

PROGRAM EVALUATION GUIDELINES

OVERVIEW

The Office of Off-Campus Study & Exchanges (“OCSE”) sponsors a formal evaluation process for Skidmore and Approved programs abroad. Each year OCSE invites faculty and staff members to assist in this process by conducting on-site evaluations of these programs. The evaluation process is integral to monitoring the programs’ academic rigor and ability to support students in their co-curricular and residential lives. Evaluations could result in recommendations for changes to the program or the addition or removal of a specific program. It is also our hope that meeting with program faculty and staff and observing program classes and co-curricular structures will allow faculty and staff to better advise students who are choosing programs in a given discipline or location.

As a participating evaluator it is expected that you will complete a comprehensive program evaluation report for each program visited. (See report template at the end of this document.)

- The report is due within 30 days of completion of travel.
- The report will be a public document and will be distributed to OCSE program managers and all department chairs and faculty that approve the program. It also will be utilized as an informational resource and advising tool.
- If there is confidential information that should not be shared publicly, it should be included in a separate appendix.

After completion of a program evaluation visit, you will be asked to serve as a resource for students and faculty who are interested in the program you evaluated. OCSE may ask you to participate in sponsored events to speak with students about the program(s) as well.

SELECTION OF EVALUATION SITES

Each late spring/summer OCSE determines which sites will be evaluated the following academic year. We consider several factors when making these decisions. We preference programs that:

- are used most frequently by our students;
- are approved by departments that have not conducted an evaluation in the past five years;
- have not been evaluated within the past five years;
- have experienced major administrative or academic changes in the recent past;
- cause concern based on student or faculty feedback.

OCSE also considers evaluation requests made by specific chairs and program directors, as long as those requests align with the factors above.

Given this information, OCSE determines which program evaluations can be sponsored in a given budget year. We then approach specific chairs or program directors to see if there are faculty within those disciplines who are able to conduct an evaluation in a given year. The chair/director makes recommendations for faculty who would be appropriate for a specific program evaluation based on faculty expertise or experience. If there are administrative concerns to address, OCSE will either sponsor an administrative review or sponsor a faculty member and a staff member for the same review. We typically begin working with departments in the spring or summer prior to a given academic year to plan who will go where and when.

Program evaluations typically occur during January or spring breaks; occasionally, if the academic calendar abroad permits, evaluations can take place in the summer. OCSE will work with evaluators to determine the best time to visit based on the on-site calendar and the evaluator's availability. In all cases, faculty and staff must conduct the review during the program's academic year when semester students are participating on the program. Summer programs are very different from semester programs and, therefore, are not included in the opportunities to evaluate programs.

PRIOR TO DEPARTURE

Once the program selections are made, evaluators work with the Finance Manager in OCSE to arrange all aspects of the visit. The Finance Manager and the evaluator each have specific responsibilities prior to the evaluation.

OCSE Finance Manager:

- meets with the evaluator to discuss specific issues or concerns that should be addressed during the visit;
- assists the evaluator by providing program specific information and/or arranging meetings with past student participants prior to the visit;
- arranges the on-site itinerary in consultation with evaluator and on-site program director;
- helps the evaluator arrange all travel through the OCSE preferred vendor (i.e., airfare, hotel accommodations, etc.);
- all travel must follow Skidmore College's Travel and Entertainment Policies and Procedures given later in this document – the OCSE Finance Manager helps evaluators understand how the policy affects their travel and visit;
- processes evaluator's travel expenses to ensure costs are reimbursed in a timely manner.

