



Operations Handbook

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I. Introduction

A. What are Transformational Learning Opportunities?

A transformational learning opportunity is a learning opportunity inside or outside the classroom that potentially enriches or augments student learning and personal development. TLOs involve taking information you have learned in your major area of study or in a particular class and seeing how it relates to the real world and to a specific place. Transformational learning is not simply going somewhere and being exposed to another culture. TLOs that involve travel must not rely solely on the fact that travel is involved as the basis for “transformation.”

B. Categories of TLOs

1. Study Abroad Experiences
2. Service Learning Experiences
3. Research Experiences with a Faculty Member
4. Internships, Practicum, Field and Co-op Experiences
5. Directed Independent Studies with a Faculty Member
6. Learning Communities
7. Leadership Experiences

C. How are TLOs funded?

The University of North Florida’s Board of Trustees has allocated recurring funds to support student engagement in transformational learning opportunities (TLOs).

II. Application Process

A. Eligibility

Fulltime faculty and staff from colleges, academic departments and programs, and other campus entities, may apply for a portion of these funds to support initiatives that are not funded through the regular budgeting process and that fit the University’s definition of transformational learning opportunities. Proposing individuals must assure that their units have the necessary infrastructure to

1. carry out the proposed activity/activities,
2. advertise/market the availability of funding to all eligible students,
3. track student outcomes, and
4. distribute and track the funds appropriately. Please Note: Departmental Office Managers/ Secretaries need to be made aware once the TLO has been awarded funds so that they will know in advance that they may have to make purchases on behalf of this TLO.

B. Application Guidelines

1. The award period will not cover two academic years.
2. TLO projects must demand a rigorous commitment on the part of the participating students.
3. Preference will be given to proposals that
 - a) Suggest the potential for a transformational academic and developmental impact on a significant number of students

- b) Provide an opportunity for students to apply disciplinary content knowledge to real life settings and problems
- c) Foster inter- and multi-disciplinary learning
- d) Are cost effective
- e) Have the potential to generate additional funding (e.g., grants, gifts)

4. Preference for funding study abroad proposals will be given to programs that require individual students to spend time and actively engage with foreign citizens

5. Preference for funding student research projects will be given to programs that have the greatest potential to result in student presentation, publication, or juried exhibits/performances

6. The application includes a preliminary budget, in which the TLO leader will give details on expected costs for the expenses associated with their TLO as well as details on what expenses the TLO scholarship will cover.

C. Criteria of Review of TLO Applications

1. Level of transformative involvement and engagement of students
2. Number of students potentially impacted by the project
3. Cost effectiveness
4. Potential to generate future funding
5. Potential for significant student learning and deeper connection to academic subject(s)
6. Potential for interdisciplinary or multidisciplinary learning
7. Potential for subsequent student presentation/publication of products
8. Leveraging with additional funds
9. Appropriate budgetary information
10. Clearly articulated learning outcomes
11. Reasonable plan or ideas for assessment of outcomes
12. Degree of project innovativeness

D. TLO Application Workshop

After the application has gone out, there will be a TLO Application Workshop held for all faculty and staff who might be interested in applying during that application period. At this workshop items to be discussed are: application review criteria, budget planning for your TLO, the general TLO timeline

III. Roles and Responsibilities of a TLO leader

A. Prior to the TLO Experience

1. TLO Pre-Project Meeting

At this meeting TLO leaders will be given information about the pertinent policies and procedures related to their TLO.

2. OFE Workshop

Participate in a small-group workshop conducted by the Office of Faculty Enhancement on best pedagogical and assessment practices applicable to the particular TLO area of interest.

3. Recruit Students

a) Deadlines for student recruitment: For Spring and Summer TLOs, students need to be recruited no later than the first week of October to allow for a reasonable payment schedule to be implemented. For Fall TLOs students need to be recruited the first week of classes in the Fall.

b) As students are recruited for TLOs that will be awarded as scholarships, they should be given a TLO Scholarship Award Fact Sheet (found on the last page of this handbook) that will explain the scholarship award process and procedures. Students should also be informed that even though they have signed up for the TLO that does not automatically guarantee that they will be eligible for the award. Please see "Scholarships" section for more information on student eligibility.

c) It is highly recommended that for TLOs that will be awarded as straight scholarships, the names and n-numbers should be submitted to Financial Aid as they are recruited so that their eligibility for the award can be checked.

