University Extension

Faculty & Chairs
Self-Support Program Guide

from *idea* to *launch*

I have a great idea for a new program that I would like the University to offer.

What do I do next?

You've started at the right place by reading this "*Faculty & Chairs Self-Support Program Guide."* University Extension (UE) at California State University, East Bay is the arm of the University that helps bring new programs on board to serve the community and its broad variety of nontraditional and traditional students.

Because your innovative ideas play a key role in helping the University to thrive, we want to encourage your involvement by explaining what it takes from the time you present your idea to the time it can be offered to the public. We can help you develop self-support programs for working adults and lifelong learners through traditional and non-traditional, credit and non-credit, face-to-face, and online educational experiences. Programs are delivered at times, in formats, and at locations that meet the needs of both "nontraditional" and traditional students.

UE partners with CSUEB academic colleges to offer a wide range of credit-bearing courses, certificates, and degree programs. Responsibility for all academic aspects of these programs lies with the academic faculty, departments, and colleges, while responsibility for administrative functions lies with UE.

This guide provides an overview for working with UE to develop and implement such self-support programs as:

- Special Sessions Degree Programs
- Credit Certificates
- Noncredit Certificates
- Stand-Alone Academic Credit Courses
- Programs offering Continuing Education Units (CEUs)
- Noncredit Community Education Classes

This *Guide* includes:

- An FAQ section
- Web links to relevant proposal forms
- Additional reference materials
- CSU executive orders

We encourage you to use this *Guide*, and to provide comments and suggestions on how to improve this document. For further assistance about developing self-support programs, please contact:

Gabriela Sotomayor
Associate Dean, Professional and Continuing Education (PaCE)
University Extension
gabriela.sotomayor@csueastbay.edu
ext. 5-2328

Table of Contents

What it Takes to Get Your Program Up and Running…..... 4

FAQs..... 10

Templates for New Programs by Category

A. Special Sessions Degree Programs..... 12

B. Credit Certificate Programs..... 15

C. Noncredit Certificate Programs..... 18

D. Stand-Alone Academic Credit Courses..... 20

E. Programs Offering Continuing Education Units..... 22

F. Noncredit Community Education..... 23

List of Documents and Sources You May Need……..... 24

Sample Course Proposal Forms..... 25

Abbreviation Key

APS – Academic Programs and Services
UE – University Extension
E.O. – Executive Order of the CSU Chancellor's Office
FAQ – Frequently Asked Questions
WASC – Western Association of Schools and Colleges

Contacts at UE

Gabriela Sotomayor,
Associate Dean, Professional and Continuing Education (PaCE)
gabriela.sotomayor@csueastbay.edu
ext. 5-2328

What it Takes to Get Your Program Up and Running

This section provides a general overview of the program development and implementation process. Depending upon the type of program you would like to develop (e.g., credit vs. non-credit), the specific steps and tasks necessary at each phase will vary.

Note: There is a Frequently Asked Question (FAQ) section directly following this one to further assist you in learning about this process.

Following the FAQs, you will find templates for the following specific program types:

- Special Sessions Degree Programs
- Credit Certificate Programs
- Noncredit Certificate Programs
- Stand-Alone Academic Credit Courses Programs offering Continuing Education Units
- Noncredit Community Education

Please review the following steps, the FAQs, and the templates before you begin implementation of a new program.

Step I. Make Initial Contacts

When you have an idea for a program that you are considering developing with UE, there are several areas within the University that you need to contact as you move from early idea to formal program plan. In general, the following individuals/areas should be contacted during the initial stages of conceptualizing a program:

1. Academic Department and College

Your chair, department, dean, and college faculty committees that review new program ideas can provide critical insight regarding curriculum and faculty availability. Prior to spending considerable time, energy, and effort on developing a self-support program, it is essential that you confirm there is sufficient interest/support for your program within your department and/or college. For international degree programs, it is the responsibility of the academic college to ensure that the international partner secures any and all required official government approvals from its host country in advance of entering into any agreement.

2. University Extension (UE)

Your initial point of contact at UE will likely be with one of the key personnel listed at the bottom of the welcome page of this document. UE has extensive experience working together with faculty and chairs, as well as with potential audiences/partners, in exploring opportunities for self-support programming. We work closely with you to fully discuss and understand your program, to describe the standard (and non-standard) opportunities and challenges associated with self-support programs, to provide information about what has and has not worked in the past, and to help ensure the development and implementation of a successful self-support program. Areas of concern include, but are not limited to whether:

1. The budget submitted for fee approval and the expected number of enrollments adequately covers operating costs.
2. Expectations of potential students and partners may damage the University's reputation if the program does not run as planned or if extensive changes to their expectations are required to enable the program to be successful.
3. The budget plans for student attrition.
4. A formal needs assessment has been conducted in an unbiased manner.
5. The expected time-to-launch includes adequate allowance for the marketing phase of the program as well as all necessary approvals.
6. Adherence to California Education Code, CSU regulations*, and CSUEB policies has been achieved.

*Note: The executive order that governs special sessions is #1047; it can be viewed at https://calstate.policystat.com/policy/6741737/latest/
(may require opening a new/incognito browser)

Please be sure to begin conversations about your new program idea well before it is finalized and ready for implementation. At the early stages, UE provides guidance about budgeting and staffing for self-support programs, applicable policies and procedures, reaching nontraditional learners, scheduling options, the multi-faceted approval process, working with third parties, and more. At this point, it is also common to discuss logistical issues such as options for tuition payment, registration, books, etc., to ensure that the program can be established in a manner that is accessible for students and can be successfully supported by UE.

