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Schedule and Key Dates

29 August, Thursday: What is a Learning Cluster? 430-530pm, Pauling 216

- Mandatory session for first-year students to introduce LCs, but open to all
- Students will be provided access to LC Brightspace

11 September, Wednesday: Optional LC Meeting 1210-1250, Maathai 207

- A brief overview and update, then questions and answers. Open to all faculty, students, and staff, recommended for new faculty

13 September, Friday: Third-Year Student Statement of Intent

- Third-year students asked to [confirm their intent to enroll](#) in a third LC in late August, and must confirm by 13 September, so that we know how many students to plan for. Third-year students that confirm their intent to take a third LC are encouraged pre-register in a class by the 24 October deadline, whether travel or otherwise. Third-year students who do not pre-register will still be able to register for LCs during the registration period, but only after first and second-year students.

The following are relevant only for Nieves Family Foundation Travel Grant applicants

07 October, Monday: NFF Statement of Intent, 5pm - relevant only for Nieves Family Foundation Travel Grant applicants

- Groups planning to apply for the NFF Travel Grant must submit the [Statement of Intent Form](#). Requested information include the proposed instructor, topic, location and purpose of travel, and interested students. This will provide an opportunity for the NFF Travel Grant Committee to provide early feedback.

11 October, Friday: Notice of NFF Applicant Courses - relevant only for Nieves Family Foundation Travel Grant applicants

- Groups intending to apply for the NFF Travel Grant are required to post a description of their course on the [LC Bulletin Board](#) on Brightspace, sharing application instructions and selection criteria. While some students may already be associated with planning the prospective course, it is essential to ensure a transparent and fair process. Faculty should ensure that at least 6 of the 12 roster seats (and 1-3 students on the waitlist) are filled through an application process.

16 October, Wednesday (the day after Fall Break): Deadline for NFF Applications, 5pm - relevant only for Nieves Family Foundation Travel Grant applicants

- [Travel grant applications](#) must include an overview, rationale for travel, detailed budget, potential meetings and activities, list of students (w/student ID #s), and tentative syllabus
- Students must ensure that all financial and academic holds are removed from their accounts
- The NFF Travel Grant Committee will meet to deliberate on Friday 18 October, forward their recommendations to the Dean, and will notify applicants within a week of submission
- All NFF grant recipients (faculty and students) are invited to meet with the LC Coordinator to discuss policies, share advice, and answer questions

24 October, Thursday: Course Information Deadline and Pre-Registration, 5pm

- All LC faculty, including NFF awardees, must submit course details to the Registrar's Office and LC Coordinator through the [LC Registration Information Form](#). Required information includes:

LC long title: Under 50 characters

LC short title: Under 30 characters

Preferred time (morning, afternoon, other)

Preferred classroom (with alternative)

List of students for pre-registration (name & ID)

Optional: 1-3 waitlisted students

Classes expecting to use over \$1000 of their \$2000 budget provide an outline of anticipated expenses

A draft syllabus providing the course topic, brief abstract, a sense of learning objectives and how they speak to the LC learning objectives, and methods of assessment

- For students: All financial and academic holds must be removed, otherwise you cannot pre-register. Students associated with multiple LCs, even on waitlists, will be dropped.
- The Office of the Registrar will enroll pre-registered students. Remaining seats will be available through the regular registration period.
- For NFF awardees: Potential revisions or clarifications and passport information due 31 October (please use [Travel Info Sheet](#) to provide passport details); once approved and with a full roster of pre-registered students, faculty may begin to purchase tickets

07 November, Thursday: Deadline for Supplemental Budget Requests, 5pm

- LC courses with additional budgetary needs, primarily those involving local travel, must submit detailed budgets and an explanation of how the expenses contribute to course learning goals. Consider how the course might proceed with and without the funds. Supplementary budget requests can be for a maximum of \$3500, bringing the total course budget to up to \$5500.

18-22 November: Registration Week

- Scheduled week to register for Winter Block LCs as well as Spring Courses. Students pre-registered in an LC should double-check, but do not need to register for LCs during this week. Students not pre-registered will sign up for remaining seats in the following order: Second-year students, first-year, and then remaining third-year students.