4. Complete international travel requirements as set forth by the University (if the TLO involves international travel). This includes, but is not limited to

a) completing the University Activity Abroad Approval Request Form. Your international travel is not approved by virtue of the TLO award. It must officially be approved by the AARC.

b) reminding students to attend an international travel Safety Session and arranging international health insurance.

5. Monitor how much is being spent on the TLO and make sure that all expenses are paid for out of the correct account. If there is any uncertainty concerning this, the TLO leader should contact Undergraduate Studies immediately.

6. Set a payment schedule and follow up with any students who have not made payments on time to remind them of their obligation.

B. During the TLO Experience

1. Facilitate the transformational experience for the students--TLO leaders must facilitate the TLO that was proposed in their application. TLO leaders are not at liberty to change the intent of the TLO after the application has been submitted. If there is anything that might need to be adjusted concerning the TLO, the leader must inform Dr. Jaffee immediately.

2. Oversee and provide supervision for students

3. Maintain oversight of the TLO budget and make sure that expenses do not exceed the budget.

C. After the TLO Experience

1. Assessment --Develop and assess student learning outcomes for their TLO project.

a) Collect direct (student products) and indirect (surveys) evidence of student learning and transformative impact of experience.

b) TLO leaders are responsible for encouraging their students to participate in the TLO student web survey, which Undergraduate Studies will send out.

2. Report -- By the end of the semester that your TLO takes place, submit a report that outlines and demonstrates the success and accomplishments of the project. The guidelines for the report are as follows:

c) Please list the names and n-numbers of the students who participated in your funded TLO.

- d) What were the learning objectives of your TLO and how did the student activities and experiences advance those learning outcomes?
- e) Are there any student products that have resulted from the TLO that can be used to assess the success of the project and the extent of learning? If so, what kind?
- f) Are there any lessons you have learned about conducting this type of TLO that you would share with others or that might lead you to modify the TLO in some fashion in the future?
- g) Have you conducted any assessment of your TLO? If so, what kind of assessment did you conduct and what are the results? [This could include an assessment of the amount of student learning that occurred as reflected in student work or products. It can also include evidence of the “transformational” impact of the experience as reflected in student testimonials and student evaluations. Student testimonials will also be especially useful for promoting the TLO concept and communicating success to diverse audiences].
- h) Please provide any additional comments, suggestions, or insights that might be used to improve the TLO concept and student learning experience at UNF.

IV. General Guidelines for TLOs

A. Research TLOs

Students working on research projects can be paid OPS wages directly out of the TLO E&G index, and the TLO leader’s department should handle the PAF. Another option would be for students to be awarded straight scholarships with no COA increase. In order for this to be done, the TLO leader would need to send a list of the students’ names, n-numbers, and award amounts to Undergraduate Studies. The student must be enrolled in a credit-bearing UNF course during the semester that the scholarship will be disbursed in order to receive the scholarship.

Faculty members can also submit TLO applications for students to be able to travel to conferences to present their research. These scholarships will be awarded as straight scholarships to the students unless the expenses are being paid for as a group.

B. Directed Independent Study with a Faculty Member, Internships, Practicum’s, Field Experiences, Clinical Experiences or Co-op Experiences

These TLOs will be issued via a straight scholarship. The TLO leader should send a list of the student’s names, n-numbers, and award amounts to Undergraduate Studies. The student must be enrolled in a credit-bearing UNF course during the semester that the scholarship will be disbursed in order to receive the scholarship. However, if the student is going to be enrolled in classes at another domestic institution, then there will need to be a Consortium agreement between UNF and the other institution in order for the student to be able to receive the scholarship.

C. Learning Communities or Common Boundary Experiences

The TLO funds will go directly into an E&G account for the faculty member to use in support of a learning community or Common Boundary experience. There is no need to award scholarships in this case.

D. Leadership Experiences

If these experiences involve student travel, an agency account will be established and a charge will be placed on the student’s account. If the Leadership experience does not involve travel, the students will be awarded a straight scholarship. The student must be enrolled in a credit-bearing UNF course during the semester that the scholarship will be disbursed in order to receive the scholarship.

E. Service Learning Experiences

If the service learning experience involves international travel or travel in the US, the Study Abroad procedures apply. Local service learning experiences will have to be reviewed once details are known.