3. Academic Affairs / APS

Academic Affairs provides oversight of all operating fund and self-support academic programs at the University. APS, on behalf of Academic Affairs, guides and approves all academic program development. If you are considering developing any academic degree, program, or certificate, it is essential that you follow the approved curriculum procedures and keep APS involved with the development of your program.

4. WASC and CSU Office of the Chancellor

If you are developing a degree program that is new, you will need to seek approval from the Chancellor's Office, but not WASC. If your program includes a substantive change (for example, being offered online), and/or will be offered more than 25 miles from campus, you will need approval from the CSU Office of the Chancellor and WASC. Because these steps often take nine months or more, it is important to begin work on the process during the initial stages of program development. Your department, College, UE, and APS are all good resources for assistance in preparing your proposal for approval.

5. Potential Partners

Conversations with potential partners take place at various stages throughout the program development process. Commitments for services may only be made in accordance with the guidelines in step IV of this *Guide*. At various points throughout the program development process, agreements within CSUEB will be reached for different program aspects such as:

a. Academic: curriculum, program format, program length
b. Administrative: admissions, start dates, schedules
c. Fiscal: tuition, revenue sharing, collection of fees, payment of faculty, etc.

Once an agreement has been reached on a particular item, you will be notified when it is appropriate to let the partner know.

UE is available to work with and support you by playing a facilitative role in conversation(s) you have with potential partners, to help ensure that key areas are addressed during these conversations, and to help prepare you for the next steps.

Step II. Conduct a Needs Assessment

Concurrent with your initial conversations about a self-support program, it is important for you to be actively involved in conducting your needs assessment. Any time the University considers offering a new program (e.g., a new major), it is important to consider such program characteristics as the anticipated demand for the program, preferred delivery modalities, preferred schedule, price-point, etc. A formal needs assessment should be conducted early in the program development process to determine whether or not there is a very high probability for the program to cover its development, implementation, and operating expenses. **Note**: Regulations require that self-support programs cover all of their operating costs; therefore, it is not possible to approve a program that cannot or is not likely to cover operating costs.

A comprehensive needs assessment also enables you to design a program that is closely aligned with potential student need. This might include curricular issues and instructional delivery methods.

There are numerous ways to conduct a needs assessment, and UE is available to help you consider ways you could gather this information. In some instances, UE may be able to conduct your needs assessment directly through surveys of potential students, focus groups, and other similar methods. Your department or college also may have resources available to help you conduct a needs assessment. Professional associations and/or industry organizations may also be good sources of assistance.

Step III. Prepare a Budget

It is important to discuss overall budget issues in the early stages of program development for a number of reasons including:

1. All self-support programs must adhere to CSUEB, CSU, and State policies and regulations that govern self-support program budgets.
2. These policies and regulations govern such UE program facets as:
    a. Budget development, monitoring, and audit compliance
    b. Establishment of fees
    c. Allowable expenses
    d. Collection of funds
    e. Oversight and management of self-support programs.
3. A partial list of applicable CSU Executive Orders (EOs) is listed at the end of this *Guide*.
4. UE has developed and will make available to you a series of very helpful templates to enable you to properly develop self-support program budgets

Step IV. Gain Program Review and Approval

Before a program is implemented, and in most cases before marketing a program and beginning to recruit students, there are a number of approvals that need to be in place. UE will work very closely with you on these approvals; we can provide support in completing and routing forms and other paperwork for required signatures/approval, and offer guidance if there are challenges or questions that arise during the approval process.

1. Each college has a curriculum coordinator in the Dean's office, who will steward the approval process for credit and degree programs. Depending upon the type of credit and the scope of the program, approval may follow different procedures. APS will work with you to identify what kind of approval you will need and prepare the form(s) necessary to secure this approval from the Academic Senate.
2. Fee approval for credit programs is necessary if your self-support program is charging a non-standard per unit fee. UE will prepare the final budget and fee approval form and see this through the approval process.
3. CSU Chancellor's Office and WASC approval, if necessary. If the approval is for a new program or substantive change to a previously approved program, the proposal must be approved first by the Chancellor's Office. The Chancellor's Office then issues a letter to APS who forwards the appropriate paperwork to WASC for approval, if appropriate.
4. Signed Memorandum of Understanding, if necessary. In some cases, a program might involve a third party such as a private business, partner university, or professional organization. For international degree programs, it is the responsibility of the academic college to ensure that the international partner secures any and all required official government approvals from its host country prior to entering into an agreement. In such cases, it is necessary to have a formal agreement that will likely include information about services rendered and financial arrangements. Such formal agreements are generally reviewed and signed by numerous parties across campus. It is critical that this document is signed and in place since some of the other approvals – especially fee approval, WASC, and Chancellor's Office approval – may hinge upon this agreement.

5. UE approval. Because UE is a necessary partner for self-support programs, it is important that UE approves of the program in order to ensure effective administration and fiscal viability in a self-support model. In some cases, UE and the sponsoring department or college will develop and sign a Memorandum of Understanding that outlines tasks and responsibilities and fiscal issues. Some areas must, by regulation, be handled by UE; some other tasks (e.g., academic advising, selection of faculty, etc.) will most likely be handled by the faculty advisor for the program.

These approvals must be secured prior to recruiting students. Until these approvals are in place, it is possible that the program will not be approved or that there may be changes in the academic content or instructional delivery of a program, the fees for the program, or the timeline associated with program launch.

