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1. **Background**

The International Scientific Relations Fund (ISRF) is a financial fund denominated in dollars that the Technion designates for eligible academic faculty members. The funds accumulated in this fund are available to the faculty members and can be used to finance various activities, as specified in Section 5.1.

The use of the term “fund” does not imply that the allocations in question are classified as a fund under legal definitions.

2. **Objectives**

The objective of this procedure is to document the formal regulations at the Technion concerning eligibility for accruing rights in the International Scientific Relations Fund, the rates of accumulation, conditions for utilizing accrued rights, terms for redeeming these rights, as well as the approval process, supervision and control related to their implementation, and all related matters.

3. **Definitions**


4. **Authority and Responsibility**

- 4.1. The Accounting Division has the authority and responsibility to establish the procedures for receiving funds and payments for a faculty member traveling for professional development, as well as to implement the provisions specified in this procedure in accordance with the expense guidelines permitted by the Tax Authority.
- 4.2. The Executive Vice President for Academic Affairs (EVPA) has the authority to determine who is eligible for the International Scientific Relations Fund (ISRF), as well as to establish the criteria for this eligibility.
- 4.3. In the case of professional development abroad, it is the responsibility of the faculty member to secure medical insurance.

5. **Method/Nature**

5.1. **Permitted Uses of the ISRF**

- 5.1.1. Funding academic activities outside the Technion, whether in Israel or abroad (for example: participation in research, conferences and professional tours, seminars).
- 5.1.2. Payment of membership fees to professional associations (as detailed in Section 5.4.6).
- 5.1.3. Transferring funds from the annual ISRF allocation to a research funding budget, which allows for additional uses as detailed in Section 5.4.8.


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5.2. Eligibility for the ISRF

- 5.2.1. Eligibility for the ISRF is based on the annual allocation to which the faculty member is entitled, proportional to their employment percentage and academic rank.
- 5.2.2. The following individuals are eligible for the ISRF:
 - 5.2.2.1. Full-time faculty members employed at the Technion for at least one semester.
 - 5.2.2.2. Part-time faculty members (at least one-quarter position) employed for at least one full year.
 - 5.2.2.3. Faculty members in a teaching fellows track (half-time position) employed for 10 months.
 - 5.2.2.4. Faculty members who are included in one of the above categories and are on sabbatical and/or are exempt from teaching.
 - 5.2.2.5. Faculty members on maternity/parental leave as defined by the Employment of Women Law, 5714-1954.
- 5.2.3. Notwithstanding what is stated in Section 5.2.1., a faculty member whose appointment came into effect after the start of the academic year will be entitled to a proportional amount based on their period of employment during that year.

5.3. Annual Allocation and Personal Account

- 5.3.1. The Association of University Heads determines the annual allocations to the fund each year. The amount of the annual allocation is set according to the faculty member's rank, pertains to a full-time position, and is updated annually.
- 5.3.2. Each faculty member at the Technion who is eligible for allocations from the fund will have a dollar-denominated account opened, where the balance of the fund available to them is calculated.
- 5.3.3. The personal account will be credited on October 1st of each year with the annual allocation amount, in accordance with the faculty member's rank and status, or the proportional amount as specified in Section 5.2.3.
- 5.3.4. A faculty member who is promoted during the year will have their account credited with the additional amount to which they are entitled, similar to how they receive adjustments to their salary.
- 5.3.5. During the first seven years of service at the Technion, a faculty member may request an advance from the amount that will be available to them on October 1st of the following year, provided that their total debt in the fund does not exceed half of the amount that will be available to them on October 1st of the following year. Long-serving faculty members may submit a special request for an advance to the Executive Vice President for Academic Affairs (EVPAA).
- 5.3.6. The amounts available to the faculty member in the ISRF account are in dollars and do not accrue any interest.
- 5.3.7. At any time, a faculty member can view the balance available to them through the Technion portal.

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5.3.8. It is the responsibility of the faculty member to utilize the fund during their period of employment at the Technion. It is not possible to access the fund during a period of unpaid leave.

5.3.9. The total annual credits that are not utilized may be carried over for up to 9 years. Any ISRF credits that remain unused after 9 years will be cancelled.

5.3.10. A faculty member who joins the Technion and was entitled to funds from the ISRF at another higher education institution can verify with the Human Resources Division at the Technion whether a continuity of rights agreement exists.

If a continuity of rights agreement exists between the institutions, the faculty member may transfer the remaining ISRF balance from the previous institution to the Technion. Upon receipt of the funds at the Technion, the faculty member's ISRF account will be credited with the dollar amount equivalent to the funds received from the transferring institution on the day the funds are actually received at the Technion.