F. Faculty-Led Study Abroad Experiences or Domestic Travel Experiences

E&G funds cannot be used to pay for travel for students. E&G funds can only be spent on employee or student travel that is for official business of the University of North Florida. Study abroad does not qualify as official business. **However, E&G funds can be used for study abroad if each student is awarded a TLO scholarship.** A charge will be placed on the student account in the amount of the TLO award plus the amount that the student is required to pay toward the trip. This charge will move the funds into an agency account from which the trip expenses will be paid.

In some situations, the awarding of a scholarship can have unintended financial consequences to the student. In some cases, a student that is receiving financial aid will have already been awarded the maximum amount allowed under federal guidelines. The TLO scholarship is then an “over award.” An over award (the student has now received more funding than his financial need budget allows) then reduces the amount of financial aid the student has been awarded for the academic year.

To avoid this result, a re-evaluation of student financial need is done based on the increased cost of attendance in a study abroad, college credit earning class. Students must be enrolled in at least one credit-bearing UNF course during the semester that the TLO scholarship will be disbursed in order to receive the scholarship.

Faculty members are responsible for making sure that their students attend one of the International Center’s Safety Sessions and arrange for international health insurance or the student will not be able to participate in the trip.

There needs to be two faculty members attending each international study abroad experience.

G. Individual International Study

Students study abroad individually in many cases through exchange programs or third-party providers. In order to be eligible for TLO funding, the student must either be enrolled in a UNF credit-bearing course or in an approved consortium/ study abroad course. The International Center should be consulted in order to ensure that the course is approved via a consortium/ study abroad agreement.

With international exchanges, students sign up for a placeholder course that will be swapped out with the actual course. Students studying abroad with third-party providers, do not have to sign up for UNF placeholder courses. In both cases, however, the TLO award will not pay out until after the student completes the following forms:

<u>Form</u>	<u>Location</u>
Study Abroad Agreement	http://www.unf.edu/finaid/2008-2009/forms/StudyAbroadAgreement.pdf
Consortium Agreement	http://www.unf.edu/finaid/2008-2009/forms/Consortium%20Agreement.pdf
Concurrent/Transient Student Form	Advising office
Enrollment Verification/Learning Agreement	Speak to advising office on how to retrieve
Fee Slip	Speak to advising office on how to retrieve
Fee Deferment	Speak to advising office on how to retrieve, if applicable

Students must be prepared to reserve funds for the costs associated with the trip until the TLO funds become available. Please note: the Enrollment Verification form cannot be completed until after the student has begun his or her coursework abroad.

Financial Aid will award the TLOs as straight scholarships to the students with no associated charge on the student’s account. It is important that students have all of their UNF bills paid prior to the scholarship disbursement process so that the TLO award does not pay these bills first.

If the student is already receiving the full amount that their financial aid budget allows, then the TLO scholarship award will result in a decrease in the student’s federal aid award. In order to avoid this, the student’s cost of attendance can be adjusted only if the amount that it costs the student to attend school in the other country costs more than approximately \$8000 per semester. If it costs less than this, it is not in the best interest of the student to pursue an adjustment in their financial aid budget, because in some countries it might actually cost less to attend school than it does at UNF, resulting in a reduction in their financial aid budget.

H. Student Conference Travel

Often students travel to conferences to present their research. Because there can be issues associated with justifying the “benefit to the university” that is requested on the TAR, students who are traveling to conferences will not have their expenses paid from the E&G account. Rather, they will be awarded straight scholarships with no Cost of Attendance increase.

V. Financial Policies

A. Availability of Funds

1. TLO funds are available for use during the fiscal year that the TLO will take place. Due to the constraints of the fiscal year close out, TLO leaders should expect that their TLO funds will not be available in their TLO index until around August 1st.
2. TLO funds will be disbursed during the term that the TLO falls according to the chart below:

If the TLO begins...	The scholarship will be disbursed...
Aug. 7th-December 14th	Fall
Dec. 15th-May 31st	Spring
June 1st-August 6th	Summer

3. For TLOs that will be paid out as scholarships with an agency account, it is imperative that the recruited students be able to receive the TLO award. If the recruited students are ineligible for the TLO award based on their financial aid or enrollment status, then they will have to pay 100% of the total TLO cost in order to participate.