22 November, Friday: Deadline for Various Budget Requests

- Deadline for all NFF-funded LCs to submit requests for 1) Airport Transfers and 2) Payment Office materials (i.e., cash advances and payments required from SUA purchasing director)
- Deadline for any LC instructor to [request an expense card](#) (Janna Skye, jskye@soka.edu)

06 January, Monday: First Day of LCs, Winter Block

- All students enrolled in an LC are expected to be on campus for the first day of class

07 January, Tuesday: Enrollment Deadline

- Final day for students to add courses or drop them (without receiving a 'W')
- Last day to shift grading to/from Pass / No Pass

20 January, Monday: Martin Luther King Jr. Holiday

29 January, Wednesday: End of Winter Block Classes, LC Fair

- Learning Cluster Fair, time and location to be confirmed. All LCs are asked to participate, sharing their learning experiences with the campus community

03 February, Monday: Final LC Grades due to the Registrar’s Office (by 11:59am)

Overview

This Handbook is designed to aid students and faculty participating in the Learning Cluster (LC) program at Soka University of America. It is revised annually to inform students and faculty about LC policies.

Learning Clusters are a signature feature of the SUA curriculum, some of SUA’s most exciting, innovative courses. Offered annually during the 3.5-week January Winter Block, LCs are intensive 4-credit courses. All SUA undergraduate students must complete two LCs; one in their first year and one in their second year, with some students completing an additional LC in their third year. Guided by a faculty member, LCs are intended to tackle real-world issues in creative ways. LCs are immersive, with daily contact and students enrolled in only one class, enabling off-campus learning. Rather than traditional catalogue courses, most LCs are created anew each year through faculty-student collaboration.

SUA’s mission is “to foster a steady stream of global citizens committed to living a contributive life.” LCs speak to this mission, as they move beyond traditional classroom environments, with some able to travel regionally or globally with the support of competitive grants. All told, LCs are among the most popular, fulfilling parts of our students’ journeys.

LC Learning Objectives

In taking Learning Cluster courses, students will:

- Develop critical, analytical, and investigative skills to formulate educated responses to a specific problem or question
- Develop personal and leadership skills to work collaboratively toward the completion of a common project
- Develop skills and awareness as concerned and engaged global citizens

Background

Specialized, intensive courses taking place between regular semesters have long been staples of liberal arts education. Leading liberal arts universities refer to similar courses as January-terms, J-Terms, Interterms, and Winter Terms. The term 'Learning Cluster' was coined by John D. Montgomery as SUA prepared to open its doors. The first LCs were offered in May 2002, and May and August in the following year. In 2007, all LCs shifted to the January block, and 2009 saw the first travel grants. SUA offers approximately 25 LCs annually, with classes capped at 11-12 students. In SUA's first 20 years (2002-2022), we have offered over 600 LCs. For more information, including examples of LC courses, please see [the LC webpage](#). A [full list of SUA LCs](#) is available [here](#).

Enrollment and Credit Hours

All SUA undergraduate students are required to take at least two LC courses. Students must enroll in an LC during their first and second year. Depending on Study Abroad, some third-year students may also enroll in a third LC as an elective. Incoming third-year students will be asked to confirm their interest and availability early on so that SUA can confirm the list of LC faculty. LC courses are small, providing a rich, responsive learning environment. In 2025, all on-campus LCs are capped at 11 students and all NFF grant classes must have 12. Faculty may not increase enrollment caps to accommodate waitlisted students.

LCs courses are intensive seminars, with students earning four credit hours over the Winter Block. This means that they should have about three contact hours per day across about 15 days of instruction. Students should expect to spend nearly two hours outside of class (reading, planning, research, writing, and creating) for every hour of in-class time across the course. Students should anticipate a workload commensurate with a full course load in a regular Fall or Spring semester.

Creating a Learning Cluster


Just as LC courses feature a vast range of topics and approaches, so too do their origins vary. The common element is that they are not like catalogue courses, varying from year to year and crafted through student-faculty collaboration, although the degree of student input and faculty oversight will vary. Some LCs develop mostly from students, who develop a topic and identify a suitable faculty member, who in turn oversees the syllabus, the budget, and evaluation. Such courses involve mutual learning, with faculty typically outside of their comfort zone. Other LC courses form more from the initiative of faculty members, who may identify a topic linked to their research, personal interests, or current events. They then meet with interested students, who are encouraged to suggest readings, topics, and activities for the course.

