

<b>The Technion – Israel Institute of Technology Procedures</b>	<b>Procedure No.: 11-0105</b> <b>Effective from: February 21, 2017</b> <b>Edition: 3</b> <b>Last updated: March 9, 2021</b> Page 1 of 11
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1. **Background**

The International Scientific Connections Fund (ISCF) was designated by the Technion for eligible academic staff members. The money accruing in the fund is available to academic staff members for funding various activities, as specified in Section 5.1 below.

Use of the term "fund" does not indicate that said allocations are in the nature of a fund, as it is meant in any statute.

2. **Purposes**

The objective of this procedure is to set down in writing the prevailing rules at the Technion, concerning the eligibility for accrual of rights in the ISCF, rates of accrual, conditions for realization of the accrued rights, conditions for redemption of these rights, approval procedures, oversight and control of rights realization, and everything pertaining to and entailed in all the above specified.

3. **Definitions**

(Cancelled)

4. **Authority and Responsibility**

4.1 The Accounting Division has the authority and responsibility to determine the arrangements for receiving the funds and payments for an academic staff member travelling for study purposes, and to implement what is defined in this procedure, in accordance with the rules regarding expenses permitted by the Israel Tax Authority.

4.2 The Executive Vice President for Academic Affairs (EVPAA) is authorized to define the persons eligible for the ISCF and the criteria for eligibility.

4.3 In case of studies abroad, the academic staff member would be responsible for taking out medical insurance.

5. **Method/Essence**

5.1 **Permitted uses of the ISCF**

5.1.1 Funding of participation in conferences in Israel/abroad and/or professional tours abroad or travel for participating in research abroad.

5.1.2 Payment of membership fees for professional associations (as specified in Section 5.4.6 below).

5.1.3 The transfer of funds from the annual ISCF allocation to a research funding budget will allow for additional uses as set out in Section 5.4.8.

5.2 **Eligibility for ISCF**

5.2.1 The amount credited to the ISCF is based on the annual allocation the academic staff member is entitled to, calculated according to the percentage of the academic staff member's position and academic rank.

5.2.2 Persons eligible for the ISCF include:

5.2.2.1 A full-time academic staff member, having been employed at the Technion for at least one semester prior to eligibility.

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- 5.2.2.2 A part-time academic staff member (quarter-time position, at least), having been employed at least for a whole year prior to eligibility.
- 5.2.2.3 An academic staff member in a teaching fellow track (in a half-time position), having been employed for 10 months prior to eligibility.
- 5.2.2.4 An academic staff member in one of the aforementioned groups, who is on sabbatical or exempt from teaching.
- 5.2.2.5 A female academic staff member during childhood and maternity leaves, as defined in the Employment of Women Law, 5714-1954.
- 5.2.3 Notwithstanding that which is stated in Section 5.2.1, an academic staff member whose appointment took effect after the beginning of the year, will be credited with an amount pro rata to the length of time the academic staff member worked that same year.
- 5.3 Annual allocation and personal account
- 5.3.1 Every year, the Council of University Presidents determines the annual allocations for the Fund. The amount of the annual allocation is determined based on the rank of the academic staff member, for a full-time position, and is updated every year.
- 5.3.2 For every academic staff member of the Technion who is entitled to allocations from the Fund, a dollar account is opened in which the Fund balance standing to their credit is calculated.
- 5.3.3 This personal account will be credited on October 1<sup>st</sup> of every year with the annual allocation amount, according to the rank and standing of the academic staff member, or with the pro rata amount as specified in Section 5.2.3.
- 5.3.4 If academic staff members had been promoted during the year, their account will be credited with the additional amount they are entitled to, just as they receive pay differentials due to them.
- 5.3.5 In their first seven years of service at the Technion, academic staff members may ask for an advance payment from the amount to be credited to them on October 1<sup>st</sup> of the following year, so that their debit balance in the Fund will not exceed half the amount that will be available to them on October 1<sup>st</sup> of the following year. Academic staff members with greater seniority, may submit a special request for an advance payment to the EVPAA.
- 5.3.6 The amounts available to the academic staff member in the ISCF account are in dollars and do not bear any interest.
- 5.3.7 At any time, academic staff members may view the balance available to them on the Technion portal.
- 5.3.8 Academic staff members must use the Fund during their period of employment at the Technion. ISCF funds cannot be used during leave without pay.
- 5.3.9 The total of unused annual credit amounts should not exceed 9 years. An amount credited to the ISCF account that has not been used for 9 years, will be cancelled.

