



Annual US LUO Meeting Sept. 26

Agenda

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|----------------------------------------|--------------------------------------------------------|---------------------------------------|
| <input type="checkbox"/> 8:30 – 8:45 | Welcome to LBNL | Director A. Paul Alivisatos |
| <input type="checkbox"/> 8:45 – 9:15 | Introduction by the Chair | H. Newman (Caltech) |
| <input type="checkbox"/> 9:15 – 9:45 | Status of the LHC | Mirko Pojer (INFN-CERN) |
| <input type="checkbox"/> 9:45 – 10:05 | US Accelerator Research Program | Gian Luca Sabbi (LBNL) |
| <input type="checkbox"/> 10:05 – 10:30 | ALICE Status Report | Peter Jacobs (LBNL) |
| <input type="checkbox"/> 10:30 – 11:00 | ATLAS Status Report | Valeria Perez Reale (Columbia) |
| <input type="checkbox"/> 11:00 – 11:20 | COFFEE BREAK | |
| <input type="checkbox"/> 11:20 – 11:50 | CMS Status Report | Tulika Bose (Boston) |
| <input type="checkbox"/> 11:50 – 12:15 | LHCb Status Report | Steven Blusk (Syracuse) |
| <input type="checkbox"/> 12:15 – 12:45 | DOE OHEP Report | Glen Crawford (DOE OHEP) |
| <input type="checkbox"/> 12:45 – 13:15 | Sandwich LUNCH | |
| <input type="checkbox"/> 13:15 – 14:20 | Young Physicists' Posters
(with dessert and coffee) | Sridhara Dasu (Wisc., Organizer) |
| <input type="checkbox"/> 14:20 – 14:50 | HEP Status at NSF | Jim Reidy (NSF) |
| <input type="checkbox"/> 14:50 – 15:15 | ACCU Report | Darin Acosta (Florida) |
| <input type="checkbox"/> 15:15 – 15:25 | LUEC Election Committee | J. Huth (Harvard), B. Klima (FNAL) |
| <input type="checkbox"/> 15:25 – 16:10 | Discussion of Trips to DC | Robert Clare (UC Riverside) et al. |
| <input type="checkbox"/> 16:10 – 16:30 | AFTERNOON BREAK | |
| <input type="checkbox"/> 16:30 – 17:30 | Guest Perspective: | Charles Petit, US News & World Report |
| <input type="checkbox"/> 17:30 – 18:20 | Open Forum (Discussion of Issues) | |
| <input type="checkbox"/> 18:20 | AOB | |
| <input type="checkbox"/> 18:40 | Adjourn for Dinner | |



US LUO Executive Committee Membership (2 Year Terms)

<u>Name</u>	<u>Institution</u>	<u>Collaboration</u>	<u>Term Expires</u>
<input type="checkbox"/> Harvey Newman <input type="checkbox"/> Chair for 2009	Caltech	CMS	2009
<input type="checkbox"/> Julia Thom <input type="checkbox"/> Secretary in 2009-10	Cornell	CMS	2010
<input type="checkbox"/> Mike Albrow	Fermilab	CMS	2009
<input type="checkbox"/> Michael Barnett	LBL	ATLAS	2009
<input type="checkbox"/> Bob Clare	UC Riverside	CMS	2009
<input type="checkbox"/> Sridhara Dasu	Wisconsin	CMS	2010
<input type="checkbox"/> Dan Green	Fermilab	CMS	2010
<input type="checkbox"/> John Huth	Harvard	ATLAS	2010
<input type="checkbox"/> Boaz Klima	Fermilab	CMS	2010
<input type="checkbox"/> Greg Landsberg	Brown	CMS	2010
<input type="checkbox"/> Peter Limon	Fermilab	LARP	2009
<input type="checkbox"/> Sheldon Stone	Syracuse	LHCb	2010
<input type="checkbox"/> Ex-Officio [Youth, Gender, Exp. Balance]: Y. Maravin, K. Copic, P. Jacobs			