Some LC courses evolve over nearly a year, with students discussing topics and meeting with faculty in the spring or summer. This is especially true of travel LCs, which require significant planning. Most LC courses take root in September and October. Detailed planning for LC courses should not take place until the faculty member has been approved as part of the LC roster, as determined by the Dean of Faculty. Once on campus, students may have ideas and approach faculty members. Discussions are often spurred by an early information session for first-year students and following optional session for the entire campus. As LC courses form, organizers (student and/or faculty) are expected to post their ideas to the LC Bulletin Board on Brightspace to ensure that interested students have an opportunity to be part of the course.

The Brightspace LC Bulletin Board

The Brightspace LC page is an essential resource. It features a list of faculty members teaching LCs, shortcuts to essential forms, and links to other useful resources. The Brightspace page includes forms related to field trips, pre-registration, expense requests, reimbursements, budgeting, per diem, expense cards, guest speakers, mileage, and more. Perhaps most important, especially in the Fall semester, is the LC Bulletin Board. Students and faculty who have ideas for potential courses can start a new discussion thread, as well as respond to existing ones. The Bulletin Board is used to form the early topics and rosters of LC courses, and to advertise meetings for interested students.

LC Bulletin Board

 Print

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LC Bulletin Board

Faculty Listing

Forms

Resources

🗨️ [LC Bulletin Board 2024-2025](#)

DIRECTIONS:

1. If you have an idea for a potential LC, click "LC Bulletin Board 2024-2025" and "Start a New Thread" (blue button). Put a subject title for your proposed cluster in the "Enter a subject" and a brief description of your idea in the text box and click "Post".
2. One subject idea per New Post, please.

IMPORTANT

1. To follow up on someone else's post or your own post, after opening their/your message, use the "Reply to Thread" button at the bottom of the page. This way, all related messages are organized and grouped together as an easy-to-follow thread so that a reader does not have to scroll around looking for related posts that are spread out all over the place.

Field Trips

Many LC courses involve activities beyond the classroom and campus. We encourage all LCs to consider off-campus activities where possible and appropriate. Considerable effort is required to ensure safe, enjoyable activities, whether international travel or a local trip. LC field trip policies include the following:

- All students participating in off-campus field trips must sign the [Academic Field Trip Waiver of Liability and Hold Harmless Agreement](#) at the beginning of LC semester. Forms will be collected by faculty and submitted to Teri Chester (tchester@soka.edu) prior to leaving campus. Students who signed waivers during previous years must sign a new form. Students who are under 18 must have the form completed and submitted by a parent or legal guardian.
- Faculty must accompany students during LC off-campus activities
- Participation of additional persons beyond enrolled students and the faculty member, such as other students, alumni, colleagues, or university personnel requires prior approval by the Dean of Faculty and LC Coordinator, as well as completion of the Waiver form. Extra-class participants may not accrue additional expenses to LC budgets.
- All field trips require approval, with requests made at least three days prior to the departure date using the [Field Trip Request Form](#).
- Meals: Field trips requesting packed meals must complete the request form at least two days prior to departure using the [Packed Meal Request Form](#). To complete the form, faculty should have a sense of the number of meals, which meals (breakfast, lunch, dinner), and student dietary restrictions (vegetarian, vegan, allergies). Faculty may arrange for students to pick up meals prior to departure from the cafeteria in coordination with the Bistro. For meals taken during off-campus LC activities, instructors must provide itemized receipts wherever possible, with students signing off on funds received through [the Cash Disbursement Form](#). Daily per diem and incidentals never exceeding US \$50/person as per [SUA travel policy](#)
- Ground Transport: LC classes may book shuttles where appropriate, such as to and from airports, or else use taxis and ride share services (such as Uber and Lyft). SUA has a [Lyft Concierge account](#) that can be accessed by instructors through Janna Skye (jskye@soka.edu). Faculty may rent vehicles, subject to the conditions of their driver's licenses, and must obtain vendor insurance. SUA partners with Enterprise Rent a Car, with a handful of vans on campus that may be arranged via Teri Chester (tchester@soka.edu). Finally, faculty and students are permitted to use personal vehicles, provided they provide a valid driver's license and are reimbursed based on mileage as calculated through Google Maps or equivalent through Workday.

