

Strategic Budgeting for Internationalization

Virginia Commonwealth University

Richmond, Virginia USA

November 3-4, 2022 *(this is an in-person event with no virtual components)

Jill Blondin of Virginia Commonwealth University (VCU) and Paulo Zagalo-Melo of Western Michigan University will facilitate an AIEA Thematic Forum on 3 and 4 November 2022 at Virginia Commonwealth University in Richmond, Virginia, focused on “Strategic Budgeting for Internationalization.” This Forum, intended for SIOs, fiscal administrators, study abroad directors, and other campus leaders, will focus on ways in which participants can ensure budgetary alignment with strategic initiatives, which allows for prioritizing resources to foster internationalization. This Thematic Forum examines ways that financial sustainability, budgeting, and intentional planning intersect to strengthen and increase campus internationalization, as well as the role of the SIO in strategic fiscal management.

Sessions will discuss examples of issues with existing budget models and the potential challenges and opportunities generated by recent budget remodeling and pandemic-related financial impacts. Some of the questions that will be addressed include: What are good practices in building adequate budget models for international offices? How are institutions responding to revenue declines? What are the shortcomings of institutional budget models from an SIO’s perspective?

Participants will hear from speakers representing multiple institutions and perspectives, including leaders from large and small, and public and private, and minority-serving institutions.

Participants will be encouraged to interrogate their approaches to budgeting and discover innovative ways in which SIOs can foster financial sustainability and growth in the global enterprise of their institution. In fact, the sessions will be highly interactive, and will build on the facilitators’ expertise as well as the participants’ status as engaged international education practitioners with much to share and learn from each other. There will be opportunities for high-level conversations about budgeting, and more informal conversations on topics of common interest.

We welcome you to join us at this event! More details are provided via **VCU Global Education [website](#)**.



Forum Hosts

Jill Blondin, Ph.D.

Executive Director
Global Education Office
Virginia Commonwealth University



Paulo Zagalo-Melo, Ph.D.

Associate Provost for Global Education
Western Michigan University



Strategic Budgeting for Internationalization

AN AIEA THEMATIC FORUM

Virginia Commonwealth University
Richmond, Virginia, USA
November 3-4, 2022

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This Thematic Forum examines ways that financial sustainability, budgeting and intentional planning intersect to strengthen and increase campus internationalization, as well as the role of the SIO in strategic fiscal management.

Speakers

- **Jill Blondin, Ph.D.**, Executive Director, Global Education Office, Virginia Commonwealth University
- **Paulo Zagalo-Melo, Ph.D.**, Associate Provost of the Haenicke Institute for Global Education, Western Michigan University
- **Martha Merritt, D. Phil.**, Dean and the Carole M. Weinstein Chair of International Education, The University of Richmond
- **Paul Ginder**, Fiscal Manager, Global Education Office, Virginia Commonwealth University

The workshops will cover:

- Current budget models
- Low-cost internationalization ideas
- Budgetary alignment with strategic initiatives
- Financial sustainability
- Revenue-generating ideas
- Communication
- Fundraising
- Strategic budgeting
- Finding revenue sources

The sessions will be highly interactive, with opportunities for high-level conversations about budgeting. There will also be opportunities for more informal conversations on topics of common interest.

The Thematic Forum provides an opportunity for SIOs to learn and to focus on strategic budgeting and planning in alignment with internationalization.

To register, visit bit.ly/AIEAforum22 or scan the QR code. Registration fee is \$45.





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Strategic Budgeting for Internationalization

An AIEA Thematic Forum
Virginia Commonwealth University
Nov. 3-4, 2022

Final Report

THEMATIC FORUM

Strategic Budgeting for Internationalization



The AIEA Thematic Forum, “Strategic Budgeting for Internationalization,” organized and facilitated by Dr. Jill Blondin of Virginia Commonwealth University and Dr. Paulo Zagalo-Melo of Western Michigan University, was delivered to a diverse group of international educators, including SIOs, fiscal administrators, directors of global learning, and other campus leaders, on November 3-4, 2022, on the campus of Virginia Commonwealth University in Richmond, Virginia. The 30 participants came from a diversity of institutions in the United States and abroad. Dr. Martha Merritt of the University of Richmond, and Paul Ginder of Virginia Commonwealth University, joined the facilitators in delivering the workshop content.

