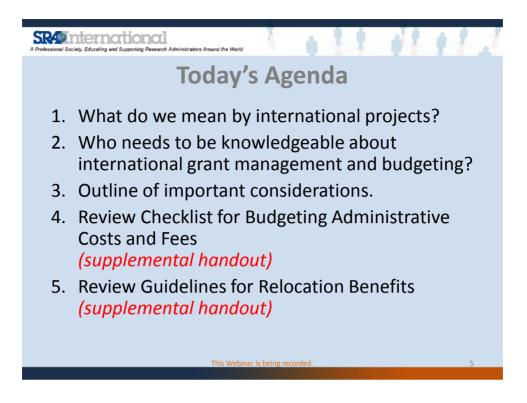
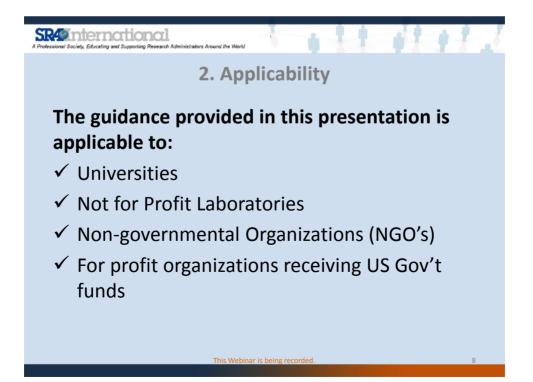


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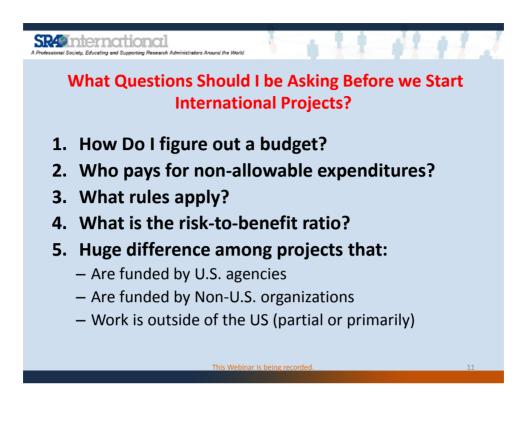


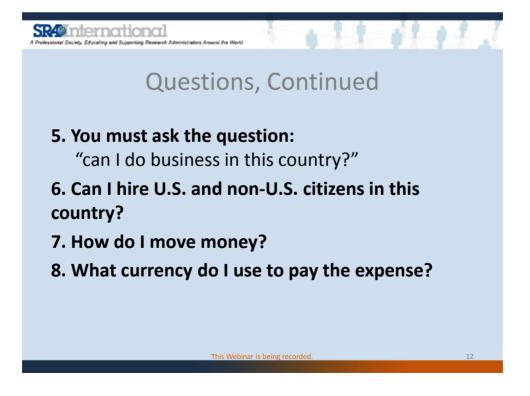


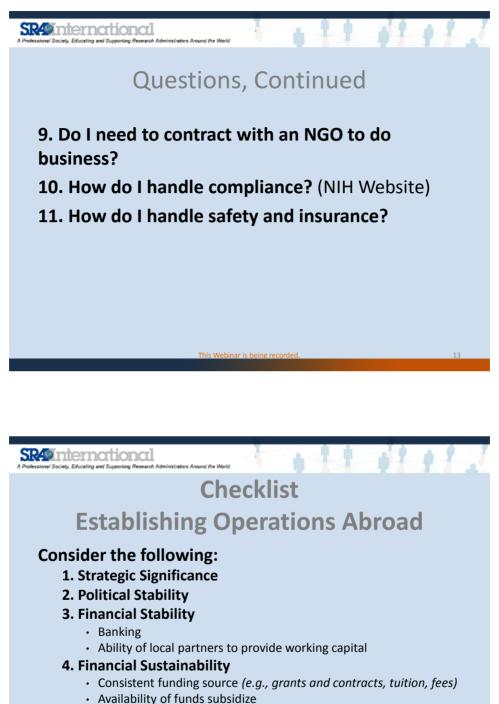


Do We Have Different Challenges In the International Arena?