Note: In order to provide accurate information to potential students, it is critical to secure these approvals in advance of recruitment and program implementation.

Step V. Market and Recruit for a Program

In some cases, you may already have a population of students who are prepared to enroll in your program (e.g., an employer is sponsoring a group of employees to participate in a program). However, in most cases it will be necessary to market the program to potential students and recruit them into the program. There are numerous ways UE can help you market your program; they include:

- Listing the program in CSUEB press releases (if appropriate.)
- Featuring the program in the UE catalog.
- Web site listings on the department, college, and UE Web sites.
- Direct marketing via e-mail or mail to targeted potential student populations.
- Internet marketing using a combination of search engine optimization (SEO) strategies and social media.
- Outreach and networking through relevant professional and industry organizations.
- Public relations efforts to showcase new or innovative programs.

UE program and marketing staff will work closely with you to develop a marketing plan for your program. In addition, your college and University resources in marketing and public relations may also be available to help with marketing efforts and student recruitment. Because potential students are likely to take time in making a decision about enrolling, particularly for more expensive degrees, certificate programs, seminars, or workshops, it is important to allow sufficient time for marketing efforts. As a very general guideline, a minimum of 6-9 months of recruitment time is recommended for degree and certificate programs, 3-6 months for seminars and workshops, and 12-18 months for Study Abroad programs.

Step VI. Launch a Program

Depending upon the nature of the self-support program (e.g., a single noncredit course vs. an entire graduate degree program) various tasks will be implemented to smoothly and efficiently launch your program. These include:

- When students need to apply to and matriculate into the University in order to take the program, the program must be set up in Cal State Apply.
- Reviewing applications, if necessary.
- Setting up program accounts.
- Submission of course proposals. (See Course Proposal Form at the end of this document.)
- Identifying instructional faculty and preparing contract and payroll documents.
- Setting up courses and enabling registration.
- Ongoing monitoring of enrollments and the budget to ensure success as a self-support program.
- Ongoing student support and advising.
- Developing catalog copy.

As part of the initial program planning, we probably will have discussed the respective responsibilities of your department or college and of UE. Since we will be working closely together during the program launch, UE will be able to serve as a resource to provide assistance on tasks/responsibilities you and/or your staff may be handling for the first time.

FAQ's

1. **Why is it important to speak with so many departments and divisions when I am just beginning to think about a program?**
   Each area can offer guidance on your program idea. Your academic department provides input on program content and curriculum and what faculty might be involved in the program. APS provides guidance on developing your program in accordance with University, Chancellor's Office, and WASC policies and procedures. UE offers guidance on a number of issues relevant to self-support programs including expertise in developing programs for nontraditional students, marketing, policies and procedures for self-support programs, budgeting, and implementing the program so that it runs smoothly and students have a positive learning experience.

2. **What does it mean for a program to be self-supporting?**
   Self-support programs must cover all operating expenses by bringing in outside revenue in the form of tuition, materials costs, and/or fees. The California State University system does not provide revenue to cover the cost of self-support programs. While the University provides the infrastructure to help self-support programs get started, it is not authorized to allocate funds to subsidize self-support programs once they are launched.

3. **How do I develop a budget for my program? How do I set fees for my program?**
   You are required to work with UE from the very beginning of the budget process as we have significant experience in developing budgets for all the program types described in this document. UE can provide information about likely program expenses, discuss mechanisms for taking in revenue and covering expenses, budget for an appropriate number of students, determine whether standard or special fees will apply, and make sure the program budget is in compliance with CSU Executive Orders. UE has budget templates that are helpful in the development of self-support program budgets. There is more flexibility in pricing for noncredit programs, but even for noncredit programs, there are University-approved fee ranges and guidelines, and your program must cover all direct and indirect costs.

4. **What is the fee approval process? Why is this important?**
   Any credit program with a special fee needs to go through an official fee approval process. Once a fee has been approved, additional steps are necessary to incorporate this fee into the registration and cashiering functions. Fee approval is important as it allows the University to review special fees being set, and to verify that they are within University-approved ranges for the program type and follow all CSU policies. When UE is involved in the budget process, we can help insure that your budget and fees conform to all relevant policies and have the best chance of being approved by the University.

5. **Why might I need an MOU for my program? Who needs to review and sign this MOU?**
   If you are developing a program that will be provided to, and paid for by, a third party (e.g., a business), or that obligates UE and the University to provide services, you will need a Memorandum of Understanding (MOU). The MOU with the organization outlines the delivery of the program, costs, and responsibilities of the parties, etc. A similar MOU would be needed if you were developing a collaborative program with another university. In general, these MOUs need to be reviewed and signed by the College, UE, and Academic Affairs. UE has templates for these MOUs that can be helpful as you begin this process. It is critical that these MOUs are reviewed in draft form by the aforementioned parties prior to negotiating with third parties. These agreements along with any associated CSUEB-specific policy may be viewed online at: https://csueastbay.policystat.com/

6. **I am not clear on some of the tasks that my staff or I will need to perform in order to implement this self-support program. Where can I get help?**
   UE can provide guidance on any issues related to self-support programs. UE program staff can also train any staff in your area that will be responsible for these tasks during the duration of the program.

7. **I am eager to start recruiting students for my program. Why do I need to wait for all these approvals before marketing the program and recruiting students?**
   While early marketing is generally helpful for a program, the University requires first that a program is approved by necessary parties within the University, and second that the program is fully viable for launch before reaching out to students. It would reflect poorly on the program and the University if students were recruited for a program that ultimately was not approved.