- All honoraria must be approved by the LC Coordinator. Honoraria are capped at \$200 per session for virtual appearances and \$300 for in-person appearances. Amounts in excess of these must be justified and approved by the Dean, as per the [SUA Honoraria Policy](#).
- IRB Approval: Any LC project that plans to involve human participants for purposes of research is required to obtain approval from [SUA's IRB](#) (Institutional Review Board). SUA's IRB is an administrative body designed to safeguard the welfare and rights of human participants in research or class projects conducted under the auspices of Soka University of America. The IRB has the authority to approve, disapprove, or require modifications to research proposals. Their first deadline is typically the first Friday of December.

Budgeting and Funding

Each LC is provided with \$2000 in course development funds. This can be used for field trips, honoraria, class materials, and more. This said, LCs that anticipate using more than \$1000 of their budget must submit a preliminary budget with their syllabus and course information as part of the 24 October deadline. This will allow the LC Coordinator to ensure the efficient use of funds and to distribute unused funds to courses in need of further resources. If a preliminary budget is not submitted, the default course budget is \$1000. Faculty are encouraged to contact Janna Skye (jkskye@soka.edu) and apply for an expense card. Expense cards can be used to make purchases during travel and can streamline reimbursement.

Supplemental Funding: LC courses can apply for up to \$3500 in addition to their \$2000 budget, for a total maximum course budget of \$5500. Supplemental funding is intended to support local travel, such as overnight stays, to support course learning. Supplemental funds are not available to NFF grant holders. Detailed budget requests along with explanations for how the intended activities support course learning goals are due to the LC Coordinator by 5pm on Friday, 08 November, to be evaluated by the NFF grant committee. Supplemental funding is competitive and subject to availability.

Faculty should overestimate some budget items to provide some slack in the case of unexpected expenses or increases. Requests to provide further compensation for classes over their budget will not be considered; faculty members are required to pay for budget excesses.

The Nieves Family Foundation (NFF) Travel Grants

NFF Travel Grants are intended to support field-based, experiential learning for LC courses, supporting travel beyond southern California. The grant is intended to cover a range of travel-related course expenditures, including airfare, ground transportation, lodging, meals, honoraria, admissions, and more. NFF grants are available for up to four LCs each year, subject to a competitive application process overseen by an NFF Grant Review Committee, consisting of the LC Coordinator and at least two faculty members not applying for additional LC funding. The maximum total course budget is \$30,000. Expenses beyond this are the responsibility of the instructor. No requests for additional funding will be considered. Students may not contribute personal funds to any essential LC expenses.

Before applying for the NFF Grant, interested LC faculty and students must first submit a [Statement of Intent](#) to the LC Coordinator by Monday, 07 October. This will allow for early input into prospective travel applications, and will provide a sense of the number of applications for a given session. By the end of that week, Friday, 11 October, prospective NFF Travel Grant applicant courses must post on the LC Bulletin Board, noting the course topic and how students can apply. Although students that have already contributed to planning may expect to have a seat in pre-registration (even if their course does not receive the grant), open applications for remaining seats allows for greater transparency and more diverse classes. Failure to post on the Bulletin Board and to make seats available to other interested students may result in the denial of an application.

Applications are due by 5pm on Wednesday, 16 October through the NFF Application Form. Late applications will not be considered. The grant process is highly competitive, requiring an overview, rationale for travel, detailed budget, a list of prospective meetings and activities, and tentative syllabus. More detail will enable the grant committee to assess applications. Applications will be assessed by the NFF Grant Review Committee, evaluated in terms of clear and reasonable budgeting, academic rigor, clear engagement with LC Learning Objectives and SUA's mission, and with some consideration given to a balance of topics/regions. Applicants should explain how the grant would enable them to achieve learning goals compared to if they remained on campus. The NFF Grant Review Committee will meet within 72 hours, using a [common rubric](#) to evaluate the

applications, providing notices of acceptance, minor revisions, resubmission, or rejection to the instructor within five days of the original submission. Although there may be up to four NFF Grants, there could be fewer depending on the number and quality of applications.

