Learning Cluster Handbook
2026-2027

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Overview

This Handbook seeks 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 evolving policies. For the sake of convenience, it contains links to various forms and policies; of course, links may change, and faculty should be familiar with policy documents found via Portal and the LC Brightspace page.

Learning Clusters are a signature feature of the SUA curriculum. Offered annually during the January Winter Block, LCs are intensive 4-credit courses held over the 3.5-week January block. All 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, depending on Study Abroad and personal preference. LC classes are small, providing a rich, responsive learning environment. Currently, **all** LCs are capped at 11 students. Faculty may not increase enrollment caps to accommodate waitlisted students.

Guided by a faculty member, LCs are intended to tackle real-world issues in creative ways. Rather than traditional catalogue courses, most LCs are created anew each year through faculty-student collaboration. LCs are immersive, with daily contact. Students are enrolled in only one class, enabling work beyond traditional classroom environments, including regional and global travel. LCs speak to SUA's mission "to foster a steady stream of global citizens committed to living a contributive life."

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

Schedule and Key Dates

02 September, Wednesday: What is a Learning Cluster? 445-530pm, Pauling 216

- Mandatory session for first-year students, recommended for new faculty, open to the campus community.
- Students provided access to Learning Cluster Brightspace page.

18 September, Friday: Third-Year Student Statement of Intent 5pm

- Third-year students that intend to take a Learning Cluster must confirm their intent to enroll. Those that do so are encouraged pre-register for a class by the 28 October deadline. Third-year students who do not pre-register will still be able to register for LCs during the registration period, but after first and second-year students.

23 September, Wednesday: Learning Cluster Update 1210-1250, Maathai 207

- A brief overview and program update, followed by questions and answers.
- Recommended for new faculty and those considering travel grant applications. Open to the entire campus community.

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

09 October, Friday: Travel Grant Statement of Intent, 5pm

- Groups planning to apply for the NFF Travel Grant as well as SIGS travel LCs must submit a Statement of Intent. Required information includes the proposed instructor, topic, location and purpose of travel, and list students integral to early planning that intend to pre-register (but not more than six, see below). The statement of intent allows opportunities for the NFF Travel Grant Committee to have a sense of the number of applicants and provide early feedback.
- Groups applying for the NFF Travel Grant and SIGS travel LCs must 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 course, it is essential to ensure a transparent and fair process. Faculty should ensure that at least 6 of the 11 seats (and the required 1-3 students on the waitlist) are filled through an application process, featuring diversity among students.

23 October, Friday: Travel Grant Application Deadline (SIGS & NFF), 5pm

- Travel grant applications must include an overview, rationale for travel, detailed budget, potential meetings and activities, list of students (w/ student ID #s), 1-3 waitlisted students, and tentative syllabus.
- Students must ensure that all financial and academic holds are removed from their accounts. This is their responsibility; it is recommended to double check just before pre-registration.
- Students must ensure that their names are not attached to any other LC, even on a waitlist, otherwise they will be dropped from all LCs during pre-registration.
- The NFF Travel Grant Committee will deliberate quickly, and will work to notify applicants within a week of submission.

28 October, Wednesday: Registrar Deadline: Course Information and Pre-Registration, 5pm

- All LC faculty, including SIGS LCs and 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 slot (morning, afternoon, other)	Preferred classroom (with alternative)
List of students for pre-registration (name & ID)	1-3 waitlisted students (required for all travel LCs)

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

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

- Students: All financial and academic holds must be removed, otherwise you cannot pre-register. Students wishing to pre-register are expected to watch for holds carefully. 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 filled during the regular registration period (16-20 November).
- Once faculty provide a list of pre-registered students, that list is final. Faculty should only submit the list when it is complete and may not submit updated lists to the Registrar. Faculty must ensure that students are aware that they will be pre-listed.
- NFF awardees: Potential revisions or clarifications and a confirmation of passport information due 31 October; once approved and with a full roster of pre-registered students, faculty may purchase tickets.

