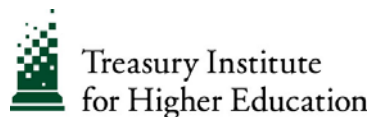




International Expansion for University Activities Abroad

Treasury Institute for Higher Education

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How our Global Support Project came about

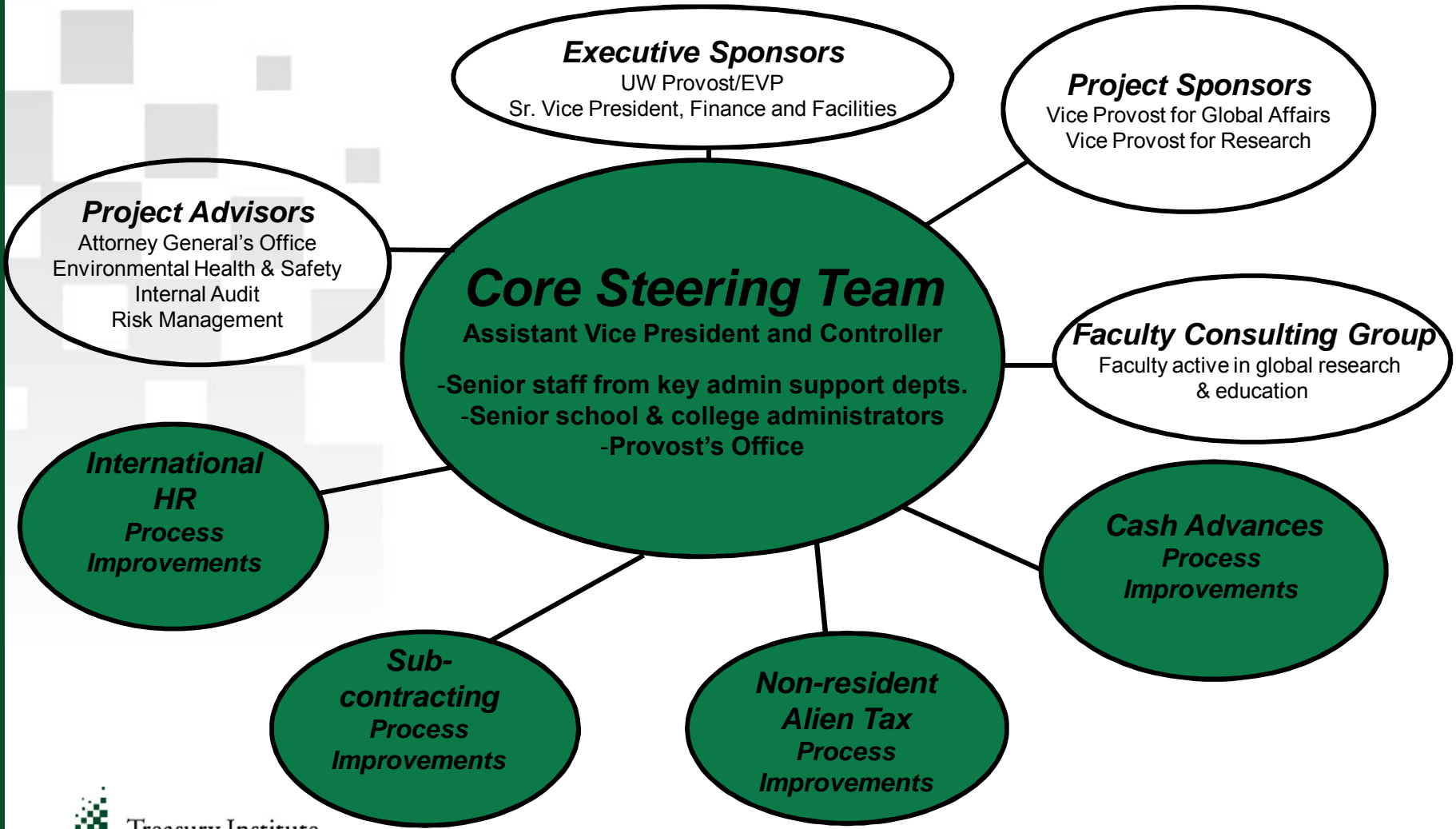
- ◆ New UW president establishes goal of being leader in solving global and environmental sustainability problems
- ◆ Acknowledgement that administrative processes were too “siloed” to support global work
- ◆ Significant funding available for global health, particularly in developing countries

How do we align our administrative infrastructure to support this goal?

What will encourage units to collaborate in effective problem-solving?

Can we scale up fast enough to support funders’ and PIs’ needs and requirements?

**Global Support Project
Phase I – Research & Sponsored Projects
Project Oversight Structure**



Establishing the scope

Identified global hot buttons



Validated issues through focus groups



Refined with stakeholder input



We operate through a team approach

Sponsored Process Improvement Teams

- ◆ Field Advances
- ◆ Nonresident Alien Tax
- ◆ Reporting
- ◆ Global HR
- ◆ Sub-contracting

Rapid Response Teams

- ◆ Unique job classification and benefit rates for specific project
- ◆ Emergent needs for training project in Africa
- ◆ Property leasing abroad
- ◆ PI concerns about global hiring and cash management

Phase I: Building a foundation through knowledge creation & improved processes

◆ Communication & Outreach

- Single points of contact in
 - central offices
 - Global Support Manager meets with
 - global programs to ID issues
 - Website/portal
<http://www.washington.edu/admin/finmgmt/globalsupport/>
 - Briefings with Deans
 - Faculty Consulting Team

◆ Human Resources

- Guidance for global hiring
- Internal job codes & benefit rates
- Expanded relocation compensation

