

PROJECTS WITH EXTERNAL FUNDING

DEFINITION

A project with external funding is any project where non-Smithsonian researchers bring his/her own research funds (external to SI or STRI), and would prefer to have the funds transferred to STRI directly. STRI will provide support in administering these funds.

PROCESS

Any researcher requesting to bring funds to STRI will need a STRI sponsor.

A reimbursement agreement specifying the terms of the transfer of funds should be signed between the visitor's organization/institution/university and STRI. For a template of this agreement, please follow this [link](#).

Once the funds are received, a fund number will be assigned to the project.

A **15% Scientific Support Fee** will be applied to partially defray STRI expenses for the management and administrative support of a project. Long-term projects should anticipate periodic modest increases on the percentage rates.

Execution of the project will start once the funds are received on a STRI account.

RESEARCHER'S RESPONSIBILITIES

The researcher is responsible for:

- Presenting a scope of work of the project with the operating budget and expected expenses.
- Providing information on who is responsible for the expenses and payments of bills, and should include detailed contact information (telephone, email and address).
- Provide contact information at his/her academic institution, for execution of the reimbursement agreement.

The information above should be submitted to Mrs. Xenia Saavedra at saavedrax@si.edu and she will notify the respective departments below.

STRI'S RESPONSIBILITIES

The following are the departments and their respective responsibilities that will provide administrative support to your project:

- 1- ADSA- (Office of Science Administration)-

- Review the scope and budget for each project presented by the researcher.
- Approves the acceptance of the project with external funding.

2- Finance & Administration/ Procurement

- Creates a fund number.
- Assigns a fund manager to administer the fund.
- Assigns a buyer to support you in making purchases.
- Process all procurement orders and contracts in accordance with the established budget and SI policies.

3- Fund Manager-

- Maintains current and accurate fund balances and financial records.
- Reviews budgets, operational costs and applies the scientific support fee.
- Works with the researcher to establish a payment plan and method of payment.
- Creates and sends all invoices to the researcher.
- Process all deposits to the researcher's fund with the support from accounting.

4- Buyer/Procurement

- Gets quotes, if needed
- Prepares purchase orders
- Follows up on the order together with the researcher.

5- Office of Human Resources

- Advise researcher on guidelines and options to contract or hire personnel in compliance with regulations from Panama's Ministry of Labor:
 - Employees are processed under STRI's compensation and benefits guidelines
 - Contracts through professional services- the researcher will be referred to the fund manager and buyer.
- Process all personnel contracts for each project.
- Process all salary payments and benefits.
- Inform researcher of all legal requirements to contract personnel in Panama and through STRI.

NOTE: according to STRI regulations, all contracted personnel must have a STRI employee as a supervisor, who is a permanent employee at a higher level than the contracted personnel. It is your responsibility to arrange with a STRI employee

6- Office of Academic Programs

- Fellowships and internships- If and when applicable, researchers will be referred to the Office of Academic Programs.

7- Sponsors

- Oversees the management of the project
- Ensures that all Smithsonian policies are followed

ADDITIONAL INFORMATION

For additional information pertaining to external funded projects contact Xenia Saavedra at saavedrax@si.edu or (507) 2128061 [Panama].