06 November, Friday: Deadline for Supplemental Budget Requests, 5pm

- LC courses with additional budgetary needs must submit a Supplementary Budget Request. Required information includes the amount requested, a description of the activity, and a breakdown of the budget. Consider how the course might proceed with and without the funds. Supplementary budget requests can be for a maximum of $3500, bringing total course budgets to up to $5500.

16-20 November: Registration Week

- Scheduled registration week for Winter Block LCs as well as Spring semester courses. Students not pre-registered will sign up for remaining seats in the following order: Second-year, first-year, and then remaining third-year students.

27 November, Friday: Deadline for Various Budget Requests, 5pm

- Deadline for all NFF-funded LCs to submit requests for airport transfers and payment office materials (i.e., cash advances and payments required from SUA purchasing director).
- Deadline for LC instructors to request an expense card (Janna Skye, jskye@soka.edu).

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

- LC students must be on campus for the first day of class.

12 January, Tuesday: Enrollment Deadline

- Final day for students to add or drop courses (without receiving a 'W') or change grading bases to Pass/No Pass (with instructor approval).

18 January, Monday: Martin Luther King Jr. Holiday

03 February, Wednesday: LC Fair, End of Winter Block Classes

- Learning Cluster Fair, Performing Arts Center and Black Box Theatre, 1-4pm.
- All LCs must participate, sharing their learning experiences with the campus community.

08 February, Monday: Final LC Grades due to the Registrar's Office

01 March, Monday: LC Reimbursements Due, 5pm

Creating a Learning Cluster

Specialized, intensive courses taking place between regular semesters have long been staples of liberal arts education. Other liberal arts universities refer to 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. In 2007, all LCs shifted to the January block, and the first travel grants were offered in 2009. SUA offers approximately 26 LCs annually, with classes capped at a dozen students. In SUA's first 20 years (2002-2022), we offered over 600 LC classes. A full list is available here (click here for the Excel version). The public-facing LC webpage is available here.

Just as LCs feature a vast range of topics and approaches, so too do their origins vary. The common element is that they are not catalogue courses, varying from year to year and crafted through student-faculty collaboration, although the degree of student input and faculty oversight varies. Some LCs start with students, who develop a topic and identify a faculty member, who in turn oversees the syllabus, budget, and evaluation. Such courses involve mutual learning, with faculty typically outside of their comfort zone. Other LC courses start with faculty, 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.

Although some evolve even earlier, especially NFF applicants, LC courses generally 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 by the Dean of Faculty. On campus, students should discuss ideas and approach faculty members. Discussions are often spurred by the orientation session for first-year students and the optional session for the entire campus. As LCs 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 LC Brightspace 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 with ideas for potential courses can start a new discussion thread or 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.

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 planning is required to ensure safe, enjoyable activities, whether international travel or a local trip. All trips must follow the SUA Field Trip policy. LC field trip policies include the following:

- All students participating in off-campus field trips must complete the Field Trip Risk Acknowledgment and Safety Agreement. 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 persons beyond enrolled students and the instructor (other students, alumni, staff, or faculty) requires prior approval by the Dean of Faculty and LC Coordinator. Such 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 three 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. Payment for meals can be made by the instructor or else students signing off on funds received through the Cash Disbursement Form. Daily per diem and incidentals may not exceed US $60/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). Faculty and students are permitted to use personal vehicles, provided they provide a valid driver's license and vehicle registration, to be reimbursed based on mileage (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 or multiple honoraria to one speaker must be 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 Institutional Review Board (IRB). 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.

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 28 October deadline. This allows the LC Coordinator to ensure the efficient use of resources, distributing unused funds to courses in need of further resources. If a preliminary budget is not submitted, the default course budget is $1000.

Expense cards can be used to make purchases during travel and can streamline reimbursement. Faculty are encouraged to contact Janna Skye (jskye@soka.edu) for information.