B. Scholarships

1. E&G funds cannot pay for student travel. Therefore, TLOs involving travel most often need to be awarded via scholarships to students.
2. Students must be enrolled in at least one credit-bearing UNF course during the term that the TLO scholarship is being disbursed in order to receive the scholarship. TLO funding is contingent upon a student’s ability to qualify for disbursements
3. The TLO scholarship awards cannot be posted until the budget has been finalized.
4. Students must sign a scholarship acceptance letter that Undergraduate Studies will generate.
5. The Cost of Attendance for each individual student is adjusted at the time that the award is posted to ensure that “need” is available for the scholarship.
 - a) In the case of international exchanges the cost of attendance must exceed approximately \$8000 for a semester-long experience for Financial Aid to adjust the budget.
 - b) In some instances (depending on how inexpensive it may be to live in certain countries) the cost of attendance may actually go down, making it disadvantageous to the student to attempt to adjust their financial aid budget.
6. Scholarships can only be given to degree-seeking UNF students. This means that in the event that a student needs an additional person to accompany him or her on the TLO experience, scholarship funds can only be used to support the expenses of the eligible student.
 - a) Additional persons who are not eligible for the TLO award may join the trip but they will not receive the TLO financial support and must assume all costs incurred.
7. A student may not receive the TLO award if they are in SAP status (Satisfactory Academic Progress) according to financial aid. The student will not be able to receive the award until he or she successfully completes the appeal process. In order to submit a SAP appeal the student needs the following form:

8. If the student is receiving a straight scholarship then he or she must have all bills satisfied on his or her account. If she or he does not satisfy the account, the funds will go to pay the bills on his or her account first.
9. Post –Baccalaureate students are eligible if they are pursuing a degree (not just taking a class).
10. A single student can be funded for multiple TLOs in a given academic year if
 - a) The TLO is not filled with students participating in their first TLO
 - b) The student is participating in a follow-up experience that relates to the original TLO (i.e. going to a Conference to present findings from the first TLO)
11. If a student is participating in his or her second TLO and his or her COA has been increased once before, Financial Aid will take the higher of the two COA increases. Therefore, some of their loans or other financial aid may have to be decreased in order for them to accept the second TLO award.
12. Once the scholarship awards have been made to students they will only be reversed in extenuating circumstances as deemed appropriate by Undergraduate Studies.

C. Charges on Student Accounts

1. The charges placed on students accounts will equal the sum of the TLO scholarship plus the amount that the student must pay in.
2. The charge will be given a future due date so that the students will not go on hold for the outstanding charge until after the scholarship has been awarded and the final payment is due.
3. Students will make payments toward their charge at the Cashier’s Office using a deposit slip provided by Undergraduate Studies.
4. When the TLO scholarship is disbursed to the student, the funds pay the TLO portion of the charge and then move into the agency account from where expenses for the TLO will be paid.
5. Students need to understand that if they have any other financial aid in addition to the TLO Award some of that aid could possibly pay the charge for the TLO. This is why TLO charges will be posted on the student accounts after the initial financial aid disbursement of the semester, so as to avoid this co-mingling of charges and financial aid as much as possible.

D. Awarding out of E & G

1. The only time when TLOs can be paid for out of E & G are if the students are not travelling, are not paying any amount in for the TLO, are being paid OPS wages for participation (i.e. research with a faculty member), and/or if the TLO award is only being used to purchase equipment for a TLO.
2. If the student travel has a direct benefit to the University then submit a TAR to the Controller’s Office. “Student” needs to be indicated next to the traveler’s name. Whether this method of awarding can be used will be determined on a case-by-case basis.
3. If it can be spent out of E&G you do not need a detail code, because you are not awarding a scholarship nor is the student paying in.

E. Budgets

1. In the TLO application, TLO leaders are required to provide a preliminary budget. All TLO leaders must submit a final fully developed budget 3 months prior to the date of the TLO. For TLOs involving travel this budget must be developed in conjunction with the International Center (if international) or Academic Affairs (if domestic).

2. As the TLO leader develops the budget he or she must identify particular per student expenses to be covered by the TLO award, and those that are to be covered by the student payment amount. Refunds (if necessary) will be made based on this information. Students should be told what the TLO award is paying for and what their payment is paying for.
3. If a TLO includes payment for expenses such as tour guides and drivers, these expenses should be clearly outlined in the budget to show that these expenses were planned for when collecting fees from students for such items. In addition, Purchasing and the Controller's Office may require a contract for services in order to facilitate the authority of these types of payments.
4. TLO leaders need to make sure that the per student awards listed on the budget add up to no more than the total TLO award amount. It is important to pay attention to the formulas used in your budget and the rounding used in the Excel spreadsheet to avoid going over the award amount.
5. The final budget has to be signed off by Academic Affairs, the TLO leader, and the International Center (for international trips only). The goal in looking over the budget is to make sure that it conforms with acceptable budget principles and categories. We want to ensure that the budget is as accurate, and the figures are as firm, as possible. Some considerations: Has anything been booked in advance (hotel, flight, etc.)? How were the costs determined? Have any deposits been made? How firm are the numbers? Are the exchange rates stable? Have they included contingency funds?
6. For all study abroad travel, the study abroad approved budget will be required as documentation for the Travel Reimbursement Form. Therefore it is very important that your budget is as accurate as possible.