**Totals: CMS 8+1, ATLAS 2+1, LHCb 1, LARP 1, ALICE 0
+ Darin Acosta (ACCU), Jen Nahn (Webmaster)**



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<input type="checkbox"/> Julia Thom <input type="checkbox"/> Secretary in 2009	Cornell	CMS	2010
<input type="checkbox"/> Kevin Burkett	Fermilab	CMS	2011
<input type="checkbox"/> Sarah Demers	Yale	ATLAS	2011
<input type="checkbox"/> Sridhara Dasu	Wisconsin	CMS	2011
<input type="checkbox"/> Sandor Feher	Fermilab	LARP	2011
<input type="checkbox"/> Al Goshaw	Duke	ATLAS	2011
<input type="checkbox"/> Dan Green	Fermilab	CMS	
<input type="checkbox"/> John Huth	Harvard	ATLAS	2010
<input type="checkbox"/> Boaz Klima	Fermilab	CMS	2010
<input type="checkbox"/> Greg Landsberg	Brown	CMS	2010
<input type="checkbox"/> Sheldon Stone	Syracuse	LHCb	2010
<input type="checkbox"/> Harvey Newman <input type="checkbox"/> Chair for 2009	Caltech	CMS	2011
<input type="checkbox"/> Ex-Officio for Youth, Gender, Exp. Balance: Yuri Maravin, Katherine Copic, Peter Jacobs			

Totals: CMS 7+1, ATLAS 3+1, LHCb 1, LARP 1, ALICE 0+1
+ Darin Acosta (ACCU), Jen Nahn (Webmaster)



USLUO Issues

- ❑ **US LUO funding**
 - ➔ **Membership Dues ?**
 - ➔ **If so, how to administer ?**
- ❑ **Representation on the US LUEC: US ALICE & LHCb**
 - ➔ **Shall we propose a constitutional amendment to go to the US LUO membership ?**
 - ➔ **What form would it take ?**
- ❑ **Actions for the coming year**
 - ➔ **Visits in association with the April APS meeting**
 - ➔ **Arranging a high level visit to the Office of Science ?**
- ❑ **Users' Support at CERN**
 - ➔ **Any points to be raised at the US LUO**
- ❑ **Other Issues ?**



USLUO Issues

Other Issues



USLUO Funding in Future

Goodwill-based funding cannot be guaranteed in future

- ➔ Washington visit funds are a major problem, as gov't funds cannot be used for lobbying
 - ❑ 2008 partially funded by DPF, and the remaining from University funds
 - ❑ 2009 visit: concerted efforts by Harvey resulted in ~\$5K from DPF (young people), FRA (older), Stanford (ATLAS members) + Harvard, Caltech

Proposal for the future

- ➔ Solicit funds from membership? (Fees or Voluntary)
\$20,000 is sufficient per year [\$ 25 Annual Fee]
- ➔ Will there be support from the community?
- ❑ In any case coordinate with FNAL & SLAC UECs



US ALICE Representation in LUEC

- ❑ In the past we have appointed ad hoc (observer) members of LUEC to improve our age, gender and experiment “balance”
 - ❑ Katherine Copic and Yurii Maravin selected by ATLAS and CMS respectively for 2008-2009
- ❑ US ALICE has requested representation on LUEC, and has suggested that our election rules be changed
- ❑ In discussions among LUEC members, we reached a consensus that we need to be inclusive, with all LHC experiments having a voice.
- ❑ Opinions on whether our election rules (and hence our constitution) should be changed are divided.
- ❑ We then reached consensus on the following procedure
 - ❑ Appoint an ad hoc US ALICE representative: Peter Jacobs selected
 - ➔ Discuss the matter of constitutional change.
 - ❑ *If justified*, put the matter to the US LUO membership
- ➔ Note: ad hoc members do not have a vote, but US LUEC works by consensus



“April” APS Meeting (Feb. 13-18) in Washington DC: An Opportunity

Sign Up to Give a Talk at the APS !

- Many interesting sessions (and *first LHC Data*)
- An excellent opportunity for students & young postdocs
- Get your trip funded
- Take the occasion to visit with Congress and Agencies*
- Abstracts are due **October 23**

Sessions (DPF, FIP, DAP, Others)

- Energy Frontier at the LHC
- Towards the Proton Intensity Frontier
- Testing the SM; Beyond the SM
- Neutrino Mixing Angles; Neutrino Astrophysics
- State of Heavy Flavor
- “Keys to Success in Global Collaborative Physics Projects”
- Plus News from Fermi, on UHECR, LIGO, DM Searches, Cosmology, Entanglement, ...