Evaluator:

- reviews the program evaluation report form to understand what questions should be asked during the visit;
- reviews program specific materials provided by OCSE to ensure a basic knowledge of the program prior to arriving to conduct the evaluation;
- meets with past participants or reviews past student evaluations to understand strengths and weaknesses of program;
- meets with OCSE staff to learn more about the program and the questions OCSE might want addressed during the evaluation;
- finalizes and pays for travel and accommodations. ***Skidmore requires all employees to pay for their own travel and entertainment costs. However, all evaluation-related expenses will be reimbursed by OCSE.***

DURING PROGRAM EVALUATION ONSITE

Evaluator:

- visits program facilities and classrooms, including program center and/or host universities;
- meets with program faculty and host institution faculty to discuss overall curriculum and academic quality of program and to address any academic questions;
- meets with program staff and/or host institution staff to discuss overall structure of program and to address any administrative or student support questions;
- attends classes specific to own discipline and/or disciplines included on Approved Programs list;

- meets with program participants – Skidmore students where available; other students in all cases. (Meeting with students should NOT include program staff as students should have the opportunity to give candid feedback about the program.)
- visits housing facilities and/or families; if there is more than one option for housing, visit each option available to students;
- looks for unique characteristics of the program – academic or co-curricular – that can be used to better target program to appropriate students during advising;
- looks for challenges that need to be discussed openly during advising;
- collects and tracks receipts for local ground transportation, meals, accommodations, etc.;

You must follow the College's guidelines for reimbursement:

- Receipts must be submitted for all expenses related to the program evaluation visit.
- There may be times when you cannot get a receipt for such items as tips and small purchases (i.e. train/bus fare, coffee stand, etc.). In these cases you may submit a log indicating the date, vendor, location, item purchased, and the cost (in local currency). **Please note that an individual purchase without a receipt cannot exceed \$25 (USD).**
- An important part of your itinerary will be meeting with students. This meeting may take place over coffee or a light snack, which you can pay for and submit for reimbursement. You will need a receipt for this cost.
- The general College policy is not to reimburse for alcoholic beverages. However, there may be an occasion when you are hosting program staff and/or faculty for a meal. In order to be hospitable and culturally sensitive you may purchase an alcoholic beverage for yourself and the guest. However, you must never purchase alcoholic beverages for students.
- When entertaining guests, you must provide a list of the names of the guests with the accompanying receipt. For student groups, if unable to provide names, please give an appropriate count of individuals in attendance.
- There may be an opportunity outside of the program evaluation itinerary for you to take part in a cultural activity such as a visit to a museum or another site or event relevant to program study. Experiences such as these are beneficial when discussing the program with students upon return to campus. Excursions such as these should be pre-approved by the OCSE Finance Manager in order to be reimbursed.

UPON RETURN

Evaluator:

- submits program evaluation report to OCSE Finance Manager within 30 days of completing the program evaluation visit;
- submits travel expense report within 30 days of completing program evaluation visit for reimbursement of expenses;
- makes him/herself available to OCSE for questions about the report or advising for specific students.

OCSE Finance Manager:

- processes expense report and follows up as needed;
- distributes the program evaluation to the director and staff of OCSE and to relevant chairs and program directors as appropriate;
- contacts evaluators to speak with students regarding the program visited at events such as interest meetings, International Education Week, panel discussions, pre-departure orientation, study abroad fair and/or open house events.

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SKIDMORE COLLEGE TRAVEL AND ENTERTAINMENT POLICIES

Updated January 2013

PURPOSE

These policies are intended as a guide to reimburse individuals for College-related travel and entertainment expenses. The responsibility to observe the guidelines rests both with the traveler and the chairperson or administrator who certifies conformance to these guidelines by approving the expenditure(s). This policy applies to anyone who incurs travel or entertainment expenses paid by Skidmore College, regardless of the source of funds. The College will reimburse for reasonable travel, meals, lodging and out-of-pocket expenses incurred in the transaction of College business. This document outlines policies and procedures in general terms to allow reasonable discretion for travelers. Departments may implement more restrictive policies and procedures that departmental personnel should adhere to. The policy is not expected to cover every possible situation. Federally funded awards may have additional requirements.