5.4. Traveling for Professional Development

5.4.1. Procedures for Obtaining Approval for Travel for Professional Development Using ISRF Funds

5.4.1.1. Requests for travel or absences involving the use of ISRF funds must be submitted through the portal at least 15 working days before the planned absence. Requests submitted close to or after the date of the absence will not be processed, except in exceptional cases that are convincingly justified.


5.4.1.2. If a faculty member needs to change the dates of approved travel, they must request retrospective approval for the change through the portal's forms system by selecting "Change to the Approved Request Form."

5.4.1.3. Generally, travel for professional development that takes place during the academic term will not be approved, except for attending a conference for a short period of time, up to one week.

5.4.1.4. Absences during the first week of the semester will be approved only in exceptional cases and require appropriate justification.

5.4.1.5. A faculty member who wishes to travel, and that travel includes the month of October (the start date of the academic year is October 1st), must complete the detailed teaching schedule form for the first semester of the next academic year. This form is available on the faculty member's personal portal at the following website: <https://portal.technion.ac.il/irj/portal>. The faculty member's signature on this form will be regarded as a declaration that the faculty member is prepared to teach the courses listed.

5.4.1.6. A faculty member who teaches a course must be present during the exam. Additionally, according to the procedure, final grades must be

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submitted within a week of the exam date. Therefore, as a general rule, travel for professional development will be approved only if it occurs at least one week after the exam. If the faculty member wishes to travel before one week has passed since the exam, they must ensure that they submit the grades before they leave.

5.4.2. Submitting a Request and Receiving Approval

- 5.4.2.1. Faculty members eligible for the ISRF, as outlined in Section 5.2, must submit a request to utilize ISRF funds in advance using the electronic form available on the faculty member's personal portal at the following website: <https://portal.technion.ac.il/irj/portal>.
- 5.4.2.2. The request must include detailed information about the activity for which the funds are needed and exact dates.
- 5.4.2.3. The request will be reviewed and approved by the authorities specified on the electronic form, according to the criteria in effect at that time.
- 5.4.2.4. The Accounting Division will generate a travel identification number and allocate the requested amount in the financial system.

5.4.3. Flight Tickets and Choosing a Travel Agency


- 5.4.3.1. The costs of flight tickets will be approved in accordance with income tax regulations.
- 5.4.3.2. A Technion faculty member who chooses to use the services of one of the travel companies that won the public tender conducted by the Technion may request the travel agency to send the invoices to the Technion, and the Technion will pay the agency directly.
- 5.4.3.3. If the faculty member chooses to use a different travel agency that did not win the Technion's tender, they must pay the agency independently and will be reimbursed by the Technion. In this case, the faculty member cannot request to have the invoice sent to the Technion.

5.4.4. Financial Arrangements and Funding

- 5.4.4.1. The faculty member should contact the Accounting Division and determine, with them, arrangements for obtaining funds and payments.
- 5.4.4.2. A faculty member may receive funding from the ISRF for trips related to one of the purposes mentioned in Section 5.1 above (conferences in Israel or abroad and/or professional tours abroad or travel for research participation abroad), as well as from research grants or budgets available to them at the Technion R&D Foundation or the Technion.
- 5.4.4.3. The faculty member may request an advance before their trip based on the estimated expense report approved approximately one month prior to the travel date.

5.4.5. Returning from a Trip and Submitting a Report to the Accounting Division

- 5.4.5.1. Upon returning from the trip or sabbatical, the faculty member must submit a report to the Technion's Accounting Division detailing the use of ISRF funds, along with supporting documentation and receipts, as

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specified on the form, such as the form in Appendix A, within 30 days of their return from the trip.

5.4.5.2. The faculty member must include a detailed account of all actual expenses on the form that were not covered by other sources.

5.4.5.3. If the faculty member combines the trip with an additional research activity funded from a budget managed by the Technion R&D Foundation (as detailed in Section 5.4.8), they may submit the report either to the Technion or the Technion R&D Foundation, at their discretion. A single joint travel report should be prepared for this trip.

5.4.5.4. A faculty member who does not report their trip within 90 days will have the travel funds provided to them prior to the trip treated as income for tax purposes, after receiving notification from the Accounting Division.

Additional travel requests will not be approved until the report for the previous trip has been submitted.

5.4.5.5. If a faculty member receives funds exceeding the allowable amount for income tax purposes, they must return the excess amount within one month of receiving notice. Failure to do so will result in the excess amount being deducted from their salary.

5.4.5.6. The Accounting Division will reconcile the account and credit or debit the traveler, in accordance with the tax authority's allowable expense regulations. These regulations can be reviewed on the Technion's website, Office of the Director General of Finance, under the "Forms" tab: <http://mishne.net.technion.ac.il>.