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 SIGS LCs or 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, 06 November through this form, to be evaluated by the NFF grant committee. Supplemental funding is competitive and subject to availability.

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

Nieves Family Foundation (NFF) Travel Grants

NFF Travel Grants are intended to support field-based, experiential learning through travel beyond southern California. Grants are intended to cover varied travel-related course expenditures, including airfare, ground transportation, lodging, meals, honoraria, admissions, supplies, 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. The maximum total course budget is $35,000. Expenses beyond this are the responsibility of the instructor. No requests for additional funding will be considered.

Before applying for the NFF Grant, interested LC faculty and students must first submit a Statement of Intent. This will allow early input for prospective travel applications and provide a sense of the number of applications for a given session. Within one week, NFF travel 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 bring 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 Friday, 23 October through the NFF Application Form. Late applications will not be considered. The grant process is rigorous and competitive. 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. The NFF Grant Review Committee will provide notices of acceptance, revisions and 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.

The Application Form will require the name of the faculty member, course title, proposed location(s), rationale (why is travel necessary/preferable?), and how the course will proceed without a travel grant. The form also requires applicants to link their proposed class to the LC Learning Objectives (they may write 'see PDF' if this is included in a single PDF application document, to avoid extra work). The form also requires the name and student ID numbers of 11 students and 1-3 waitlisted students. Please ensure that students are aware that if they are associated with multiple LCs, they will be dropped, and if they have holds on their accounts, they will be dropped (including waitlists). Applicants must then upload a draft syllabus and budget.

Draft syllabi should contain learning objectives, course policies, core themes, readings, safety plan, and a proposed itinerary. LCs may only spend a total of 12 days off campus, including travel. While it is not expected that meetings will be confirmed before receiving the grant, some sense of expected activities and meetings 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 advance logistical work, reassuring the Committee that this will be a successful and rigorous LC. The syllabus must include a safety plan, listing emergency contact information, noting the instructor's suitability for travel (experience, language fluency), and discuss local health information (immunizations, hospital locations, etc). Faculty must ensure that students have health insurance that will cover the destination sites (note that international students are no longer required to subscribe to SUA-issued insurance). The syllabus should also discuss student visa arrangements.

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 other outlays.

Successful NFF Travel Grant recipients should collect 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), and confirm with the LC Coordinator that all passports have been seen and are valid. Trip waivers, evidence of progress in terms of visas and vaccinations, and revisions to the budget and syllabus required by the NFF Grant Committee should be provided to the LC Coordinator within one week, and must be submitted before travel booking can commence.

Click here for a sample proposal from a previous NFF-funded class. Please do not take this as a strict model, as policies change, topics vary, and conditions vary by country.

SIGS Learning Clusters

Two Learning Clusters are supported each year by the Soka Institute for Global Solutions (SIGS). Typically involving travel, SIGS-supported LCs are formed based on SUA's relationships with partner organizations, with topics and logistics developed in

coordination with these partners. SIGS will determine which faculty and topics will be supported, and may involve faculty travel in consecutive years, unlike NFF grants. SIGS-supported LC are provided with input by the NFF Grant Committee and are subject to the same oversight, academic rigor, sound logistics, and student safety as all travel Learning Clusters.

Celebrating and Concluding: LC Fair and Final Submissions

The Learning Cluster Fair is held on the last instructional day of the Winter Block (03 February 2027), from 1-4pm in the Performing Arts Center and Black Box Theatre. Participation/attendance is mandatory for all classes and LC Faculty. 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 2027 January Winter Block officially ends on Wednesday February 3rd. Final grades are due to the register on Monday 08 February, the start of the Spring semester. Faculty should work to complete reimbursement requests as soon as possible, and can ask Janna Skye for help with Workday. LC Reimbursements are due within one month of the end of the Winter Block (01 March).