F. Use of Funds

TLO funds must directly support student participation and/or costs associated with instruction and student learning. Funds may not be used to subsidize administrative costs. Support for faculty who serve as research mentors is allowable. Funds can also support the cost of faculty travel in accompanying the students.

1. The funding maximums for travel are \$1500 per student and \$1500 per faculty/staff member. Faculty costs are to be divided amongst the students to add up to the total student cost.
2. If fewer students participate in the TLO than proposed in the application, any unused funds would go back to the general TLO account.
3. Funds cannot be used until a budget is completed. This may be a preliminary budget, but it needs to be as accurate as possible.
 - a) For trips, TLO funds cannot be used until the TLO leader knows the student names and n-numbers so that scholarships can be awarded.
 - b) If a TLO leader feels that it is absolutely necessary to pay for expenses in advance of having student names and n-numbers, then he or she must get a TAR approved before any purchases are made, make the purchases on his or her P-Card. Please note: the TLO leader would still be required to submit a budget (even if it is preliminary) to Undergraduate Studies before making those advanced purchases.
4. If a TLO leader overspends his or her total TLO award, then he or she will have to pay the difference unless the overspending was a result of extenuating circumstances. Academic Affairs will review these on a case by case basis and will determine if the overage could be covered. Surcharges could be added to the students' total cost if the cost of travel increases by an exorbitant amount.
5. One-time funding requests can be made to support transformative experiences for students that are of a special nature. Request forms can be obtained from Undergraduate Studies. These requests should be made at least 2 months prior to the date of the activity.

G. Cancellation Policy

Students are responsible for payment of the costs that are not covered by the TLO award. If a student decides not to participate in the TLO, efforts will be made to refund the student as much as possible. Attempts to refund students any portion of their money will only be made after it is determined that doing so would not negatively affect the cost for the other students involved with the TLO. Late withdrawal from TLO participation may have financial consequences, including repayment of the TLO scholarship.

If a student does not make the scheduled student payments as outlined by the TLO leader he or she can be dropped from the TLO. If a student is dropped from a TLO for non-payment or for any other reason, the scholarship should be reversed so that it might possibly be able to be re-awarded to another student. The faculty member must then recruit an additional student for the TLO. If there is no other student who can take the place of the dropped student, then the student will not receive back the full amount that he or she has paid. Rather, the student will only receive back money if it does not negatively affect other students or if the costs incurred for this student cannot be recovered.

Refunds to students will be determined based on the expenses that the TLO money and the student payment money have been earmarked for by the TLO leader.

H. Agency Accounts

1. Undergraduate Studies will determine whether or not an agency account is needed for a TLO depending on the type of TLO and the way that the funds will be awarded.
2. The person who is going to be responsible for paying bills on behalf of the TLO will need to submit a formal request for the agency account, and they will need to follow the Agency Fund Procedures. These procedures can be accessed at <http://www.unf.edu/dept/budget/forms.html>.
3. When a TLO is completed, the department that is handling the payments for the TLO expenses must review and reconcile the agency account, making sure that there is a zero balance. Any funds that are not used will be swept back into the general TLO account OR the funds need to be refunded to the students.
4. Agency Accounts should not go in the negative at any time.

I. Paying Bills and Expenses

Please Note: The procedures outlined in this handbook should be followed when paying for any expenses related to the TLO. Failure to follow proper procedure will weigh negatively on future TLO applications.