RESPONSIBILITY

These policies and procedures are also necessary to comply with Federal tax law and third party sponsoring agency regulations. They will ensure consistent and fair treatment between departments throughout the College and the uniform reporting of financial results. In general, the quality of travel, accommodations, entertainment and related expenses should be governed by what is reasonable and appropriate to the purpose involved. The College respects the personal integrity and discretion of each member of its faculty and staff and conducts expense account affairs accordingly. Skidmore's travel meets the IRS definition of an "accountable plan." As a result, travel reimbursements do not have to be reported as income to the traveler. Under the accountable plan, travel advances and reimbursement of expenses must meet three requirements:

- They must have paid or incurred deductible expenses while performing services as your employees.
- Travelers must provide a statement substantiating the amount, time, use and business purpose of expenses within a reasonable amount of time (not to exceed 60 days) after the expenses are incurred. Original detailed receipts must be attached to the statement.
- Employees must return any advance amounts in excess of substantiated expenses within a reasonable period of time (not to exceed 60 days).

If an employee does not substantiate expenses and/or return any excess advance within a reasonable period of time (60 days), this amount must be treated as if it were paid under a non-accountable plan and must be treated as salary, subject to withholding, on the employee's Form W-2.

In order for business travel expense reimbursements to remain tax-free to the employee, the policies and procedures that follow must be adhered to.

SALES TAX AND BUSINESS VISA CARD

Skidmore College is a tax exempt organization. NYS requires vendors to allow for tax exempt purchases only when someone is paying with check, debit card or credit card from the tax exempt organization. If paying with a personal check or personal credit/debit card, vendors are instructed by NYS to charge sales tax. Skidmore offers a Business Visa card to eligible employees that travel on

behalf of the College and will not reimburse sales tax to employees for sales tax paid to local vendors. This includes restaurants, department stores and Enterprise rent a car.

The Business Visa Card and the College tax exempt certificate should suffice for vendors to honor the College tax exempt status. Tax exempt certificates are available on the Financial Services web page or in the Accounts Payable office. Many departments also have a supply of the certificates as well.

For additional information about the Business Visa Card, please visit the Financial Services home page.

I. SKIDMORE COLLEGE TRAVEL POLICY

MODES OF TRAVEL

The most cost effective mode of travel should be used based on itinerary

- **Air Travel**
 - Southwest Airlines is the preferred airline.
 - Appropriate for travel beyond a 200-mile radius from campus
 - Arrangements should be made through the Skidmore travel on-line website at (<http://www.skidmore.edu/administration/travel/>) with your corporate visa card, not your departmental purchasing card (We encourage use of the corporate card because the College receives a rebate based on the total volume of the card usage)
 - If you find a more economical flight outside of the Skidmore Travel website, please book it and forward a copy of the itinerary to the Purchasing office to be logged into our travel database
 - Coach travel only (otherwise individual covers incremental cost)
 - Personal excess baggage charges, flight insurance, etc. are not reimbursed
 - The College is not responsible for costs associated with lost luggage (In extenuating circumstances, please discuss with your Supervisor or Chair)
 - Credit card bill is mandatory for airline ticket reimbursement prior to trip
- **Personal Automobile**

When employees use their own vehicle on authorized College business, it is their personal insurance policy that is primary coverage for liability and physical damage coverage. It is important that the individual have adequate coverage, as Skidmore's insurance provides non- ownership liability for exposure to the College only (this means the insurance covers only the College in the event of a lawsuit).

 - Appropriate for travel within a 200-mile radius of campus
 - Reimbursed at 56.5 cents per business mile as of 1/1/13 (adjusted annually per IRS guidelines)
 - Maximum reimbursement for mileage is 400 miles round trip
 - Tolls and parking fees reimbursed at actual cost
 - Gas, oil, repairs, maintenance, fines, etc. are not reimbursed
 - The College will reimburse personal insurance deductible for damages sustained while on business when employee is not at fault (police report required)
- **Automobile Rental**

The College's insurance provides for both liability and physical damage for employees who rent vehicles while on authorized College business. The coverage extends for car rentals in the US, Canada, Puerto Rico and US territories (therefore please waive the rental agency's insurance coverage). For vehicles rented in a foreign country - the College's international policy covers liability only, and therefore, you must secure physical damage coverage from the rental agency. If any rental vehicle will be in your custody for a period in excess of 30 days, please notify Business Services. Employee's personal effects, while within the vehicle, are not covered by College insurance unless the vehicle is no more than 1000 feet from campus (limit of \$25,000). If a loss or damage occurs to your personal property outside of this radius, please submit the loss directly to your homeowners/renters insurance.

