

Cal State **Fullerton**

IRA Information Sessions with Campus Partners

Fall 2024

September 12, 2024

10:00am -12:00 pm

Zoom Session



IRA INFORMATION SESSIONS WITH CAMPUS PARTNERS



AGENDA

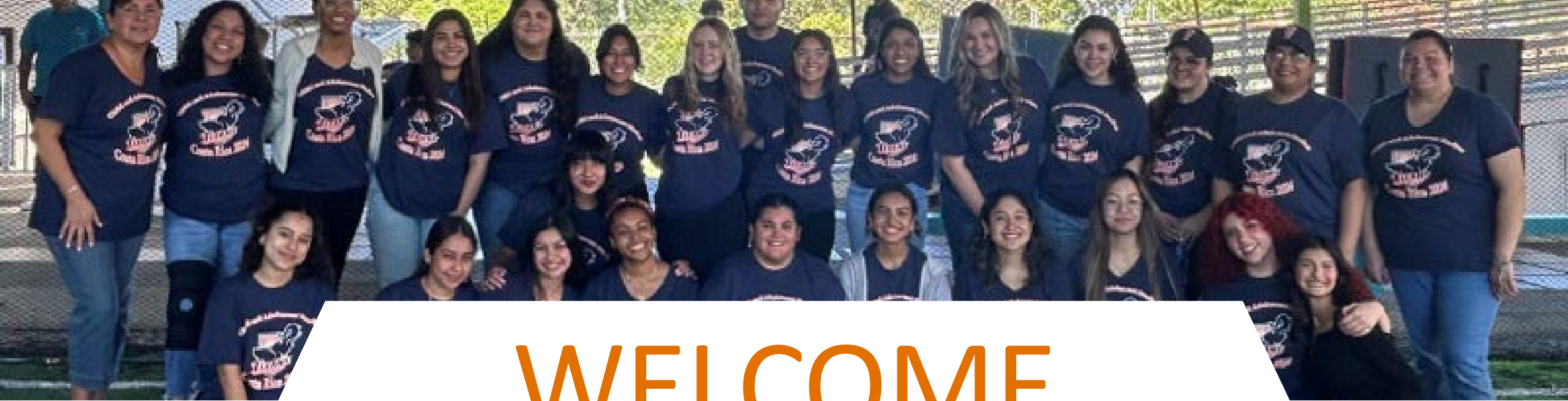
- Meeting Format
 - General Information Session
 - Topical Breakout Sessions
- Why IRA?
- Transition to State
- Process, Timeline, and Important Reminders
- Fiscal Stewardship
- Contacts and Resources

Cal State **Fullerton**

Study Abroad and Global Engagement (SAGE)
International Education and Engagement (IEE) - Academic Affairs

Presented by: Shari Merrill, Associate Director





WELCOME

Presenter: Shari Merrill

- Associate Director, SAGE IEE
- Fulbright Program Advisor (Students)
- Fulbright Scholar Liaison
- International Education Professional for 16 Year (15 working with department-led/faculty-led programs)

WHY?: IMPACT

“What we tell students is true --- the experience is transformational! However, what you didn’t tell me was that it would also be transformational for me.”

Professor Randy Hoffman, Accounting- Summer 2024, ACCT Program Italy

"I continue to lead groups because to see individuals change (including myself) with each journey in a way that is immeasurable and unique to this educational travel process I cannot imagine a university experience without study abroad. This is the best way to teach, learn, connect, and develop life-long global advocates, in my opinion!"

Professor Diana Robles, Child and Adolescent Studies- Winter Session 2024 and Summer 2024 Program Leader, CAS Internship Programs in Costa Rica & Italy

WHY? CONT'D: REASONS

- High Impact
- Lived Experience
- Intercultural Skills Development
- Professional Opportunities
- Personal Growth
- CSUF demand



INTRO TO PROGRAMS

- Led by CSUF faculty or staff: Program Leaders!
- May be tied to a course (credit bearing) or experiential (non-credit bearing)
- Can take place within (away) or outside of the United States and its territories (abroad)
- Can include a single or multiple locations
- If tied to a course, can fulfill major, elective, or G.E. requirements
- All must align with the CSUF approval and coordination process



HOW?: PROGRAM COORDINATION

IMPORTANT DATES AND DEADLINES				
<u>PHASE</u>	<u>FALL/FALL BREAK 2025</u>	<u>WINTER 2026</u>	<u>SPRING/SPRING BREAK 2026</u>	<u>SUMMER 2026</u>
1. PROGRAM PROPOSAL DEADLINE	DEC 6, 2024	DEC 6, 2024	DEC 6, 2024	APR 25, 2025
2. PROGRAM PROPOSAL DECISION NOTIFICATION	DEC 20, 2024	DEC 20, 2024	DEC 20, 2024	MAY 9, 2025
3. PROGRAM DETAILS MUST BE FINALIZED	JAN 31, 2025	FEB 28, 2025	FEB 28, 2025	AUG 22, 2025
4. RECRUITMENT DEADLINE	FEB - MAY 2025	MAR - JULY, 2025	MAR - MAY 2025	SEPT - DEC 5, 2025
5. PREDEPARTURE TASKS AND PREPARATION	JUN - AUG 2025	AUG - DEC 2025	AUG 2025 - JAN 2026	DEC 8, 2025 - MAY 15, 2026
6. PROGRAM TRAVEL	AUG/SEPT - NOV/DEC 2025	DEC 2025 - JAN 2026	JAN - APR/MAY 2026	MAY - AUG, 2026
7. RE-ENTRY	JAN - FEB 2026	FEB - MAR 2026	JUN - JULY 2026	JUN - AUG, 2026