1. A Travel Authorization Request (TAR) must be approved all UNF employees participating in the TLO before ANY expenses are paid for travel. The TAR and budget should be developed at the same time for TLOs involving travel.
2. Payments for expenses will be handled by the International Center for international TLOs, by the College of Business for CCB international TLOs, and by the leader's department for all other TLOs.
 - a) Departments should use a departmental P-Card to pay for expenses related to the TLO.
 - b) Then the expense should be coded to the correct TLO index. This index will be supplied to the departmental office manager/ secretary by Undergraduate Studies.
3. TLO leaders should not pay for any expenses out of their department account or out of a TLO E & G index unless they have been advised to do so by Undergraduate Studies.
4. Advances--A TLO leader must use his or her P-Card to pay for expenses in advance so that he or she can be reimbursed in a timely manner.
 - a) TLO leaders should not attempt to pay for expenses on his or her personal credit card. If he or she does, it must be understood that they would not be reimbursed 80% of the expenses until 10 days before the TLO.
 - b) The Travel Reimbursement Form must be turned in within 5 days after the TLO.

J. Carry Forwards

If there is money left over in an agency account from a particular project it can be carried forward into the next fiscal year if approved. If the TLO leader did not indicate in their original application that their TLO would cross over into another fiscal year, they can submit a Request for Carry Forward via email to Dr. Jaffee (djaffee@unf.edu) no later than May 31st. That request must include the following: the TLO leader's name, an update on how funds have been used to this point, the reason for the Carry Forward request

VI. Graduate TLOs

10% of the TLO funds will support graduate TLO proposals. These proposals will be evaluated and awarded by the Graduate Dean in conjunction with a sub-committee of the Graduate Council. These TLO awards will be shaped around the objectives of graduate study, and faculty members will be encouraged to apply for the funding and collaborate with students on research.

The call for applications for these awards will go out along with the announcement for undergraduate TLO applications. In the email we will inform the campus that they can apply separately for both graduate and undergraduate TLO awards and there will be two separate applications attached. The graduate TLO applications will be reviewed and awarded on the same timeline as undergraduate TLOs. The maximum amount of a graduate TLO award will be \$5000.

These awards will be administered just like the undergraduate TLOs. The Graduate TLO leaders will have to submit a report to Academic Affairs just like the undergraduate TLOs and the students who participate in these TLOs will be invited to respond to the TLO survey as well.

VII. Global Honors Scholarships

These TLO scholarships are administered through the Admissions Office and are for honors or multi-cultural students to participate in a transformational learning opportunity in their first year at UNF. These TLO experiences are developed and implemented by the Honors Program. TLO accounts and agency accounts will be created for each of the Global Honors TLOs. TLO scholarships as well as other scholarships administered by the Honors Program will go into the agency account.

The Honors Program will submit one report that will include information about all of the Global Honors TLO experiences. Any TLO experience that was supplied funds via the Undergraduate Studies TLO application process will be reported on separately as its own TLO. Students, who participate in any of these experiences, will be invited to respond to the TLO survey.

TLO Procedures

Phase 1: Preparation

1. Early September a call goes out to faculty and staff to apply for TLO funding.
2. A workshop is held mid-September for faculty/ staff who are interested in apply for a TLO award.
3. Applications will be due mid-October

Phase 2: Awarding Funds

4. TLO committees (domestic, international, ad graduate) make recommendations on which proposals to award and how much each proposal will receive.
5. The applications that are recommended for funding will be reviewed by Dr. Joann Campbell to make sure that they fulfill the requirements of the budget spending committee.
6. Award letters are to be sent out to faculty/ staff in late November

Phase 3: Pre-Project Meeting

7. Undergraduate Studies will request appropriate detail codes for the agency accounts and TLO indexes from Financial Systems.

Phase 4: Setting up Accounts

8. The department that will handle the agency accounts needs to be determined for each TLO
 - a. Undergraduate Studies will determine how each TLO needs to be paid out based on the type of TLO and any special circumstances regarding the TLO.
 - b. The responsible person in every department that is handling the payments for their TLO on their own will need to review the Agency Fund Procedures and submit a formal request for an agency account to Undergraduate Studies. After review, it will be forwarded to the Controller's Office. Undergraduate Studies need to be informed of the new agency account number when it is established.
9. Undergraduate Studies will request that Financial Systems set up the appropriate detail codes for the agency accounts and TLO indexes. If the TLO is to be awarded as a straight scholarship, then Financial Systems needs to set up the priority of the detail code so that the funds only pay out after all other bills have been satisfied on the student's account.
10. Undergraduate Studies will put all of the TLO account numbers, agency account numbers, their respective detail codes, and how each TLO will be paid out in a spreadsheet and send it to Financial Aid and the Cashier's Office.

