

# EXTENDED EDUCATION POLICIES AND OPERATIONS MANUAL'

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<sup>1</sup> Formally incorporated in the State University Administrative Manual (SUAM).

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## Extended Education Policies and Operations Manual

February 2002

**1500**            **EXTENDED EDUCATION**  
**Reference:**    **Executive Order No. 811**

Extended education programs include all instructional programs designed and utilized to provide increased access to the educational resources of the system and to otherwise facilitate utilization of these resources. Extended education embraces all self-support and State-supported (i.e. General Fund) instructional programs that serve the purposes specified above. Examples include off-campus instruction, distance education, programs offered on irregular calendars or schedules, multi-campus and regional programs, international education, and other programs designed to serve students in both General Fund and self-support programs on and off campus. Extended education programs are organized, administered, and offered by individual campuses and by cooperating campuses.

**1500.01**        **THE COMMISSION ON THE EXTENDED UNIVERSITY**  
**Reference:**    **Executive Order No. 811**

The Commission on the Extended University was established by the Trustees to facilitate, promote, and encourage extended education programs within the California State University.

**1500.01.01**    **CHARGE TO THE COMMISSION ON THE EXTENDED UNIVERSITY**  
**Reference:**    **Executive Order No. 811**

The Commission is charged with:

- A. Advising the Chancellor on policies and procedures pertaining to extended education programs and to the improvement of access to and utilization of the educational resources of the system;
- B. Recommending to the Chancellor policies governing the management of the Continuing Education Revenue Fund, including those activities that should receive support from the systemwide operations account within the systemwide Continuing Education Revenue Fund while providing for the maintenance of a contingency reserve;
- C. Serving as a liaison between the campuses and the Chancellor, as appropriate, on matters relating to Extended Education programs;
- D. Reviewing and making recommendations to the Chancellor concerning multi-campus and regional extended education programs;

- E. Reviewing and making recommendations to the Chancellor concerning distance education, international education, and programs for off-campus students;
- F. Making recommendations on the level of budgetary support for the Division of Extended Education in the Office of the Chancellor; and
- G. Other advisory roles as may be requested by the Chancellor.

**1500.01.02      MEMBERSHIP OF THE COMMISSION ON THE EXTENDED UNIVERSITY**  
**Reference:      Executive Order No. 811**

**Membership of the Commission on the Extended University**

The California State University Commission on the Extended University is composed of:

- A.** Four full-time faculty members nominated by the Academic Senate, CSU;
- B.** Two vice presidents for academic affairs;
- C.** Three campus deans of extended education;
- D.** Three representatives of the chancellor's staff;
- E.** One campus director of distance education;
- F.** One campus director of international education; and
- G.** Two campus presidents, one of whom shall serve as commission chair.

## **1501 SPECIAL SESSIONS**

Policy regarding the purpose and administration of special sessions are included in this section.

### **1501.01 IMPLEMENTATION OF SPECIAL SESSIONS**

**References:** Title 5 §40200

This section describes the circumstances under which campuses of the California State University may offer special session courses, programs, and services. Each campus is authorized to offer special session courses and services. The Chancellor is authorized to establish and from time to time revise procedures for implementing this section.

#### **1501.01.01 PURPOSE OF SPECIAL SESSIONS**

**Reference:** Executive Order No. 802

Special sessions are a means whereby the instructional programs of the CSU can be provided to matriculated students on a self-support basis at times and in locations not supported by State General Fund appropriations. (A matriculated student is a student who has, through normal procedures, been formally admitted to and enrolled at a CSU campus to pursue an authorized degree, credential, or certificate.) Such offerings shall be consistent with the CSU mission and applicable laws and regulations. Academic standards associated with all aspects of such special sessions are identical to those of comparable instructional programs. Examples of special sessions include: interim sessions between college year terms; programs of a continuing nature offered at military bases, correctional facilities, and other distant or isolated locations; and instructional programs for a specific client group requiring special services.

Special sessions also provide a means whereby state-supported course offerings can be made available to non-matriculated students paying self-support fees through Open University/Concurrent Enrollment (Title 5, California Code of Regulations Section 40202). A maximum of 24 semester units (36 quarter units) in special session course credit earned through state-supported or self-support regular course offerings in non-matriculated status may be applied toward a degree (Title 5, California Code of Regulations Section 40407.1).

Self-support special sessions shall not supplant regular course offerings available on a state-supported basis during the college year (Education Code Section 89708).

#### **1501.01.02 FINANCING OF SPECIAL SESSIONS**

**Reference:** Executive Order No. 802

Special sessions are self-supporting with fees set by the campus to cover the costs of instruction and other services (Education Code Section 89708). Special sessions shall be operated within the framework of the State University Continuing Education Revenue Fund (Education Code

Section 89704) with the option now to deposit the revenues in local trust accounts (Education Code Section 89721 (i). Special sessions funds are subject to all fiscal policies and procedures pertinent to the fund in which the revenues are deposited and are available “for the support and development of self-support instructional programs” as provided in Education Code Section 89704.

**1501.01.02.01 SPECIAL SESSION FEES**

**Reference: Education Code Section 89708 and Section 89709; Executive Order No. 740; see also “Extended Education Fees,” Section 1510 in this manual.**

Education Code Section 89708 specifies that “Tuition fees adequate, in the long run, to meet the cost of maintaining special sessions in the California State University shall be required of, and collected from, students enrolled in each special session according to and pursuant to rules and regulations prescribed by the Trustees.

**As** authorized in Education Code Section 89709, the Trustees “may require and collect [from students] special fees to cover cost **of** materials for specific services and other fees to cover the cost of accommodation services and other services provided students.”

The Board retains the authority to establish, adjust, and abolish systemwide fees; the chancellor is delegated authority to establish new campus fees; and campus presidents are delegated authority to adjust or abolish campus fees.

**1501.01.03 REQUISITE CONDITIONS FOR SPECIAL SESSIONS**

**Reference: Executive Order No. 802**

1. For a group of courses or program to be offered under special sessions, both of the following criteria must be met:
  - a. State General Fund appropriations to support the program must be either unavailable or inappropriate. Examples of inappropriate use of State General Fund appropriations would include courses or programs delivered primarily out-of-state.
  - b. The courses or program must be different from approved, state-supported programs operating on campus by one or more of the following:
    - i. The courses or program is designed primarily for career enrichment or retraining (Education Code Section 89708).
    - ii. The location of the courses or program offerings is significantly removed from permanent, state-supported campus facilities.
    - iii. The client group for the courses or program receives educational or other services at a cost beyond what could be reasonably provided under state support.