5.4.6. Additional Uses of the ISRF

5.4.6.1. An active faculty member who is eligible for the ISRF may request to pay membership fees to professional associations.


The membership fee form should be submitted by the faculty member to the Accounting Division.

5.4.6.1.1. Membership fees to professional associations abroad will be paid by the Accounting Division based on an invoice from the association, and the expense will be charged to the faculty member's ISRF account.

5.4.6.1.2. Membership fees to professional associations in Israel will be paid directly by the faculty member, and reimbursement will be issued based on the receipt for the payment, with the expense being charged to their ISRF account.

5.4.7. Professional Development During Sabbatical

5.4.7.1. A faculty member who wishes to withdraw funds from the ISRF allocation for travel as per Section 5.1 (conferences in Israel or abroad and/or professional tours abroad or travel for research participation abroad) before leaving for sabbatical must submit a request in

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accordance with Section 5.4.2. and report on the use of ISRF funds according to Section 5.4.5 (after returning from sabbatical).

- 5.4.7.2. A faculty member in the same situation as above, who leaves for professional development and continues their sabbatical without returning to Israel, will not be reimbursed for the cost of the plane ticket.
- 5.4.7.3. A faculty member may request to add to their sabbatical grants a withdrawal of funds from the ISRF of up to 30% of the sabbatical grant amounts, or the annual credit amount, whichever is higher. These amounts will be transferred to them, subject to tax deductions.
- 5.4.7.4. For travel during a sabbatical abroad, a request must be submitted in accordance with Section 5.4.2.
Reimbursement will be provided for recognized expenses, excluding per diem and accommodation expenses.
For travel during a sabbatical in Israel or during a period of exemption from teaching, the procedures are similar to those for a regular professional development trip taken during active work time.

5.4.8. Use of ISRF for Research Expenses

Up to 20% of the annual ISRF allocation may be transferred to a budget used for research funding purposes. The transfer will be subject to the following conditions:

- 5.4.8.1. The transfer request must be made using the form in Appendix B.
- 5.4.8.2. The transfer will be made once a year, to an institutional research budget.
- 5.4.8.3. The transfer will only be approved if there is a positive balance in the ISRF, equal to at least one year's worth of contributions, before the transfer is made.
- 5.4.8.4. The portion of the ISRF budget that was transferred to research, after deducting VAT and 10% overhead, may be used for the following purposes: purchasing laboratory equipment, software or hardware, a personal computer (one computer purchase is allowed every two years), payment for research assistants' salaries, research consumables, subscription fees for scientific and professional journals, translation and editing of professional literature, and payment for publication in indexed scientific journals. In addition, it can cover the cost of monthly internet access at the researcher's home (ADSL), including a static IP if required, and reimbursement for a router with a one-time purchase cost (not rental).
- 5.4.8.5. The faculty member will not be permitted to authorize salary payments to themselves or any other financial benefits for themselves within the framework of a research budget account.

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Funds accumulated in this budget do not qualify for additional research allowances, cannot be redeemed upon completion of employment, and cannot be transferred back to the ISRF account. Additionally, these funds are not inheritable.

5.5. Completion of Service

5.5.1. Withdrawal of ISRF Balance by a Faculty Member Who Concludes Their Service Due to Retirement, Dismissal, or End of Appointment

5.5.1.1. A faculty member who concludes their service at the Technion and transfers to another higher education institution with which the Technion has a continuity of rights agreement can request that this continuity agreement be applied to their sabbatical and ISRF funds. They may instruct that their remaining ISRF balance at the Technion be transferred to the academic institution they are joining. The request for continuity of rights must be made within one year from the end of employment at the Technion.

The Technion will carry out the transfer after receiving a request from the institution to which the faculty member has transferred.

The transfer of funds will be made in NIS according to the dollar exchange rate on the actual date of transfer.


5.5.1.2. A faculty member who concludes their service at the Technion and concludes their employment is entitled to severance pay (or to the completion of severance pay according to the accumulating pension plan regulations), and they may request to redeem the balance of the ISRF to which they are entitled upon the end of their service. Redemption of the ISRF balance, through payment in NIS and subject to statutory tax deductions, will be carried out within 30 days from the date of notification by the Human Resources Division.

5.5.1.3. A faculty member who resigns and is not entitled to severance pay (or to the completion of severance pay for those in the accumulating pension plan) have their rights to the ISRF nullified.

5.5.1.4. A faculty member holding the rank of full professor who retires and is awarded the title of Professor Emeritus has the option to utilize the remaining ISRF funds as follows:

5.5.1.4.1. Continued utilization of the ISRF funds in the first year following retirement, under the same conditions applicable to tenured faculty members.