Applications must include the name of an eligible faculty instructor, as well as the names and student IDs of students that helped to develop the proposal and wish to be pre-registered (students with holds or that are associated with multiple applications will be denied). Before being approved, NFF classes must have 12 students and at least 1-3 students on the waitlist (in case one student cannot be pre-registered or cannot participate). Faculty and students must also provide emergency contact information. Applications should demonstrate concern for safety, health, visas, and communication. Special attention should be given to explaining why local destinations are insufficient for achieving learning objectives. In other words, applications must provide a compelling justification for travel. They should also speak the instructor’s suitability for the proposed travel, such as experience and language proficiency, and where relevant, student suitability as well. In terms of safety, applications should consider potential immunizations and student health, as well as communication within the class and concern for safety after working hours while abroad. Consideration should also be made of potential IRB approval and ethics for engaging with local respondents.

The draft syllabus should contain learning objectives, course policies, core themes, readings, and a proposed itinerary. LCs may only spend a total of 12 days off campus, including travel time. While it is not expected that meetings will be confirmed before one receives the grant, some sense of the activities and meetings the class will engage in is required. Preference will be given to applications with detailed, realistic schedules, and activities that speak to course objectives. Potential activities include interviewing experts; meeting community and professional organizations; visiting important historical sites or knowledge areas such as universities, museums, archives, and laboratories; cultural immersion and ethnographic observation. We want applications that provide a sense of advanced logistical work, reassuring the Committee that this will be a successful LC.

Budgets must be highly detailed. For airfare, it is insufficient to list the price of one single fare from a travel website. Rather, evidence such as screenshots should be provided for the entire class, especially with estimates provided by group booking offices and including potential baggage fees, providing a clear sense of this major budget expense. For lodging, classes may consider hotels, hostels, AirBNB, and Booking.com. To help make for accurate budget estimates, courses could consider booking refundable lodging early on. Per diem and incidental expenses should be clearly explained based on local rates. Budgets should also include prospective visa and vaccination costs, ground transportation, and any other major outlay.

Successful NFF Travel Grant recipients must then provide accurate passport information for all participants using the [Group Travel Template](#) (all passports must expire at least six months after the day of arrival in the destination), trip waivers, evidence of progress in terms of visas and vaccinations, and revisions to the budget and syllabus required by the NFF Grant Committee. This must be provided to the LC Coordinator within one week, and must be submitted before travel booking can commence.

Concluding and Celebrating

The Learning Cluster Fair is held on the last instructional day of the Winter Block (January 29, 2025), time and location to be confirmed. This event allows students and faculty to share their experiences and insights with the wider campus community. LCs that have received Travel Grants or supplemental funding are required to participate. Participation for all other LCs in the Fair is strongly encouraged. To ensure that we can provide appropriate support (e.g., tables, audio-visual), Janna Skye will contact instructors at least one week before the Fair.

The 2025 January Winter Block officially ends on Wednesday 29 January. Final grades are due to the register on Monday 03 February, the same day that the Spring semester begins. Faculty should work to complete reimbursement requests as soon as possible, and can ask Janna Skye for help with Workday.

Frequently Asked Questions

Q: How do faculty and students learn more about Learning Clusters?

A: This Handbook provides an explanation of the LC program, with additional materials available through links and on Brightspace. Faculty and students are encouraged to consult syllabi from previous LC courses through the Registrar on [Learn](#), and to approach experienced LC instructors. The LC Coordinator offers orientation sessions for students and faculty. Faculty and students are also encouraged to contact the LC Coordinator (sbarter@soka.edu), who will provide multiple orientation sessions for students and faculty.

Q: What if the faculty member I want to work with is not on the roster of LC Faculty?

A: Only faculty scheduled to teach a Learning Cluster can teach a Learning Cluster. The Dean of Faculty tries to post the roster as soon as possible, with the number of faculty based on expected enrollments and the specific faculty members determined by their teaching obligations as well as needs across the curriculum. While we encourage faculty and students to think about potential LCs early on, they should not engage in advanced planning until the teaching roster has been confirmed.

Q: How do LCs relate to my other courses?

A: LCs are part of the General Education curriculum rather than Concentrations. While instructors often offer LCs in areas where they possess expertise, LCs provide opportunities to branch out and follow student interests.

Q: How much funding is available to each LC?