8. **I am not familiar with the UE catalog. Should my program be in this publication?**
   The UE catalog is a print catalog mailed out each fall, spring, and summer to over 30,000 households primarily in Contra Costa and Alameda County. If you are planning to recruit students from the general community (e.g., working professionals), the catalog may be a good place to list your program. The digital course catalog may be accessed at https://ce.csueastbay.edu/registration/schedule.html.

9. **What happens if enrollments are lower than projected?**
   If the program has not yet started, it may be possible to do a final marketing push to increase enrollments. However, if the minimum number of enrollments necessary to run the program from a fiscal perspective has not been achieved, there are two options. The first is to revise the budget to raise the per student fee to cover all program costs, or decrease expenses so that the lower number of enrollments still covers the program costs. The second option would be to cancel the program and try to re-launch it at a later date.

10. **How long will it take for my program to be offered?**
    Because there are many variables that determine how quickly an idea can go to market, including the type of program offered (credit, non-credit, etc.), approvals required, and marketing plan, it is not possible to give an absolute timeframe. As a general rule of thumb, the process takes as little as 9 months for a simple program and up to 24 months or more for more complex programs.

Template A - Sample Timeline for a Special Sessions Program from Inception to Launch

The following timeline is offered to give you a general visual understanding of this process, which varies significantly by program. The numbers across the top of the grid represent months over a two-year period. The numbers within the body of the grid correspond to the tasks in the template that follows. A task may be completed at any point in time across the possible time period shown, depending upon the program and external environment. For example, Task 10, **Approved Budget**, will begin fairly early in the process; it can take 3, 4, or 5… on up to 9 months to receive full approval.

Note: **The grid visual is only an example.** Each program type has different complexity; program timeframes vary not only by the number of steps and approvals required, but also by the budget constraints and market conditions leading up to and including the launch.

Degree Program Assessment and Development – Initial Steps in Months																						
Mo.1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Task 1																							
2																							
3																							
	4																						
	5																						
		6	6	6	6	6	6	6	6	6													
Gaining Approval for and Finalizing a Degree program																							
		7	7	7	7	7	7	7	7	7	7	7	7										
			8	8	8	8	8	8	8	8	8	8	8	8									
				9	9	9	9	9	9	9	9	9	9	9	9								
					10	10	10	10	10	10	10	10	10										
						11	11	11	11	11	11												
							12	12	12	12	12	12	12	12	12	12	12	12					
											13	13	13	13	13	13	13	13	13	13	13	13	13
Implementing a Degree Program																							
					14	14	14	14	14	14	14	14	14	14	14	14							
												15	15	15	15	15	15	15	15	15			
																					16	16	16
																					17	17	17
																					18	18	18
								19	19	19	19	19	19	19	19	19	19	19	19	19	19	19	19

TEMPLATE A **Special Sessions Degree Programs** UE Timeframe, Guidelines, and Checklist

	Task	Estimated time for completion	Description	Date Task Completed	Initials
Special Sessions Degree Program Assessment and Development – Initial Steps					
1	**Contact Dept. Chair and College Dean**	**Initial Step**	Initiate a conversation with your chair and dean. In some colleges there is a formal process for reviewing new program ideas; this should be pursued when appropriate. For international degree programs, it is the responsibility of the academic college to ensure that the international partner secures any and all required official government approvals from their host country in advance of entering into any agreement.		
2	**Contact UE**	**Initial Step**	Initiate contact and conversation with appropriate UE director. This requires completion of the Special Sessions Program/Course Proposal Form (EO 1047) including Special Sessions Course Proposal forms for all courses that will be a part of the degree.		
4	**Contact Academic Programs and Graduate Studies (if applicable)**	**Initial Step**	Initiate contact with APS to keep them abreast of the proposed degree program. This is also an opportunity to confirm whether you will need WASC or other CSU Chancellor's Office approval, and to begin planning for the WASC process if necessary. No formal approval is necessary at this early stage.		
5	**Estimated/Actual Enrollments and Market Needs Assessment**	**Initial Step**	The department, college, and UE can serve as resources in conducting a needs assessment. Evidence of sufficient demand for the program should be in place before moving ahead with program planning.		
6	**Draft Budget**	**9-12 months**	UE will support you in developing a self-support budget for your program.		
Gaining Approval for and Finalizing a Special Sessions Degree Program					
7	**Departmental and College Approval**	**12 months**	After approval of the new program concept by the Dean, the department chair will email APS and UE (copying the Dean), notifying them of the intent to proceed.		
8	**Approval from APS**	**2-12 months**	Contact APS to help you determine the appropriate approvals necessary.		
9	**Approval from UE**	**9-12 months**	This will likely take the form of an MOU identifying the program, outlining program responsibilities, and confirming program budget and fiscal relationships between the academic college and UE.		
10	**Approved Budget**	**9 months**	All self-support program budgets are reviewed and approved by UE, the University, and Academic Affairs to ensure EO compliance.		
11	**Fee Approval (if nonstandard fee)**	**6 months**	Fee approval is a critical step. Without officially approved program fees, it is inappropriate to quote fees to prospective students.		
12	**Approved MOU (if applicable)**	**9 months**	In many instances, this is a critical component of program viability, especially if a third party plays a central role in the program (e.g., as a partner university, employer sponsoring students in		

