To Aim Globally, You Must Organize Locally

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Presenters

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Agenda

• Going Global
• Risk Management
• The Silo Effect
• Coordinate Locally--Rally the Troops
• Make the Pitch
• Implement

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Going Global

• Internationalization is critical in all aspects of the university’s programs for research, students, employees, and graduates. The university must pursue programs and policies that enable it to compete successfully in the global economy.
• Internationalization used to comprise mostly of study abroad.
Poll Question

What is your type of institution?

A. Public, research-extensive university
B. Private, research-extensive university
C. 4 year college/university
D. 2 year college
E. Other

Poll Question

What structure does your institution currently have regarding global operations?

A. Centralized office that serves all colleges and departments
B. Decentralized where each college and department handles their own
C. No structure at all—faculty handles all on his/her own
Poll Question

Have you seen a significant increase in international activity over the last 5 years?
A. Yes
B. No
C. I don’t know

Going Global

Factors to consider when evaluating the risk of international activities include:
• Degree of emphasis on research and educational programs
• The number of colleges separately engaged in international activities
• Level of decentralization of the organizational structure
Going Global

• As the University expands its global workforce presence, hiring employees and consultants abroad is a complex and challenging issue. Labor laws, taxation, and immigration requirements vary considerably from one country to another and tend to be quite different from regulations in the U.S.
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Risk Management

- Identify
- Assess
- Evaluate
- Prioritize
- Plan
- Implement
What are the risks?

• Cash management and banking in foreign countries
• Purchasing and leasing equipment/office space
• International tax considerations
• International research and funding regulations
• Infrastructure costs
• Intellectual property, export control, technology

What are the risks?

• Lack of policy/strategic plan regarding activities abroad
• Failure to have robust knowledge of the scope of the university’s international presence
• Determining risk appetite/tolerance
• Contract stipulations and foreign country enforcement
• Penalties for violation of foreign laws/contracts
• Travel registry, global emergencies, insurance
What are the risks?

- Hiring and paying “in-country” citizens
- Foreign laws and regulations regarding employment of “in-country” citizens
- Paying U.S. citizens working abroad long-term
- Documentation/legality of U.S. citizen working abroad in various countries
- Independent contractor vs employee

What are the risks?

- Lack of policy/strategic plan regarding activities abroad
- International research and funding regulations
- IRB constraints and regulations
- Exposure for the university regarding the topics/issues faculty are involved in abroad
Have you seen this?

- Faculty headed to foreign countries with satchels full of cash to fund projects
- Finding foreign citizen in another country being paid through bank account of university employee
- Faculty setting up foreign projects under advice from foreign individual with no credentials or knowledge

The Silo Effect

- Risks cross multiple functional areas
- Lack of communication that creates silos
- No department has university-wide “ownership”
- Lack of consistency of operational processes
- Result is significant risk
Breakdown Silos

- Increase communications
- Provide transparency
- Find common ground
- Value expertise of each business area and their important role in global operations
- Commit to working together

Rally the Troops

- General Council’s Office
- Sponsored Research
- Human Resources
- Business Affairs
- International Center
- Provost’s Office
- Controller’s Office
- Contracts and Grants
Make the Pitch

Consultant for an International Risk Assessment

• Benchmarking
• Evaluate governance structure
• Evaluate ability of university to identify and resolve legal and compliance issues
• Assist with establishing efficient infrastructure
• Provide international planning tools

Make the Pitch

• Funding: ‘Go big or go home’ or ‘ask for what you can get’
• Focus groups
• Faculty buy-in
• Advisory committee/council
• Strategic decisions on international work
• Site visits
• Handling current projects
• Outside vendors, ITN’s
• Technology
Considerations for Implementation

- Staffing the department
- Create and monitor Global Operations website
- Create and continually monitor an International Project Start-Up Guide for faculty and staff
- Create checklists, charts, contract frameworks to use in planning, budgeting and implementing projects
- Country Risk Ratings
- Faculty, Staff, and Student travel policies
- Coordination of global involvement awareness and approval committee (internal)
- Administration of the University Travel Registry
- Manage and negotiate international health insurance program
- Coordinate a global emergency response program

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- Security support and evacuation services
- Emergency translation services
- Travel Document Management and Referral
- Visa Applications
- Manage international travel and research orientation
- International incident tracking and monitoring
- Coordination of international contract and agreement processing
- Export and import control assistance
- Staffing for international work (home-country requirements)
- Provide key contacts to international researchers and travelers (concierge service for individuals within the university)
- Import and Export employee tracking and monitoring
Our Story

- Proposed centralized global operations office
- Director of Global Operations, communications specialist, administrative support
- Two components—operational and research
- Commitment to fund outside consulting when needed
- Priorities are review of international activity, assessment of institutional needs with balance of service and compliance, and development of global operations policies and procedures.

Takeaways

- No true owner
- Coordinate locally by partnering with other administrative areas
- Institutional risk appetite
- Risk Management Plan
- Funding
- Implement
Don't forget to submit your questions to our presenters.

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Thank you for joining us today!