A: Each LC course is allocated a \$2000 budget. Instructors may request further funding by submitting a supplementary budget request, with a maximum of \$3500 additional funding. Finally, NFF grants are available for up to \$30,000 to enable travel beyond southern California.

Q: When should I start planning an LC course?

A: LCs typically take shape in the Fall semester, developing through collaboration between faculty and students. This said, some LC courses take shape earlier, especially those intending to apply for the NFF grant.

Q: How does preregistration work?

A: Students committed to a particular LC will provide their name and student number to the instructor, who adds this to the [LC Registration Form](#) as part of 24 October deadline. Pre-registration is required for travel grant recipients (necessary for booking transportation), and is recommended for students that helped to develop a LC course and for third-year students taking an optional third LC course.

Q: How are Learning Clusters graded?

A: Students gain four credits from an LC, with contact hours and workload commensurate with a course taken during regular semesters, but condensed into three weeks. They are evaluated in ways consistent with other classes.

Q: What is the Learning Cluster Fair?

A: The LC Fair allows students and instructors to exhibit what they learned to the campus and the wider community. On the final day of the Winter block, the campus comes together to experience the educational output of LC classes. This may include performances, artistic displays, videos and photos, posters, games, skits, or other activities that give a window into LC classes. Participation is required for LCs that received NFF Travel Grants or supplemental funding. All other LCs are strongly encouraged to participate.

Q: Does my LC require Institutional Review Board (IRB) assent?

A: If class activities or assignments involves human research subjects, please consult with [the SUA's IRB](#). This can protect the university, including its students, as well as ensure high ethical standards with human participants.

Q: How do I provide honoraria for guest speakers?

A: All honoraria must be approved by the LC Coordinator. Honoraria are capped at \$200 per session for virtual appearances and \$300 for in-person appearances. Amounts in excess of these must be justified and approved by the Dean of Faculty, as per the [SUA Honoraria Policy](#). Preparing honoraria involves two steps: 1) Ask your speaker to fill out a tax form, [W9 for US-based speakers](#) or [the W-8BEN for international speakers](#). 2) Review [the Honorarium Policy](#) and submit [the Honorarium Request Form](#). You will be required to upload the completed W-9 or W-8BEN to submit the Honorarium Request Form. The Dean's Office will complete the submission in Workday. Honoraria will be paid after services have been rendered. Please contact Janna Skye (jskye@soka.edu) with questions.

Q: Are faculty required to fill out a field trip request form, as in other classes?

A: All LCs intending to conduct off campus activities should consult the [SUA Field Trip Policy](#). Instructors must complete the [Field Trip Request Form](#) and submit completed student travel waivers to Teri Chester (tcchester@soka.edu) as early as possible, with a minimum of three days' notice.

Q: Are students allowed to arrange their own transportation and drive their cars?

A: Students may arrange transportation in consultation with the instructor. Please refer to the [Lyft Concierge form](#) in LC Transportation Policy section. Students can use personal vehicles and instructors are permitted to drive personal vehicles within their driver's license class limits, reimbursing mileage at [current University rates](#).

Q: What if we want to take a last-minute field trip?

A: Field trip requests must be submitted at least three work days before the trip. Field trip requests with less than 72 hours' notice cannot be accommodated, since approval requires the assent and signatures of several offices. Time is required to ensure the trip is appropriate as well as to arrange transport and food.

Q: Can we use Uber/Lyft for field trips?

A: Yes, especially Lyft, with which SUA offers the Concierge service for all field trips. Faculty can request access to the Concierge account through Janna Skye (jskye@soka.edu), and then link their Lyft App to be paid directly by the university. Further details are available on [the Lyft Concierge document](#).

Q: What happens if we request meals from the cafeteria for a field trip but no longer need them?

A: To cancel requested meals, instructors must communicate with the cafeteria and through Teri Chester, providing adequate time for cancelation. Otherwise, all meals must be picked up from the cafeteria as agreed. Failure to pick up meals once they are prepared will result in the LC course budget being charged for the wasted food.

Q: Which expenses can faculty expect students to pay for?

A: To ensure equal access, students may not contribute persons funds towards required LC activities. Exceptions include textbooks and small, optional expenses such as snacks and souvenirs. This applies to all LCs, whether on campus or traveling abroad.