	Task	Estimated time for completion	Description	Date Task Completed	Initials
			the degree program, etc.). Other approvals (e.g., WASC) may also hinge on a signed MOU with involved third parties. See #3 above regarding international degree programs.		
13	**CSU Chancellor's Office and WASC Approval**	**6-12 months**	APS secures Chancellor's Office and WASC approval. This is a necessary step in launching the program if substantive changes are made to the degree program. This approval is also critical from a recruitment perspective, since it is prohibited to recruit students for a program that has not been officially accredited.		
Implementing a Special Sessions Degree Program					
14	**Marketing Efforts**	**6-12 months**	Planning is important here as certain marketing efforts (e.g. placement in University catalogs, brochures) require significant lead-time.		
15	**Review Student Applications**	**3-9 months**	You will be working closely with graduate or undergraduate admissions on this task.		
16	**Complete Course Proposals**	**1-3 months**	Complete course proposals, including instructor and date information, enable UE to set up the courses so that students can register.		
17	**Complete Instructor and Administrator Information**	**1-3 months**	Complete instructor and administrator information ensures that UE will be able to process instructor and administrative pay in a timely manner.		
18	**Confirmation of Registration Process**	**1-3 months**	It will be important for all involved – the academic program staff, UE program staff, and UE Registration and Cashiering to confirm how students will register and pay for their courses. All communication or other correspondence sent to students regarding the registration process must be initiated by UE.		
19	**Monitoring**	**Ongoing**	New programs require close monitoring to ensure that student expectations are being met, academic college and UE procedures are facilitating efficient program administration, and that the program is fiscally successful in a self-support model.		

Template B - Sample Timeline for a Credit Certificate Program from Inception to Launch

The following timeline is offered to give you a general visual understanding of this process, which varies significantly by program. The numbers across the top of the grid represent months over a two-year period. The numbers within the body of the grid correspond to the tasks in the template that follows. A task may be completed at any point in time across the possible time period shown, depending upon the program and external environment. For example, task 10, **Approved Budget**, will begin fairly early in the process; it can take 3, 4, or 5… on up to 9 months to receive full approval.

Note: **The grid visual is only an example.** Each program type has different complexity; program timeframes vary not only by the number of steps and approvals required, but also by the budget constraints and market conditions leading up to and including the launch.

Credit Certificate Program Assessment and Development – Initial Steps in Months																							
Mo.1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
Task 1																							
2																							
3																							
	4																						
	5																						
		6	6	6	6	6	6	6	6	6													
Gaining Approval for and Finalizing a Credit Certificate program																							
		7	7	7	7	7	7	7	7	7	7	7	7										
			8	8	8	8	8	8	8	8	8	8	8	8									
				9	9	9	9	9	9	9	9	9	9	9	9								
					10	10	10	10	10	10	10	10	10										
						11	11	11	11	11	11												
							12	12	12	12	12	12	12	12	12								
Implementing a Credit Certificate Program																							
						13	13	13	13	13	13	13	13	13	13	13	13						
												14	14	14	14	14	14						
															15	15	15						
															16	16	16						
															17	17	17						
						18	18	18	18	18	18	18	18	18	18	18	18						

TEMPLATE B **Credit Certificate Program** UE Timeframe, Guidelines, and Checklist

	Task	Estimated Time for completion	Description	Date Task Completed	Initials
Credit Certificate Program Assessment and Development – Initial Steps					
1	**Contact Dept. Chair and College Dean**	**Initial Step**	Initiate a conversation with your chair and dean. In some colleges there is a formal process for reviewing new program ideas; this should be pursued when appropriate.		
2	**Contact UE**	**Initial Step**	Initiate contact and conversation with appropriate UE director. For a Special Sessions certificate program, this requires completion of the Special Sessions Program/Course Proposal form (EO 1047), including Special Sessions Course Proposal forms for all courses that will be a part of the certificate.		
4	**Contact APS**	**Initial Step**	Initiate contact with APS to keep them abreast of the proposed certificate program. No formal approval is necessary at this point.		
5	**Estimated/Actual Enrollments and Market Needs Assessment**	**Initial Step**	The department, college, and UE can serve as resources in conducting a needs assessment. Evidence of sufficient demand for the program should be in place before moving ahead with certificate program planning.		
6	**Draft Budget**	**9-12 months**	UE will support you in developing a self-support budget for your program.		
Gaining Approval for and Finalizing a Credit Certificate Program					
7	**Departmental and College Approval**	**12 months**	After approval of the new program concept by the Dean, the department chair will email APS and UE (copying the Dean), notifying them of the intent to proceed.		
8	**Approval from APS**	**9-12 months**	Contact APS to help you determine the appropriate approvals necessary.		
9	**Approval from UE**	**9-12 months**	This will likely take the form of an MOU identifying the program, outlining program responsibilities, and confirming program budget and fiscal relationships between the academic college and UE.		
10	**Approved Budget**	**9 months**	All self-support program budgets are reviewed and approved by UE, the University, and Academic Affairs to ensure EO compliance.		
11	**Fee Approval (if nonstandard fee)**	**6 months**	Fee approval is a critical step. Without officially approved program fees, it is inappropriate to quote fees to prospective students.		
12	**Approved MOU (if applicable)**	**9 months**	In many instances, this is a critical component of program viability, especially if a third party plays a central role in the program (e.g., as a partner University, employer sponsoring students in the certificate program, etc.).		
Implementing a Credit Certificate Program					
13	**Marketing Efforts**	**6-12 months**	Planning is important here as certain marketing efforts (e.g., placement in University catalogs,		

