coordinator at the ISC should make a request as soon as the number of students has been decided. On the application form a choice of housing area can be made. However, we cannot guarantee that the choice for accommodation on campus will be filled, as this housing area is very popular.

There are three student accommodation areas at OU. Two areas are on campus and one off campus.

On Campus: Studentgatan: 3 minutes on foot from the main building of the University. Tybblegatan: 6 minutes on foot from the main building of the University. On campus there are apartment blocks with student corridors. There are eight apartments in each corridor. The kitchen and the living room are shared with the other students living in the corridor. The apartments are furnished and have a private bathroom and WC. The rooms are 18.8 square meters (202 square feet) and designed for one person. Electricity, heating, water and free Internet connection are included in the rent.

Off Campus: Brickebacken (Björkrisvägen, Enrisvägen, Granrisvägen, Tallrisvägen): 10-15 minutes by bike, 7 minutes by bus from the University campus. Accommodation in Brickebacken is apartment style living. Two Swedish and one International student share a three-room apartment. Each student has an individual room but share the kitchen and the bathroom. The rooms are between 12.8 and 17.2 square meters and designed for one person. The rooms have basic furniture but students must bring their own bed linen and towels. Electricity, heating and water are included in the rent.

For further information regarding housing, please visit the OU website:

<http://www.oru.se/org/avd/studfr/ik/ECTS/accom.html>

MEDICAL FACILITIES

Medical care is available at both public and private clinics. Citizens of some countries are covered by special agreements, which entitle them to reduced costs for medical care. Tourists from other countries must pay the entire cost of treatment and medicine. All students must purchase health insurance before departure.

Campushälsan - Health Care on Campus, works mostly with preventive health care and only treats minor injuries and medical conditions connected to studies. However, they can help students to find further help when necessary. Their services are free of charge for students. Campushälsan consists of a nurse (sjuksköterska), gynecologist (barnmorskor), a social counselor (kurator) a health counselor

Further information on medical care in Örebro is available at the Campus Health Care.

BANKING SERVICES

It is suggest that students bring traveler's checks or that buy a commercial check in their name at their home bank. If students use a bank card, please check before leaving home that it is valid during the stay in Sweden. Students should plan on conducting most or all financial transactions in cash or credit card.

STUDENT BUDGET PLAN

Below is approximate monthly student budget that will help students to plan their economy. A budget is very personal depending on one's habits but this budget can be a pointer. The most expensive item in the budget is food and it has been calculated for a person who is eating at one of the university restaurants Monday to Friday. If students choose to cook for themselves, as most students do, since every student room has access to a well-equipped kitchen, students can reduce the food budget considerably. Students should then calculate food costs to about 70 SEK per day.

A monthly budget:

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| (Rent is excluded.) | |
| Food: | |
| Lunch on campus 5 days/week | 800 |
| Lunch at home on week-ends | 240 |
| Coffee on campus 5 days/week | 100 |
| Dinner at home 30 days (50 SEK/day) | 1,500 |
| Course Literature | 800 |
| Rent for a bike | 100 |
| Rent for a pillow/quilt (150 SEK/semester) | 30 |
| Hobbies, amusements, personal care | 800 |
| Total per month | 4,370 SEK (\$ 435.19 USD) |

Before coming to Örebro there are some fees that student will have to pay in advance:

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| Deposit for student room (mandatory) | 500 |
| Advance payment of rent (mandatory) | 5,442 |
| Orientation Programme (optional) | 500 |
| Total | 6,442 SEK (\$ 641.54 USD) |

Please note that there will be some costs (below) during the student's first week in Örebro. Students can calculate their own expenses and make sure that they have the money available in Swedish currency on arrival.

Optional costs:

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| Rent for quilt and pillow (one semester) | 150 |
| Rent for bike (one semester) | 500 |
| Student Union fee (mandatory, approx): | 210 |

According to Swedish law all students at the universities must be members of a Student Union. The fee for membership is decided each year by the students through their democratic organization.

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| Total | 860 SEK (\$ 85.65 USD) |
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