Phase 5: Recruiting Students

11. TLO leaders should actively promote their trip to students up until the pre-determined deadline.
12. For TLOs that involve student internships, individual study aboard, or any other TLO wherein the students will be getting a straight scholarship the names and n-numbers of the students who are recruited should be sent to Undergraduate Studies as soon as they express an interest.
13. BEFORE the student is notified that they have been awarded a TLO scholarship, Undergraduate Studies will collaborate with Financial Aid to find out if the student can receive the entire amount of the award. If the student cannot receive the total amount of the award, a lesser amount can be offered to the student or he or she can consult with Financial Aid about lowering one of his or her loans so that he or she can receive it.
14. TLO leaders should give students a copy of the TLO Scholarship Award Fact Sheet as the students are recruited.

Phase 6: Budget Approval

15. At least three months prior to the TLO date, the leader must submit budget to Undergraduate Studies. If there are any corrections to the budget that need to be made, the leader must make those changes and re-submit.
16. Undergraduate Studies, International Center (if international trip), and the trip leader must sign off on the budget.

Phase 7: Notifying the Students of the Scholarship Award

17. Student award letters will be developed by Undergraduate Studies and sent to the TLO leaders. The TLO leaders are responsible for getting the award letters out to the students and making sure they are returned to Academic Affairs within 2 weeks.

Phase 8: Moving the Money

18. The Cashier's Office will post the full amount of the charge for the TLO to the student's account with a future due date on the charge. This date will correspond with the last date on the payment schedule defined by the TLO leader.
19. Undergraduate Studies gives the TLO leader the deposit sheets for their students so that the students can make payments.
20. Financial Aid evaluates the budget, adjusts students' COA, and posts the scholarships
21. The student makes payments at the Cashier's office with the deposit form. These transactions will be "T-paid" based on the detail code that has been established. As students pay and as the scholarship is applied, the money automatically moves into the correct agency account.
22. All expenses will be paid out of the agency account for TLOs involving travel

Phase 9: Maintenance

23. Undergraduate Studies will check to make sure that the TLO funds have been moved into the appropriate agency account.
24. Undergraduate Studies will follow up with faculty members to make sure they are spending the money that they have in a timely manner

Phase 10: Implementing the TLO experience

25. The TLO needs to happen during the semester/year for which it was funded and it needs to follow the proposed activities.
26. The TLO leader needs to make sure that he or she is not over-spending during the TLO

Phase 11: Evaluating the TLO experience

27. The leader must evaluate the TLO and provide evidence of the extent to which students were transformed. This evaluation could take the form of a paper, presentation, etc.
28. Undergraduate Studies will provide the leaders with report guidelines and the faculty/staff person must submit this report to Undergraduate Studies by the end of the semester that the TLO took place in order to be eligible for future TLO funds.
29. Undergraduate Studies will send out an assessment survey via Web Surveyor to all students who participated in the TLO.

Phase 12: Retrieving Funds

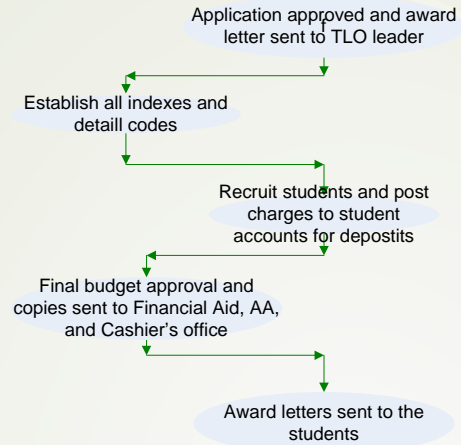
30. Undergraduate Studies will go through all of the agency accounts making sure that they have a zero balance after the TLO experience is completed.
31. Any money that is not used in the agency account needs to be moved back to the TLO account OR refunded to the students. If there is a compelling reason as to why the money needs to be rolled to the next fiscal year, then Academic Affairs will notify the Budget office that it needs to be rolled.

