

CSU-San Marcos  
Extended Learning at CSUSM Project  
Progress Report – April 13- May 2, 2020

**Scope of the Work:**

Review the current organizational and fiscal structure of CSU-San Marcos' Extended Learning division (EL at CSUSM) through internal and external document reviews, one-on-one and group interviews, and site visits as needed and provide a report on the current status and the recommendations about the overall organizational and fiscal management of the Division.

**Status:** Data Gathering

**Completed Meetings (members met at least once):**

EL Staff and Administration.....29 members

Faculty Representatives.....16 members

Stateside Staff and Administration.....9 members

**Purpose of the Progress Report**

This progress report outlines the initial observations based on interviews with CSUSM stakeholders and internal/external document reviews. It should be noted that these observations are not complete and conclusive and require further investigation. This progress report will address five initial areas of concern.

***1- Division of Extended Learning – Organizational Structure***

Observation:

- Organizational structure within Extended Learning has not been reviewed for several years and is in need of significant reimagining. My observations and interview responses indicated significant lack of communication, lack of clarity in reporting lines, lack of accountability within the division, lack of transparency, and eventual frustration among staff members because of unclear reporting lines and division of roles and responsibilities. This lack of clear definition of roles, responsibilities create inefficiencies, duplicate structures - not only within EL but also across campus partners - and lack of morale among employees within the Division.

Recommendation:

- I recommend an extensive and comprehensive review the organizational structure of the EL, including the Temecula Campus, and restructure the division based on the functions needed for operational efficiencies and priorities.
- I recommend this restructure begin with clarifying the mission of the EL, the priorities, and the vision for the EL for the next decade.
- I recommend that this restructure include clear definition of roles and responsibilities within a framework of 'responsibility, authority and accountability'.
- I recommend that this restructure include significant skills/gaps analysis across the division to eliminate operational inefficiencies and reallocate the resources within the division in alignment with the mission, vision, and the priorities of the EL.

## **2- Memorandum of Understanding – Cost Recovery**

### Observation:

- Recently developed MOU has not been understood campus partners (faculty and administration) and the EL staff. My recent interactions with faculty indicated that the MOU is vague and did not have relevant faculty input and perceived to have been prepared and implemented to protect the university against an audit. Both the stateside and the EL staff members indicated that they did not understand the MOU and my observation was that the EL staff was not involved in preparation of the MOU (other than the former dean) and the stateside staff involvement was minimal and not to the extent of effecting the decisions within the MOU. Feedback from stateside staff and administration varied and is incomplete at this time of the review. However, my initial observation indicates a lack of buy-in for the MOU among faculty because of lack of relevant faculty input, lack of trust and transparency throughout the process, and the top-down pressure felt by the EL staff during the drafting of the MOU. MOU forms the basis of the relationship of the EL with campus partners and it should have a broader buy-in/support from faculty, staff and administration.

### Recommendation:

- I recommend a new MOU be prepared through a representative taskforce that would form the basis of the relationships of the EL with campus partners.
- I recommend that after such an MOU, each program proposes addendum specific to the programs for discussion with EL administration, program directors, and school/college deans.
- I recommend that the MOU include clear definition of roles and responsibilities for academic programs and the EL.
- I recommend that the Indirect Cost Allocation methodology both for campus partners (faculty and administrative offices across the university) be simplified and shared across administrative offices, schools, colleges, and academic programs.

## **3- Sustainability of Academic Programs Administered through Extended Learning**

### Observation:

- I do not have the documentation and the evidence to show whether any degree program administered through EL is self-support or not. Interviews indicate a lack of clarity on what it means to be self-support, which programs are fully self-support, and the lack of documentation creates the need for further investigation into why the sustainability of each program is not clearly shared and documented. This is an area that needs significant review, understanding, and transparency.
- My review indicates a lack of understanding of EL's mission at the University. EL is a place for innovation, to pilot new programs, and is an arm of the University to respond to the needs of the communities in an efficient manner.

### Recommendation:

- I recommend that each program budget is prepared with 'true cost recovery' and shared across the program stakeholders
- I recommend that the roles and responsibilities of the academic programs and the EL are spelled out in an agreement.
- I recommend a review of academic degree programs administered through EL to see if they have been sustainable for a sufficient amount of time and be considered to move any programs to Stateside. This

will require significant budget review to calculate the indirect costs for any program to be moved to stateside.

- I recommend that EL's large footprint at the university be reviewed and decide whether to have any framework around the large footprint of the EL.

#### **4- Compliance with California Education Code §89704 and Executive Order (EO)1099**

Observation:

- My limited review indicated that the process around the expenditures from the EE Local Trust Fund – Campus Partners (444) is not transparent and lacks process and control systems.

Recommendation:

- I recommend that the university creates a process and control system to ensure compliance for EE Local Trust Funds. The EE Local Trust Fund and its expenditures shall comply with all applicable Chancellor's Office directives (i.e. ICSUAM, EOs, Coded Memoranda); laws; statutes and regulations of the State of California, and local or federal governments and is available solely "for the support and development of self-supporting instructional programs" as provided in Education Code section §89704.

#### **5- Global Programs and Services (GPS)**

Observation:

- My limited review indicates that there is a lack of understanding of the Global Programs and Services within EL and by the University in general. It sometimes acts as a separate unit within EL and its connection to EL has not been clear to EL staff and campus stakeholders. GPS as seen a different unit, not connected to EL, and acts as a stateside unit in some cases and as an EL unit in some cases, depending on the context. This creates questions and concerns around the relevance of the GPS as part of the EL operations.

Recommendation:

- I recommend that the GPS be reviewed as part of the EL restructure.
- I recommend that the GPS be embedded more appropriately, both in staffing and in fiscal management, as a unit with the EL.
- I recommend that the offset to cost recovery for GPS be reviewed again and documented appropriately.