2. **All** special sessions must have the following characteristics:
- a. Each must consist of a planned presentation of a degree, credential, or certificate program or a group of courses offered at a particular location or through a distinct technology. Courses may be presented concurrently or sequentially but in a defined time frame.
  - b. While a special session need not offer all or even a significant portion of a degree, credential, or certificate program, it must be planned to serve a substantive educational objective supportive of such programs; e.g., an opportunity for a matriculated student to accelerate achievement toward an objective, or a significant portion of a degree program offered for military or business personnel.
  - c. Degree, credential, or certificate programs offered through special sessions must secure all regular campus and system approvals. Such programs may have a state-supported counterpart operating on campus, or they may operate only as self-supported programs through special sessions. The Chancellor's Office shall be notified when previously approved, state-supported degree or credential programs are first offered in self-support mode through special sessions.
  - d. Self-support degree, credential, or certificate programs offered under the provisions of this executive order shall be operated in accordance with all appropriate campus and system policies and procedures.
  - e. Campuses offering special sessions shall provide educational support services (e.g., admissions and records, advising, library, financial aid) appropriate to the nature and scope of the program.
  - f. **All** instruction offered shall have been approved under procedures utilized for state-supported programs, and all academic policies governing special sessions shall be identical to or established under the same procedures as those governing state-supported programs.
  - g. **All** students in special sessions degree programs and education credential programs must be matriculated. Non-matriculated students paying self-support fees may enroll in special sessions courses on a space-available basis. A maximum of 24 semester units (36 quarter units) in special sessions course credit taken as a non-matriculated student may be applied toward a degree (Title 5, California Code of Regulations Section 40407.1). However, a maximum of **24** semester units (36 quarter units) in special session course credit earned through state-supported regular course offerings (Open University/Concurrent Enrollment) may be applied toward a degree (Title 5, California Code of Regulations Section 40407.1).
  - h. Location of instruction must be in accordance with pertinent system policies.
  - i. Special sessions offerings must be consistent with all applicable policies of the Western Association of Schools and Colleges and other accrediting bodies under whose jurisdiction special sessions fall.

- j. Academic credit offered through special sessions shall be applicable toward residence credit requirements at the campus offering the special sessions. However, a maximum of 24 semester units (36 quarter units) in special session course credit earned through state-supported regular course offerings (Open University/Concurrent Enrollment) may be applied toward a degree (Title 5, California Code of Regulations Section 40407.1).
- k. Special session courses shall not be offered at times or places that are likely to supplant or limit offerings of the state-supported program (Education Code Section 89708).
- l. Faculty shall be compensated according to approved special session salary schedules.

**1501.01.04 RECORDS MAINTENANCE**

**Reference: Executive Order No. 802**

**Each campus shall maintain records of special sessions activity that include:**

1. Name, location, and time of each special session course/program.
2. Brief description of the purpose of each special session course/program.
3. Enrollment data, including number of graduates, as specified in system enrollment reporting requirements.
4. Faculty workload and salary data.
5. An indication as to whether the session is one-time or recurrent, including the projected number of cycles of offerings.
6. If applicable, changes anticipated in future cycles of offering.

**1501.02 SPECIAL SESSION CREDIT ALLOWANCE**

**Reference: Title 5, § 40201**

A maximum of one semester unit may be allowed for each fifteen hours of instruction in a special session.

**1501.03 SPECIAL SESSION CREDIT**

**Reference: Title 5, § 40407.1**

A maximum of 24 semester units in special session course credits earned through state-supported regular course offerings may be applied toward the degree. The Chancellor is authorized to establish and revise criteria for application of special session credits earned through enrollment in state-supported regular course offerings toward the degree, in accordance with applicable law.

#### **1501.04 SPECIAL SESSION ENROLLMENT IN REGULAR CURRICULUM OFFERINGS**

**References:** Title 5, § 40202, Article 3; § 40407.1, Article 5; Letter of Authorization from Interim Senior Vice Chancellor: “Redesignation of Concurrent Enrollment Program Credit,” dated October 8, 1997

Each campus may designate each semester or quarter those state-supported regular course offerings that may be attended for special session credit, provided that enrollment in any such course for special sessions credit shall be permitted only after students otherwise eligible to enroll in the course as a state-supported regular course offering have had an opportunity to do so. (This procedure is referred to as Open University or Concurrent Enrollment, as designated by the campus.)

A maximum of 24 semester units in special session course credit earned through state-supported regular course offerings may be applied toward the degree. The chancellor is authorized to establish and revise criteria for application of special sessions credits earned through enrollment in state-supported regular course offerings toward the degree—in accordance with applicable law.

Each campus may require that special session students meet course prerequisites and may establish other requirements for enrollment in particular courses.

Faculty who teach regular courses in which special session students are enrolled shall not be paid additional direct faculty compensation.

Special session enrollments (or potential enrollments) shall not be used as the basis for adding a new course section, nor shall they be used as justification for continuing a course section that would otherwise be cancelled because of low enrollment of regular matriculated students.

#### **1501.05 DEGREE PROGRAMS OFFERED THROUGH SPECIAL SESSIONS**

**References:** Board of Trustee Standing Orders, Chapter 3.e; Letter of Authorization from Interim Senior Vice Chancellor: “Degree Programs Offered Through Special Sessions,” dated December 4, 1996

The Trustees have authorized the chancellor to approve individual campus proposals to offer new special sessions programs leading to a degree. Previous authorization to offer additional external degree programs was terminated with the authorization to offer degrees as special session degree programs.

##### **1501.05.01 NEW DEGREE PROGRAMS OFFERED THROUGH SPECIAL SESSIONS**

**References:** Executive Order 802, section C.2.c

Degree, credential, or certificate programs offered through special sessions must secure all regular campus and system approvals. Such programs may have a state-supported counterpart operating on campus, or they may operate only as self-supported programs through special sessions. The Chancellor’s Office shall be notified when previously approved, state-supported degree or credential programs are first offered in self-support mode through special sessions.

**1501.05.02 DEGREE PROGRAMS OFFERED THROUGH SPECIAL SESSIONS:  
ONGOING POLICY**

**References: Executive Order 802, section C.2.d-f**

Self-supporting degree, credential, or certificate programs offered under the provisions of this executive order shall be operated in accordance with all appropriate campus and system policies and procedures.

Campuses offering special sessions shall provide educational support services (e.g., admissions and records, advising, library, financial aid) appropriate to the nature and scope of the program.

**All** instruction offered shall have been approved under procedures utilized for state-supported programs, and all academic policies governing special sessions shall be identical to or established under the same procedures as those governing state-supported programs.

**1502            EXTENSION CREDIT**  
**Reference:     Title 5, § 40300**

Extension offerings are self-support courses, conferences, workshops, and seminars-either credit or noncredit. Unlike special sessions, there are limitations on applying extension credit toward degrees and on applying extension credits toward residence requirements.

Each campus may establish and maintain extension courses and services when authorized to do so by the Board of Trustees.

**1502.01        APPLICABILITY OF EXTENSION CREDITS**  
**Reference:     Title 5, § 40407**

A maximum of 24 semester units in extension course credit may be applied toward the degree. The chancellor is authorized to establish and revise criteria for application of extension credits toward the degree in accordance with applicable law.

**1502.02        EXTENSION CREDIT AND RESIDENCE REQUIREMENTS**  
**Reference:     Title 5, § 40403**

Extension credit shall not be used to fulfill the residence requirements for a baccalaureate degree, except that the chancellor may designate specified extension courses that may be offered for residence credit.

**1502.03        TRANSFER OF EXTENSION CREDIT**  
**Reference:     Executive Orders No. 167 and No. 191**

Campuses shall accept in transfer all extension credits earned in courses that are certified, approved, or otherwise identified as baccalaureate courses, provided that the total does not exceed 24 semester units or 36 quarter units. Credits not required for a student's particular degree objective shall not be transferred.

