

IEC Meeting Minutes
April 29, 2015

PRESENT:

Kris Bartanen (Guest), Michael Burley (Student), Sarah Comstock, Diane Kelley, Pepa Lago, John Lear, Allyson Lindsley (Guest), Eric Orlin, Dan Sherman, Peter Wimberger.

The meeting commenced at 11:00.

Lear, acting committee chair, opened the discussion by welcoming Academic Vice President Bartanen and thanking her for coming to speak with us.

Bartanen distributed a confidential (internal Puget Sound use only) document (see Document 1 appended below) which includes information shared with VP for Student Affairs Mike Segawa, VP for Enrollment Jenny Rickard and VP for Finance and Administration Sherry Mondou in September of 2014 to get feedback on the effects of the implementation of the limits of merit aid on student participation in study abroad. Bartanen presented a similar document in January 2015 to the Cabinet and discussed it with them.

Bartanen began her remarks reminding the committee that the university has the challenge of keeping tuition low and moderating the discount rate. As Bartanen reviewed the document with the committee, the comments and questions below were discussed.

Bartanen noted that a new development approved by the Cabinet was the application for hosting a Foreign Language Teaching Assistant on campus through the Fulbright program. If our application is successful, this program might be expanded. (See Section II of Document 1 below.)

Regarding section V addressing “Actual data on impact on student aid packages,” Bartanen stated that the intent of indicating that 75% of students studying abroad were not affected by the merit aid change was to point out that in the big picture most students studying abroad were not affected by the merit aid change. Wimberger pointed out that this statistic does not take into account those who choose not to participate in study abroad, and thus does not accurately reflect the impact of the financial aid policy.

Section VI letter B offers some evidence that the merit aid decision has less of an effect on student decisions to not study abroad than initially thought. Bartanen underscored that we still have the constraint of making UPS affordable and that our net tuition revenue is pretty flat. She also pointed out that the Cabinet is interested in student learning outcomes for study abroad and we may want to highlight not only satisfaction but also student learning outcomes.

Another element we can work on is to check rumors about all aid not transferring to abroad programs, as discussed in section VII. There are myths circulating on campus, for example that Puget Sound aid cannot be applied to an abroad semester. We need to find ways to better communicate the policy to students.

Regarding section VI letter B, Kelley asked about the concern “that less resourced students should not subsidize well-resourced students as we work to manage Puget Sound’s discount rate.” She indicated that the IEC, as a voice of the faculty, is concerned that some of our most academically gifted students

(indicated by large merit scholarships) are unable to study abroad. She also said that demonstrating student learning outcomes particularly for language programs would be easy to do. Lear followed up on this by asking how we can justify the value of study abroad to the Cabinet. Wimberger noted that data about study abroad is available that show that the semester spent abroad is often the most transformative semester of a student's undergraduate career and stated that these data are readily available. Bartanen indicated that the concern is that some students go abroad without a strong academic reason, which had been fine in a more economically sound environment. She understands the context of this request for student learning outcomes as a desire for study abroad to be academically grounded. All study abroad may not have equal value; a case can be made for students who are studying abroad for academic outcomes with evidence.

Wimberger noted that this document demonstrates that a lot of effort has been made to explore alternative hypotheses for the decline in study abroad participation other than the change in the financial aid policy. But there is a compelling correlation between this change and the downward trend in the number of students who choose to study abroad. He continued by stating that the university hasn't engaged in a serious attempt to address this correlation and that the onus really should be on the administration to demonstrate that it's not the change in policy that has led to the decline. The students who decide not to go abroad (the vast majority of our students) are not captured in the data. We should make a careful analysis of impacts of financial aid on a student's choice to go abroad. Lear added that only the Office of Financial Services can access the data necessary to do that well. Bartanen replied that we have survey results and only 6 of 38 students who couldn't get enough support to go abroad indicated that this was due to their financial aid situation (see section VI letter B of Document 1). She added that the offices of Student Financial Services as well as Admission do not see evidence that the merit aid policy is a deterrent to enrollment and also that there are anecdotes of expressed concern about aid; that they are only anecdotal does not mean that they are untrue.