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 Learn, and to approach experienced LC instructors. 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: When should we start planning a Learning Cluster?
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: What if the faculty member I want to work with is not on the LC Faculty roster?
A: Only faculty scheduled to teach a Learning Cluster can teach a Learning Cluster. The Dean of Faculty will confirm the roster as soon as possible, with the number of faculty based on expected enrollment and the specific faculty members determined by their teaching obligations alongside curricular needs. 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 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 28 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 do Learning Clusters relate to my other courses?
A: LCs are part of the General Education curriculum. While instructors often offer LCs in areas where they possess expertise, LCs provide opportunities to branch out and follow student interests. In these intense classes, students should anticipate about three contact hours per day across about 15 days of instruction, with about two hours outside of class (reading, planning, research, writing, and creating) for every hour of in-class time, a workload commensurate with full course load in a regular semester.

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 $35,000 (total budget) to enable travel beyond southern California.

Q: How are Learning Clusters graded?
A: Students are evaluated in ways consistent with other classes. Completing an LC earns students 4 credits. Contact hours and workload are commensurate with a course taken during regular semesters, but condensed into three weeks. Students should expect about three contact hours per day across 16 days of instruction, with about two hours outside of class (reading, planning, research, writing, and creating) for every hour of in-class time.

Q: Is it acceptable to miss a class or two, especially to book cheaper travel back to campus in January?
A: No. While instructors have some discretion, the nature of Learning Clusters require that students and faculty are on campus on the first day, ready to go. Learning Clusters are condensed, 3.5-week semesters for 4 credits. With three contact hours per day, missing one day is the equivalent of missing one week of a 3-credit course. Not only does this sacrifice valuable class time in a condensed semester, arriving late also deprives students of the ability to add/drop their course, and may impact their full-state student status. Students and faculty are expected by the university to be in class and in person on the first day of the LC semester. Aside from emergencies linked to health or winter travel, no exceptions will be made. Faculty that must miss an in-person class due to an emergency must complete the Faculty Absence Form, and students must complete the Short-Term Leave of Absence form.

Q: Is it acceptable for third-year students to miss a class or two at the end of the LC Block, so they can do an LC and arrive on-time to Study Abroad?
A: See above. Faculty do have some discretion, and the last day or two are sometimes less pressing than the first day or so. Faculty may be able to accommodate third-year students missing one day of instruction, and here, students must complete the Short-Term Leave of Absence form. Generally, this is not encouraged, and is certainly not permitted for more than two days before the end of the Winter Block. Again, missing one day of LC classes is the equivalent to one week of a regular semester. It is essential that students be there, in person, to learn and contribute. This is especially important for writing final class projects and participating in the LC Fair.

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 (a Wednesday), 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 all LCs class and faculty; faculty not participating in the LC Fair may be ineligible for travel funds in subsequent years.

Q: Does my LC require Institutional Review Board (IRB) assent?
A: If class activities or assignments involves human research subjects, please consult with 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, as per the SUA Honoraria Policy. Amounts in excess of these or one speaker obtaining multiple honoraria must be approved by the Dean of Faculty. 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) 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: What if we want to take a last-minute field trip?
A: Field trip and cafeteria meal 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, process waivers, as well as to arrange transport and food.

Q: Are faculty required to fill out a field trip request form, as in other classes?
A: Instructors must complete the Field Trip Request Form, with a minimum of three days' notice. Students must sign the Field Trip Risk Acknowledgment and Safety Agreement. All LCs intending to conduct off campus activities should consult the SUA Field Trip Policy.

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 the 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: Can faculty rent and drive larger, 12 person vans?
A: Yes, provided that they are rented by Soka University of America (not privately) and the faculty member is the sole driver. Instructor must provide copy of a valid driver's license and attest that they have no driving-related convictions during the last 5

years. The faculty member must understand the challenges associated with driving a larger vehicle, including braking, blind spots, and vehicle height (i.e., in parkades). Although faculty may rent vans of up to 15 persons capacity, a maximum of 12 (11 passengers and a driver) may be transported.