**1503 CONTINUING EDUCATION UNIT**  
**Reference: Executive Order No. 255**

The Continuing Education Unit (CEU) is a flexible unit of measurement for non-credit extended education activities. CEUs may be used to record an individual's participation in non-credit activities, courses, and programs, and in nontraditional modes of non-credit extended education activities, including various forms of independent and informal study. In no instance shall CEUs be converted to units of academic credit (e.g., semester or quarter units).

One CEU is defined as ten hours of participation in an organized extended education experience under responsible sponsorship, capable direction, and qualified instruction. Campuses may, however, choose to award a decimal fraction of a CEU when complete instructional hours or the equivalent are considered (for example, a program involving 18.5 contact hours would award a maximum of 1.8 CEUs).

Each campus is authorized to develop and implement policies and procedures for non-credit Extension program activities utilizing the CEU as the standard unit of measurement of individual participation. Implementation is permissive. Campuses choosing to utilize the CEU shall develop local policies and procedures consistent with national standards and systemwide requirement provided hereafter.

**1503.01 CRITERIA FOR INDIVIDUAL PROGRAMS AND ACTIVITIES**  
**Reference: Executive Order No. 255**

**Each campus shall develop its own criteria for non-credit extension programs and activities for which individuals may be awarded CEUs. As a minimum, these criteria shall include:**

1. The activity shall meet the educational needs of a specific target population whose representatives have had an opportunity for input in the planning process, as have faculty (or other qualified experts approved by the appropriate campus authority), and campus personnel assigned the responsibility for the administration of such activities.
2. The following program elements have been determined during the planning stages prior to the time the program is approved for implementation: program purposes and objectives, student performance requirements, evaluation procedures suitable for measuring the effectiveness of program design and operation, and the number of CEUs to be awarded for satisfactory completion of performance requirements.
3. The program or activity is of an instructional nature and is sponsored or approved by the academic or administrative unit of the campus best qualified to determine the quality of the program content and to approve the resource personnel required.
4. Provisions have been made for student registration, including the gathering of sufficient information from the student to ensure a permanent record of individual participation.

**1503.02            ADMINISTRATION OF CONTINUING EDUCATION UNIT (CEU) PROGRAMS**  
**Reference:        Executive Order No. 255**

**Each campus shall develop local administrative policies and procedures that, at a minimum, shall provide for the following:**

1. Assignment of local administrative responsibility for the program to appropriate campus personnel;
2. Record keeping and reporting functions that ensure that a permanent record will be maintained for all Continuing Education Units (CEUs) awarded and for all programs for which the awarding of CEUs is authorized. The form and content of these records should be consistent with nationally recognized standards for the maintenance of CEU records for students and for programs;
3. Program review and approval procedures that are consistent with procedures utilized in connection with other extended education programs sponsored by the campus;
4. Program instructional and resource personnel review and approval procedures that are consistent with procedures utilized in connection with other extended education programs sponsored by the campus; and
5. Steps to preclude duplicate record keeping when such a program is jointly sponsored by another campus.

## 1504 CERTIFICATES AND CREDENTIALS

This section lists policy regarding undergraduate and graduate certificates and credentials.

### 1504.01 CERTIFICATE PROGRAMS

**Reference:** Executive Order No. 806; Title 5 § 40400, Standing Orders of the Board of Trustees CSU, Chapter 11, Section 3.b

Title 5 § 40400 specifies that the Board of Trustees, upon recommendation of the faculty of the campus, shall issue the appropriate diploma, certificate or degree to a student who has completed the prescribed course of study.

The Board of Trustees Standing Orders Chapter 3.b authorizes that upon recommendation of the faculty of the campus, the Chancellor shall issue, on behalf of the Board of Trustees, the appropriate diploma, certificate, or degree to a student who has completed the prescribed course of study.

**Certificate programs are designed to serve students with a set of experiences concentrated in a specific set of goals, such as:**

- Increasing knowledge in a career area by updating a student's knowledge about the career, providing advancement opportunities, introducing students to new developments, or providing added information based on student needs and interests;
- Providing initial knowledge designed for entering a new career, or making a significant change in an existing career, such as moving from a nurse to a nurse practitioner;
- Providing knowledge for new and emerging career opportunities;
- Providing opportunities to explore the possibility of moving to different careers;
- Providing an organized set of knowledge within any discipline, based on student interests, such as in different areas of art, music, literature, mathematics or science; and
- Providing other programs based on identified or anticipated student needs and interests.

In most cases, certificate programs are provided via extended education. At the discretion of the university, academic credit may be awarded at the graduate and undergraduate levels. Certificate programs may grant Continuing Education Units (CEUs), or they may include non-credit offerings.

Campuses are encouraged to establish appropriate policies for planning and developing certificate programs. The campus-determined policies should address the number of semester or quarter credits needed for a credit-bearing certificate program and the requirements for non-credit certificates.

**1504.02 CREDENTIAL PROGRAMS**  
**Reference: Executive Order No. 758 and Title 5, § 40101**

Title 5 section 40101 authorizes campuses to establish and maintain courses leading toward fulfillment of requirements for one or more public school service credentials, and when a campus is approved by the Commission for Teacher Preparation and Licensing, the campus is authorized to recommend qualified applicants to the Commission for Teacher Preparation and Licensing for the credential.

Executive Order No. 758 establishes standards for admission to teacher education basic credential programs and for entrance to a student teaching experience, addresses the evaluation of subject matter competence for an entrant to a teacher education basic credential program, and notes a limitation on the transfer of community college credit in education to a teacher education basic credential program.

Credential-generating activities are a major responsibility of each campus' regular academic program. Campuses may offer self-support credential programs as necessary.

EO 758 outlines the requirements for admission to matriculated status within a credential program. Within these parameters, extended education is encouraged to provide instructional services that support CSU efforts to meet California's teaching needs, recognizing that a very large number of new teachers are needed to serve the public schools each year.

**1505 CREDIT FOR PROFESSIONAL DEVELOPMENT ACTIVITIES**  
**Reference: Title 5, § 40103; Title 5, § 40403; Title 5, § 40407; Letter from Executive Vice Chancellor and Chief Academic Officer to Presidents: “Professional Development Credit,” dated July 5, 2001.**

**California State University campuses may certify completion of courses or programs in two ways:**

1. **Academic credit.** Degree-applicable credit, in either semester or quarter units, is authorized under Title 5, § 40103. Semester units are based upon the traditional Carnegie standard: approximately 45 hours of student effort per semester unit (e.g. 15 hours of lecture-discussion instruction with the expectation of approximately two hours of out-of-class student preparation for each hour of instruction). A quarter unit is two-thirds of a semester unit.

Academic credit offered in a self-support mode is identified as either extension credit or special sessions credit. Extension credit meets all standards of effort described above. However, extension credit is not considered as “resident credit” (Title 5, § 40403), and a maximum of 24 units of extension credit may be used toward a baccalaureate degree (Title 5, § 40407, and § 1502, this manual).

Special sessions credit meets all standards of effort described above. Special sessions credit satisfies CSU residency requirements and is fully applicable toward degrees, with one exception. Only 24 units of special sessions credit earned through Open University/Concurrent Enrollment may be used toward a baccalaureate degree. (See § 1501 for additional information in special session Credit.)