5.5.1.4.2. Transferring the remaining funds in the ISRF to the Technion R&D Foundation Ltd. must be completed no later than one year from the date of retirement. These funds will be used to finance research and international collaborations within the framework of research at the institution according to the

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established guidelines. Note that the transfer of funds from the Technion to the Technion R&D Foundation is subject to VAT payments according to the law and overhead costs in accordance with the regulations of the Office of the Executive Vice President for Research. These amounts will be deducted from the remaining transferred funds.

5.5.1.4.3. Receipt of the fund's remaining balance, subject to statutory tax deductions. The remaining balance refers to the amount recorded in Technion's financial records that has not been used and/or transferred to the Technion R&D Foundation.

5.5.1.5. A faculty member with the rank of Associate Professor or Senior Lecturer who retires will receive the remaining balance of the fund, subject to statutory tax deductions.

5.5.2. In the event of the death of an active faculty member – the remaining balance in the ISRF (up to the limit according to Section 5.3.9) will be paid to their legal heirs upon presentation of a certificate of inheritance or a will, subject to income tax regulations.

6. Applicability and Effectiveness

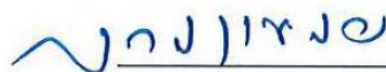
- 6.1. The procedure and administrative instructions herein shall apply to all units of the Technion at large.
- 6.2. This procedure is subject to any changes, if such occur, in the law, salary agreements and directives from the Commissioner of Wages at the Ministry of Finance/Planning and Budgeting Committee.
- 6.3. This procedure shall be in effect from the date of its publication.

Appendices

- A. ISRF Utilization Report Form.
- B. Request for transferring funds from the ISRF to the Technion R&D Foundation for research expenses according to the ISRF Procedure, Section 5.4.8.



Prof. Boaz Golani
Executive Vice President and
Director-General of the Technion



Prof. Shimon Marom
Executive Vice President for Academic Affairs

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Procedure on the International Scientific Relations Fund for Senior Academic Staff at the Technion**Appendix A – ISRF Utilization Report Form****Reporting on a Trip Abroad (Please mark) From the Scientific Relations Fund On Assignment**Required Documents to be Submitted Along with the Report (Please check the box next to the attached material):

- Electronic flight ticket (E-Ticket)
- Boarding passes for departures/arrivals to/from Israel and domestic flights
- Flight ticket – original invoice and receipt
- Hotels – original invoice and receipt
- Car rental – invoice and receipt + rental agreement + rental contract detailing the dates of pick-up and return of the rental car
- Conference – confirmation of attendance and payment for the conference (include traveler's name and conference dates)
- Communication – detailed phone call records and marking of relevant calls related to the trip
- Other expenses

Traveler's Information:

Name: _____

ID#: _____

Email: _____

Cell Phone #: _____

Faculty: _____

Unit Phone #: _____

	From Date	To Date	Number of Days
Total Duration of Stay Abroad for Training/Position			
Total Duration of Stay Abroad (Including Personal Vacation)			

Amounts Paid Directly by the Technion:

	Amount \$
Cash Advance (from the bank)	
Payment to Travel Agent (Flight/Hotel/Car Rental)	
Conference Registration Fees	

Travel Details for Per Diem Calculation (Please separate if part of the period includes personal vacation and/or is funded by another source):

Name of Country	Funding Source	From Date	To Date	Number of Days

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If a reimbursement is due to the traveler (please check the box):

- In NIS to the bank account
 In USD by bank transfer (Address for sending the payment order by mail: _____)

If payment is due from the traveler to the Technion (please check the box):

- In NIS to the Treasury Department
 In USD to Bank Leumi
 In USD, deducted from the salary

Date: _____**Signature:** _____

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**Appendix B – Request for Transferring Funds from the ISRF to the Technion R&D
 Foundation for Research Expenses According to the ISRF Procedure, Section 5.4.8**

Full Name: _____

ID #: _____

Unit Name: _____

ISRF Account Number (781): _____

Requested Amount (*) Before Deductions (\$): _____

Date: _____

Signature: _____

* The requested amount will be subject to VAT deductions + a 10% overhead charge.

** Funds transferred for research purposes are non-redeemable upon cessation of employment and cannot be returned to the ISRF account.

*** The portion of the ISRF budget allocated for research, after deductions, may be used for the following purposes: purchasing laboratory equipment, software or hardware, a personal computer (one computer purchase is allowed every two years), monthly internet connection cost at the researcher's home (ADSL), including a static IP if required, and reimbursement for a router with a one-time purchase cost (not rental), payment of research assistants' salary, research consumables, subscription fees for scientific and professional journals, translation and editing of professional literature, and payment for publication in indexed scientific journals.

Information to be Completed by the Accounting Division:

Cost Center: _____

Approved Amount for Transfer: _____ (if different from the requested amount).