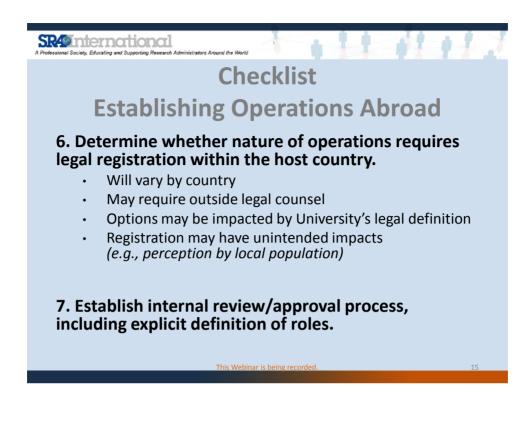




• Unexpected costs: Logistics, Legal, Unrecovered in-directs

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5. Safety and Security





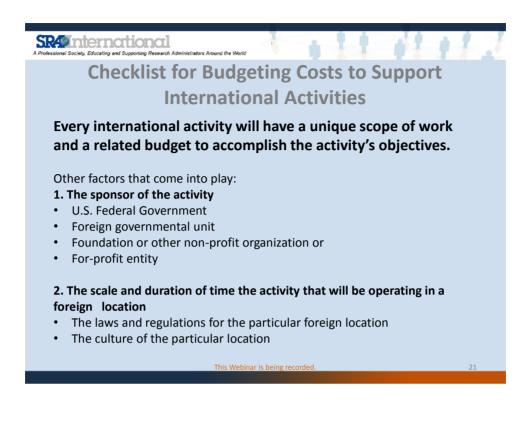




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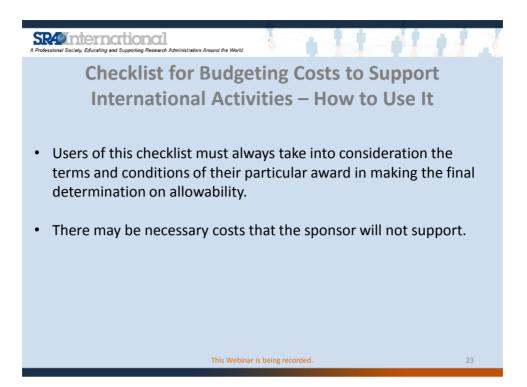


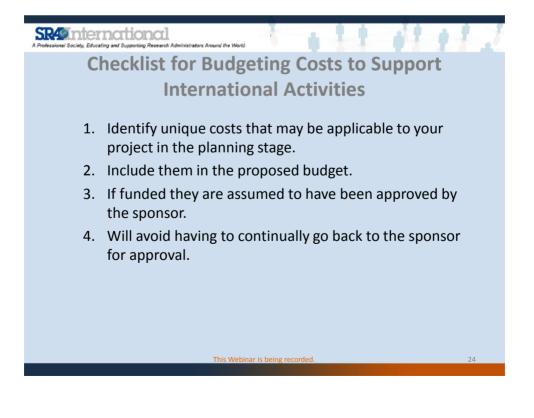
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Checklist for Budgeting Costs to Support International Activities – How to Use It

- This checklist is meant as a planning tool to assist in identifying potential costs that may need to be considered in developing a budget and scope of work. Many of these costs are in addition to the cost of conducting the actual project.
- In preparing the checklist that follows we have tried to take into consideration the conditions on the previous slides to determine if a cost would generally be considered allowable or unallowable.
- We also considered the provisions of OMB Circular A-21 (2 CFR 220), the NIH Grants Policy Statement, the PHS Grants Policy Statement and certain other sponsor terms and conditions.

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Allowability comments Allowability comments 1. Wire, Credit Card Transaction & Foreign Bank Fees Allowability Comments a. Wire fees (for field advance to a domestic or foreign bank account; salary to UW employee working abroad; payments to vendors, independent contractors and/or other service providers) Allowable Allowable b. Credit card transaction fees in foreign settings Allowable Allowable Allowable c. US and foreign bank fees for processing a wire transaction initiated by the UW Allowable Allowable Allowable	International Activities Allowability comments 1. Wire, Credit Card Transaction & Foreign Bank Fees Allowability comments a. Wire fees (for field advance to a domestic or foreign bank account; salary to UW employee working abroad; payments to vendors, independent contractors and/or other service providers) Allowable b. Credit card transaction fees in foreign settings Allowable c. US and foreign bank fees for processing a wire transaction initiated by the UW Allowable	SRegisternational A Professional Society, Educating and Supporting Research Administrators Around the World	111	111	١.
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Checklist for Budgeting	g Costs to Support	
International	Activities	
2. Pre-departure Expenses		
a. Pre-travel health consultation	Not Allowed	
b. Required immunizations and preventative medications	Allowable	
c. Malaria prevention supplies	Allowable	
d. Personal health supplies (e.g., bug spray, first aid kit)	Not Allowed	
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International Al Society, Educating and Supporting Research Administrators Around the World Checklist for Budgeting International A		upport
3. Travel		
a. Airline tickets (Note: budget permitting, business class upgrade is an option if the total time spent in flight is 14 hours or longer)	Allowable-(Generally Subject to U.S. Flag Carrier Restrictions)	
b. Ticketing fee for airline tickets	Allowable	
c. Airline fuel surcharge fees	Allowable	
d. Checked baggage fees	Allowable	
e. Excess baggage fees	Allowable	
f. Tickets for other ground transportation (e.g., train, bus, ferry)	Allowable	
g. Passport (if needed for business purposes) initial, renewal or extra pages	Not Allowed	
h. Visa, if required by foreign country	Generally Not Allowed	
i. Visa expediting service	Not Allowed	
j. Entry and/or exit fees at foreign airports	Allowable	
k. Trip insurance	Not Allowed	
4. Per diem & Lodging		
a. Per diem allowance for travelers	Allowable	
b. Lodging	Allowable	