2. **Continuing Education Units (CEUs).** The provisions governing the use of Continuing Education units are outlined in Executive Order No. 255 and section xxx of this manual. CEUs may be used to provide official non-credit recognition of courses completed through extended education.

**Beyond standard academic credit units, CEUs, special sessions credit, and extended education credit, CSU campuses are not authorized to award any other form of credit or unit of measurement of individual participation, including the use of “professional development credit.”** Campuses may, however, offer courses, degrees, credentials, or certificates identified with the term “professional development” (such as “professional development course”), but the unit of measurement shall be offered in a manner consistent with CSU standards.

Campuses may offer non-credit courses, workshops, conferences, certificates, or other activities that award Continuing Education Units, as illustrated in section 1503 of this manual. These programs also may be identified with the term “professional development,” provided they use the measurements of accomplishment described in number one above.

**1506                    CENTERS, INSTITUTES, AND SIMILAR ORGANIZATIONS**  
**Reference            Executive Order No. 751**

Each campus shall adhere to the following principles for developing campus policies and procedures governing centers, institutes, and similar organizations.

1. **Definition—Centers**, institutes, and similar organizations are entities affiliated with California State University campuses to offer non-credit instruction, information, or other services beyond the campus community, to public or private agencies or individuals. Campuses may create such entities—usually designated “Institutes,” “Centers,” “Research Groups,” “Councils,” “Bureaus,” “Field Stations,” or “Consortia”—to facilitate the conduct and dissemination of research, perform public service, or provide special training.
2. **Responsibility for Policies Governing Centers, Institutes, and Similar Entities**  
Policies governing centers, institutes, and similar entities are primarily the responsibility of each campus.
3. **Principles for Campus Policy Development**

**The following policy development principles apply:**

- a. Each California State University campus is to have explicit policies and procedures for establishing, operating, monitoring, reviewing, and discontinuing centers, institutes, and similar entities. These policies are to be consonant with principles of academic freedom and concomitant academic responsibilities. **Policies and procedures are to be designed to ensure that the activities of each entity:**
  - (1) **Contribute to the fulfillment of the California State University mission and the campus mission;**
  - (2) **Are consistent with generally accepted tenets of scholarship (e.g. subject to peer review);**
  - (3) **Meet accepted standards of academic research; and**
  - (4) **Comply with all applicable laws and regulations and comply with the California State University and campus risk management policies.**
- b. Each entity is to be under the programmatic oversight of an academic unit (e.g., a department, school, college, office of graduate studies and research, or office of academic affairs). The establishment and continuation of the entity shall be subject to periodic review to ensure compliance with the principles described above. It is not the intent of this executive order to preclude the operation of an entity under an appropriate auxiliary organization, as authorized by the Board of Trustees in § 43500 (a) (7) of Title 5, California Code of Regulations.
- c. The campus is to report periodically *on* the implementation status of the campus policies and procedures. The campus is also to make available to the Office of the Chancellor a list of all centers, institutes and similar entities, including the name and purpose of each entity. The list is to be updated at least annually.

4. **Insurance Requirements and Risk Management**  
See Section 1508, this manual.

**1507**                    **EXTENDED EDUCATION SERVICE AREAS**  
**Reference:**           **Standing Orders of the Board of Trustees, Chapter III, Section 3.f;**  
                              **Executive Order No. 804**

### **Background**

Campus self-support assigned “Extension Program Service Areas” were formal policy in the California State University (codified in the Standing Orders of the Board of Trustees, Chapter III, Section 3.f). However, that policy was repealed by resolution of the Board of Trustees on January 30, 2002 ( ROR01-02-01).

The concept of formal “service areas” has been rendered moot by the growing use of technology-delivered instruction, which is not limited by geography. Maintaining distinct service areas is also problematic for extended education clients (including California businesses, industries, and government agencies) who want to contract with one office for training and education services delivered at several sites. Given these changing demands on higher education in California, this executive order addresses CSU policy in the absence of formal “service areas.”

### **Current Policy**

Each CSU campus shall retain the primary responsibility of meeting the needs of individuals and organizations in locations where academic service has traditionally been delivered. This includes but is not restricted to courses and programs transmitted by learning technologies, self-support “off-campus centers,” and all face-to-face instruction.

However, because the resources and capabilities of a local CSU campus may not always meet the community’s requirements, other campuses may offer their extended education services to a community in need. While this means that there are no longer formal, geographic service areas, each campus is expected to cooperate and consult with the campuses that have traditionally provided extended education to the audience in need of academic services.

**1508 RISK MANAGEMENT AND INSURANCE REQUIREMENTS OF OFF-CAMPUS INSTRUCTIONAL PROGRAMS**

**Reference: Executive Orders No. 715 and No. 743**

Off-campus instructional programs should be discussed with the Risk Manager or Coordinator to ensure that appropriate policies and insurance requirements are in place.

Executive Order No. 715 specifies that each president shall designate a Risk Manager/Risk Management Coordinator to assist campus administrators in maintaining campus risk management policies and practices. Each president shall develop campus risk management policies and procedures that include an ongoing process by which appropriate administrators identify risks, perform analysis of the frequency and severity of the potential risks, select the best risk management techniques to manage the risk without unduly curtailing or modifying activities necessary to the CSU mission, implement appropriate risk management techniques and staffing standards; and monitor, evaluate, and document the results.

Risk management includes policies and practices designed to minimize the adverse effects of losses experienced by the California State University. These losses arise from injury to persons or damage to property and include the legal liability imposed upon the CSU when the CSU or its officers or employees have caused the injury or damage, in whole or in part. The California State University and its officers and employees are responsible for conducting CSU programs and activities in a manner that does not impose an unreasonable risk of injury or loss.

Executive Order No. 743 outlines risk identification and evaluation, specifies minimum CSU insurance requirements, and establishes approved hold harmless provisions based on the risk assessment of the contract category.

**1509 OUT-OF-STATE AND OUT-OF-COUNTRY PROGRAMS**  
**Reference: Executive Order No. 795**

The president is responsible for all out-of-state and out-of-country programs sponsored by the campus and shall ensure that these programs are established and managed in accordance with the laws of the State of California; the laws of the state, territory, or nation in which the program is being offered; the policies of the Board of Trustees, and all pertinent directives issued by the chancellor.

**1509.01 ACADEMIC STANDARDS**  
**Reference: Executive Order No. 795**

The academic standards and requirements are the same as for comparable on-campus activities. Programs shall be self-supporting and shall be developed and administered in accordance with applicable standards, policies, and procedures of the Senior Commission of the Western Association of Schools and Colleges (WASC).

Academic standards and requirements are the same as for comparable on-campus activities.

**1509.02 FISCAL SUPPORT**  
**Reference: Education Codes 89704 and 89721; Executive Order No. 795**

Programs shall be self-supporting and shall be administered in accordance with the fiscal policies and procedures governing the Continuing Education Revenue Fund (EC 89704) or local trust accounts (EC89721).

**1509.03 PROGRAMS OFFERED IN OTHER STATES AND TERRITORIES**  
**Reference: Executive Order No. 795**

Programs offered in other states and territories shall be designed to expand the educational opportunities of the region being served rather than to compete with local educational institutions. Mutual understanding shall be reached with the local public institutions of higher education to ensure that California State University programs will neither duplicate nor compete with the instructional activities of these institutions. When there are circumstances that make a mutual understanding impossible, the campus president shall consult with the chancellor prior to deciding whether to offer the program. Program planners shall notify the appropriate regional accrediting agencies of their intentions. Any such program shall be in compliance with laws and regulations of the state or territory concerned.