Purpose: Increase understanding of how to effectively communicate through the media

Subjects covered:

- How the media works and what makes news
- Importance of preparing for media interactions
- Key messages, analogies and sound bites, and their use in interactions with media
- Interviewing methods and strategies
- Where to go for assistance



- **Past in-person sessions:**
 - **At CERN November 2008 and February 2009**
 - 3-hour sessions for up to 20 people
 - Presented by Katie Yurkewicz, Fermilab/US LHC
 - Well received by attendees
 - **At DPF meeting July 2009**
 - 1.5-hour seminar presented by Kathryn Grim, Fermilab
 - **CERN also organizes trainings several times a year, presented by outside contractors (sign up through EDH)**

- Upcoming in-person sessions:
 - At CERN Oct. 16 and Nov. 11 (K. Yurkewicz)
 - At Fermilab this fall (Elizabeth Clements)
- On-line at www.uslhc.us/mediatraining
 - Site to be updated with more/better content by mid-October
- ➔ We are looking for additional opportunities to give trainings in the U.S. Contact katie@fnal.gov to add a training session

- ★ Previous Sessions Have Been Well-attended
- ★ Attendees Found the Sessions Very Useful
- ★ There is Still Room – You Are Welcome to Sign Up !



Information on US Taxes: Attention Req'd For a Summary, see www.usluo.org

Tax Information for Americans and Green Card Holders Living in Switzerland

Tax Information for Americans and Green Card Holders Living in Switzerland

Issues	General comments & information
Who must file	All U.S. citizens and green card (GC) holders abroad. The majority is presently non-compliant, in the belief that they should only be taxed where they live.
Non-compliance	The "old" approach of ignoring the problem is not a viable solution. Now it is not a matter of "will the IRS find me," but "when the IRS will find me," such as with the renewal of a passport, or from a list obtained from the embassy, or a club.
What income needs to be declared?	The annual gross income, which triggers a filing requirement, depends on your age and your marital status, among other things. For ex., the personal exemption for an under-65 married individual who is not the head of the household is \$3,500*. See table 1-1 below. Income resulting from a real estate rental or sale of stock is also in this category. All income is taxable <i>unless specifically exempted</i> by U.S. tax law. This includes, for example, Swiss child allowances.
Double taxation	U.S. citizens and GC holders effectively face taxation in both the country of residence and the U.S., collectively paying the higher of the U.S. or the foreign tax on each type of income. The U.S. is the only industrialized nation that practices taxing its citizens based on nationality, rather than residency. In order to alleviate the situation somewhat, the U.S. has tax treaties with individual nations, including Switzerland, wherefrom the foreign tax credit.
Foreign Tax Credit	This is the income tax paid to any foreign country on income earned or investment income received in that country.
Foreign Earned Income Exclusion	You can exclude the first \$87,600* of foreign earned income from U.S. tax, but you still have to file a tax return ¹ . Many people assume that because they're under this threshold they don't have to file. The FTC and the FEIE accomplish the same thing (reducing US tax due), albeit by a different process.
Domiciliary states	Some states, like MA, VA, NJ and MD are domiciliary states; if you are a resident of one of these states, you are a resident of that state for all purposes.
FBAR	In addition to the foreign tax reporting, the Foreign Bank and Financial Accounts (FBAR) reporting is required if you have a financial interest in or signature authority over a foreign financial account if the aggregate value of the accounts exceeds \$10,000 at any time during the year. Time records have to be kept and U.S. do year. The