- Local rental appropriate only when cost effective
- Recommend arrangements to be made through AAA Northway
- Luxury vehicles not allowed
- Collision damage coverage is not reimbursed
- Return car with full gas tank. Refueling charges by the rental agency are not normally reimbursed
- **Train Travel**
 - Encouraged when cost effective, especially to New York City
 - Recommend arrangements to be made through Skidmore travel website. Contact AAA Northway if assistance is needed.
 - Coach travel only (otherwise individual covers incremental cost)

LODGING, MEALS, AND INCIDENTALS

- **Lodging**
 - Recommend arrangements to be made through Skidmore Travel website
 - Lodging costs should be kept to a minimum
 - Cost up to \$150 per night
 - Cost up to \$300 in High Cost areas* (see list below).
 - Conference rates are reimbursable.
 - Staying with friends or family is encouraged (appropriate gift is reimbursed, up to \$50)
- **Sales Tax Exemption (hotel rooms)**
 - Exempt from sales tax in New York, Florida, Massachusetts, New Jersey and the city of San Francisco
 - Obtain appropriate forms from Accounts Payable or from Purchasing web page (NY only)
 - Some states accept NYS exemption; check with vendor
- **Meals, Alcoholic Beverages and Incidentals**
 - Actual cost of meals and incidentals up to an average of \$60 per full day is reimbursed
 - For partial days, allowance is \$10 breakfast, \$15 lunch, \$30 dinner, \$5 incidentals
 - For High Cost Areas* an additional \$20 per day is reimbursable
 - If conference fees include meals, daily allowance is reduced accordingly (see above)
 - Entertainment expenses (meals for guests) should be reported separately

The general College policy is not to reimburse for alcoholic beverages. If incurred, payments for alcoholic beverages should be billed separately and paid for by the employee directly and are not eligible for reimbursement. An exception is allowed only in special circumstances for certain donor, advancement, recruitment, visiting artists/lecturers, visiting external reviewers, and similar purposes, determined in advance by the Cabinet member responsible for approving the expense.

Note: if the cost exceeds the above guidelines - Director or Chair must approve

- Reimbursable incidentals include such things as tips, brief phone calls home, and laundry
- Personal hygiene items, medicines, etc. are not reimbursed
- Personal entertainment (movies, games, etc) are not reimbursed
- Childcare is not reimbursed

In an effort to promote a healthy lifestyle, we will reimburse health club fees if the hotel that you are staying at does not have a fitness room for use free of charge.

OTHER ITEMS

- **Cash Advances**
 - Cash Advance must be approved by supervisor, Director or Chair
 - \$25 dollar minimum; over \$1,000 must be pre-approved by Vice President or Dean
 - Request made on standard "Check Request Form" with purpose and dates of trip
 - Cash obtainable up to \$250; otherwise check (Tuesday request issued Friday)
 - Previous advances must be cleared before new advance is issued. Advances must be cleared within thirty-days after returning from your trip
- **Reporting and Approval of Expenditures**
 - Requests for reimbursement must be on a fully completed Travel Expense Report
 - Form within thirty days upon returning from trip
 - Original receipts for all items \$25 or over must be attached; receipts for all expenditures are encouraged
 - Travel Expense Report must be approved by supervisor, Director or Chair
 - Reimbursement up to \$250 paid in cash, otherwise check
- **College Guest Travel**
 - When College is paying for guest travel (job candidates, trustees, consultants, etc.), we encourage arrangements be made through AAA Northway or Skidmore travel website for Southwest Airlines reservations
- **International Travel or Transactions**
 - Please use your Skidmore Business VISA corporate credit card whenever possible
 - PLEASE CALL: 584-5844 ext 2285 to let Adirondack Trust know:
 - each time a card holder is going to make reservations from an over-seas merchant
 - each time a card holder **begins** and **ends** a trip overseas
 - Include your credit card bill with your expense report, (this enables exchange rates to be handled efficiently) for cash transactions, please include exchange rates
- **Exceptions to the Policy**