**1509.04            PROGRAMS OFFERED IN OTHER NATIONS**  
**Reference:        Executive Orders No. 795**

**In addition to the provisions of the above section on “Programs Offered in Other States and Territories,” an institution considering the development of a program for delivery in a foreign country shall take the following additional steps early in the planning process:**

1. Contact the United States Department of State to advise appropriate personnel of campus intentions and to seek advice.
2. Contact the United States Embassy (and/or Consulate) in the nation concerned to inform appropriate personnel of campus intentions and to seek advice and comments concerning such matters as living conditions, security, etc. Once contact has been established, it should be maintained as need dictates during the life of the program.
3. Contact the embassy of the nation concerned to seek advice and to inform appropriate personnel of campus plans and to seek advice.
4. Special attention should be given to the foregoing when there is any reason for concern that the health or safety of California State University personnel might be an issue.

**1509.05            OUT-OF-STATE AND OUT-OF-COUNTRY PROGRAM EVALUATION**  
**Reference:        Executive Orders No. 795**

In order to assure compliance with systemwide and campus policies and procedures, the president of any campus offering out-of-state or out-of-country instructional programs shall establish procedures for their initiation, evaluation, review, and approval with respect to their academic, contractual, faculty, fiscal, legal, and logistical arrangements and commitments. These procedures and subsequent modifications shall be filed with the State University Dean of Extended Education in the Office of the Chancellor at least 60 days prior to the initiation of the first program to be offered under the provisions of this executive order. Once procedures are on file, the president shall routinely advise the Division of Extended Education in the Office of the Chancellor of intention to initiate a program.

**1509.06            OUT-OF-STATE AND OUT-OF-COUNTRY PROGRAM ADMINISTRATION**  
**Reference:        Executive Orders No. 795**

Any contract related to out-of-state or out-of-country instructional programs to which the campus is party shall conform to the following as well as all other pertinent policies and procedures:

1. The contract shall be made in conformance with applicable laws and procedures and Board of Trustees policy and chancellor directives.

2. The contract shall be specific concerning the matters for which the institution is not responsible.
3. The contract shall be reviewed and approved as to proper legal form by the Office of General Counsel in the Chancellor's Office.

**1509.07            OUT-OF-STATE AND OUT-OF-COUNTRY PROGRAM DIRECTOR**  
**Reference:        Executive Orders No. 795**

Each out-of-state or out-of-country program shall have a director assigned by means of a letter of appointment issued by the campus president or the president's designee. This letter shall specify the extent of the director's responsibility as a campus employee.

**1509.08            FOREIGN STUDY PROGRAMS**  
**Reference:        Executive Order No. 745**

Presidents of the campuses of the California State University or their designees may initiate self-support campus-based study abroad programs that support, enrich, and/or broaden existing curricular offerings.

For the purposes of Executive Order No. 745, "self-support" shall mean any CSU campus instructional program that relies exclusively on non-state general funds to support its operation. "Study Abroad" shall mean any CSU campus instructional program that requires physical presence at a site outside of the United States of America, is normally of one year or less duration and is not a degree program.

Self-support, campus-based study abroad programs are credit-bearing programs operated by the Continuing or Extended Education Division.

Such programs will be conducted consistent with the provisions of other related executive orders (such as those on air travel, risk management, and special sessions).

**1509.08.01        FOREIGN STUDY STANDARDS AND CURRICULUM DEVELOPMENT**  
**Reference:        Executive Orders No. 745**

Self-support, campus-based study abroad academic offerings must present a course of study that is congruent with or adjunct to the campus curriculum and that is related to the overseas instructional site.

Such programs must undergo a normal on-campus development process that incorporates all appropriate administrative and academic reviews and approvals as defined by the sponsoring CSU campus curricular process.

**1509.08.02      FOREIGN STUDY EVALUATION AND REPORTING REQUIREMENTS—  
CAMPUS**

**Reference:      Executive Order No. 745**

Campus Presidents or their designees will incorporate plans for the review, evaluation, and improvement of self-support, campus-based study abroad programs as a regular feature and condition of their operation.

**1509.08.03      FOREIGN STUDY PROGRAM ADMINISTRATION**

**References:      Executive Orders No. 590 and No. 745**

**The following policies and procedures apply to the development, administration, and conduct of all self-support campus-based Study Abroad Programs:**

1. The Extended Education division operates self-support campus-based Study Abroad Programs.
2. Such programs shall undergo a normal on-campus development process that incorporates all appropriate administrative and academic reviews and approvals.
3. Self-support campus-based Study Abroad academic offerings shall present a course of study that is congruent with or adjunct to the campus curriculum and that is related to the overseas instructional site.
4. Campus presidents or their designees will incorporate plans for the review, evaluation, and improvement of self-support campus-based Study Abroad Programs as a regular feature and condition of their operation.
5. Such programs shall be conducted in compliance with the provisions of other related executive orders (including those on air travel, risk management, and special sessions).

**1510 EXTENDED EDUCATION FEES**

**References: Executive Order No. 740**

Executive Order No. 740, *The California State University Fee Policy*, defines the types of fees authorized by the Board of Trustees and describes the process for establishing new fees. Category III fees are those paid to receive materials or services, or paid for the use of facilities provided by the university, or paid to enroll in a course offered through a self-support instructional program. Examples of Category III fees include those for extension courses, special sessions, distance learning, Conferences (short course institutions), off-campus study programs, and summer sessions, among others.

**1510.01 ESTABLISHING AND ADJUSTING EXTENDED EDUCATION FEES**

**Reference: Executive Order No. 740**

This section identifies policy for changing existing fees and establishing new fees.

**1510.01.01 ESTABLISHING EXTENDED EDUCATION FEES**

**Reference: Executive Order No. 740**

The Board retains the authority to establish, adjust, and abolish systemwide fees; the chancellor is delegated authority to establish new campus fees; and campus presidents are delegated authority to adjust or abolish campus fees.

Campuses wishing to request the chancellor's authorization of a new fee shall follow the procedures outlined in Executive Order 740. Appropriate and meaningful consultation with the campus fee advisory committee shall occur prior to requesting the chancellor to establish new campus fees.

**1510.01.02 ADJUSTING EXTENDED EDUCATION FEES**

**Reference: Executive Order No. 740**

Campus presidents are delegated the authority to adjust or abolish chancellor-authorized campus fees. Appropriate and meaningful consultation with the campus fee advisory committee shall occur prior to increasing campus fees.

**1510.02 EXTENDED EDUCATION REFUND POLICY**

**Reference: California Code of Regulations Title 5 § 41802, as revised by Board of Trustees Resolution REP 11-01-05**

For self-support, special sessions, and extension course tuition fees: Refunds of tuition and fee charges for self-support, special sessions, and extension courses shall be made in accordance with policies and procedures established by the campus offering the session or course.

Board of Trustees Education Policy Committee, Resolution REP 11-01-05 stipulates that, “[e]ach campus shall review the refund policy presented in this section and establish a campus policy that meets the requirements of Title 5, § 41802.