Issues	General comments & information
	caused not a few red faces. Careful: if you have two or three accounts, and the IRS can prove that is was a willful violation, it can cost you up to 50% of the account balance, or \$100,000 depending. If it is criminal, it can be up to \$500,000 and ten years in prison. See www.irs.ustreas.gov .
Bank accounts	Whether a bank account is in the U.S. citizen's name or in the non-U.S. citizen spouse's name, if the U.S. citizen <i>has access</i> to that account, <i>uses a credit card on that account, or has power of attorney to that account</i> , it must be declared if all foreign financial accounts exceed \$10,000. This includes any assets such as stocks, bonds, and mutual funds.
Foreign mutual funds	Anyone who holds foreign non-US registered mutual funds has special filing requirements and likely needs professional assistance, at least initially, to understand the compliance issues. Failing to file ² can result in a minimum \$10,000 fine <i>per form per year</i> .
Capital gains	The IRS (Internal Revenue Service, U.S. tax authorities) taxes all U.S. citizens and GC holders on capital gain, <i>no matter where it comes from, even if it is exempt</i> in the foreign country where it was acquired.
Pension funds	When you pay into a Swiss pension fund voluntarily as a form of savings, you will have to pay taxes on this in the U.S. The IRS does not recognize these as retirement accounts. They are treated as an ordinary investment account, income earned in them must be declared every year. You can avoid potential problems by making certain provisions. Pension funds which you have through your foreign employer are not taxed directly, but depending on how they are declared can make a significant difference in how much tax you pay in the end. ³ A tax expert versed in this field is strongly advised.
Real estate	If, for example, a home is in the name of the non-American spouse but it was obtained using community property funds, the home may thus be

The "old" approach of ignoring the problem is not a viable solution. Now it is not a matter of "will the IRS find me", but "when the IRS will find me", such as the renewal of a passport, or from a list obtained from the embassy, or a club.

Amnesty extended to October 15 (if you paid the taxes)

¹ Form 2555



Information on US Taxes: Q & A

Democrats Abroad Switzerland
 Meeting on US Taxes for Americans living and working overseas
 31 August 2009, Lully (VD) Switzerland

YOUR QUESTIONS ANSWERED

Who has to file taxes in the US?

1. a) An American citizen who has no ties with the US as far as accounts, property, etc., and married to a Swiss person, can the filing status for the American be: married filing separate return? **Yes**. Or do they need to include their spouse? **If it is more beneficial, a once in a life time election can be made to allow the non US person to file jointly with her US citizen spouse. Then the non US spouse would file jointly for future years, unless revoked either through death, divorce or revocation of the election.**

b) When this same American is not working do they need to fill out a tax return? **If gross income reaches the personal exemption amount (currently \$3,500), a spouse filing "married filing separately" would need to file. For other filing status there is a different threshold.**

Have a look at the info. You are well-advised to consult a tax expert with relevant experience, if you are affected

Table 1-1. 2008 Filing Requirements for Most Taxpayers

IF your filing status is...	AND at the end of 2008 you were...*	THEN file a return if your gross income was at least...**
single	under 65	\$ 8,950
	65 or older	\$10,300
married filing jointly***	under 65 (both spouses)	\$17,900
	65 or older (one spouse)	\$18,950
	65 or older (both spouses)	\$20,000
married filing separately	any age	\$ 3,500
head of household	under 65	\$11,500
	65 or older	\$12,850
qualifying widow(er) with dependent child	under 65	\$14,400
	65 or older	\$15,450

* If you were born on January 1, 1944, you are considered to be age 65 at the end of 2008.

** Gross income means all income you received in the form of money, goods, property, and services that is not exempt from tax, including any income from sources outside the United States (even if you may exclude part or all of it). Do not include any social security benefits unless (a) you are married filing a separate return and you lived with your spouse at any time during 2008 or (b) one-half of your social security benefits plus your other gross income is more than \$25,000 (\$32,000 if married filing jointly). If (a) or (b) applies, see the instructions for Form 1040 or 1040A or Publication 915 to figure the taxable part of social security benefits you must include in gross income.

*** If you did not live with your spouse at the end of 2008 (or on the date your spouse died) and your gross income was at least \$3,500, you must file a return regardless of your age.