Lear continued the conversation by clarifying that the committee is interested in the number of students who have merit aid who don't study abroad and why they have made that decision. Bartanen added that some study abroad choices such as Borneo and Cuba, two programs associated with courses, are not counted in our data. The University is also gathering evidence on students' international experiences prior to attending Puget Sound.

Orlin indicated that as more of these kinds of programs get developed, it is a good time to ask the questions that we are asking. As some of these programs may have add-on costs, we should consider different financial models to make sure that less resourced students do not find taking those courses impossible.

Bartanen pointed out that we have multiple models happening without a sense of what is going to be sustainable. Orlin asked if the IEC has a role or a voice in how to make programs affordable. Bartanen indicated that yes, it does, but only a partial one because faculty do not set tuition. The university has to determine what is fair to ask students with regard to incremental costs and the sustainability for new models. She has asked Roy Robinson to work on this after the process for getting approval of new program types is in place.

Wimberger brought the conversation to #1 on the document that the IEC sent to Bartanen prior to the meeting (see Document 2 below) because it was not addressed in the document provided to the IEC by

Bartanen. This question was: “What would be a reasonable goal for the percentage of students studying abroad? What would be a level that would be considered too low?” Orlin and Lear said this question is particularly important as the percentage of Puget Sound students studying abroad is lower than that of our peer institutions. Wimberger asked if the university has a goal that it would be willing to articulate regarding the percentage of students it would like to see studying abroad. Sherman asked if there is a participation percentage that would elicit concern. Wimberger said that many universities do set participation goals. Bartanen said we cannot set a percentage. We would need evidence to support that decision. She pointed out that in the late 1980s only 6-7% of Puget Sound students studied abroad and that in 2007-2009 the university invested an additional \$1 million in study abroad, indicating a significant investment in study abroad. Committee members indicated that we find the decline to be a serious concern.

Lear brought up the question of the possibility of restoring merit aid for specific programs that we value because they are Puget Sound programs. He also asked about creating new models, such as teaming up with NW5C institutions or running more of our own programs, even semester-long ones. He suggested that seed money be made available for the development of such programs with sustainability in mind. He specifically asked if there is a possibility of partial restoration of merit aid usage for the Pac Rim program or Oaxaca. Bartanen responded that the Cabinet does not support the idea of delineating the policy depending upon type of program. But, Wimberger pointed out, PacRim is our program: all the professors are paid through Puget Sound and the grades are on a Puget Sound transcript. He asked how Pac Rim is that different from the Southwest semester program which allows students to take their merit aid as if they were on campus. Bartanen responded that for the Southwest semester tuition dollars stay on campus because it is entirely funded from fees for room and board plus a program fee.

The question was then raised if, since we are saving money in study abroad, better students could use this money in the form of scholarships? Wimberger suggested that we could largely solve the decline in study abroad numbers by returning to the former study abroad model where students receive all federal, state and Puget Sound aid. Prior to the implementation of the new financial model, IEC developed an application and criteria for selecting students to limit participation to within the study abroad budget. Now, there are lots of excess funds and not enough students able to use them. Orlin added that it would be the responsibility of our committee to choose the number of students who would be able to go. Bartanen reiterated that we need to keep tuition low and moderate the discount rate; adding scholarships works against those strategic goals.

Bartanen reiterated that work needs to be done to check the misinformation that circulates on campus regarding what financial aid can or cannot be used for study abroad.

The meeting adjourned at 11:50.

Respectfully submitted,

Diane Kelley

DOCUMENT 1: CONFIDENTIAL (for internal Puget Sound use only) memo from Dean Bartanen to the IEC for discussion in April 29, 2015 IEC meeting with her.

April 29, 2015

TO: International Education Committee Colleagues

FR: Kris Bartanen

RE: International and Experiential Education at Puget Sound

I hope that the following summary is helpful in your considerations of questions about study abroad.