◆ Information Technology

- Country-specific connectivity information

◆ Legal

- UW non-profit established—will
 - enable in-country registration
 - Identified legal counsel in
 - various countries

◆ Financial

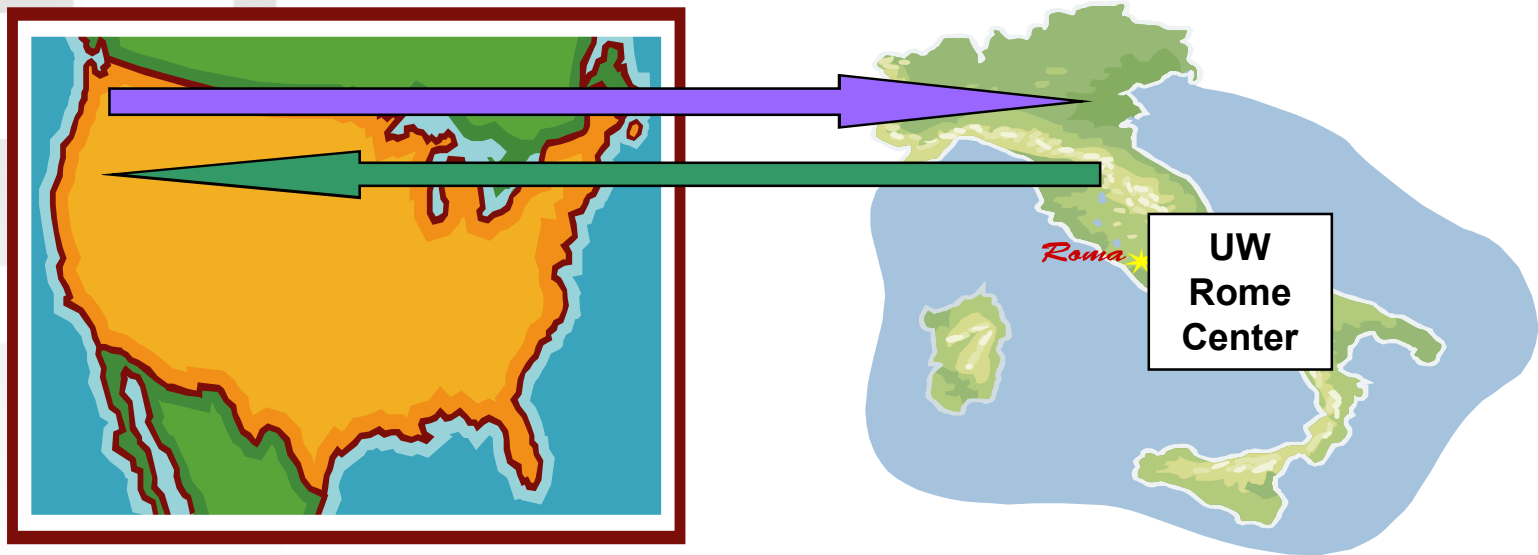
- New guide for foreign tax issues
- Cash advance improvements

◆ Risk and Safety

- Guidance on insurance
 - coverage while abroad



Global education occurs in many directions, for example -



Phase II: Global Education – Challenges

- ◆ **No comprehensive oversight & management of global education**
 - Non-standardized process for establishing agreements
 - No consistent policy & procedural guidance to faculty leading study abroad programs
 - No database to track & monitor global activities
 - Unclear authority about how to determine degree of overseas engagement
- ◆ **No institution-wide approach for student safety and security abroad**
 - No office on campus “owns” student safety while abroad
 - Washington state laws prevent requiring students to buy insurance
- ◆ **Students don’t receive as much support as they want**
 - Housing in Seattle and at sites abroad is time-consuming to find
 - Funding for foreign scholars from developing nations is inadequate
 - Evacuation support has been problematic
- ◆ **Non-degree programs at the UW are hard to access for foreign students**
 - No central office is set up to be contact point
- ◆ **Financial sustainability for foreign “branches” is problematic**
 - Lack of business approach to management,
 - Currency fluctuation
 - Legal registration issues

Checklist for establishing operations abroad

- ◆ **Determine whether nature of operations requires legal registration within the host country**
 - Will vary by country
 - May require outside legal counsel
 - Options may be impacted by University's legal definition
 - Registration may have unintended impacts (e.g., perception by local population)
- ◆ **Establish internal review/approval process, including explicit definition of roles**
- ◆ **Create delegated authorities**
 - Executing contracts
 - Hiring personnel
 - Financial management
 - Use of University trademarks/logos, etc.
 - Solicitation and/or gift acceptance
 - Relationships with local officials

Checklist for establishing operations abroad (con't)

- ◆ **Consider the following:**
 - Strategic significance
 - Political stability
 - Financial stability
 - Banking
 - Ability of local partners to provide working capital
 - Financial sustainability
 - Consistent funding source (e.g., grants and contracts, tuition, fees)
 - Availability of funds subsidize
 - Unexpected costs
 - Logistics
 - Legal
 - Unrecovered indirects
 - Safety and security
- ◆ **Develop array of administrative processing options to address unique needs**

Checklist for closing operations abroad

- ◆ Establish closing decision-making criteria
- ◆ Identify transition issues
 - Contractual
 - Financial
 - Human Resources
 - Infrastructure
 - Legal structure
 - Partnerships
- ◆ Create handover to “surviving” entity, if applicable

Lessons learned

- ◆ There is no one best way...many options must be available
- ◆ Creative and compliant solutions can be established—but risk can't be totally eliminated
- ◆ Challenges are not unique among institutions but answers are unique by country
- ◆ Situations “on the ground” can change very rapidly; we need to be able to respond quickly

We're not in Kansas any more...