- Exceptions must be recommended by the appropriate Dean or Vice President (in such cases, please submit written explanation with Travel Expense Report), but final disbursement authority rests with the Office of Financial Services

*High Cost Areas: New York City, Boston, Newark, Philadelphia, Washington, D.C., Atlanta, Miami, Chicago, Dallas-Ft. Worth, Los Angeles, San Francisco, Seattle. This list is not all inclusive. Other cities may qualify as well.

II. SKIDMORE COLLEGE POLICY ON ENTERTAINMENT & SPECIAL GESTURES

GENERAL PURPOSE

- Reasonable expenses when interacting with external constituencies are reimbursed (trustees, donors, alumni, parents, vendors, job candidates, professional guests, etc.)
- Interactions among faculty/staff/students are not generally reimbursed

ENTERTAINMENT

- **Meals**

Expenses for local dining involving non-College personnel are reimbursable when the purpose of the meeting is to conduct College business and when it is necessary or desirable to have the meeting in conjunction with, or during a meal. This includes our guests such as speakers, visiting artist, writers etc. Reimbursement up to \$50 per person. Please use the Downtown discount business cards whenever possible.

Note: if the cost exceeds the above guidelines - Director or Chair must approve

Entertainment expenses should be reasonable in relation to the nature of the function and the resulting business benefit expected to be derived from the expenditure. A list of names must be indicated on the expense report along with the purpose of the entertainment. Some examples of this type of entertainment would be for alumni functions and entertaining donors or prospective donors.

- Generally no more than 2 or 3 faculty/staff should dine off-campus with each guest
- Spouse/partner may be included if guest's spouse/partner is present

- **Entertainment of Students**

- Light refreshments for receptions, lectures, and other special events are reimbursable (Dining Services should cater such events if more economical)
- Occasional entertainment of student volunteers by Chairs/Directors as a "thank you" is reimbursable
- Occasional (at most once per semester) inexpensive entertainment (pizza, etc.) of paid student workers by Chairs/Directors as a "thank you" is reimbursable

- **Entertainment of Faculty/Staff Members**

- Entertainment of fellow faculty/staff is not normally reimbursed
- The College will not normally pay for meals (on or off campus) for faculty/staff meetings

- Annual staff retreats are reimbursable; such events should be budgeted and charged to Account Number 7430
- Individual Faculty / staff / department going away parties, retirement, or holiday celebrations are not reimbursed (Campus wide retirement parties must be catered by Skidmore Dining Services)
- Other campus wide celebrations (e.g. “going away parties”) are allowed only in special circumstances, must be campus wide, must be catered by Skidmore Dining Services, and must be approved in advance by the Cabinet member responsible for approving the expense.
- Alcoholic Beverages are generally not reimbursed. The general College policy is not to reimburse for alcoholic beverages. If incurred, payments for alcoholic beverages should be
- billed separately and paid for by the employee directly and are not eligible for reimbursement. An exception is allowed only in special circumstances for certain donor, advancement, recruitment, visiting artists/lecturers, visiting external reviewers, and similar purposes, determined in advance by the Cabinet member responsible for approving the expense.