The workshop focused on ways in which participants understood financial budget models, and could use the information to ensure budgetary alignment with strategic initiatives. The workshop also examined ways that financial sustainability, budgeting, and intentional planning intersect to strengthen and increase campus internationalization, as well as the role of international educators in strategic fiscal management.

Workshop sessions focused specifically on budget models and the potential challenges and opportunities generated by recent budget remodeling and pandemic-related financial impacts, fundraising, strategic planning and budget alignment, and the application of budgeting information at participants’ own institutions. Many opportunities were provided for networking and information sharing.



The Context for the AIEA Thematic Forum

In ACE's Higher Education Today Blog, Robin Helms writes, "campus internationalization is possible—even in a resource-constrained environment—when there is firm leadership commitment and alignment with key strategic institutional goals." (<https://www.higheredtoday.org/2015/03/16/campus-internationalization-on-a-budget/>) NAFSA dedicated its International Educator In March 2022 issue to "The Business of Budgets" – featuring interviews with both Dr. Blondin and Dr. Zagalo-Melo – and highlighted how critical financial sustainability and strategic budgeting are for global initiatives and international offices.

International offices, similarly to other university units, face endemic financial issues related to defective structural budgeting modes. New budget models address issues with major units – academic affairs, auxiliary, athletics – while overlooking specificities of smaller or less visible units like international offices. The pandemic and its multidimensional negative financial impact on universities have compounded the problem with fewer resources available for global engagement. Familiarity with different budget models is critical to the success of internationalization and the international office at any institution, along with strategic planning in a resource-constrained environment.

International offices have many potential sources of funding – state allocations, tuition, student fees, 'general fund' allocations, as well as revenues generated by internal units such as ESL, Study Abroad and other service areas. As institutional funding sources are tightening and markets become more volatile, colleges and universities are seeking different budgeting models.





Sessions

The Forum began with a welcome by William Nelson, VCU's Senior Vice Provost for Academic Administration and Operations, who encouraged attendees to investigate their approaches to budgeting and discover innovative ways in which SIOs can foster financial sustainability and growth in the global enterprise of their institutions.

The two-day forum was comprised of six sessions, two of which included interactive workshops facilitated by the hosts.

The first session was led by Paulo Zagalo-Melo, Ph.D. Associate provost for Global Education at Western Michigan University. Dr. Zagalo-Melo presented on **"Resource Allocation Models and their Impact on HEIs,"** as he gave an overview of higher education funding, and addressed the current dominant budget models with examples of issues created by each model while highlighting potential challenges and opportunities generated by each of them. The session also covered how different budget models might impact internationalization from three perspectives: organizational culture, strategy, and financial management.

The second session, **"Resource Allocation and Fundraising in Internationalization,"** was presented by Dr. Zagalo-Melo and Martha Merritt, D. Phil., Dean and the Carole M. Weinstein chair of International Education of The University of Richmond. This session discussed the many potential sources of funding of international offices that include state allocations, tuition, student fees, 'general fund' allocations, fundraising, as well as revenues generated by internal

units such as ESL, Study Abroad and other service areas. The presenters discussed how as institutional funding sources are tightening and markets become more volatile, colleges and universities are seeking different budgeting models.

The third session, **"Revenue Generating Strategies,"** presented by Dr. Zagalo-Melo, Dr. Blondin, Dr. Merritt and Paul Ginder, fiscal manager of the Global Education Office at VCU, focused on how to strategically look for revenue generating initiatives, sharing real examples of successful and 'not-so-successful' approaches.

Some of the questions addressed during the session included: How do you bring your ideas and initiatives to fruition, and how do you sustain your initiatives? What resources are needed? How do you measure the success of your initiatives? What are your priorities for internationalization?

In the fourth session, attendees were divided into four groups and proceeded to engage in a hands-on workshop focusing on application of information at participants' institutions, facilitated by Dr. Zagalo-Melo, Dr. Blondin, Dr. Merritt and Paul Ginder.