	Task	Estimated Time for completion	Description	Date Task Completed	Initials
			brochures) require significant lead-time.		
14	**Review Student Applications**	**1-6 months**	For Advanced Graduate Certificates, students must officially apply through Cal State Apply and must be formally admitted into the program. Ideally, this happens before students begin to take classes; however, it is possible to complete up to 13 units before being formally admitted into the program.		
15	**Complete Course Proposals**	**1-3 months**	Complete course proposals, including instructor and date information, enable UE to set up the courses so that students can register.		
16	**Complete Instructor and Administrator Information**	**1-3 months**	Complete instructor and administrator information ensures that UE will be able to process instructor and administrative pay in a timely manner.		
17	**Confirmation of Registration Process**	**1-3 months**	It will be important for all involved – the academic program staff, UE program staff, and UE Registration and Cashiering to confirm how students will register and pay for their courses. All communication or other correspondence sent to students regarding the registration process must be initiated by UE**.**		
18	**Monitoring**	**Ongoing**	New programs require close monitoring to ensure that student expectations are being met, academic college and UE procedures are facilitating efficient program administration, and that the program is fiscally successful in a self-support model.		

Template C - Sample Timeline for a Noncredit Certificate Program from Inception to Launch

The following timeline is offered to give you a general visual understanding of this process, which varies, significantly by program. The numbers across the top of the grid represent months over a two-year period. The numbers within the body of the grid correspond to the tasks in the template that follows. A task may be completed at any point in time across the possible time period shown, depending upon the program and external environment. For example, task 5, **Approved Budget**, will begin fairly early in the process; it can take 3, 4, or 5… on up to 9 months to receive full approval.

Note: **The grid visual is only an example.** Each program type has different complexity; program timeframes vary not only by the number of steps and approvals required, but also by the budget constraints and market conditions leading up to and including the launch.

Noncredit Certificate Program Assessment and Development – Initial Steps in Months																							
Mo.1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**	**21**	**22**	**23**	**24**
Task 1																							
2																							
	3																						
Gaining Approval for and Finalizing a Noncredit Certificate program																							
		4	**4**	**4**	**4**	**4**	**4**	**4**	**4**	**4**													
			5	**5**	**5**	**5**	**5**	**5**	**5**	**5**	**5**												
				6	**6**	**6**	**6**	**6**	**6**	**6**	**6**	**6**											
Implementing a Noncredit Certificate Program																							
									7	**7**	**7**	**7**	**7**	**7**	**7**	**7**	**7**						
															8	**8**	**8**						
															9	**9**	**9**						
															10	**10**	**10**						
															11	**11**	**11**						

TEMPLATE C **Noncredit Certificate Program** UE Timeframe, Guidelines, and Checklist

	Task	Estimated time for completion	Description	Date Task Completed	Initials
Noncredit Certificate Program Assessment and Development – Initial Steps					
1	**Contact Dept. Chair and College Dean**	**Initial Step**	Initiate a conversation with your chair and dean. In some colleges there is a formal process for reviewing new program ideas; this should be pursued when appropriate.		
2	**Contact UE**	**Initial Step**	Initiate contact and conversation with appropriate UE director.		
3	**Estimated/Actual Enrollments and Market Needs Assessment**	**Initial Step**	UE can serve as a resource in conducting a needs assessment. Evidence of sufficient demand for the program should be in place before moving ahead with certificate program planning.		
4	**Draft Budget**	**Initial Step**	UE will support you in developing a self-support budget for your program.		
Gaining Approval for and Finalizing a Noncredit Certificate Program					
5	**Approval from UE**	**6-9 months**	If applicable, this will likely take the form of an MOU identifying the program, outlining program responsibilities, and confirming program budget and fiscal relationships.		
6	**Approved Budget**	**6-9 months**	All self-support program budgets are reviewed and approved by UE to ensure EO compliance.		
7	**Approved MOU (if applicable)**	**6-9 months**	In many instances, this is a critical component of program viability, especially if a third party plays a central role in the program (e.g., as a partner university, employer sponsoring students in the certificate program, etc.).		
Implementing a Noncredit Certificate Program					
8	**Marketing Efforts**	**6-9 months**	Planning is important here as certain marketing efforts (e.g., placement in University catalogs, brochures) require significant lead-time.		
9	**Complete Course Proposals**	**1-3 months**	Complete course proposals, including instructor and date information, enable UE to set up the courses so that students can register.		
10	**Complete Instructor Information**	**1-3 months**	Complete instructor information ensures that UE will be able to process instructor pay in a timely manner.		
11	**Confirmation of Registration Process**	**1-3 months**	It will be important for all involved – the academic program staff, UE program staff, and UE Registration and Cashiering to confirm how students will register and pay for their courses. All communication or other correspondence sent to students regarding the registration process must be initiated by UE**.**		
12	**Monitoring**	**Ongoing**	New programs require close monitoring to ensure that student expectations are being met, academic college and UE procedures are facilitating efficient program administration, and that the program is fiscally successful in a self-support model.		