- I. Puget Sound invests in supporting a variety of study abroad opportunities:
 - our distinctive, academic-year, Pacific Rim Asia Study Travel Program
 - special partnership programs in Dijon, France and Oaxaca, Mexico
 - over 100 academic year and semester programs in more than 50 countries, on 6 continents, through third-party providers
 - faculty-led, short-term courses and field schools
 - approved summer programs, for which students pay direct costs, including a summer internship program in Madrid, Spain and the Taiwan Summer program

- II. Puget Sound is investing in foreign language teaching assistants (FLTA) to support language and cultural learning on campus.
 - We have support for 2013-2015 (and will continue) a two-year residency for a foreign language teaching assistant in Chinese language.
 - Cabinet colleagues have supported our application to Institute for International Education, which supports more than 400 FLTAs annually who live, study and teach at American colleges and universities, in order to bring an FLTA in a less-commonly taught language to Puget Sound next year (2015-2016). This investment includes tuition and fee waiver for two audit courses, housing provided in a MRID or Trimble suite, and a partial meal plan to support up to 20 hours per week of language tables or other programmatic activities to bolster strong student language proficiency.
 - Hosting FLTAs may also open additional relationships in support of productive recruitment of international students, which is an incremental priority being addressed by the Office of Admission.

- III. Puget Sound is investing in faculty development opportunities in international education.
 - We have launched the Puget Sound-Fujian Normal University Faculty Exchange as a means of bolstering faculty members' familiarity with China and to lay the groundwork for a faculty-led seminar-tour program to Fuzhou. Prof. Pierre Ly has been named the inaugural exchange faculty member.

- We have completed successfully the pilot environmental Field School in Indonesia, supported by a planning grant from the Henry Luce Foundation. The Luce Foundation has funded a multi-year implementation grant for additional Field Schools in Southeast Asia, which will provide not only for additional field schools, but language training, field school development grants for faculty members, faculty grants for travel expenses to pursue scholarly interests in Southeast Asia, and an annual symposium.
- We have supported faculty involvement in Northwest Five Colleges collaborative projects: Negotiating the Global South, Hispanic/Latino/Latin American Studies Regional Association (LATISA), Imagining the Global: Platform for Hybrid Scholarship, Teaching Asia in the Pacific Northwest, Southeast by Northwest: Interdisciplinary Collaborations in Southeast Asian Studies, Summer Institutes in Latin America, Integrating Middle East and Arabic Studies across the NW5C.
- We have supported “internationalizing” of the School of Business curriculum, including internal and external faculty development grants.

IV. Puget Sound offers a strong financial aid program for all students.

- We are committed to keeping our high touch, faculty and staff intensive education accessible to a broad range of talented students.
- We value study abroad, and 41% of graduating seniors report having participated. (See Appendix 1)
- In order to maximize student participation in financially sustainable study abroad program, Puget Sound scholarships are available to students who demonstrate financial need. As noted on the study abroad finances website.
 - Students who complete the FAFSA and demonstrate financial need may use, in conjunction with federal and state aid, their Puget Sound scholarships up to their level of financial need.
 - Students who do not complete the FAFSA or demonstrate financial need are not eligible for Puget Sound scholarships during their semester or year abroad.
 - Students should consult with Student Financial Services to determine if all or a portion of their Puget Sound scholarship will be available for study abroad.
- All students may apply for study abroad specific scholarships to support their expenses; many students find that the value of study abroad is worth the investment in a small loan, if needed, to cover additional costs of a semester or year abroad.
- Students who need to take additional courses following study abroad can use their Puget Sound scholarships during a fifth year of study.

V. Actual data on impact on students' aid packages: 75% of study abroad students have not been impacted by the aid policy.