Q: Is it possible for the university to issue a pre-paid card for necessary expenses to make reimbursement easier?

A: LCs involving off-campus travel can apply for SUA Corporate [expense cards](#). Faculty should consult with Janna Skye (jskye@soka.edu) for more information; arrangements should be made by 22 November to ensure adequate processing time.

Q: Can faculty use the leftover cash advance toward other expenses?

A: Leftover cash advances must be returned and cannot be used for expenses that were not previously approved.

Q: How do I apply for the Nieves Family Foundation (NFF) grant?

A: Applications require a draft syllabus, detailed budget, list of students, justification for travel, and a tentative list of meetings/ activities. Instructors are encouraged to ask previous NFF recipients or the LC Coordinator for advice. Faculty members may not receive a NFF grant in consecutive years. Applicants are due in mid-October, with a committee evaluating applications and sometimes requesting modifications or additional information.

Q: What happens if my class does not receive the NFF grant?

A: We expect that no class applying for an NFF grant is focused only on international travel. Faculty and students should be interested in the topic and committed to its educational value regardless of where it takes place. If a class is not awarded an NFF grant, it is assumed that a class on a similar topic will continue locally. Education is the goal, not travel and tourism, and those interested in a class only if it travels should reflect on this.

Q: How do NFF grant awardees purchase airline tickets?

A: Ticket prices tend to increase as travel dates approach; as a result, it is recommended that airlines costs estimated in applications reserve 5-10% for potential price increases. In applications, be aware that single ticket estimates from travel websites may not reflect the actual travel costs for groups (it is common that a certain fare rate has limited seats available) and may exclude baggage or other fees. Tickets may only be purchased after the Registrar's office approves pre-registration lists, usually in late October, so classes have a full confirmed roster, and only after the LC Coordinator has approved potential revisions and [receives student passport information](#). Applicants are encouraged to contact airlines, especially group bookings, to get a sense of the policies of specific companies. Some airlines may allow refundable deposits quite early, or may allow one to purchase tickets early on (i.e., when the NFF grant has been approved), but then to provide names and passport information weeks later (i.e., after registration). To purchase tickets, faculty may work through Janna Skye and the SUA travel agent, or may purchase tickets themselves to be reimbursed.

Q: When should an NFF Grant LC depart for travel?

A: It is recommended that international travel take place at the end of the first week of the Winter Block. It is expected that several on-campus sessions take place prior to travel to provide foundations and framing for relevant course concepts and empirics. Classes may only spend a total of 12 days, including travel time, off campus. As per the waiver, students are not permitted to travel separately and meet the class at the destination, as faculty and students must travel together, and the student in question would be unable to benefit from pre-departure classes, and would violate the maximum 12 days off campus. Exceptions will be made only in truly exceptional circumstances in consultation with the LC Coordinator and Dean of Faculty.

Q: How do we get relevant vaccinations for international travel? How much do they cost?

A: The cost of vaccinations, if required, must be incorporated in the Travel Grant Application. Faculty and students are responsible for reviewing [CDC](#) and [State Department](#) guidelines related to the country(ies) they will visit. Conditions in a given country can change rapidly, and may vary depending on the region of a country. Students will be fully reimbursed before the end of the winter block, given that the costs have been included in the proposed budget. The SUA Study Abroad Office recommends [vaccinations from Walgreen's](#), which offers many travel immunizations through Wellfleet (SUA student medical insurance). Vaccinations may also be available through Saddleback Memorial Hospital, South Coast Medical, and the Soka Health Center, please reach out with inquiries. Another option is [Passport Health](#), a clinic in Laguna Hills that specializes in travel. Finally, there is the [OC Healthcare Agency](#) in Santa Ana; OCHA requires appointments, proof of Orange County residency, proof of travel, and a completed [questionnaire](#). Please see the [OCHA vaccination price sheet](#).

Q: Who is responsible for the cost of visas and related immigration issues?

A: Faculty and students are expected to factor these expenses into their budgets and are responsible for obtaining proper travel authorization, which includes the cost of the visa as well as potential travel, mailing, or online expenses to obtain it. Faculty and students will be reimbursed provided that relevant costs have been included in the budget. Remember, different passports will have different visa requirements; it is recommended that students look into the requirements for their country in the destination country. Third-year students may also have to factor in Study Abroad visas, and passports must be valid for at least eight months from the time of application (many countries deny entry to persons whose passports expire within six months of proposed entry). Participants should also ensure that they have relevant reentry documents, such as student visa documentation, Green Cards, and other information.