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5.3.10 Academic staff member who had joined the Technion and had ISCF funds to their credit at another institution of higher learning, can check with the Technion's Human Resources Division for the existence of a continuity of rights agreement. If such an agreement exists between the institutions, the academic staff members may transfer the ISCF balance from the institution where they worked to the Technion.

Upon receipt of the funds at the Technion, the ISCF account of the academic staff members will be credited with the dollar balance on the day of actual receipt of the money from the transferring institution.

#### 5.4 Travel for continuing education

##### 5.4.1 Rules for approving travel paid from ISCF funds

5.4.1.1 A request for travel/absence involving the use of ISCF money, should be submitted via the portal at least 15 work days prior to the planned date of absence. Requests submitted shortly before or after the date of absence will not be processed, save in exceptional cases that present compelling reasons.

5.4.1.2 If academic staff members are forced to change the dates for an already approved travel, they must request retroactive approval of the change via the portal's forms system using the option "Change in request for an already approved form."

5.4.1.3 Generally, study travel during the period of studies will not be approved, unless it is to attend a short conference of up to a week.

5.4.1.4 Leave of absence during the first week of the semester will be approved in exceptional cases and necessitates appropriate reasons.

5.4.1.5 Academic staff members requesting to travel for a period that includes October (the academic year begins on October 1<sup>st</sup>), must fill out a form for specifying teaching schedule details for period A of the coming academic year, which appears on the personal portal of the academic staff member on the website: <https://portal.technion.ac.il/irj/portal>. The academic staff members' signature on the form will be considered as a declaration that they will be prepared for the courses they are scheduled to teach.

5.4.1.6 Academic staff members who teach a course, must be present during the examination. Also, as per procedure, final grades must be submitted within a week of the examination date. Therefore, as a rule, approval will be given for study travel that begins, at its earliest, a week after the examination. If academic staff members request to depart before a week has passed since the examination, they must state that they will submit the grades before departure.

##### 5.4.2 Submitting a request and receiving approval

5.4.2.1 Academic staff members who are eligible for ISCF according to Section 5.2, must submit a request in advance to use ISCF funds, via an e-form found on the academic staff members' personal portal on the website: <https://portal.technion.ac.il/irj/portal>

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- 5.4.2.2 The request should include full details of the activity for which the Fund money is required and specify the exact dates.
- 5.4.2.3 The request will be reviewed and approved by the officials defined in the e-form based on the valid criteria at the time.
- 5.4.2.4 The Accounting Division will assign an identification number to the trip and allocate the requested amount in the financial system.
- 5.4.3 Plane tickets and selecting a travel agency
  - 5.4.3.1 Flight ticket costs will be approved pursuant to income tax regulations.
  - 5.4.3.2 The Technion academic staff members who had chosen to use the services of one of the travel agencies that won the public tender held by the Technion, will be able to ask the travel agency to send the invoices to the Technion, and the Technion will pay the agency directly.
  - 5.4.3.3 In the event the academic staff members had chosen to use another agency that did not win the tender held by the Technion, the academic staff members will pay the agency independently and receive reimbursement from the Technion. In this case, the academic staff members will not be able to ask for the invoice to be sent to the Technion.
- 5.4.4 Financial arrangements and funding
  - 5.4.4.1 Academic staff members must get in contact with the Accounting Division and set with them the arrangements for receiving the money and payments.
  - 5.4.4.2 Academic staff members may fund travel for one of the purposes mentioned in Section 5.1 above (conferences in Israel/abroad and/or professional tours abroad or travel to participate in research abroad) from the ISCF as well as from research funds and budgets available to them at the Technion Research and Development Foundation (TRDF) or the Technion.
  - 5.4.4.3 Academic staff members may ask for an advance prior to their trip, according to the report of estimated expenses approved for them, about a month prior to the travel date.
- 5.4.5 Submission of a report to the Accounting Division by academic staff members returning from travel
  - 5.4.5.1 Academic staff members who had returned from travel or from a sabbatical, must submit to the Technion's Accounting Division a report on the use of ISCF funds, plus confirmations and receipts on forms such as the one shown in Appendix A, within 30 days of the date of return from travel.
  - 5.4.5.2 The form should specify all the academic staff members' actual expenses that were not funded from another source.
  - 5.4.5.3 Academic staff members who combined the travel with another research activity, funded from a budget managed at the Technion Research and Development Foundation (TRDF) (as set out in Section 5.4.8), may submit the report either to