- For 2012-2013 (most recent data available):

- Only 1 student was unable to take a full \$12,000 scholarship. This means the student, over four years, would have still received \$36,000 of Puget Sound aid above demonstrated financial need.
- 1 student received an \$1800 increase in aid.
- 43 students saw an average reduction of just under \$5000 in aid for the period in which they were abroad; they were able to take the rest of their federal, state, and Puget Sound aid.
- Total number of students = 178 (entering first-year class = 625)
- For 2011-2012:
 - 9 students were unable to take full university scholarships (average \$10,833). This means the students, over four years, would have still received at least \$32,500 of Puget Sound aid above demonstrated financial need (if they were full-year abroad students, more aid if they were semester abroad students).
 - 2 students gained \$2,450 in university aid.
 - 51 students saw an average reduction of \$4411 in aid for the period in which they were abroad; they were able to take the rest of their federal, state, and Puget Sound aid.
 - Total number of students = 234 (entering first-year class = 721)

VI. The President's Cabinet has been monitoring the study abroad financial aid policy and other international initiatives. I previewed in September 2014 three proposals (an IIE FLTA, a five-year plan to consolidate program offerings, and policy change for merit aid to be used for Puget Sound programs) with Sherry Mondou, Jenny Rickard, and Mike Segawa. In January 2015, I asked for preliminary consideration by the Cabinet as a whole of those same ideas. There was positive feedback for moving ahead with the FLTA and with program consolidation.

A. With respect to program consolidation, Puget Sound been supporting approximately 130 third-party provider programs, compared (in round numbers) to 40 at Lewis and Clark, 50 at Willamette, 60 at Reed, and 80 at Whitman. Through a series of one-on-one meetings with academic departments last year, Roy Robinson learned that we provide so many choices that many faculty members are uncertain how to counsel advisees regarding best-fit options for students' academic programs. While program reduction is not without controversy, we support the IEC in continuing to review and prune – and encourage progress toward a total of 50-60 program offerings – with an eye to improve overall program quality. Discussions with department chairs, including in the context of strengthening experiential learning opportunities for students, suggest that some departments are already on board with identification of a few key study abroad programs, in a few locations, that serve their majors particularly well. Further, Roy anticipates that consolidation – along with development of additional direct exchange programs, short-term faculty-led options, and modest growth in summer offerings – will bring down Puget Sound's average third-party program costs.

- B. With respect to the merit aid policy for study abroad, we looked at the data in Appendix 1. The OIP data – which excludes Pac Rim and faculty-led opportunities – is contextualized by the OIR/Registrar and NSSE data to suggest that a marked decline is less clear than it might initially seem. We also looked at 2014 Spring Survey evidence in which 38 students reported not being able to get the support they needed to study abroad; of 13 who offered explanatory comments, 6 specifically noted financial aid as a challenge. In open comments, 2 of 4 critical comments mentioned a financial aid barrier (these may or may not be among the 6 naming financial aid as a challenge). We considered anecdotal reports of student and parent concern, which were contextualized by lack of similar concerns from Admission and Student Financial Services colleagues. Results from the Admitted Student Survey do not suggest that the financial aid policy impacts enrollment negatively.

Overall, the consensus was that multiple factors are in play in consideration of the data. The interaction of family wealth and the impact of the recession, including willingness to borrow, on student choice is an important consideration. As well, the change in Puget Sound student profile in recent years – specifically, the rebalancing of the proportion of the incoming class that is able to pay Puget Sound tuition – increases the likelihood that students have had international experiences prior to coming to Puget Sound, such that some elect to remain on campus rather than take a semester or year abroad.¹

There was also a strong sense that we made a hard economic decision in implementing the merit aid policy for study abroad, but that we did so with the conscious choice that less resourced students should not subsidize well-resourced students as we work to manage Puget Sound’s discount rate. Cabinet was inclined to continue to monitor data, to look for stronger student learning outcomes evidence for study abroad program options, and to maintain the current financial aid policy.

