

POLICY AND GLOBAL AFFAIRS

Administrative and Financial Management of Your PEER Grant

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National Academy of Sciences (NAS)

... an honorific society of distinguished scholars engaged in scientific and engineering research, dedicated to the furtherance of science and technology and to their use for the general welfare.

1863 NAS Act of Incorporation

...to "investigate, examine, experiment, and report upon any subject of science or art" whenever called upon to do so by any department of the government...



**National Academy of
Sciences**
(1863)
ACT OF
INCORPORATION

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(1863)  
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(2015)  
Chartered under the Act"];
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**National Academy of
Engineering**
(1964)
Chartered under the Act

**National Academy of
Medicine**
(2015)
Chartered under the Act

Methods of Operation

- **CONSENSUS STUDIES**
 - Balance and Composition of Committees
 - Report Reviews
- **CONVENING ACTIVITIES**
- **OPERATIONAL PROGRAMS**
 - Fellowships and Associateships
 - Capacity Building
 - Data Banks
- **Publications**
 - PNAS

Unique Strength

- Stature of academies' membership
- Ability to get the very best to serve
- *Pro bono* nature of committee service
- Quality assurance and control procedures
- Reputation for independence & objectivity

Focus Areas in International Activities

- Responding to critical global challenges
- Building capacity in developing countries, including institutional capacity building in grants management and review process
- Pursuing direct relationships with scientists and organizations worldwide
- Advising the U.S. government

Role as your grant manager

- Set-up your agreement and administer your funding
- Review your progress (reporting, updates, site visits)
- Monitor and evaluate your project and make sure it continues to be compliant with USAID regulations throughout its lifetime
- Review proposed changes to your project activities and budget
- Coordinate visa process (Lina Stankute-Alexander)
- Help resolve issues (for example with US partner, with your institution)

Financial Matters

- Keep records of all spending on your PEER Science project including **receipts** to document purchases of equipment, supplies, travel, salaries and student stipends
- **Equipment or service of more than \$5,000:** you must get bids from **three** vendors and document them
- Budget revisions must be approved
- You are **not** allowed to cover the expenses of your USG-sponsored partner using PEER funds
- You are not allowed to cover the expenses of participants or personnel from non-PEER eligible countries
- Financial trainings may be organized for most PEER financial officers

Reporting

- Four **brief quarterly reports**, due each year in January, April, July, and October.
Pictures are welcome
- Annual reports (detailed): technical and financial
- Final reports due 30 days after the end of the project
- Following year funds will not be disbursed before we receive and approve your annual reports.

Website

- Each grantee has a webpage with his grant summary and updates
- Audiovisual material strongly encouraged
- You are welcome to set-up your own project webpage

Travel

- You are required to contact your grant manager for review and approval of international flight itineraries **before** you buy your tickets using PEER funds
- Fly America Act (FAA): you must use U.S. air carriers to the maximum extent available. European Union carriers are allowed as well.
- Failure to comply with FAA will disallow your expenses

Travel to the U.S. and Visas

- Travel to the U.S.: the visitor must travel on a USAID-sponsored **J-1 visa** if any portion of the cost will be covered using PEER funds (unless traveler is receiving salary from PEER)
- Finalize the **name(s)** of the visitor(s), the **dates** and **purpose** of the visit(s)
- Notify your NAS grant manager at least **3 months** in advance of any visits to the U.S.
- It is a lengthy process, with several forms to fill out->
START EARLY