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the Technion or to the TRDF, as they choose. A single joint travel report is to be prepared in this case.

- 5.4.5.4 If academic staff members fail to submit a report on their travel within 90 days, the travel money given to them before their trip will be added to their pay for tax purposes, after being sent a notice in this regard by the Accounting Division.

No further travel will be approved for them until they submit a report on their trip.

- 5.4.5.5 In the event academic staff members had received money in excess of the amounts permitted for income tax purposes, they must return the excess amount within a month of receiving a notice thereof, otherwise the debt will be deducted from their salary.

- 5.4.5.6 The Accounting Division will prepare an account and credit/debit the traveler in compliance with the rules regarding the expenses permitted by Income Tax. These rules can be viewed on the website of the Technion, CFO, under the tab "Forms": <http://mishne.net.technion.ac.il>.

#### 5.4.6 Additional uses for ISCF

- 5.4.6.1 Active academic staff members eligible for ISCF, may request to pay membership fees for professional associations.

5.4.6.1.1 Membership fees for professional associations abroad will be paid by the Accounting Division against an invoice from the association, and the expense will be charged to the ISCF account of the academic staff members.

5.4.6.1.2 Membership fees for a professional association in Israel will be paid directly by the academic staff members, who will be reimbursed against a payment receipt, through the debiting of their ISCF account.

#### 5.4.7 Continuing education during a sabbatical

- 5.4.7.1 Academic staff members who wish to withdraw funds from the ISCF allocation for travel, as specified in Section 5.1 (conferences in Israel/abroad and/or professional tours abroad or travel to participate in research abroad) before leaving for a sabbatical, must submit a request as per Section 5.4.2, and report on the use of ISCF funds as per Section 5.4.5 after returning from the sabbatical.

- 5.4.7.2 The aforesaid academic staff members, who take a leave for continuing education and then go on directly to a sabbatical without returning to Israel, will not be reimbursed for the plane ticket.

- 5.4.7.3 In addition to receiving sabbatical grants, academic staff members may request a withdrawal of ISCF funds of up to 30% of the amount of the sabbatical grants, or equal to the annual credited amount, whichever is higher. These amounts will be transferred to the academic staff members net of tax.

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5.4.7.4 With regard to travel during a sabbatical abroad, an application must be submitted pursuant to Section 5.4.2. Reimbursement will be given for recognized expenses, except for per diem and lodging expenses.

The procedure with respect to travel abroad during a sabbatical in Israel, or during a period of exemption from teaching, is the same as for regular continuing education travel during working hours.

5.4.8 Use of ISCF for research expenses

Up to 20% of the annual ISCF allocation sum may be transferred to a research funding budget, under the following conditions:

5.4.8.1 The transfer request will be made on the form shown in Appendix B.

5.4.8.2 A transfer will be made once a year, to an institutional research budget.

5.4.8.3 The transfer will be approved only if there is a positive balance in the ISCF, prior to execution of the transfer totaling at least one year's deposit.

