

# UIS Study Abroad Policies and Procedures

## I. Course Proposals

- A) Proposals for new UNI 460 – Global Experience Seminars or for repeating previously approved UNI 460 seminars should be submitted to the Office of International Programs at least 12 months prior to the start date of the seminar.
- B) Proposals for new or repeated departmental study abroad offerings should be submitted to the appropriate Dean's Office in October for summer and fall offerings and in April for winter/spring offerings.
- C) Proposals for either UNI 460 seminars or departmental study abroad offerings should include the following information in addition to information required by the appropriate college for any new course:
  - 1) Course title
  - 2) Course description
  - 3) Course objectives
  - 4) Location
  - 5) Travel Itinerary, if appropriate
  - 6) Budget
  - 7) Minimum and Maximum Enrollment

## II. Course/Seminar/Program Finances – UNI 460 and Departmental Study Abroad Offerings

- A) Each course/seminar/program will have a separate fund and program designated to collect and disburse program fees
- B) Program fees exclusive of tuition shall include all 'out of pocket' expenses associated with the study abroad course/seminar/program. 'Out of pocket' expenses may include but are not limited to: international airfare; airport shuttles; local transportation; lodging; entrance fees; local salaries as appropriate; meals; and faculty director's expenses.
- C) Program fees are charged to students/participants.
- D) Program fees may also be financed through fund raising activities and donations provided the necessary vending license has been obtained for the activity.
- E) Separate funds will be established to record fund raising activities and donations for each course/seminar/program.
- F) Funds awarded to students must be processed by the Office of Financial Assistance and will be treated as an aid resource which may impact eligibility for other aid resources awarded to the student. The award will be posted to the student's account and only the amount in excess of any current balance on the account will be refunded to the student.
- G) Program fees may not be financed by transferring funds from other University funds with the exception of University gift and fund raising accounts.
- H) Faculty salaries will be charged to the appropriate department/college.

## III. Student/Participant Application – All Study Abroad Programs/Courses/Seminars

- A) Individuals applying to study abroad through UIS, either through UNI 460, 470 or 480 or through a departmental study abroad offering must complete a Global Experience Program Application. The complete application consists of a form for data collection germane to

the applicant, two letters of recommendation, an official transcript and an essay. (Students/participants not intending to register for credit may have the letters of recommendation and transcript waived.) Students must also obtain the signatures of their academic advisor, the Dean of Students or designee and the Financial Aid Office if applying for financial assistance.

- B) Students intending to use study abroad credit towards their major or towards university requirements are encouraged to have a course equivalency form and transfer waivers approved before they begin their program.
- C) Students/Participants are required to sign and return a form acknowledging the risks of studying abroad and their responsibilities.
- D) Applications will be reviewed by the Office of International Programs, the Faculty Director and the Global Experience Committee as appropriate.

#### IV. Billing and Payment

- A) Upon approval students/participants will be given/sent a financial agreement detailing: the program fees, tuition and university fees; the payment schedule; and the refund schedule. The financial agreement will also state that participants will be billed and be responsible for any additional trip-related costs that are over and above the estimated program fee and that any surplus will be refunded to the participants.
- B) Students/participants must sign and return the financial agreement within ten days of receipt along with a program deposit (non-refundable). Deposits may be paid at the Cashier Office via cash, money order, personal or cashiers check made payable to UIS.
- C) Students are responsible for the payment of tuition, university fees and program fees for the program/seminar/course for which they have registered.
- D) In-person payments may be made via cash, money order, personal or cashiers check made payable to UIS at the Cashier Office. The receipt must include the name of the participant.
- E) Program fees will be posted to the Banner accounts by the Office of International Programs and billed by University Student Financial Services and Cashier Operations via the E-Bill process.
- F) Tuition and university fees will be assessed using the Banner registration process and billed by the Office of Student Accounts.
- G) Students studying abroad through UNI 460 or departmental study abroad offerings are charged UIS tuition and university fees plus program specific fees.
- H) Students studying abroad through UNI 470 (exchange program) pay UIS tuition. Their UIS university fees are waived, provided that they are not enrolled in any other UIS courses at the same time. There are no program fees.
- I) Students studying abroad through UNI 480 pay a fixed, reduced, UIS tuition, applicable to UNI 480 only. Their UIS university fees are waived, provided that they are not enrolled in any other UIS courses at the same time. Students who are enrolled for any additional UIS courses while they are registered for UNI 480 will pay the standard UIS tuition for the additional courses and will not have their university fees waived. There are no program fees.