TEMPLATE D **Stand-Alone Academic Credit Course** UE Timeframe, Guidelines, and Checklist

	Task	Estimated time for completion	Description	Date Task Completed	Initials
Stand-Alone Academic Credit Course Assessment and Development – Initial Steps					
1	**Contact Dept. Chair and College Dean**	**Initial Step**	Initiate conversations with your chair and/or dean about the need to run a course through UE.		
2	**Contact UE**	**Initial Step**	Initiate contact and conversation with appropriate UE director.		
4	**Estimated/Actual Enrollments and Market Needs Assessment**	**Initial Step**	The department, college, and UE can serve as resources in conducting a needs assessment. Evidence of sufficient demand for the program should be in place before moving ahead with certificate program planning.		
5	**Draft Budget**	**Initial Step**	UE will discuss fiscal options for running the course.		
Gaining Approval for and Finalizing a Stand-Alone Academic Credit Course					
6	**Departmental and College Approval**	**1-3 months**	Review the curricular procedures manual (online) for new course proposal guidelines and forms. Your department chair and dean will sign off on the course proposal form.		
7	**Approval from APS**	**1-3 months**	For a Special Sessions stand-alone course, this requires completion of the Special Sessions Program Proposal form (EO 1047), including Special Sessions Course Proposal forms for each course. If you are offering a Special Topics course, this course will need to be approved by the Special Topics Committee as well. Contact APS to help you determine the appropriate approvals necessary.		
8	**Approval from UE**	**1-3 months**	UE will sign off on the course proposal form(s).		
9	**Approved Budget**	**2-3 months**	All self-support program budgets are reviewed and approved by UE, the University, and Academic Affairs to ensure EO compliance.		
10	**Fee Approval (if nonstandard fee)**	**2-3 months**	UE will seek fee approval if a non-standard fee is being used for the course, however, stand-alone courses usually do not qualify for special fees.		
Implementing a Stand-Alone Academic Credit Course					
11	**Marketing Efforts**	**As needed**	Planning is important here as certain marketing efforts (e.g., placement in University catalogs, brochures) require significant lead-time.		
12	**Complete Course**	**1-3 months**	Complete course proposals, including instructor and date information, enable UE to set up the		

	Task	Estimated time for completion	Description	Date Task Completed	Initials
	Proposals		courses so that students can register.		
13	**Complete Instructor Information**	**1-3 months**	Complete instructor information ensures that UE will be able to process instructor pay in a timely manner.		
14	**Confirmation of Registration Process**	**1-3 months**	It will be important for all involved – the academic program staff, UE program staff, and UE Registration and Cashiering to confirm how students will register and pay for their courses. All communication or other correspondence sent to students regarding the registration process must be initiated by UE**.**		
15	**Monitoring**	**Ongoing**	New programs require close monitoring to ensure that student expectations are being met, academic college and UE procedures are facilitating efficient program administration, and that the program is fiscally successful in a self-support model.		

TEMPLATE E **Continuing Education Unit Program** UE Timeframe, Guidelines, and Checklist

	Task	Estimated time for completion	Description	Date Task Completed	Initials
Continuing Education Unit Program Assessment and Development – Initial Steps					
1	**Contact UE**	**Initial Step**	Initiate contact and conversation with appropriate UE director.		
2	**Draft Budget**	**Varies**	UE will assist in identifying current per unit costs for CEUs for your program.		
Gaining Approval for and Finalizing Continuing Education Unit Program					
3	**Approval from UE**	**1 month**	UE signature on a CEU course proposal is the only required document for program approval.		
Implementing Continuing Education Unit Program					
5	**Marketing Efforts**	**3-9 months**	Depending upon the nature of the program, early marketing and publication in UE catalogs and/or other venues may be critical for student recruitment.		
6	**Complete Course Proposals**	**1 month**	Complete course proposals, including instructor and date information, enable UE to set up the courses so that students can register.		
7	**Confirmation of Registration Process**	**1-3 months**	It will be important for all involved – the academic program staff, UE program staff, and UE Registration and Cashiering to confirm how students will register and pay for their courses. All communication or other correspondence sent to students regarding the registration process must be initiated by UE**.**		

TEMPLATE F **Noncredit Community Education Courses** UE Timeframe, Guidelines, and Checklist

	Task	Estimated time for completion	Description	Date Task Completed	Initials
Noncredit Community Education Course Assessment and Development – Initial Steps					
1	**Contact UE**	**Initial Step**	Initiate contact and conversation with appropriate UE director.		
2	**Estimated/Actual Enrollments and Market Needs Assessment**	**Initial Step**	UE can serve as a resource in conducting a needs assessment. Evidence of sufficient demand for the program should be in place before moving ahead with program planning.		
3	**Draft Budget**	**Initial Step**	UE will assist in developing a program budget for your course or program. This includes establishing program fees.		
Gaining Approval for and Finalizing a Noncredit Community Education Course					
4	**Approval from UE**	**3-9 months**	Obtain formal approval from appropriate UE director.		
Implementing a Noncredit Community Education Course					
5	**Marketing Efforts**	**3-9 months**	Depending upon the nature of the program, early marketing and publication in UE catalogs and/or other venues may be critical for student recruitment.		
6	**Complete Course Proposals**	**1 month**	Complete course proposals, including instructor and date information, enable UE to set up the courses so that students can register.		
7	**Complete Instructor Information**	**1 month**	Complete instructor information ensures that UE will be able to process instructor pay in a timely manner.		
8	**Confirmation of Registration Process**	**1-3 months**	It will be important for all involved – the academic program staff, UE program staff, and UE Registration and Cashiering to confirm how students will register and pay for their courses. All communication or other correspondence sent to students regarding the registration process must be initiated by UE**.**		
9	**Monitoring**	**Ongoing**	New programs require close monitoring to ensure that student expectations are being met, academic college and UE procedures are facilitating efficient program administration, and that the program is fiscally successful in a self-support model.		