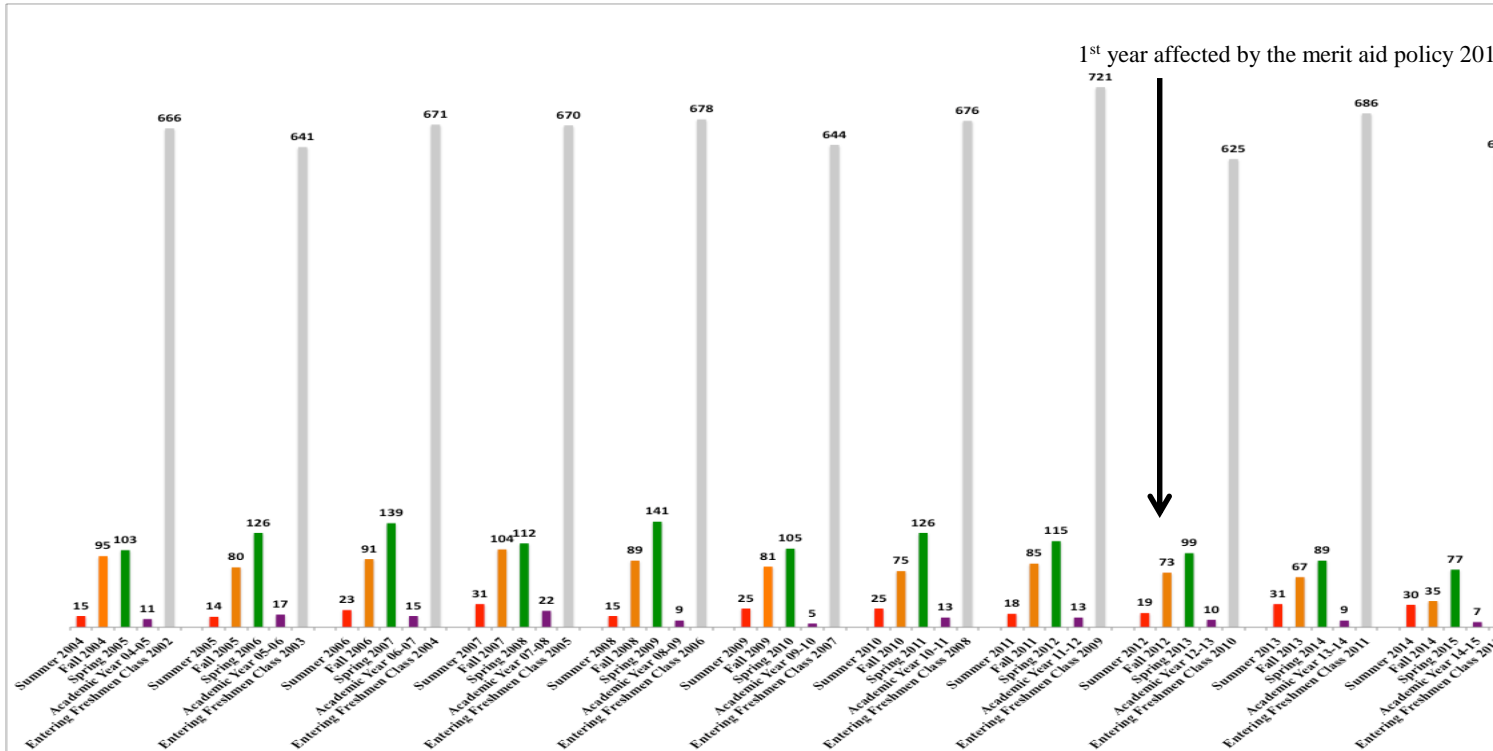
- VII. Puget Sound financial aid award letters are clear about the merit aid policy. Student Financial Services colleagues work with students and families who have questions and they are the best resources on campus in this regard. **Faculty and staff members need to communicate accurately to students and families about our program and policy:**
- Our financial aid program is strong and offers scholarships to all students.
 - 41% of graduates report having participated in study abroad.
 - Puget Sound includes consideration of study abroad cost in the cost of attendance for the semester or year that a student goes abroad.