Checklist for Budgeting Checkl		pport
International A		
	ctivities	
5. Communication Equipment/Technology		
5. Communication Equipment/Technology		
5. communication equipment, recimology		
	Allowable for Special &	
	Unique Circumstances Allowable – see 5a	
	Allowable – see 5a	
	Allowable – see 5a	
	Allowable	
bridge lines, UWATTS	Allowable	
	Allowable – See 5a	
	Sponsor Approval	
electronic equipment	-r	
	Allowable –Non-UW	
	Location	

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Professional Society, Educating and Supporting Research Administrators Around the World Checklist for Budgeting International A		øl øl pport	2
6. Supplies/Educational Aids/Materials			
a. Office supplies (e.g., pens, paper)	Allowable Special		
	Circumstance		
b. Educational aids (e.g., DVDs, books, whiteboards)	Allowable		
c. Materials	Allowable		
d. Shipping cost, if purchased out of the foreign country e. Duty or customs fees, if purchased out of the foreign	Generally Not Allowed		
country	Generally Not Allowed		
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Checklist for Budgeting Cos	sts to Sup	port	
International Activ	vities		
7. Procurement			
a. Shipping cost to foreign location for purchased item	Allowable		
b. Duty or customs fees	Generally Not Allowed		
c. VAT (Value Added Tax) on purchases made in foreign locations	Not Allowed (NIH)		
d. Expediter fees to facilitate entry of purchased item (e.g., scientific equipment) into foreign location	Allowable		
e. Storage fees at port of entry	Allowable		
8. Equipment			
a. Fuel to run equipment (e.g., gas)	Allowable		
b. Alternations and/or renovations to work space to	Allowable-May		
accommodate equipment	Require Prior Approval		
 c. Alarm system to signal equipment malfunction or loss of electricity (e.g., alarm for a freezer) 	Allowable		
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9. Vehicles		
a. Vehicle purchase	Sponsor Approval	
b. Tax and registration fee	If Purchase	
	Approved	
c. Customs or duty fees, if purchased outside of foreign location	Generally not	
	Allowed	
d. Vehicle maintenance	Allowable	
e. Fuel and oil	Allowable	
f. Replacement tires, if traveling primarily outside of main cities	Allowable	
g. Parking or storage fee	Allowable	
h. In-country vehicle insurance (Note: Vehicle insurance is a UW requirement if it isn't required by the foreign government)	Allowable	

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Checklist for Budgeting Adn	ninistrativ	e Costs	
and Fees to Support Interna	ational Ac	tivities	
10. Services			
a. Photocopying	Allowable – Special circumstances		
b. Faxing	Allowable – Special circumstances		
c. Mailing costs (e.g., Fedex)	Allowable – Special circumstances		
11. Safety & Security			
a. Insurance for exclusions in UW's SOS travel assistance policy	Not Allowed		
b. SOS security evacuation from a country with an "extreme risk" rating (this evacuation is excluded as part of UW program)	Allowable with Sponsor Approval		

A Professional Society, Educating and Supporting Research Administrators Around the World Checklist for Budgeting Admin and Fees to Support Interna			
12. Insurance		tivities	
a. In-country health insurance to supplement UW employee's state-side plan	Allowable if required for all UW employees		
b. Mandatory UW international health insurance for undergrad or grad student affiliated with the international project	Allowable		
c. Property insurance to cover lost, damaged or stolen UW property used abroad	Allowable		
d. Potential in-country insurance requirements for equipment, property, worker's compensation, auto, general disability, health insurance and professional malpractice	Allowable		
e. Theft insurance, if handling large amounts of cash	Allowable- with Sponsor Approval		
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Checklist for Budgeting Administrative Costs and Fees to Support International Activities