#### V. Financial Aid

- A) Students enrolled for study abroad courses/program/seminars should consult with the Office of Financial Assistance to determine their eligibility for assistance.
- B) To be considered for financial aid students must be enrolled full-time during the term/semester they are studying abroad.

## VI. Registration

- A) Electronic approvals (formerly WPIs) for UNI 460/470/480 are issued by the Office of International Programs, once applications are completed and approved. Students are then free to register.
- B) Registration controls for departmental offerings are at the discretion of the instructors.

## VII. Credit Transfer

- A) Students participating in a UNI 460 course/seminar or a departmental study abroad offering will have their coursework assessed by UIS faculty and will have their grades posted directly to their transcript.
- B) Students participating in a program through UNI 470 (exchange program) will have their UNI 470 grade marked as credit/no credit on their official UIS transcript based upon transcripts received from the host institution.
- C) Students participating in a program through UNI 480 (study abroad through another institution/university/agency) will have their UNI 480 grade noted as credit/no credit based upon transcripts received from the host institution.

## VIII. Course/Seminar/Program Accounting Procedures

- A) Disbursement of all program fees will be recorded by the Office of International Programs and the Faculty/Director.
- B) International airfare will be arranged by the Office of International Programs including final booking of and payment for tickets in accordance with all appropriate University purchasing policies and procedures.
- C) The Faculty/Director will be responsible for keeping a detailed accounting, with receipts, of the disbursement of all program fees used to support the students/participants of the course/seminar/program.
- D) A statement of fund disbursement with receipts will be submitted to the Office of International Programs within 10 business days after the completion of the course/seminar/program.
- E) The Office of International Programs will, in turn, submit this statement and receipts to Accounting.
- F) If gift or agency funds are available to support the costs of a specific trip, expenses will be transferred from the self-supporting fund to the gift and/or agency fund.
- G) The travel for non-students registered in UNI 460, including both external participants and UIS students who do not register in UNI 460, is subject to Unrelated Business Income Tax (UBIT) reporting. UAFR will work with the Office of International Programs to ensure adequate records are maintained and submitted by the unit in order to properly document and report revenue, direct expenses, and indirect expenses related to non-students.

Questions about any of the policies and procedures related to study abroad at UIS should be directed to the Office of International Programs, HRB 52, 206-8319, [intprog@uis.edu](mailto:intprog@uis.edu).

# Fund Raising Guidelines

## I) Procedures for selling items purchased for resale

- A) Work with the Office of International Programs (OIP) to select vendor
- B) Items should be purchased using the university tax-exempt letter
- C) Items should be purchased using the OIP's P-Card whenever possible
- D) If using the OIP P-Card is not possible purchase should be made using an invoice voucher which will be paid by check – expect some delay, particularly if the vendor is not in the system
- E) During and after the sale the following information must be tracked
  - 1) all sales including number of sales and amount of each sale
  - 2) names and addresses of each buyer who pays over the market value of the item for sale
  - 3) funds received must be deposited with the Bursars Office within one working day of the sale
  - 4) the group organizing the sale should appoint two members to count and deposit the funds raised
  - 5) notify OIP that funds have been deposited with the Bursar
  - 6) information regarding sales and names and addresses of buyers needs to be submitted to OIP, electronically, within 24 hours on OIP's fundraising form
- F) OIP will validate the deposit and transfer the funds into the appropriate account

## II) Procedures for selling items by auction

- A) An OIP Auction Form will need to be filled out for all donated and purchased items (this form is not needed for bake sale items or for food sale items)
- B) For items purchased for the auction follow the steps in I
- C) For each donated item the following information will need to be tracked
  - 1) name and address of donor
  - 2) what was donated and its fair market value
  - 3) names and addresses of each buyer
  - 4) how much each item was purchased for during the auction
- D) Following the sale:
  - 1) All funds received must be deposited with the Bursars Office within one working day of the auction
  - 2) the group organizing the auction should appoint two members to count and deposit the funds raised
  - 3) notify OIP that funds have been deposited with the Bursar
  - 4) information regarding donations, values, purchases, sales and names and addresses of donors and buyers needs to be submitted to OIP, electronically, within 24 hours on OIP's auction form
  - 5) OIP will validate the deposit and transfer the funds into the appropriate account