5.4.8.4 The ISCF budget transferred for research, after deduction of VAT and 10% overhead, may be used for the following purposes: purchasing a laboratory instrument, software or hardware, a personal computer (a computer may be purchased once every two years); paying remuneration for continuing professional education participants; acquiring consumable research materials; paying subscription fees for scientific and professional journals; translating and editing professional literature and paying for a scientific publication in catalogued journals; covering the monthly cost of web browsing in the researcher's home (ADSL), including a permanent IP address if needed, and reimbursement for the purchase of a router for a one-time cost (not rental).

5.4.8.5 Academic staff members may not instruct to make salary payments to themselves and/or give any other financial benefit to themselves through the research budget account. The funds accruing in this budget do not entitle academic staff members to research-related salary increments, they are not redeemable upon termination of employment and cannot be returned to the ISCF account. These funds are also not inheritable.

5.5 Termination of service

5.5.1 Withdrawal of ISCF balance by academic staff members who are concluding their services due to retirement, dismissal or end of appointment

5.5.1.1 Academic staff members who are concluding their services at the Technion and transferring to another institution of higher learning with which the Technion has a continuity of rights agreement, may request that said agreement apply to them with respect to sabbatical leave and the ISCF, and instruct that the ISCF balance standing to their credit at the Technion, be transferred to the academic institution to which they are transferring. A request for continuity of rights must be made within a year of termination of employment at the Technion.

The Technion will make the transfer after receiving an inquiry from the institution to which the academic staff member had transferred. Transfer of the

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funds will be in NIS at the dollar exchange rate on the date of actual execution of the transfer.

- 5.5.1.2 Academic staff members who are concluding their service at the Technion and termination of their employment entitles them to severance pay (or severance pay supplementation for those included in a contributory pension plan), may request to redeem the ISCF balance due to them at the end of their service. Redemption of the ISCF balance by payment of the value in NIS, net of statutory tax, will be done within 30 days of the date of notice from the Human Resources Division.
- 5.5.1.3 In cases where an academic staff member resigns and is not entitled to severance pay (or severance pay supplementation for those included in a contributory pension plan), the academic staff member's rights in the ISCF are cancelled.
- 5.5.1.4 An academic staff member in the rank of full professor who has retired and been awarded the title of Professor Emeritus/Emerita can use the ISCF balance as follows:
  - 5.5.1.4.1 Continued use of the Fund's money during the first year after retirement, under conditions applying to a regular academic staff member.
  - 5.5.1.4.2 Transfer of the funds remaining in the ISCF to the Technion Research and Development Foundation no later than a year after the date of retirement. These funds will be used to finance research studies and international connections in the framework of research conducted at an institution, in compliance with generally accepted principles and guidelines. It should be noted that the transfer of funds from the Technion to the Technion Research and Development Foundation is subject to statutory VAT plus overhead, pursuant to the directives of the Executive Vice President for Research. These amounts will be offset against the balance being transferred.
  - 5.5.1.4.3 Receipt of the Fund balance, net of statutory tax. The Fund balance is the balance recorded on the Technion's books which was not used and/or transferred to the Technion Research and Development Foundation.
- 5.5.1.5 Academic staff members in the rank of associate professor or senior lecturer who had retired, will receive the unused Fund balance, net of statutory tax.
- 5.5.2 In the event of death of an active academic staff member – If an active academic staff member has died, the ISCF balance (up to the cap set in Section 5.3.9) will be paid to his/her legal heirs after presentation of an inheritance order or probate order, subject to income tax rules.

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6. **Application and Effective Date**

- 6.1 The administrative procedures and directives will apply to all Technion units.
- 6.2 This procedure is subject to changes in the law, salary agreements and directives of the Finance Ministry's Supervisor of Wages/Planning and Budgeting Committee.
- 6.3 This procedure is effective as of its publication date.

**Appendices**

- A. "Report on the Use of ISCF Funds" form.
- B. Request for transfer of funds from the ISCF to the Technion Research and Development Foundation for research expenses, pursuant to the ISCF Procedure, Section 5.4.8.

