

Guidelines for the Engagement of Individuals Outside of the U.S. and Placement of Temple University Employees on Assignments Outside of the U.S.

As a research and teaching institution, Temple University's reach extends globally with collaborations and university initiatives in several countries. As a result, the university may desire to engage individuals who reside outside the U.S. to perform services for the university from outside the U.S. or to send a university employee on an overseas assignment. These guidelines ("Guidelines") explain how schools, colleges, and administrative units may initiate a review of such requests before an offer or placement is made so that the university may process such requests efficiently. Assignments to Temple University's Japan and Rome campuses are excluded from these guidelines and handled separately by the local HR and Finance staff in coordination with the appropriate Main campus unit(s), including HR Payroll Management.

Schools, colleges, and administrative departments interested in engaging an individual resident outside the U.S. or placing a university employee overseas to perform services for Temple University outside the U.S. should carefully review this information. **The first point of contact for such requests is the relevant Associate Dean for Faculty Affairs or Dean Designee (for faculty), Human Resources Business Partner (for staff), or School Research Administrator for sponsored research projects.** Such requests should be initiated well in advance of the intended engagement or placement.

For exceptions to these Guidelines, please see the end of this document.

Decisions regarding the engagement or placement of such individuals are made in consultation with Human Resources Payroll Management, the Office of University Counsel ("OUC"), the Vice President and Chief Financial Officer ("CFO"), Faculty Affairs, Human Resources ("HR"), Provost and Faculty Affairs offices, and other departments as needed. These offices will examine applicable requirements under U.S. and host country laws and regulations, including, for example, the form of engagement (employment, independent contractor, third party hiring agency, secondment agreement with foreign institution, etc.). In many cases, such engagement or placement may result in additional costs for the university school or department, and the university may need to implement certain steps before an offer or placement can be made.

Once the school, college, or department has contacted its Associate Dean or Dean Designee for Faculty Affairs, HR representative, or School Research Administrator for sponsored research projects, the steps are as follows:

1. **Initiation**: The school, department, or division will complete the *International Engagement Request Form* (Outside the U.S.) and submit it to their Associate Dean for Faculty Affairs or Dean Designee, HR representative, or School Research Administrator for sponsored research projects. Upon approval, the request will then be forwarded by the Associate Dean for Faculty Affairs, HR representative, or School Research Administrator to the appropriate vice president or dean for review and approval along with the attached *International Engagement Request Letter*.
2. **Initial Approval**: In consultation with faculty affairs or HR as needed, the dean or vice president will assess the request for the engagement or placement and decide whether to

approve or disapprove it for further analysis and review by appropriate TU offices and will return it to the school's Associate Dean for Faculty Affairs or HR representative. See *International Engagement Request Letter Template*.

3. **Assessment of Legal/Operational Requirements:** The Associate Dean for Faculty Affairs, HR representative, or school research administrator will consult with OUC, Tax, Payroll, Sponsored Projects, and other university offices as needed. The appropriate TU offices will then advise the dean on applicable legal and regulatory requirements directly or through the Associate Dean for Faculty Affairs, HR representative, or School Research Administrator. They will anticipate the next steps to set up the engagement or placement. Consultations for longer-term placements or engagements may take up to a few weeks if advice needs to be sought from lawyers overseas or other external sources.
4. **Final Approval:** The vice president or dean will approve or decline the engagement or placement. Additional approvals from senior administration may be needed if the university must undertake significant steps or expenditures, such as legal registrations.
5. **Implementation:** Once approved, the school, division, or department is responsible for implementing the engagement in coordination with appropriate TU offices before the placement. *Exceptions: These Guidelines do not apply to short-term overseas business trips TU staff and faculty, such as to attend academic or other conferences, to conduct recruiting activities, or to carry out other routine short-term university business. These Guidelines also do not apply to the engagement of individuals outside the U.S. for one-time services, such as translation services.*

For questions or to provide feedback on these Guidelines, please contact the Assistant Vice President for Human Resource Payroll Management at 215-926-2244.