Travel to the U.S. and Visa Categories

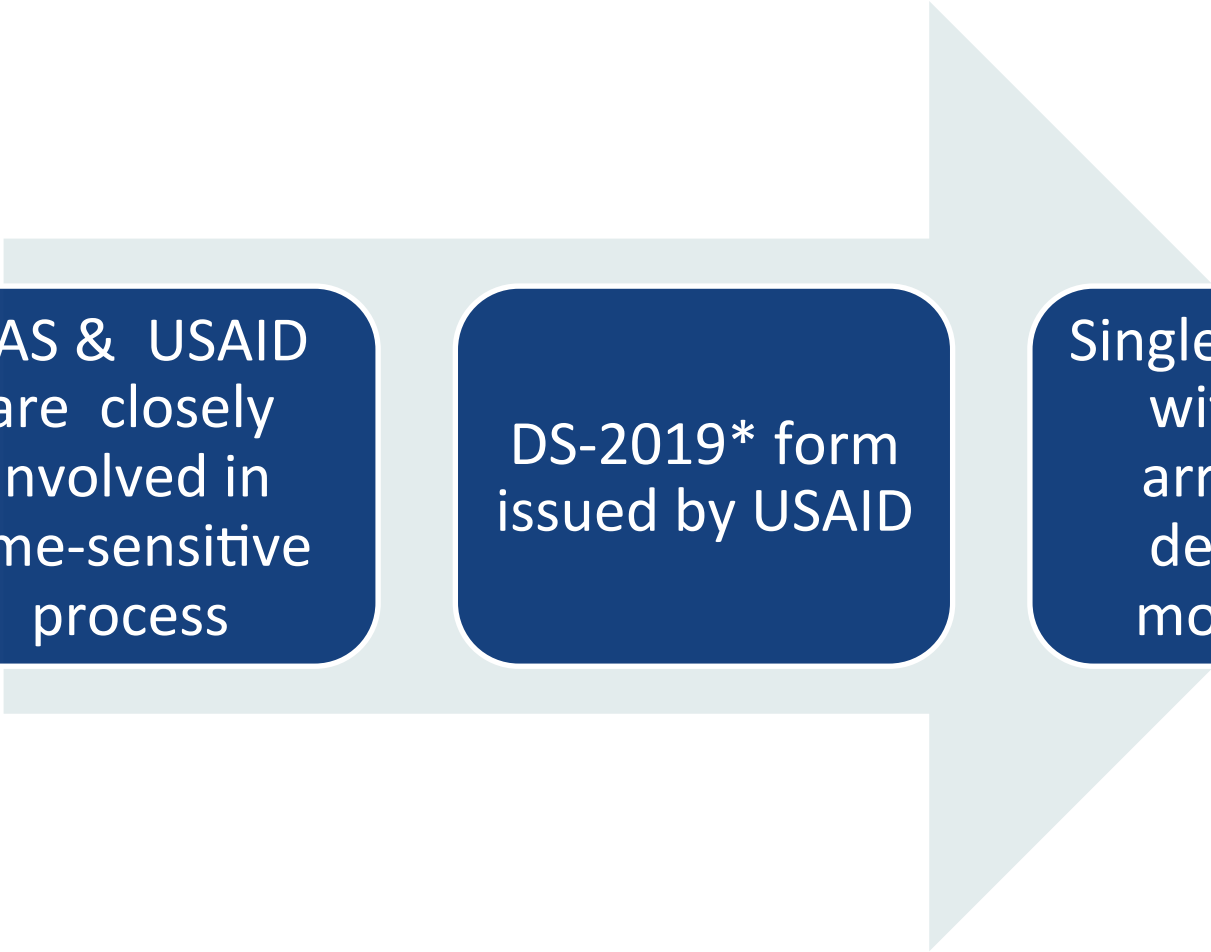
PEER funds **will be**
used for U.S. travel
AND
Traveler is not
receiving PEER salary
J-1 visa

- **USAID-sponsored J-1 visa process** (even if traveler has valid B1 visa)

PEER funds **will not**
be used for U.S.
travel
OR
Traveler **is receiving**
PEER salary

- B-1 visa or US host-sponsored visa

USAID-Sponsored J-1 Visa Application Process



NAS & USAID
are closely
involved in
time-sensitive
process

DS-2019* form
issued by USAID

Single entry visa
with strict
arrival and
departure
monitoring

U.S. Arrival and Departure Procedure for J-1 Visa Travelers

Traveler must notify NAS of timely arrival on the day of arrival in U.S. – no later than within 3 days of program start date

Upon arrival traveler must send to NAS a copy of arrival record (I-94 form)

Traveler must notify NAS of any address changes

On the day of departure from U.S. traveler (or U.S. host) must confirm departure prior to boarding the plane – no later than within 3 days of program end date

Upon return home, traveler must

- Forward to NAS copies of passport pages with country reentry stamps;
- Send updated U.S. trip cost summary. U.S. program report and photos are welcome!

Travel with B-1 Visa

**B-1 visa is
obtained by
traveler
independently**

**Must comply with
Fly America Act or
Open Skies
Agreement IF PEER
funds will be used
for travel**

**Report trip results in
the next PEER
project quarterly
report**

Communication with your US partner

- To achieve PEER program objective
- Coordinate travel to the U.S. (letters of invitation)
- Outreach to USAID in Washington DC and sponsoring USG agency
- Be creative when it comes to communication with US partner

Don't forget...

- **Inclusiveness:** please make every effort to ensure that **women** are included in your projects to the maximum extent possible
- **Publicity:** you are strongly encouraged to help spread the word about your PEER activities. Reach out to USAID staff and involve them in dissemination workshop.
- **Branding:** include the **USAID logo** on major equipment items, Web sites and written materials for public distribution produced with PEER funds.



Communicating with your grant manager

- Reporting
- Travel
- No-cost extension of your grant
- Revision to your approved budget during your performance period
- Changes to level of effort
- Problems with your USG sponsored partner
- Problems with your institution (getting funds...)

Communicating with your grant manager

- Training opportunities (financial training, regional conference,...)
- Funding opportunities
- Site-visits by NAS/USAID/USG staff
- Any additional information about your work

Questions?