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 transportation is appropriate for field trips?
A: Of course, it depends where you are going. As noted, it is acceptable to use personal vehicles (students and faculty), provided that driver's license and insurance are provided to the LC Coordinator on the field trip request form.
For those not wishing to drive personal vehicles: For field trips going to a single site, especially under one hour's drive (within Orange County), a rideshare may be more cost-effective and easier to plan than a chauffeured van. However, field trips involving multiple stops and for longer distances are appropriate for chauffeured vans. As stated above, chauffeured vans may be especially expensive for overnight travel. For faculty not wishing to use personal vehicles, and since we do not allow faculty to drive vans with more than 10 total people, special funding may be made available to cover this additional cost.

Q: What sort of meals are appropriate for field trips?
A: First, students should communicate their dietary restrictions to the faculty member, and faculty members should work to be aware of students' dietary needs.
Class meals at restaurants represent a major expense, each year totaling thousands of dollars. To help save costs, field trips should make use of Bon Appetit, requesting breakfasts and lunches for field trips. Almost all students are already paying for meals in some way through the meal plan. There are some times and occasions where a meal out with students is acceptable: 1) For longer trips, it is acceptable to dine at restaurants, especially for dinner, since meals from the cafeteria may no longer be safe to consume. 2) It is also acceptable to pay for meals when there are sound pedagogical reasons (i.e., cuisine links to class interest in culture). 3) Dining out may also be necessary for meetings, sitting down with key figures or as part of a community event. Faculty are encouraged to ask the LC Coordinator when in doubt. When eating at restaurants, classes are encouraged to make cost-effective decisions, enabling an efficient use of LC funds and respecting our donors.

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 cancellation. 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 optional expenses such as snacks and souvenirs. This applies to all LCs, whether on campus or abroad.

Q: What lodging is appropriate for overnight trips?
A: This depends on what faculty and students agree is appropriate, as perceptions of safety and comfort vary by person, and depends on the location of the field trip (in another country, camping, or at a hotel). There are some more intuitive rules, such as doors having locks or faculty having separate accommodation. Beyond this, students and faculty should communicate with each other, as your preferences should not be assumed.

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 late 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: What can we do to ensure safe educational experiences in our LCs?
A: All classes are expected to consider safety, especially those going on field trips, and all classes gaining supplementary or NFF funding must provide a safety plan as part of their application. This includes knowledge of student health issues, student health insurance, nearest medical facilities, and emergency phone numbers.

Q: Do students need insurance for travel?
A: Yes—all students considered for off-campus travel must have appropriate insurance. Students should/will already have insurance for US-based travel, either through their parents, the Soka student health insurance plan, or through private companies. For travel abroad, faculty are expected to ensure that students have insurance that will cover them in the destination country. Soka students who are enrolled in the Soka student health insurance plan have access to both AES and GeoBlue coverage when traveling outside of the United States. Students enrolled in Soka's health insurance should review the information provided for AES and GeoBlue before traveling internationally. This international coverage is available only to students enrolled in the Soka student health insurance plan. Students not enrolled in the Soka student plan must arrange for international travel insurance before airplane tickets can be booked.

Q: Which faculty are eligible for supplementary travel funding or NFF grants?
A: All faculty teaching Learning Cluster, regardless of rank, are eligible for additional course funding, with the following restrictions. First, in the interests of ensuring opportunities for more persons (and not burning out our more adventurous faculty), faculty may not be awarded NFF travel grants in consecutive years. Second, faculty must have a record of responsible use of university funds, including a demonstrated ability to use Workday.

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. Applications 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 travel. Faculty and students should be interested in the topic and committed to its educational value regardless of location. If a class is not awarded an NFF grant, it is assumed that the class will continue locally on a similar topic. Education is the goal, not travel and tourism, and those interested in a class only if it travels should reflect on this.