**1510.02.01      EXTENDED EDUCATION FEES THAT MAY BE REFUNDED**  
**Reference:      California Code of Regulations Title 5 § 41802, as revised by Board of Trustees Resolution REP 11-01-05**

**A** student who registers for classes for an academic period and who drops all classes or otherwise cancels registration for the period prior to the first day of instruction for that period shall be entitled to a refund of all tuition and mandatory fees paid less an administrative charge established by the campus.

**A** student who, within the campus designated drop period and in accordance with the campus procedures, drops units resulting in a lower tuition and/or mandatory fee obligation shall be entitled to a refund of applicable tuition and mandatory fees less an administrative charge established by the campus.

Notwithstanding the previous subsection,

1. Tuition and mandatory fees shall be refunded and an administrative charge may not be retained if:
  - A.** The tuition and mandatory fees were assessed or collected in error;
  - B.** The university canceled the course for which the tuition and mandatory fees were assessed or collected;
  - C.** The university made a delayed decision that the student was not eligible to enroll in the term for which mandatory fees were assessed and collected, and the delayed decision was not due to incomplete or inaccurate information provided by the student; or
  - D.** The student was activated for compulsory military service.
2. Tuition and mandatory fees may be refunded if the student or an authorized representative petitions the university for a refund demonstrating exceptional circumstances and the chief financial officer of the university or designee makes a determination that the tuition and mandatory fees have not been earned by the university.

**1510.02.02      APPLICATION AND PAYMENT OF EXTENDED EDUCATION REFUNDS**  
**Reference:      California Code of Regulations Title 5 § 41802, as revised by Board of**  
**Trustees Resolution REP 11-01-05**

**Any refund of tuition and mandatory fees shall be applied in the following order:**

1. Any refunds shall first be applied toward any required return of funds that had been received by the student or on his/her behalf from federal, state, institutional, or external sources that were conditioned on the student's enrollment.
2. The balance of any refunds shall be returned to the student or, with the student's concurrence, carried as a credit balance on the student's account with the university.

**1511 FINANCIAL MANAGEMENT OF EXTENDED EDUCATION**  
**References: Education Code § 89704; Executive Orders No. 794 and No. 648**

Each president is responsible for both the financial and the academic aspects of the self-support instructional programs operated by the campus through the Continuing Education Revenue Fund (CERF) or local trust accounts. Presidential authority and accountability for the administration of extended education self-support funds shall be governed by the provisions of Executive Order No. 648, *Delegation of Fiscal Authority and Responsibility*.

The purpose of this section of this manual is to set forth policies and procedures designed to ensure the financial stability of self-support instruction programs operated through the California State University Continuing Education Revenue Fund or local trust accounts and to ensure compliance with California Education Code and CSU systemwide policies.

**1511.01 DELEGATION OF FISCAL AUTHORITY AND RESPONSIBILITY**  
**Reference: Executive Order No. 648**

All funds, including the Continuing Education Revenue Funds and Campus Trust Accounts, are maintained on campus with authority to use and expend these funds, using all applicable statutes, regulations and policies of the Board of Trustees, assigned to the campus president.

The chancellor has delegated to the campus president the authority to approve the expenditure from and transfer between appropriations, funds, programs, allotments, and projects except where prohibited by applicable statutes and regulations. Executive Order No. 648 includes all funds administered by the campus including funds held outside the state treasury.

The campus president is delegated authority to approve the establishment of new positions and changes in existing positions and the state controller's payroll roster.

**1511.01.01 FISCAL RESPONSIBILITY**  
**Reference: Executive Order No. 648**

The campus president is responsible for ensuring that:

1. The authority delegated by this executive order is exercised in compliance with all applicable statutes and regulation and policies of the Board of Trustees.
2. Expenditure commitments do not exceed available resources, and request for allocation orders are completed as necessary to adjust budgeted revenue, reimbursements, and expenditures, reflecting actual experience.
3. Monies are expended for their authorized purpose, and appropriate internal controls are in place to ensure that funds are protected from misuse.

4. Campus financial practices adhere to uniform accounting standards in accordance with generally "Accepted Accounting Principles for Institutions of Higher Education" (Education Code 89761).

**1511.01.02 FISCAL ACCOUNTABILITY**  
**Reference: Executive Order No. 648**

The campus president shall provide to the vice chancellor of business affairs annual consolidated financial statements for all funds administered by the campus, including funds held outside the state treasury. In addition, to ensure that the financial statements fairly state the condition of the California State University, auxiliary organizations shall be incorporated in the financial statements. Supplementary financial detail shall also be provided by the campus in a machine-readable format and at intervals specified by the vice chancellor of business affairs.

**1511.02 PROGRAM OWNERSHIP/SPONSORSHIP**  
**Reference: Executive Order No.794**

Self-support instructional programs awarding academic credit or Continuing Education Units (CEUs) shall be owned and/or sponsored by a CSU campus. Ownership/sponsorship of an instructional program awarding credit or CEUs shall not be assigned or contracted to another party or organization, including campus auxiliary organizations.

**1511.03 DEPOSIT OF REVENUES**  
**References: Education Code § 89704 and 89721, Executive Orders No. 255 and No. 794**

All revenues from self-support instructional programs providing academic credit, from non-credit extended education programs and activities providing Continuing Education Units, and from all other non-credit courses or programs shall be deposited in the State University Continuing Education Revenue Fund or shall be deposited in a local trust account as authorized in Education Code § 89721. This includes all revenues derived from Open University or concurrent enrollment

All revenues received, as noted above, shall be used only for the support and development of self-support instructional programs of the California State University as provided in § 89704 of the California Education Code.

**1511.04 ALLOCATION OF REVENUES**  
**Reference: Executive Order No. 805**

The allocation of all revenues derived from the enrollment of non-matriculated students in state-supported regular courses or in self-support special session courses shall be determined by the campus president, following consultation with the campus budget advisory committee. The

Continuing Education Revenue Fund or campus trust (in accordance with established procedures) shall reimburse state General Fund expenditures associated with non-matriculated student enrollments. Documentation of revenues and expenditures related to this program shall be maintained in sufficient detail to facilitate the conduct of evaluative studies.

**1511.05            USE OF AUXILIARY ACCOUNTS**  
**Reference:        Executive Orders No. 698 and No. 794**

Executive Order No. 698 provides authority for campus auxiliary units to conduct (section 1., B., 3-4) “sponsored projects, workshops and institutes,” and “instructionally-related activities” and to deposit fees from such activities in auxiliary accounts. Activities organized and delivered in this manner shall not state or imply association with the California State University or member campuses.

Executive Order No. 794 specifies that auxiliary organizations are not authorized to award academic credit or extended education credits (CEUs). Instructional programs awarding academic credit or CEUs shall be owned or sponsored by a California State University Campus.

**1511.06            BUDGET MANAGEMENT**  
**Reference:        Executive Order No. 794**

It is the primary responsibility of the campus to monitor enrollments, revenues, and expenditures during any given fiscal year to assure the fiscal stability of its self-support instructional programs. Budget changes should be initiated as necessary to assure this fiscal stability.