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13. Foreign Human Subjects Review		
a. Costs associated with human subjects review at foreign location	Foreign Sub-awardee Costs Not Allowed	
14. Gratuities		
a. Tips and gratuities	Not Allowed	
b. Honoraria	Allowable	
15. Additional Considerations		
a. If paying in a foreign currency, budget should have some allowance for currency fluctuations	Should be Built into the Budget	
b. Contingency fund to cover unexpected/unplanned necessary expenses	Contributions to the Fund-Not Allowed	
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Checklist for Budgeting Administra	tivo Costs	and Eoo
to Support International	Activities	
FOR INTERNATIONAL ACTIVITY THAT WILL TAKE F PERIOD OF SIX MONTHS OR LONGER AT		
16. Benefits for UW Employees Relocated to Foreign Site		
a. Housing allowance	Include in Budget	
b. Household moving cost	Include in Budget	
c. School tuition for dependent children	Include in Budget	
d. First 30 days in-country may require hotel and per diem for each family member	Include in Budget	
	Include in Budget	
e. Return trip to US for personal purposes		
e. Return trip to US for personal purposes f. Repatriation costs (i.e., moving costs back to home location)	Include in Budget	

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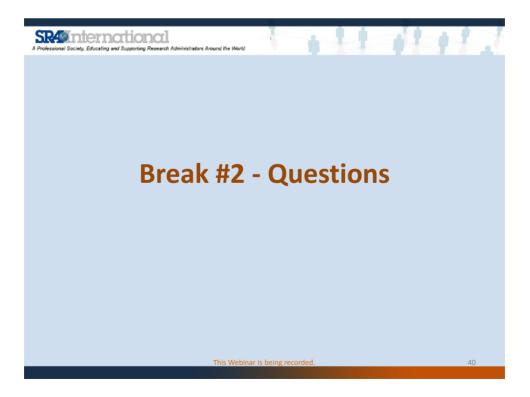
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Checklist for Budgeting Costs International Activity FOR INTERNATIONAL ACTIVITY THAT WILL TAKE P PERIOD OF SIX MONTHS OR LONGER AT	ties LACE FOR A C	CONTINUOUS
18. Human Resources Staffing		
a. If hiring local citizens through in-country HR vendor, charge from agency for staff	Allowable	
b. If hiring local citizens through in-country HR vendor, additional agency fee	Not Allowed	
c. If hiring local citizens directly through UW registered entity (e.g., UW Kenya), staff salary	Allowable	
d. If hiring local citizens directly through UW registered entity (e.g., UW Kenya), in-country benefits	Allowable	
e. If hiring local citizens directly through UW registered entity (e.g., UW Kenya), employment and social taxes for local citizens	Allowable	



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Checklist for Budgeting Costs to Sup Activities FOR INTERNATIONAL ACTIVITY THAT WILL TAKE P PERIOD OF SIX MONTHS OR LONGER AT	LACE FOR A CO	NTINUOUS	
20. Compliance with In-Country Employment and Social Taxes			
a. In-country employment and social taxes for UW employees	If Required		
21. Business License Fee			
a. Fee for business license for a UW registered entity (e.g., UW Kenya)	Sponsor Approved		
22. Audits			
a. In-country mandatory audits	Allowable		
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Guidelines for International Relocation Benefits

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International Relocation Benefit	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
Pre-Travel Preparation			
1. Work permit for UW employee	Department applies for permit and pays fees	NO	YES
2. Visa for UW employee	Department applies for visa and pays fees	NO	YES, for new hires ¹
3. Pre-travel health consultation for UW employee	Reimbursed with a receipt	NO	YES
4. Required immunizations for UW employee	Reimbursed with a receipt	NO	YES
5. Required medications for travel to foreign site for UW employee	Reimbursed with a receipt	NO	YES
6. Malaria prevention supplies for UW employee	Reimbursed with a receipt	NO	YES

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tors Around the World

Guidelines for International Relocation Benefits

International Relocation Benefit	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
Pre-Travel Preparation			
7. Visas for UW employee's family	Reimbursed with a receipt	YES	Requires explicit sponsor approval prior to submission ²
8. Pre-travel health consultation for UW employee's family	Reimbursed with a receipt	YES	Requires explicit sponsor approval prior to submission ²
9. Required immunizations for UW employee's family	Reimbursed with a receipt	YES	Requires explicit sponsor approval prior to submission ²
10. Required medications for travel to foreign site for UW employee's family	Reimbursed with a receipt	YES	Requires explicit sponsor approval prior to submission ²
11. Malaria prevention supplies for UW employee's family	Reimbursed with a receipt	YES	Requires explicit sponsor approval prior to submission ²
12. Tax advice with an external consultant selected by employee, up to \$500	Reimbursed with a receipt	YES	NO