2. Approximately how much would the tax obligation be to the US government in the case of an American married to a Swiss, filing as "married filing separately", who earns CHF 150'000 per year and pays between 25-35% to the Swiss Government? **This would depend on particular facts and circumstances involved, if additional exemptions can be claimed for dependent US citizen children and non US spouse as well as if there investment income being taxed at lower rates in Switzerland or not at all and whether there are itemized deductions that can be claimed. Paying 25% tax rate to Switzerland would likely result in no or very little US tax due.**

If you have both Swiss and American citizenship, are you required to pay US tax if you are employed in Switzerland as a Swiss citizen? **You are required to file. This does not necessarily mean there will be tax due.**

How interest and capital gains earned in Switzerland is treated. Are they considered taxable in the US? **Yes. The US taxes US citizens/green card holders on a world wide basis. If Switzerland does not tax such amounts, they would nonetheless still be taxable by the US.**



US LHC and HEP Issues

- ❑ **Funding our Research:** both universities and lab groups need increased funds to exploit the science opportunities
 - ➔ Years of attrition have brought many of our best groups to the brink; due to high living costs overseas (exchange, COLA), plus inflation
 - ➔ Graduate students have filled the pipeline; LHC delays are a real issue
 - ➔ Not being able to take on new students, at the time of peak scientific opportunity and public interest, threatens the viability of our field
 - ❑ Both within: students go to other fields
 - ❑ And without: support from Congress requires us to *educate and continuously engage with the young in our research*
- ❑ It is not true that there are “enough” members of the US LHC (and possibly the HEP) Community
 - ➔ Witness: lack of manpower for SLHC R&D, design, development, physics studies, dealing with key technical issues
 - ➔ Lack of focus on a future energy-frontier program (cf. ILC)
- ❑ **University/Lab Partnership:** Strong support of our Universities is a requirement, if we are to maintain Congress’ support



US LUO and NUFO

- ◆ **US LUO is glad to have joined NUFO**
 - **We can benefit from NUFO's experience and breadth, spanning many fields**
- ◆ **We are grateful to NUFO for changing its charter to accommodate us as users of an overseas int'l facility**
- ◆ **We look forward to developing our message with them: the key to success is the university-laboratory partnership**
 - **Resonates well with the agencies and Congress**
 - **Leading to an even more productive scientific community**
- ◆ **Our growing experience in a worldwide collaboration, and our work in the US and overseas at CERN, is greatly appreciated**



Discussions at OMB with Mike Holland

- ❑ **Agency budgets for FY10 are going to show a flattening, due to the partial effect of the Stimulus funds that also offload some other costs in FY10.**
 - ➔ **Indeed FY10 budget out in May shows that flattening [Also for LHC; but then there were small increments]**
 - ➔ **Then in FY11, the growth path to doubling the NSF and DOE/SC budgets will resume, likely (said Holland) “for the next 5-6 years”.**
- ❑ **A wild card is ITER. Holland said the project was “sold” to everyone before the degree of complexity and associated costs were well-understood.**
 - ➔ **DOE signed on for \$ 1.1B but the costs are ballooning rapidly. Now it looks like the cost to DOE might go to \$ 2.4B.**
 - ➔ **That would put pressure on other programs at the Office of Science.**



Money News (ARRA) at NSF

- ❑ Of \$ 3B of ARRA funds, \$ 2B is for broad-based research and \$ 1B for infrastructure projects.
 - ➔ Awarded as new peer-reviewed 3-year grants (some front loaded)
 - ❑ Concern about potential echo-shortfall in 3 years
 - ➔ Will NOT be added supplements of existing grants;
 - ❑ Normal NSF supplement process available: up to 20% of the original grant amount
- ❑ New solicitations went out: ARRA/ARI (one per campus), MRI (Many universities responded)
- ❑ New programs targeting young investigators ...
 - ➔ Initially delayed by increased administrative (reporting) burdens at the agency.



News on Money Flow At DOE OHEP

- ❑ **FY09 university budgets: essentially flat**
- ❑ **One time supplements for non-infrastructure projects (e.g. travel and support at CERN for commissioning)**
 - ➔ **Dealt with quickly in May; few percent**
- ❑ **Informal call for university infrastructure proposals (using ARRA funds) issued in May: \$ 10M in total**
 - ➔ **5 pages max. *per grant*, to expedite reviews**
 - ➔ **Responses done by August [Promise by Steve Chu to disburse 70% ARRA funds by Labor Day]**
 - ➔ **46 Tier3s funded at an average of \$ 50k; lab instruments**
- ❑ **Reporting burden for ARRA much increased**
 - ➔ **For example at the agencies: DOE Weekly Report.**
 - ➔ **Increased burden for grantees as well**