## III) Procedures for Meals (pancake breakfasts, chili cook offs, etc.)

- A) Work with the Office of International Programs (OIP) to select vendor, if appropriate
- B) Items should be purchased using the university tax-exempt letter
- C) Purchase should be made by the organizing group which will be reimbursed through a completed and signed travel employee reimbursement voucher. Original receipts must be attached and forwarded to OIP for processing
- D) For each donated item the following information will need to be tracked

- 1) name and address of donor
  - 2) what was donated and its fair market value
- E) Calculate the fair market value of the meal taking into consideration all of the costs of the event, such as facility and equipment rental, etc.
- F) Keep track of:
- 1) the name and addresses of each attendee
  - 2) how much over the fair market value of the meal they pay
- G) Following the sale:
- 1) All funds received must be deposited with the Bursars Office within one working day of the auction
  - 2) the group organizing the meal should appoint two members to count and deposit the funds raised
  - 3) notify OIP that funds have been deposited with the Bursar
  - 4) information regarding donations, purchases, sales and names and addresses of donors and buyers needs to be submitted to OIP, electronically, within 24 hours on OIP's special form
  - 5) OIP will validate the deposit and transfer the funds into the appropriate account

## IV) Raffles

There are several procedural issues that need to be resolved involving the raffle license which must be secured from the Sangamon County Clerk. Until these issues are resolved no raffles will be authorized.

## V) Solicitation of gifts

- A) All gifts from donors with the exception of those being given directly to an individual for their personal use must be properly recorded
- B) Gifts can include cash or checks as well as the underwriting of events, brochures or services provided by the donors.
- C) All gifts and non-gift fundraising proceeds for the University of Illinois at Springfield are processed through the University of Illinois Foundation (UIF).
- D) Other types of Gifts and related procedures:
  - 1) **Events and non-gifts** - Typically with events or other outings, there is a portion of the contribution that is directly tied to benefits/goods or services received by a donor. This portion is called a non-gift. For example, if a fundraising dinner is held, the contribution to attend is \$100; the FAIR MARKET VALUE of the dinner (not the cost of the dinner) is \$25. The tax receipt will acknowledge the \$100 contribution; \$75 as a gift and \$25 as the non-deductible portion. **It is important that the non-gift portion be determined BEFORE the event and clearly identified to donors.** UIF should process these types of fundraising activities (via the UIS Gift Processing Office in Central Development.)
  - 2) **Gifts in kind (GIK)** - Non-cash personal or real property gifts, such as, securities, buildings, farmland, equipment, computers, artwork, collections, and bargain-sales/purchase discounts are defined as gifts-in-kind. They may also include other intangible non-cash gifts such as royalties, patents, life insurance, retirement plans, limited partnerships, etc. Services may be recorded for gift credit, but are generally not tax deductible. With events, typical donated services may include catering, speaker fees, room rentals, etc. The donor determines the value of contributed items; generally, non-cash gifts over \$5,000 require an appraisal provided by the donor (UIF will require a copy for valuation documentation). Donors are required to submit to the IRS Form 8283 for certain non-cash gifts; the UIF generates this form for inclusion with the tax receipt sent to the donor.

- 3) **Sponsorships** - The IRS stipulates sponsoring an event or display within a brochure does not constitute advertising, but is a tax-deductible gift in the following instances (1) where the message does not contain qualitative or comparative language, price information, or other indications of savings or value; (2) there are no endorsements; (3) there are no inducements to purchase, sell or use the products or services. Any inclusion of the above constitutes advertising, rather than sponsorship, and is not a tax-deductible gift. Common forms of sponsorship are hosting a booth at an event or listing the company/donor name in a brochure. The value of a sponsorship is reduced by any goods or services provided to the donor in exchange for the gift (e.g. free tickets to the event, parking passes, etc.)
- 4) **Donation** – The most common form of gift in support of the Global Experience Program and the study abroad programs therein are monetary donations. These are submitted to the university in several different manners:
  - a) directly to the UIF
  - b) to a student, staff or faculty member
    - i) in this instance the funds need to be deposited in the Bursars Office
    - ii) at that time the deposit should be noted in the UIF receipt book noting the amount of the deposit, its source, and the account into which it should be deposited
    - iii) the UIF will then collect and process the funds

This guide is not meant to be exhaustive. All questions regarding fundraising related to study abroad programs should be brought to the attention of the Office of International Programs which will consult with the appropriate offices should the answer to the questions not be straightforward.

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