8/2/2007

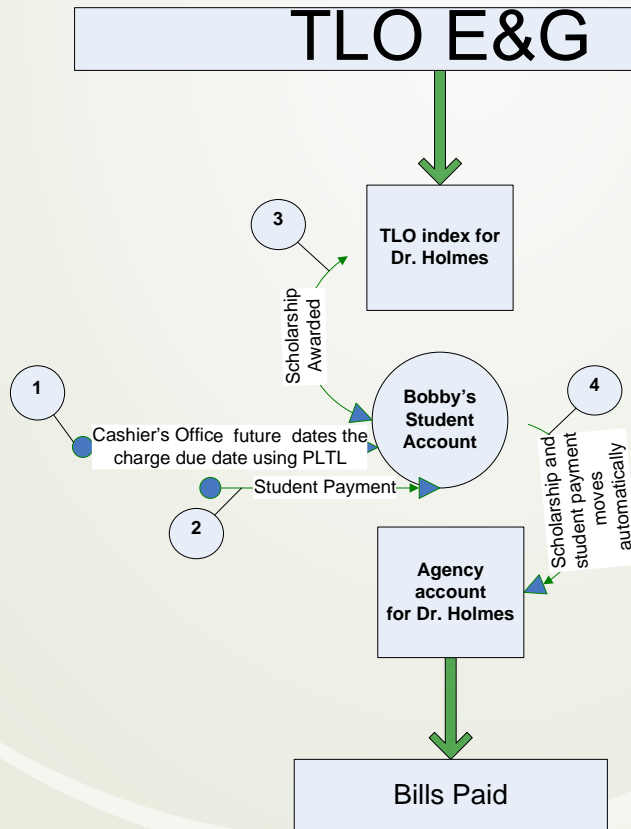
TLO Procedures Diagram

Future

Preparation Process



Money Movement Process



TLO Scholarship Award Fact Sheet

TLO funding is contingent upon a student's ability to qualify for disbursements. **To be eligible for a TLO Award you must...**

- Be a degree-seeking student (Post Baccalaureate students are eligible for Undergraduate TLOs as long as they are second degree-seeking, not just enrolled in a course).
- Be enrolled in at least one credit-bearing UNF course during the semester that the TLO scholarship will be disbursed.

If the TLO begins...	Your scholarship will be disbursed...
Aug. 7th-December 14 th	Fall
Dec. 15th- May 31 st	Spring
June 1st-August 6 th	Summer

- If you are going on individual study abroad, you must be in an approved consortium/study abroad course at the time of your trip to receive TLO funds.
- Successfully complete the appeal process outlined on the Financial Aid website if you have been notified that you are in SAP status (Satisfactory Academic Progress). If your appeal is rejected, you will not be eligible for the TLO.
- Have all University bills paid on your account before the scholarship is disbursed.
- Understand that your Cost of Attendance may be adjusted when the award is posted to ensure you have enough "need" available to receive the award. This adjustment is based on the budget submitted by your TLO leader. If you do not have enough "need", then one or more of your loans or other need-based scholarships will be reduced to receive the award. If your Cost of Attendance has been adjusted once before in a given academic year, Financial Aid will take the higher of the two COA increases.
- Sign a scholarship acceptance letter (provided by your TLO leader).

If you are traveling with a faculty member OR paying any portion of the trip cost in to the University...

Two charges will be placed on your account for the scholarship and your portion of the cost. The funds will be channeled into an agency account from where all bills and expenses will be paid. Please be aware:

- The first charge will equal the first payment amount that you owe for the trip. The second charge will equal the sum of the TLO scholarship plus the remainder of what you owe for the trip.
- The charges will be future dated in order that **you will not go on hold for the charge until after the final payment is due.**
- You will make payments toward your charges at the Cashier's Office using a TLO deposit slip (this will be provided by your TLO leader).
- When the TLO scholarship is disbursed, the funds pay the TLO portion of the charge and then move into the agency account from where expenses for the TLO will be paid.
- Please know that if you have any other financial aid in addition to the TLO Award, some of that aid might pay the charge.

If you are going on individual study abroad, doing research, traveling to a conference or doing an internship...

Your TLO award will be posted by Financial Aid and will result in a refund for the amount of the award. However, if you have ANY bills on your UNF Student Account, the funds will pay those first. Therefore, you may not receive the total amount of the TLO scholarship in your refund.

- If you are studying abroad, your course(s) must be at UNF or an institution that has signed a Consortium/ Contractual Agreement with UNF. (You can confirm this agreement is on file with the International Center.) You will need to complete a Concurrent Enrollment form, Study Abroad Agreement, Fee Slip, and Enrollment Verification form. (The Enrollment Verification form must be completed when you begin classes at the institution abroad.) Your TLO award will not pay out to you until these forms have been completed. **Please be prepared to reserve funds for your costs until you receive the TLO funds.**
- If you are NOT taking any courses at another institution, you **MUST** be enrolled in a UNF course to receive the TLO funds.

If you have any questions please contact: Martina Perry in the Office of Undergraduate Studies at martina.perry@unf.edu or 620-2607.