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Guidelines for Internati	onal Relo	catio	n Benefits
Managing Household Property	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
13. Storage at home of record, up to \$120 a month, for the duration of the foreign assignment	Pay through UW Payroll as an "APF" earn type	YES	YES
14. Assistance with moving expenses up to the following amounts to a post abroad:			
Employee \$5,000 Employee + 1 \$6,500			
Employee + 2 \$8,000 Employee + 3 \$9,500			
There are three options:			
a. Shipping costs are prepaid through the UW contract up to the stated amount above	Department works with UW Purchasing to open a PO	NO	YES
b. Reimbursement with receipts up to the stated amount above	Reimbursed with a receipt	NO	YES
c. Lump sum payment up to the stated amount above	Paid by UW check to employee in advance	YES	YES
		_	

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Guidelines for International Relocation Benefits

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Arrival at Post	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
15. Economy-class airfare for employee from employee's home of record to UW foreign post of employment	Department purchases the ticket	NO	YES
16. Economy-class airfare for employee's family from employee's home of record to UW foreign post of employment	Department purchases the ticket	NO	YES
17. Temporary lodging up to US Government rate for the foreign location—up to 30 calendar days upon arrival onsite	Reimbursed with receipts	YES (1 st night is not taxable)	YES
18. Per diem up to US Government rate for the foreign location—up to 30 calendar days	Reimbursed with receipts	YES	YES
19. Up to 40 hours paid leave to obtain housing, evaluate schools and settle in	(No Additional cost)	Reg. salary	Yes

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type pr	ponsor approval ior to submission ²
an "APF" s	Requires explicit ponsor approval ior to submission ²
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Guidelines for International Relocation Benefits

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Host Country Health Insurance	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
22. In addition to the health benefits provided by the UW, the cost of premiums for host country health insurance, if available	Dept. should consult with UW HR & Benefits Offices about how to buy host country health insurance	NO	Requires explicit sponsor approval prior to submission ²
K-12 Education			
23. Actual costs for tuition, books required fees and uniforms up to \$15,000 per child per year, not to exceed US Department of State standards for the location. Maximum family benefit is \$30,000 annually.	Employee's department should make the payments directly to the school through a wire transfer	YES	Requires explicit sponsor approval prior to submission ²

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Guidelines for International Relocation Benefits

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Home Leave (Annually after 12 months)	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
24. Home leave for employeeAfter first 12 months at post, economy roundtrip for employee to home of record, or equivalent costs to another destination.	Department purchases the ticket	YES	Requires explicit sponsor approval prior to submission ²
25. Home leave for familyAfter first 12 months at post, economy roundtrip for employee's family to home of record, or equivalent costs to another destination.	Department purchases the ticket	YES	Requires explicit sponsor approval prior to submission ²

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ators Around the World

Guidelines for International Relocation Benefits

Emergencies	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
26. Up to \$5,000 per household per year to cover costs of roundtrip economy airfare to employee's home of record (or equivalent) to attend to acute health crisis or death in employee's immediate family (immediate family as defined by the UW)	Department purchases the ticket	YES	YES
27. Evacuation assistance for the employee and family to the nearest suitable destination for safety or medical treatment.	Paid benefit by the UW		
Repatriation			
28. Economy class airfare for employee to employee's home of record at the end of the posting	Department purchases the ticket	NO	YES
29. Economy class airfare for employee's family to employee's home of record at the end of the posting	Department purchases the ticket	NO	YES

Guidelin	es for Interna	tional Relo	cation	Benefits
	epatriation	Recommended Method for Administering the Benefit	Taxable Benefit?	Allowable Charge to Federal Grant?
	moving expenses up to the to the employee's home of			
record:				
Employee	\$5,000			
Employee + 1	\$6,500			
Employee + 2	\$8,000			
Employee + 3	\$9,500			
There of	are three options:			
a. Shipping costs are	e prepaid through the UW	Department works	NO	YES
contract up to the st	tated amount	with UW Purchasing to open a PO		
b. Reimbursement v amount	vith receipts up to the stated	Reimbursed with a receipt	NO	YES
	nt up to the stated amount	Paid by UW	YES	YES
		check to employee		