¹ Reed and Whitman both enroll a more affluent student population than Puget Sound and meet full need, yet show lower participation rates in study abroad. Ellen Peters as added questions to the Spring Survey 2015 to gather information on study abroad experiences.

- Study abroad students can use all Puget Sound scholarship aid that meets demonstrated financial need – along with federal and state aid – to support their international study. Since the new policy was implemented, 75% of students studying abroad saw no change in their financial aid package.

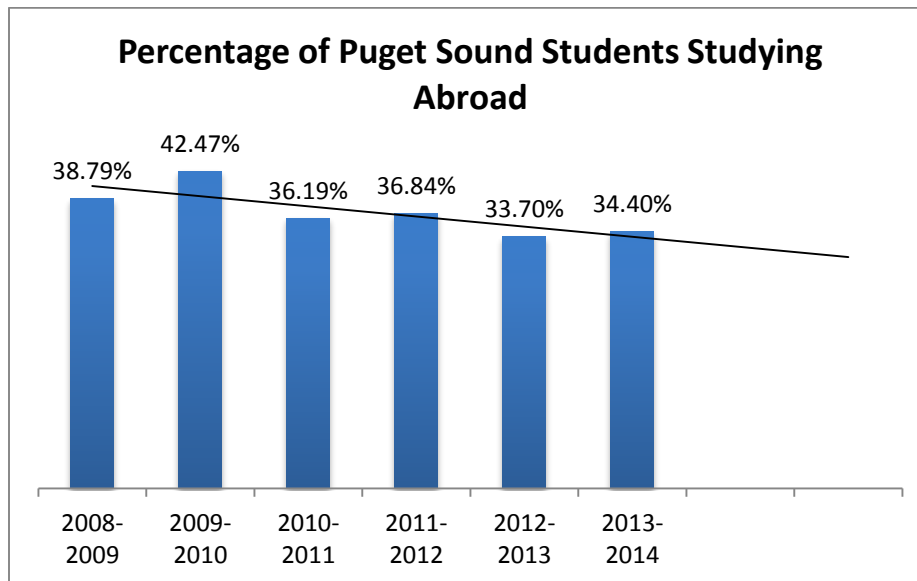
Appendix 1: Data reviewed by Cabinet regarding Study Abroad participation

Entering Class	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012
Abroad Year	04-05	05-06	06-07	07-08	08-09	09-10	10-11	11-12	12-13	13-14	14-15
JR Percentage abroad	33.6%	37.0%	40.0%	40.1%	37.5%	31.8%	35.4%	32.0%	32.1%	28.6%	23.6%



The source of these numbers is the Office of International Programs, using Cascade data that compares the number of students studying abroad in the given junior year with the size of the first-year class in which they entered. (Pac Rim is not included in order to provide constant basis of comparison. Faculty-led study programs are also not included here.)

A second way to look at participation levels is to compare the proportion of students in each graduating class that has earned academic credit for study abroad. The numbers in the graph below come from the Office of Institutional Research and include faculty-led study abroad (but not the course-extended study trips, such as Indonesia, Cuba, Borneo), including Pac Rim.



A third way to look at participation is via student self-report. NSSE data also reveals drop.² Seniors self-reporting that they had participated in study abroad:

- 2014 Puget Sound 41% (N=69, 38% survey participation rate)
- 2011 Puget Sound 39% (N=66, 31% survey participation rate)
- 2008 Puget Sound 44% (N=108, 41% survey participation rate)
- 2014 National Peers 55%³
- 2011 National Peers 56%⁴
- 2008 National Peers 55%

April 15, 2015 Questions from IEC:

1. What would be a reasonable goal for the percentage of students studying abroad? What would be a level that would be considered too low? **President Thomas has articulated a vision that “every student who graduates will have a coherent four-year experience that integrates within it a meaningful set of experiential learning activities in preparation for a successful and fulfilling career after college.” Study abroad is an important component of experiential learning.**
2. Given that the current policy on the use of financial aid to study abroad was generated in a time of financial strain, is it appropriate to reconsider how study abroad is funded on our campus? **We continue to be in a**

² Given NSSE results are student self-report, percentages will vary from institutional enrollment data; it is possible that some students have had non-credit international experiences or that those who study abroad are over-represented in the survey sample.