- TYPES OF FUNDING FOR INTERNATIONALIZATION**
- ESL/IEP tuition
 - "Integration services" fees
 - Government-sponsored student fees
 - Partnership development fees
 - Academic programs abroad (teaching programs abroad)
 - International student activities fees
 - Orientation fees
 - Application fees
 - Grants
 - International student fees
 - International student tuition
 - SA fees charged to faculty-led SA programs
 - SA course credits tuition (including SA faculty-led programs)
 - International visiting scholar mentoring program fees
 - Fundraising



On day two of the Forum, the fifth session gave an overview of **“Strategic Alignment and Budgeting for Internationalization,”** presented by Dr. Blondin and Paul Ginder. This session discussed how to budget to foster internationalization, including goal alignment, prioritizing resources, and low-cost approaches.

The last session of the Forum included another facilitated workshop focusing on the application of information at participants’ institutions. This final session provided participants with time to collaboratively explore and reflect upon budgeting and fiscal resources for campus internationalization. Participants were encouraged to articulate goals and desired outcomes, current resources, and clear first steps to take upon returning to their institutions.



Session Facilitators



Jill Blondin, Ph.D.

Associate vice provost for global initiatives
Virginia Commonwealth University

Jill Blondin, associate vice provost for global initiatives at VCU, received her B.A. from Indiana University, and her M.A. and Ph.D. from the University of Illinois at Urbana-Champaign. Before becoming executive director of GEO, Dr. Blondin served as the inaugural director of VCU Globe, a global education living-learning program devoted to building cultural agility.

Under Dr. Blondin's leadership, VCU Globe received the 2015 NAFSA Senator Paul Simon Spotlight Award and the 2018 Andrew Heiskell Award from IIE. Dr. Blondin has served as a Fulbright Specialist to Brazil (2018), as a speaker with the U.S. Department of State Study Abroad Engagement Grant Program and Fulbright Portugal (2019) and as an Expert Speaker on U.S. Study Abroad with the U.S. Embassy Guyana (2022).

Dr. Blondin, a 2021-2022 AIEA (Association of International Education Administrators) Presidential Fellow and serves as Vice Chair on AIEA's Member Outreach and Awards Committee. Her areas of expertise include strategic budgeting and internationalization, global learning, and art history.



Paulo Zagalo-Melo, Ph.D.

Associate provost for Global Education
Western Michigan University

Paulo Zagalo-Melo is associate provost for Global Education and SIO at Western Michigan University. Prior to WMU, he held executive positions at the University of Montana, the Luso-American Foundation, and Fulbright Portugal.

Zagalo-Melo is an AIEA Board Member and Chair of the AIEA Member Outreach and Awards Committee. He was an AIEA 2015 Presidential Fellow. Zagalo-Melo has an MPA from Harvard University and a PhD in political science from the Catholic University of Portugal.



Martha Merritt, Ph.D.

Dean and the Carole M. Weinstein chair of International Education
University of Richmond

As a scholar of Russian politics who has lived and taught in five countries, Martha Merritt seeks to facilitate sustained a cross-cultural community for the University of Richmond. She works with faculty, staff and students to deepen and extend UR's strong web of partnerships abroad, with particular focus on South Africa and Denmark. Her goals for international education include integrating local and global learning for challenges such as sustainability, facilitating meaningful engagement with other cultures, and empowering international students as vital community members.

Since joining UR in 2015, Merritt founded the EnCompass program to provide international experience for non-traditional students. She also extended International Education Week to a campus-wide focus on another culture. The Institute for International Education recognized EnCompass with a Heiskell Award for increasing access to study abroad, and the Association for International Educators (AIEA) presented its Innovation Award to UR for the revised IE Week, both in 2022. Since EnCompass started, nearly 70% of UR undergraduates graduate with international experience.

Merritt worked at the University of Chicago and the University of Notre Dame's Joan B. Kroc Institute for International Peace Studies before coming to Richmond. Her previous experience included establishing programs and internships in the Middle East, Africa, and Europe, as well as oversight of Chicago's Center in Paris. She attended Pomona College and Oxford University.



Paul Ginder

Fiscal manager
Virginia Commonwealth University

Paul Ginder is the fiscal manager for the Global Education Office at Virginia Commonwealth University. He has a B.A. from Wake Forest University. As fiscal manager, he is responsible for management of the Global Education Office budget and long-range planning. He also has extensive experience developing budgets for VCU study abroad programs.



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