**1511.06.01        BUDGET PREPARATION**  
**Reference:        Executive Order No. 794**

Campus extended education budgets shall be based upon enrollment and revenue projections. Initial projections shall be prepared by the campus and submitted for review to the Division of Extended Education in the Office of the Chancellor. Following consultation with the campus, the Chancellor’s Office may make revisions to these projections.

**1511.06.02        PERIODIC FINANCIAL REPORTING**  
**Reference:        Executive Order No. 794**

At the end of each fiscal year, the campus shall provide an annual financial report to the vice chancellor for Business Affairs and the Extended Education State University dean, in the Office of the Chancellor. This report shall provide information on extended education enrollments, revenue, and expenditures. The format for this report will be provided by the Chancellor’s Office.

**1511.07 REIMBURSEMENT OF GENERAL FUND FOR REASSIGNED-TIME FACULTY SERVICES**

**Reference: Memorandum BA 75-26**

For faculty reassigned temporarily from regular duties to perform duties within the Continuing Education Revenue Fund local trust accounts, the General Fund will be reimbursed the costs of the salary and benefits.

Cost for faculty released less than full time will be calculated using the 15ths rather than 12ths.

**1511.08 ACCURAL ACCOUNTING IN EXTENDED EDUCATION**

**Reference: Memorandum BA 78-21**

Revenue and expenditure accounts shall be maintained and reports prepared in the accrual basis of accounting. Revenues should be reported when earned; expenditures should be reported when materials and services are received.

An academic program that is conducted over two fiscal years (i.e., starting in June of one fiscal year and ending in August of the following fiscal year) should be accounted and reported totally within the fiscal year in which the program is primarily conducted.

Income received in one fiscal year and applicable to another fiscal year should be recorded as "Operating Income Collected in Advance," and should be remitted to the State controller.

**1512 PAYMENT OR REIMBURSEMENT OF HOSPITALITY EXPENSES**  
**Reference: Executive Order No. 761**

Hospitality expenses may be paid with university funds to the extent that the purchase and use of these services and items is consistent with the mission and fiduciary responsibilities of the university. This policy applies to activities that promote the university to the public and the provision of hospitality in connection with official university business and specifies the university funds that may be used for such purposes. Regarding the payment of hospitality expenses, each campus is required to develop written policies and procedures that are consistent with this policy.

Each campus shall develop appropriate approval processes, including the specifications that individuals with delegated approval authority shall not approve their own expenses, nor shall individuals approve their supervisor's expenses.

**1512.01 ALLOWABLE EXPENSES AND OCCASIONS TO USE**  
**Reference: Executive Order No. 761**

Hospitality expenses shall be directly related to or associated with the active conduct of official university business. When a university employee acts as an official host, the occasion shall, in the best judgment of the approving authority, serve a clear university business purpose, with no personal benefit derived by the official host or other university employees. In addition, the expenditure of funds for hospitality should be cost effective and in accordance with the best use of public funds.

Hospitality expenses, including awards and gifts, shall conform to IRS regulations. When determining whether a hospitality expense is appropriate, the approving authority shall evaluate the importance of the event in terms of the costs that will be incurred, the benefits to be derived from such an expense, the availability of funds, and any alternatives that would be equally effective in accomplishing the desired objectives. Following are examples of occasions when the provision of hospitality is permitted:

- When the university hosts official guests, including university employees visiting from another work location, donors, and prospective donors;
- When the university is the host or sponsor of a meeting of a learned society or organization;
- When the university is the host or sponsor of meetings of an administrative nature that are directly concerned with the welfare of the university and the provision of hospitality is a necessary and integral part of the business meeting and not solely a matter of personal convenience;
- When the university hosts receptions held in connection with conferences, meetings of a learned society or organization, fundraising events, meetings of student organizations and groups,

student events such as commencement exercises, and meeting of other university related groups such as alumni organizations; or

- When the university hosts receptions for the benefit of employee morale, employee recognition or length of service awards or retirement presentations.

Payment of or reimbursement for hospitality expenses are not permitted when these expenses are related to employee birthdays, weddings, anniversaries, and farewell gatherings that are not related to the active conduct of official university business.

## **1512.02 FUNDING SOURCES**

**Reference: Executive Order No. 761**

Hospitality expenses may be paid from various university fund sources, subject to the rules outlined below and the restrictions noted. There are three types of funds available for the payment of hospitality expenses: General Fund Appropriations, Special Funds, and Auxiliary Organization Funds.

### **1512.02.01 General Fund Appropriations**

**Reference: Executive Order No. 761**

The following restrictions apply to the use of General Fund Appropriations:

- General Fund Appropriations may not be used to pay for alcoholic beverage or tobacco products, gifts, or awards.
- General Fund Appropriations may not be used to pay for food and beverages for business meetings attended only by employees of the same work location.
- Any expenditures prohibited by statute including the California Budget Act.

### **1512.02.02 Special Funds**

**Reference: Executive Order No. 761**

- Special Funds may be used to pay for alcoholic beverages, tobacco products, gifts, and awards to the extent these purchases are not restricted by other applicable laws, regulations, or agreements.
- Special Funds may be used to pay for food and beverages for business meetings attended only by employees of the same work location.
- Trust Funds and Special Project Funds may be used to pay hospitality expenses only to the extent permitted by the statute under which the funds are established and maintained and any trust agreement or special project agreement.
- Federal or local government contract and grant **funds** may be used to pay hospitality costs only if such expenses are specifically authorized in the contract or grant, or by agency policy, and only

to the extent and for the purposes authorized. In the event of a conflict between agency and university policy, the stricter of the two policies shall apply.

- No alcoholic beverage or tobacco products may be charged to Federal funds.

**1512.02.03      Auxiliary Organization Funds**  
**Reference:      Executive Order No. 761**

- Auxiliary Organization Funds may be used to fund hospitality but only within the restrictions established by the auxiliary organization.
- Expenses for alcoholic beverages, tobacco products, gifts, and awards may be charged to Auxiliary Organization Funds subject to the policies and restrictions established by this policy and the auxiliary organization.

**1513 FACULTY COMPENSATION FOR EXTENSION AND SPECIAL SESSIONS**

**Reference:** **CFA Contract 1998-2001 Unit 3-Faculty**  
[http://www.calstate.edu/LaborReVContracts-HTMLUCFA\\_CONTRACT/CFAcon.shtml](http://www.calstate.edu/LaborReVContracts-HTMLUCFA_CONTRACT/CFAcon.shtml)

For each California State University faculty salary contract period, the Chancellor's Office publishes the salary schedule, based on per unit assignment, for extended and continuing education programs of extension, special session, and summer session. These schedules identify the per-teaching unit rate and the date they become effective for campus use. The semester or quarter per unit teaching rate is based on the assumption that this is the rate for teaching one semester unit or quarter unit of a course.

**1513.01 EXTENSION FACULTY HOURLY PAY GUIDELINES**

**Reference:** **CFA Contract 1998-2001 Unit 3-Faculty**  
[http://www.calstate.edu/LaborReVContracts-HTMLUCFA\\_CONTRACT/CFAcon.shtml](http://www.calstate.edu/LaborReVContracts-HTMLUCFA_CONTRACT/CFAcon.shtml)

The following guidelines are to be followed for the payment of hourly rates to faculty providing services for Extension and special sessions programs, including special session degree programs.