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Prof. Boaz Golani  
Executive Vice President & Director General

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Prof. Shimon Marom  
Executive Vice President for Academic Affairs



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### Appendix A – Use of ISCF Funds Report Form

**Overseas Travel Report (please tick)  From Scientific Connections Fund  On assignment**

Documents that must be attached to the report (please tick the box of the attached material):

- E-ticket
- Plane boarding pass on departure/arrival from/to Israel and on domestic flights
- Plane ticket – original invoice and receipt
- Hotels – Original invoice and receipt
- Car rental – invoice and receipt + rental agreement specifying the dates of taking and returning the rented car
- Conference – confirmation of participation in, and payment for, the conference (specifying traveler's name and conference dates)
- Communication – a breakdown of phone calls and marking of calls relevant to the trip
- Other expenses

Traveler's details:

Name: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Faculty: \_\_\_\_\_

ID number: \_\_\_\_\_  
 Mobile: \_\_\_\_\_  
 Unit's phone number: \_\_\_\_\_

	From date	To date	No. of days
Total period spent abroad in continuing education program/on assignment			
Total period spent abroad (including private vacation)			

Amounts paid directly by the Technion:

	Amount (\$)
Advance payment in cash (from the bank)	
Payment to the travel agent (flight/hotel/car rental)	
Conference enrollment fee	

Travel details for calculating per diem (should be split into separate periods if part of the period is a private vacation and/or funded by another entity):

Country	Funding entity	From date	To date	Number of days

Accommodation expenses (should be split and listed on separate lines according to with/without receipts):\*\*

\* Departure from the hotel is on the day after this date

Date of first night	Date of last night*	Number of nights	Without receipts (please mark)	Accommodation with receipts	
				Currency	Amount

\*\* Refers only to expenses incurred during period of continuing education program/ on assignment not funded by another entity.

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Car expenses with receipts (if necessary, the rental period should be split into separate lines):\*\*

From date	To date	No. of days	Type of expense	Currency	Amount
			Rental agreement		
			Fuel, toll, parking, miscellaneous		
			Rental agreement		
			Fuel, toll, parking, miscellaneous		

Flight expenses with receipts / flight change / cost of suitcase / seating): \*\*

Date	Expense details	Currency	Total

Other expenses with receipts (conference / trips in Israel / trips abroad / parking in Ben Gurion Airport / communication / visa): \*\*

Date	Expense details	Currency	Total

Method of payment following the report:

If a refund is due to the traveler (please tick the applicable box):

- In NIS to the bank account
- In \$ by referral to the bank → address for sending the referral by mail: \_\_\_\_\_

If a refund is due from the traveler to the Technion (please tick the applicable box):

- In NIS to the Bursar's Office
- In \$ to Bank Leumi
- In \$ deducted from salary

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

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**Addendum B – Application to Transfer Funds from ISCF to Technion Research & Development Foundation for Research Expenses under ISCF Procedure, Section 5.4.8**

Full name: \_\_\_\_\_

ID number: \_\_\_\_\_

Unit name: \_\_\_\_\_

ISCF account number (781): \_\_\_\_\_

Requested amount(\*) before deductions (\$): \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

\* The requested amount will be subject to VAT + 10% overhead.

\*\* The funds to be transferred are not redeemable upon employment termination, and cannot be returned to the ISCF account.

\*\*\* The ISCF budget transferred for research expenses following deductions, may be used for the following purposes: purchasing a laboratory instrument, software or hardware, a personal computer (a computer may be purchased once every two years); covering the monthly cost of web browsing in the researcher's home (ADSL), including a permanent IP address if needed, and reimbursement for the purchase of a router for a one-time cost (not rental); paying remuneration for continuing professional education participants; acquiring consumable research materials; paying subscription fees for scientific and professional journals; translating and editing professional literature and paying for a scientific publication in catalogued journals.

**Details to be filled out by the Accounting Division:**

Cost center: \_\_\_\_\_

Amount approved for transfer: \_\_\_\_\_ (if it differs from the requested amount).