APPROVED VENDORS

An approved vendor or third-party provider (Provider) is a company or international university that supports logistical coordination and provides onsite support for CSUF faculty/department-led programs. SAGE oversees the following:

- Provider Survey/ Vetting Process
- Maintenance of Provider 3-Year Approval Term
- Providers Ability to Meet University Requirements (health and safety, onsite support, liability)
- International Agreement Signed by CSUF and Provider
- Approved Provider List



Using Campus Approved Vendors

Continue

- Use a Campus Approved Vendor to secure study-abroad travel
- Work with SAGE on selection and advice *Cases may vary, ask first
- Working with an approved campus vendor ensures timely refund to the students

Discontinue

- Do not Sign Contracts (For most study abroad programs, an International Program Agreement is required, and this document requires CSUF President and Chancellor's Office approval. SAGE will oversee this process.)
- Collecting Cash Payments from Students Directly (Cashnet, etc.) *This requires a lot of manual processes and may affect student financial aid eligibility

*Failure to follow processes, will result in ability to receive funding going forward. Work with SAGE to determine if an International Program Agreement or only Purchase Order through Contracts and Procurement is required.

PROGRAM AGREEMENT

An approved international program agreement with an approved vendor is required to run a faculty/department-led program.

The agreement:

- Outlines services, costs, and responsibilities of CSUF and vendor.
- Serves as blanket student travel authorization
- Provides supporting documentation for vendor payment requests
- Provides legal protections



FUNDING RESOURCES



Instructionally Related
Activities (IRA)

Consolidated Course Fees
(CCF)

Philanthropic/ Fundraising

Center for Internships and
Community Engagement

Provider Discounts/
Incentives

Financial Aid

RECRUITMENT TIPS

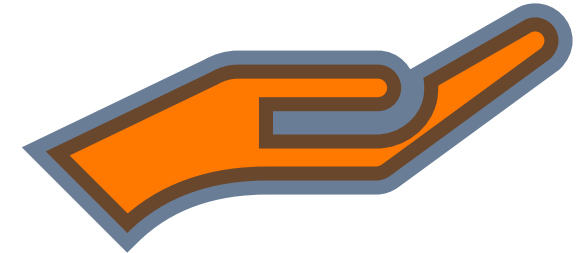


- Department email blast to students - Best!
- Tabling/ SAGE Fair
- Info Sessions
- Signage throughout college/department
- Social media
- Lead Follow-up
- Program Leader Video



RISK MANAGEMENT

- Insurance requests – SAGE submits all student requests! (Well, almost all)
- Pre-departure orientations with students and program leaders
- Pre-departure trainings and meetings with program leaders
- Risk assessment memos and in-country risk assessment
- Faculty resources
 - Program Leader Manual
 - Crisis Response and Reporting Manual
- Guidance and support in partnership with Risk Management, insurance, relevant campus departments, and institutional partners





WHOM TO CONTACT



657-278-3427



smerrill@fullerton.edu



csufabroad



[LinkedIn](#)



Pollack Library North, 120



<https://fullerton-sa.terradotta.com/index.cfm?FuseAction=Programs.ViewProgramAngular&id=10236>



THANK YOU!

Questions & Answers



ADDITIONAL RESOURCES

FOR ADDITIONAL INFORMATION PERTAINING TO TRAVEL:

Academic Field Trips, Concur Travel, Foreign Travel Insurance

Please refer to the Streamlined Success: Navigating Honorariums,
Check Requests, Hospitality, Travel, Field Trips & obtain Foreign
Travel Insurance
Presentation and Video Link.

Cal State **Fullerton**

**Please complete this short survey.
Your feedback is instrumental in
helping us develop value-added
content for our campus community.**

[Survey Link](#)



NEXT UP: BREAKOUT INFO SESSIONS

ALL SESSIONS
WILL BE
RECORDED

with slides uploaded
to the [IRA Website](#)



Schedule of Events

Welcome Session (All) 10:00 am- 10:30 am

Break (All) 10:30am- 10:35 am

Session 1 (Pre-Assigned) 10:35 am -11:15 am

Break (All) 11:15 am -11:20 am

Session 2 (Participant Choice, 5 Sessions) 11:20 am- 12:00 pm

Unlock the power of financial clarity! In this session, you'll delve into the Chart of Accounts, also known as the Chartfield string, and gain an understanding of account, fund, class, and program codes. Discover how these Chartfield strings craft your budget story within OBIEE, CSUF's financial reporting tool. You'll also learn how to efficiently run and interpret revenue and expense reports.

Budget
Clarity



Discover the various methods for procuring goods and services, tailored to meet the unique needs of your program. Learn when to create a Purchase Order, how to obtain IT Authorization, secure a Q Number from E-Business, and effectively use a Procurement Card for seamless transactions.

Procurement
Pathways



Master the essentials for managing these critical aspects of your program. Learn how to efficiently process honorariums, handle check and hospitality requests, coordinate travel, organize field trips, and obtain foreign travel insurance—all while ensuring compliance with university policies. We'll provide you with best practices, practical tips, and the tools you need to streamline these tasks.

Streamlined
Success



Unlock the skills of efficient hiring practices. Whether you're quick-hiring special consultants, hiring student assistants or graduate assistants, setting up position student task profiles, or requesting volunteers, this session will equip you with the knowledge and tools you need. Learn how to navigate each process smoothly and ensure compliance with university guidelines.

Efficient
Hiring



Gain the expertise to navigate study abroad programs effectively. Learn about CSUF's requirements and processes for proposing, coordinating, and leading a department/faculty-led program abroad. Understand how Study Abroad and Global Engagement (SAGE) partners with Risk Management to manage risk, ensure student safety, and follow related university protocols.

Global
Journeys