To pay for costs associated with obtaining visas, faculty may request a cash advance and provide funds to the student (who must sign for receipt of funds and provide receipts), or the student may be reimbursed by the faculty member, who then seeks reimbursement via Workday with appropriate documentation.

Q: Can I obtain a cash advance for my trip?

A: As instructors must pay for various expenses once in the field, SUA supports cash advances of up to \$5000, although larger advances are available if instructors provide a compelling case.

Q: How do I plan and pay for meals during international travel?

A: Per diems may not exceed \$50 US per person, per day, including incidentals and gratuities. Details are provided through the Dean of Faculty's [Travel and Reimbursement Policy](#). It is likely that some meals in groups can be covered by expense cards or be paid by faculty to be reimbursed. Other meals may involve distributing funds (including cash advances) to students for multiple meals, then managing budgets in the field; students receiving per diem allowances must sign [the per diem document](#) acknowledging receipt of funds. Faculty are encouraged not to disburse all per diem funds to students at once, in case money is lost, funds are spent too quickly, or an unexpected number of group meals are covered by the instructor. Per diems given to students are allotted for food and drink, and may not be used to pay for souvenirs or other personal items. Remember, breakfasts may be included in hotel rates. Some lodgings have kitchens, allowing faculty to purchase groceries, which can lower meal costs and make morning departures more efficient. Finally, faculty and students are strongly encouraged to obtain itemized receipts whenever possible, although per diems will be reimbursed without itemized receipts provided students have signed off acknowledging receipt, and per diem costs are within the maximum as well as planned for in the budget proposal.

Q: May I obtain additional funding beyond the NFF Grant?

A: NFF Grant recipients may not request additional funds from SUA under any circumstances, and like all LCs, may not request contributions from students. Provided they do not undertake fundraising efforts on campus, classes may seek external funding sources. Additional funding cannot be used to cover expenses already being paid for by the NFF grant.

Q: Do you have any additional advice for a successful LC?

A: Consider using WhatsApp or a related platform that can be used with internet or mobile data, perhaps create a class WhatsApp group while in the field for the sake of communication. Please keep in mind that while off campus, you are ambassadors for SUA. Behave yourselves. Be informed, engaged guests. Dress appropriately. Consider having course materials, the instructor's name card, and perhaps some small gifts for important meetings.

Relevant Forms and Documents

The following forms and supporting documents are available on the Brightspace LC page, and have been hyperlinked within this document (URL pathways may change, these can also be accessed via Brightspace).

Relevant for all LC courses

[LC Bulletin Board](#), Brightspace

[LC Registration Information Form](#) (due 24 October)

[Field Trip Request Webform](#) (for any LC class involving off-campus travel)

[Academic Field Trip Waiver of Liability and Hold Harmless Agreement](#) (for any off-campus travel)

[Packed Meal Request Form](#) (for any LC class requesting Bistro packed meal)

[Learning Cluster Budget Template](#)

[LC Reimbursement Worksheet](#)

[Expense Card Application](#)

[How to Reconcile an LC Expense Card](#)

[How to Create an Expense Requisition in Workday](#)

[How to Create an Expense Report for Reimbursement in Workday](#)

[How to Use the Lyft Concierge Feature](#)

NFF Travel Grant Forms

[NFF Travel Grant Application Form](#)

[NFF Travel Grant Application Rubric](#)

[OCHA Immunization Price List](#)

Other Relevant Documents

[Soka Field Trip Policy](#)

[Faculty Travel and Reimbursement Policy](#)

[SUA Honorarium Policy](#)

[LC Travel Grant Writing PPT](#) (created by Elena Powell and Carolyn Millar, Writing Center)

[State of California Driver's License Requirements for Van Rentals](#)

[LC Library Resources](#) (created by Jenn Tirrell and Kelly Wilson, Instructional Librarians)

[List of all SUA Learning Clusters, 2002-24](#)

[Other Useful Links](#): Previous Handbooks, SUA news, promotional materials, LC class videos, scholarly research