³ In 2014, the following 14 institutions from our new peer group also administered the survey and were included in the comparison figures: Allegheny, Beloit, Connecticut College, Denison, Hendrix, Kenyon, Knox, Lewis & Clark, Linfield, Pitzer, St. Lawrence, St. Olaf, Trinity University, and Whitman.

⁴ In 2011, the following 11 institutions from our then-named “National Peer” group also administered the survey and were included in the comparison figures: Beloit, Bucknell, DePauw, Franklin & Marshall, Furman, Gettysburg, Kalamazoo, Sewanee, St. Lawrence, St. Olaf, and Wheaton.

period of financial constraint; we are conscientiously working on the Strategic Initiatives of 2011, which include bringing the FR discount rate to 38% and percentage of no-need FR to 50%.

3. Could some of the remaining funds from the study abroad instructional budget be used to provide scholarships for students who wish to study abroad? **No; surplus funds in the university operating budget are generally put into endowment for financial aid.**
4. If there are to be limitations on financial resources available to students, in what other ways can the IEC be useful in encouraging more Puget Sound students to study abroad? I commend the actions IEC has taken, as outlined in Alva’s email to me. **Please encourage and enact clear communication about the financial aid policy. There is inaccurate mythology around the campus that “no financial aid – not even federal aid – applies to study abroad.” Truth: State and federal aid – plus all Puget Sound scholarship aid that meets demonstrated financial need – can be used for study abroad.**

DOCUMENT 2: Questions and Data collected by IEC and sent to Dean Bartanen prior to meeting with her.

Questions

1. What would be a reasonable goal for the percentage of students studying abroad? What would be a level that would be considered too low?
2. Given that the current policy on the use of financial aid to study abroad was generated in a time of financial strain, is it appropriate to reconsider how study abroad is funded on our campus?
3. Could some of the remaining funds from the study abroad instructional budget be used to provide scholarships for students who wish to study abroad?
4. If there are to be limitations on financial resources available to students, in what other ways can the IEC be useful in encouraging more Puget Sound students to study abroad? Some examples of actions that the IEC has taken in recent years include:
 - Reduced the number of study abroad programs in the UK from 18 to 4.
 - Approved the move to direct enrollment at Queen Mary College in London.
 - Implemented direct enrollment at the University of Melbourne, Australia. This resulted in savings of \$9,000 per student per semester.
 - Developed guidelines for faculty to propose a faculty-led study abroad program.
 - Developed instructions for faculty to apply for a Study Abroad Initiatives Development Grant.

Study Abroad Data from the Office of International Programs

Number of students studying abroad as a percentage of their freshman class

2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
37.5%	33.5%	35.4%	32%	32.2%	28.6%	23.6%

These numbers do not include faculty led programs such as Pac Rim.

Number of Juniors studying abroad as a percentage of the Junior Official Fall Enrollment

2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
40.5%	36.4%	36.2%	35.7%	32.7%	29.6%	25.0%

These numbers do not include faculty led programs such as Pac Rim.

Study Abroad Data from the Office of Institutional Research

Percentage of students in each graduating class who have earned credit for study abroad

2008-09	2009-10	2010-11	2011-12	2012-13	2013-14
38.8%	42.5%	36.2%	36.8%	33.7%	34.4%

These numbers include faculty led programs.

Remaining Funds from the Study Abroad Instructional Budget

	2013-2014	Projected 2014-2015
Study Abroad Instructional Budget	\$3,137,000	\$3,137,000
Program Costs	\$2,908,266	\$2,272,447
Remaining Funds	\$ 228,734	\$ 864,553