List of Documents and Sources You May Need

Course proposal forms are used when working with UE on a self-support program. They can be viewed and downloaded at http://ce.csueastbay.edu/about/partner/domestic.shtml.

- For a Credit Extension Course Proposal Form, see page 25 of this *Guide*.
- Noncredit Course Proposal Form, see page 25.

Executive Orders

Executive Orders listed below guide the development and implementation of self-support programs within the CSU. These Executive Orders can be viewed at https://calstate.policystat.com/ :
(may require opening incognito/new browser window)

EO 167: Transfer of Extension Credit

EO 341: Use of Surpluses in Continuing Education Revenue Fund

EO 569: Salaries for Extension and Special Session Faculty

EO 745: Self-Support Campus Based Study Abroad Programs

EO 794: Financial Management of Continuing Education

EO 795: Procedures Governing Self-Support Programs Outside the State of California, Conducted through the Continuing Education Revenue Fund or Local Trust Accounts

EO 804: Extended Education Service Area

EO 805: Policy Governing the Enrollment of Non-Matriculated Students in Self-Support Courses and in CSU Self-Support Special Sessions Courses

EO 811: Provision for the Commission on the Extended University of the CSU

EO 1034: CSU Student Fee Policy and Miscellaneous Course Fee Delegation of Authority

EO 1047: Special Sessions

CSUEB Curricular Procedures Manual

The CSUEB Curricular Procedures Manual has been compiled to provide step-by-step instructions, timelines and all of the necessary information for proposing curricular changes to academic programs, courses, certificates and credentials at California State University, East Bay. It is an important tool to help departments prepare curricular additions and changes. Creating new curriculum, refreshing old curriculum and discontinuing outdated curriculum is important for keeping pace with changes in the disciplines, workforce needs, and student interest. The Curriculum Guide may be accessed online:

CSUEB Curricular Procedures Manual
https://www.csueastbay.edu/aps/curriculum-development/cpm/index.html

New Program Proposal Cover Sheet
Domestic Programs
University Extension

Proposal Information

Submit To: Gabriela Sotomayor,
Associate Dean, Professional and Continuing Education (PaCE)
25800 Carlos Bee Blvd., Hayward, CA 94542
(510) 885-2328
gabriela.sotomayor@csueastbay.edu

Date Submitted: _____

Program Name: _____

Submitted By: _____

For Office Use Only

Status	Date/Initials
In Review	
Requested Info	
Held Meeting	
Admin. Review	
Accept/Reject	
Fiscal Analyst	
Academic Dean	

Proposal Content Checklist

Please utilize this checklist as a guideline for assembly and submission of your proposal.

☐	**1**	Indicate name, title, company or organization, phone, and email address of key contacts for program negotiation and/or implementation.
☐	**2**	What is the purpose of the new program?
☐	**3**	How and where will the program take place? (e.g. on-campus, off-campus, online, hybrid)
☐	**4**	What type of credit will be offered? (e.g. academic, extension, non-credit)
☐	**5**	Prepare a marketing strategy brief or outline.
☐	**6**	List of at least two competitive programs, if appropriate. Provide printouts of other programs' website offerings or hard copy brochures.
☐	**7**	List potential hurdles. For example: Why might enrollment not meet expectations?
☐	**8**	Prepare, at minimum, a one-page Excel spreadsheet showing: a) how much revenue the program can generate (show varying enrollment levels, tuition, other student expenses), b) start-up costs, c) any specific budget line items.
☐	**9**	Create an implementation timeline from program negotiation through day of first class. Include course cancellation date if enrollment level is not met.
☐	**10**	Describe the process for program evaluation both for instructor evaluation as well as course evaluations during program design and implementation process.
☐	**11**	For a degree program located 25 or more miles from campus or for one that offers over 50% online delivery, a memorandum notifying the AVP of Academic Programs of the need for WASC approval is required. Allow 180 days for processing and approval.

I have completed this sheet and included all of the above items as attachments or as part of the attached proposal. I understand that I will be informed of my proposal's status (see top right) no later than 30 working days from the date of submission, or in the absence of necessary signatories due to travel reasons, no later than 30 working days from their return to the Hayward campus.

Signed By: _____ Date Signed: _____

Glossary

Certificate (Programs) – a series of courses -- organized around a central theme -- that provides a predetermined body of knowledge or set of academic skills. Certificate programs may be either non-credit or credit.

Continuing Education Units (CEU) – a nationally recognized method of quantifying the time spent in the classroom during professional development and training activities. 10 hours of instruction is equal to 1 CEU.

Contract Courses – courses offered or taught under a contract or agreement with a school district, public agency, business, or industry for their employees. The faculty salary is paid by the contracting agency. The contract includes funds for the salary and other expenses either as a separate contract or as part of a prescribed tuition.

Extension Courses – courses that provide academic credit and are taught as self-support instructional programs, excluding all special session courses.

Open University/Concurrent Enrollment – regular state-supported courses available to non-matriculated students on a space available basis. Students in Open University pay self support fees.

Professional Development Courses – courses designed to provide instruction for continuing professional development. Courses may be offered as Special Session, Extension, Continuing Education Unit, or non-credit.

Special Session – instructional programs provided to matriculated students on a self support basis at times and in locations not supported by state general funds. Includes all Summer Session courses, Special Session Degree Programs, Concurrent or Open University Enrollments, and other courses and programs identified by the University as Special Session courses. By definition, all Special Session courses provide resident credit. Excludes all Extension courses and certificates.