SPECIAL GESTURES

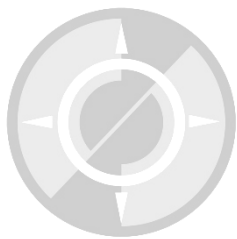
- **Gifts**
 - Individual and /or departmental gifts for parting, retirement, thank you, holidays, etc. are not reimbursed
 - A gift for the non-faculty/staff host of a gathering is reimbursable up to \$50
- **Illness, Birth and Condolence Gestures**
 - For employee inpatient hospital stays, please contact Human Resources and they will send an appropriate gift (approximately \$35)
 - For birth or adoption, the College will send an appropriate gift (approximately \$35) and congratulatory card (contact Human Resources)
 - In case of death of member of employee's immediate family, the College will send a memorial contribution of \$25 (contact Human Resources)
 - Further gestures made by individuals are not reimbursed

REPORTING AND APPROVAL OF EXPENDITURES

- Entertainment expenses should be charged to Account Number 7420
- Requests for reimbursement must be on Check Request Form indicating date, purpose, and
- Names of those participating
- Original detailed receipts for all items \$25 or over must be attached; receipts for all expenditures are encouraged
- Check Request Form must be approved by supervisor, Director or Chair
- Reimbursement up to \$250 paid in cash, otherwise by check

EXCEPTIONS TO THE POLICY

- Exceptions must be recommended by the President or appropriate Dean or Vice President (in such cases please submit written explanation to Accounts Payable), but final disbursement authority rests with the Office of Financial Services.



PROGRAM EVALUATION REPORT
OFF-CAMPUS STUDY & EXCHANGES
Skidmore College

This evaluation report is designed to help OCSE evaluate Skidmore and Approved Programs in an attempt to maintain high quality programs and to troubleshoot as needed. In addition, it serves to keep OCSE updated as to the details of the program. We will use this information when advising students in the future.

Thank you for your assistance in our efforts to deliver the best off-campus programs available.

Note: This report is due to OCSE within one month of completing the site visit.

Program Title:

Site Visited – city and country:

Sponsoring Institution (provider and/or university):

Dates of Visit:

Name and Title of Evaluator:

ADVISING POINTS

1. Highlight important academic and co-curricular aspects of the program that will help us advise students regarding the realities of the program on site. (give bullet points)
2. What are the distinctive characteristics and/or strengths of this program?
3. What are the weaknesses of this program?
4. What student population would this program best serve?

ON-SITE PROGRAM

1. Comment on the program structure, the language of instruction, who attends classes (US students or a combination of US and local students), and if there are required components.
2. Comment on the program as it pertains to department-specific goals for off-campus study.
3. Comment on any specific academic or administrative concerns you've been asked to address during your review. (OCSE will share any specific concerns prior to your visit. Please be sure address these with the on-site staff during your evaluation visit.)

ON-SITE ACADEMICS AND FACULTY

1. Comment on the host institution and the program's curricular strengths. Do they suit your students' needs?
2. Comment on the registration process, the availability of courses, and the availability of course information/syllabi. Discuss any challenges students face in this area.
3. Are there any academic aspects that are distinctive to this program? (type of assessment, service learning opportunities, community-based projects, etc.)
4. Comment on any classes you attended while on site – strengths, weaknesses, distinctive pedagogies. (Include course name, number of students, professor's name, and comments on level of instruction.)
5. Comment on quality of faculty in general and in the context of our students' needs and expectations. Are instructors accessible to and engaged with students?
6. Comment on the ability of our students to meet the academic demands of the program.

ON-SITE STUDENT SUPPORT

1. Comment on the program's support staff – number of staff, length of time with program, staff ability to support student needs – and students' perceived satisfaction level with on-site services and staff.
2. Comment on student housing – type, location in terms of classes, arrangements for meals, student satisfaction.
3. Comment on the on-site facilities, including classroom, library, administrative, and computer facilities.
4. Comment on the co-curricular program – type and number of extracurricular activities, how activities tie to curriculum, and feedback about activities.
5. Comment on our students' interaction with the local community - opportunities that exist, organized or more informal, assistance from program in finding connections.
6. Comment on health and safety structures – any concerns or issues.
7. What are the strengths and weaknesses of the on-site student support? Are there specific areas of concern or specific areas of success?

PROGRAM SITE

Please comment on the city where the program is held. Why is this particular program well-suited (or not) for its location? What advantages or disadvantages does the location present? Include any information about cultural events, public transportation, affordability, and general atmosphere of city that will help us in advising for and evaluating this program.