Q: Why do courses involving international travel require waitlists with 1-3 students? How do these work?
A: It is essential to have a list of confirmed students ready for international travel, enabling the purchase of airline tickets and potential visas. Students are often dropped during pre-registration because they have holds on their accounts or because their names are associated with multiple LC courses, and sometimes students step out for visa-related issues. Thus, all classes involving international travel must have waitlists when applying for funds, and the waitlist must be active through at least pre-registration, potentially even after during registration and in the lead-up to courses. Students should be aware that while on a waitlist, they may not enroll in another LC, as the registrar's software can only have one course for each name. Thus, the students on waitlist for international travel should be those dedicated to the class, as they have fewer registration options for other preferred courses. One option is to invite third-year students that do not need a third LC course to be on waitlists, as they are especially experienced so may step into a course if someone drops, but may not need to take an LC. In the event that a student is dropped or is forced to withdraw, the spot must go to the next student on the waitlist. If for some reason the waitlist empties and a course has a free spot, it must be filled during regular registration periods, either in November or January, depending on when the vacancy occurs. In emergency situations, instructors must communicate with the LC Coordinator.

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 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 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 roster, and only after the LC Coordinator has approved potential revisions. Applicants are encouraged to contact airlines, especially group bookings, to get a sense of their policies. Some airlines allow refundable deposits or to purchase tickets early (i.e., right after the NFF grant has been approved), but 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 takes place at the end of the first week of the Winter Block. It is expected that on-campus class 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. 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: Who is responsible for 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. Different passports have different visa requirements; it is recommended that students look into their requirements in the destination country. Classes involved in international travel may consult visa service companies, such as Global Services (https://g3visas.com/losangeles), CIBT (https://cibtvisas.com), Peninsula (www.peninsulavisa.com/), or Travisa (www.travisa.com/service-fees), but must factor such services into their budget. Third-year students should consider 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 entry). Participants should also ensure that they have relevant reentry documents, such as student visa documentation, a signed I-20 letter, Green Cards, and other information as appropriate (student may wish to have copies of SUA enrollment letters, financial aid, transcript, and proof of residence). 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: 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 country can change rapidly, and may vary depending on the region of a country. For many countries, faculty expertise is essential in assessing health and safety needs. 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: Is there a sample NFF proposal available?
A: Yes! First though, faculty and students considering applying for travel grants should consider reaching out to classes that traveled in previous years, as they may be willing to share their application. Because the LC Coordinator receives many such requests, I have modified my 2023 travel grant proposal, and it is available here. Please do not take this as a complete model, as every topic and destination will have different demands, and policies will change over time.

Q: Can faculty obtain cash advances for field trips?
A: As instructors must pay for various expenses once in the field, SUA supports cash advances of up to $5000, with larger advances 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 $60 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 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 paid by the NFF grant.

Q: Do you have any additional advice for a successful LC?
A: Yes! 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. Do not be intrusive with photography, especially with children and religious symbols. Be informed, engaged guests. Dress appropriately. Consider having course materials, business cards, and some small SUA gifts for important meetings.

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 (completed by faculty, course details to Registrar, including student pre-registration, due 28 October)
Field Trip Request Webform (for any LC class involving off-campus travel)
Packed Meal Request Form (for any LC class requesting Bistro packed meal)
Mileage Reimbursement Form (to reimburse students driving personal vehicles on field trips)
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

NFF Travel Grant Forms
NFF Statement of Intent Form (for classes wishing to apply for the NFF grant, due 09 October 2026)
NFF Travel Grant Application Form (due 23 October 2026)

Group Travel Template (useful to keep track of passport information for international travel)

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)
LC Library Resources (created by Jenn Tirrell and Kelly Wilson, Instructional Librarians)
List of all SUA Learning Clusters, 2002-present
Other Useful Links: Previous Handbooks, SUA news, promotional materials, LC class videos, scholarly research