Faculty paid on an hourly basis for services performed in accordance with the definitions, types D, E, F, and G below, are compensated according to the following tables. The dollars per hour at the appropriate faculty rank may be found in the current Extension and special session Instructional Faculty Salary Schedule.

The hourly rate for faculty also may be utilized to compensate faculty for student contact hours in connection with teaching assignments in non-credit educational activities and for a variety of non-teaching assignments performed in support of the Extension and special sessions programs (e.g., coordination of courses, workshops, conferences, and institutes, as well as program development and evaluation activities and service as special lecturers and consultants).

**Number of Hours of Compensation Per Enrollee  
Semester Units**

Type (Note 1)	1 Unit	2 Units	3 Units	Grad Thesis or Project
D	3.0	5.5	8.5	—
E	1.5	3.0	4.5	—
F	—	—	—	13
G (Note 2)				

**Number of Hours of Compensation Per Enrollee  
Quarter Units**

Type (Note 1) Thesis	1 Unit	2 Units	3 Units		4 Units or Project	Grad
D	2.0	3.5	5.5	7.5	—	
E	1.0	2.0	3.0	4.0	—	
F	—	—	—	—	10	
G (Note 2)						

Note 1: Types D, E, F, and G are described below.

Note 2: Compute in accordance with guidelines under “Type G” below.

Type D—May be used to compensate course instructors who serve as instructors for Extension and special sessions courses when students are enrolled for the same course via independent study. They shall meet each enrollee in conference at least three times during the semester (two or three times during a quarter). The additional time shall be spent reading and grading term papers and examinations. Type D also may be used to compensate instructors who work with students enrolled in web based instruction or modularized self-pacing study where instruction is given mainly by the course materials and through conferences with the mentor. The faculty responsibilities specified above are based on the assumption of a three semester-unit or four quarter-unit courses. In the tables above, the amount of time payable to type D faculty in courses with fewer units is reduced proportionately.

Type E—May be used to compensate instructors of extension or special session students who are enrolled in independent study programs of regular courses. They provide counseling and guidance services only and are not responsible for teaching the course in which the students are enrolled. Instructors shall confer with each enrollee at least three times during the semester (two or three times during the quarter), and the balance of the time shall be spent on reading and grading examinations and term papers. Type E may be used for typical independent study enrollments. The faculty responsibilities specified above are based on the assumption of three semester-unit or four quarter-unit courses. In the tables above, the amount of time expended by type E faculty in courses with fewer units is reduced proportionately.

Members (other than the chairman) of graduate theses or project committees, if compensated, may be paid according to this schedule.

Type F—May be used to compensate faculty who are engaged in the supervision of students who are working on theses or projects or who are enrolled in advanced tutorials or directed study.

Chairs of committees for graduate theses or projects may be compensated according to this scale. Other members of these or project committees may be compensated for the number of hours indicated for type E payments.

Type G—May be used to compensate program coordinators or directors of special session programs. Responsibilities may include selecting and scheduling courses and other activities associated with managing the program. Compensation will depend upon the estimated amount of time spent on performing these activities.

**1513.02            EXTENSION FACULTY COMPENSATION FOR ACTIVITY AND LABORATORY COURSES**  
**Reference:        Board of Trustees Meeting, July 13–14, 1977, Agenda Item 5, Committee on Faculty and Staff Affairs**

Faculty members teaching extension or special sessions activity or laboratory courses should be compensated on the basis of weighted teaching units (**k** factor 1.3 for activity courses and 1.5 for laboratory courses).

**1513.03            ADDITIONAL EMPLOYMENT POLICY**  
**Reference:        Memorandum HR 2001-28**

The “Additional Employment Policy” is directed toward regular campus faculty teaching in extended education programs. For other overload questions, such as extended education employee overloads or hourly paid overloads, please refer to the policy noted above.

The California State University Additional Employment Policy establishes reasonable limits on the total amount of employment an individual may have within the CSU system. **CSU** employment is defined as any employment compensated through CSU payroll, regardless of funding source (e.g. general fund, Extension, lottery, or CSU employment reimbursed by an auxiliary or other source). Outside employment is any employment not compensated through the CSU payroll, including CSU foundation and CSU auxiliary employment. When determining additional employment under the CSU Additional Employment Policy, all CSU employment and all outside CSU foundation and other CSU auxiliary employment are considered together.

Each campus is responsible for determining the extent of an employee’s CSU workload prior to appointment to any position. Campuses are responsible for developing appropriate guidelines for implementation of this policy. Further, campuses shall develop procedures for prior approval and monitoring of all additional employment. Additional employment and overload may **be** denied or restricted by the campus president or the president’s designee. Additional employment shall not interfere with the employee’s primary CSU assignment. Conflicts of interest are not permitted, regardless of the amount of compensation or the time-base.

**CSU Extended Education Policies and Operations Manual**  
**Updated 2/18/02**

- “Additional Employment” refers to any CSU employment additional to the employee’s primary appointment. Additional employment limitations are based on time-base, not salary. A maximum of 125% time-base is allowed under certain circumstances please refer to the appropriate section below for specific rules). The salary rate for additional employment may be the same as the rate for the primary appointment; however, a different salary rate is permitted if appropriate for the work performed and if allowed by the funding source. In the case of a federal grant or contract, the rate of pay for the additional employment must be the same as the CSU base rate of pay for the primary assignment.
- “Outside Employment” refers to any employment not compensated through the CSU payroll. Employment directly compensated by a CSU foundation or other CSU auxiliary that is not compensated through the CSU payroll is considered outside employment. Employment that is compensated through the CSU payroll and is reimbursed by a foundation, other auxiliary, or other funding source is considered CSU employment. CSU employees may, consistent with campus policies governing outside activities, be employed outside the CSU system. However, conflicts of interest are not permitted. When determining additional employment under the CSU Additional Employment Policy, all CSU employment and all outside CSU foundation and other CSU auxiliary employment are considered together.
- “Overload” is a term exclusive to employees represented by the CFA and refers to CSU additional employment in excess of a full-time workload, or when appropriate, in excess of a full-time (100%) time-base. A faculty member paid 100% from federal grant funds may not work more than 100% time.

For Faculty Unit Employees, Article 36 of the CFA MOU limits CSU employment (i.e., employment compensated through the CSU payroll) to the equivalent of one full-time position in a primary or normal work assignment. However, the MOU provides for additional employment of up to twenty-five percent (25%) of a full-time position if the additional employment:

1. Consists of employment of a substantially different nature from the primary or normal work assignment; or
2. Is funded from non-general fund sources; or
3. Is the result of part-time employment on more than one campus.

**As** defined previously, “overload” refers to CSU additional employment of up to twenty-five percent (25%) of a full-time position in excess of a full-time workload, or when appropriate, in excess of a full-time (100%) time-base. Overload limitations and calculations are based on workload or time-base, not salary. Additional employment is allowed at a different rate of pay if appropriate for the work performed and if allowed by the external funding/granting source. In the case of a federal grant or contract, the rate of pay for the additional employment must be the same as the CSU base rate of pay for the primary assignment.

When applying the limitations of the additional employment policy, the applicable time period for an employee in a twelve-month assignment is the calendar year. The applicable time period for ten-month and academic year employees is the campus’ academic year.

Additional employment and overload limits are calculated and applied independently during vacation, holiday periods, or other academic breaks.