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Many of our colleagues in academia hail from countries other than the U.S. Most of us are oblivious, however, to the difficulties and challenges that our non-U.S. colleagues face when they have to uproot and “come to America.” In this article, I have asked Mark Barratt, a colleague of mine here at the W. P. Carey School of Business, to share with us a highly personal perspective of his relocation to the U.S. from the United Kingdom. Hopefully, you will find Barratt’s adventures not only amusing but also informative. Enjoy.

Coming to America . . . Without Eddie Murphy

by Mark Barratt, W.P. Carey School of Business,
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“England and America are two nations separated by a common language.”

George Bernard Shaw

My family and I have been here in Arizona since July 2002. I am an assistant professor in the Department of Supply Chain Management in the W. P. Carey School of Business at Arizona State University (ASU). After just over fifteen months we are really starting to feel at home here—Arizona is a magical state and so different from the England that we left behind. I work with some great colleagues who have made me feel very welcome and a valued member of the department. We are now about to apply for an adjustment of our status to become permanent residents in the U.S. In this article I was asked to describe our experiences since we arrived, focusing on the many opportunities, the unexpected hazards, and the obstacles to getting an academic job and living as what is affectionately described as a “legal alien.” (There are times when I began to wonder if I was ET!) Some of the problems my family and I have faced since arriving in the U.S. are likely to be faced by any foreign citizens coming here for the first time. At times, the problems have been mildly frustrating and other times infuriating. There have been moments when we have felt like returning to the U.K., where life is seemingly less complicated; but fortunately these moments have passed swiftly.

I obtained my PhD in March 2002 in the UK from Cranfield School of Management. As a member of the faculty in the

Center for Logistics and Supply Chain Management, I was part of one of the world’s leading institutes for teaching and research into logistics and supply chain management. However, having already spent seven years of my career teaching in British universities, I felt it was time to broaden my horizons and seek new challenges elsewhere. After attending an international conference in the U.S., I was invited to come for an interview at Arizona State University. The choice of America was not difficult—salaries for academics in the U.K. are paltry compared to their American cousins. Little wonder that so many British academics are joining the “brain drain” in search of a better standard of living for themselves and their families.

After my interview I was offered a position as an assistant professor within the School of Business at ASU. It did not take much for me to accept the offer—I had really enjoyed meeting the faculty and was convinced that this was, despite a number of offers from other U.S. universities, the place to work. The department is comprised of faculty with broad interests across the entire spectrum of supply chain management and therefore represented the opportunity to undertake some really integrated and useful research.

Welcome to Arizona

It was 6:35 p.m. on July 14, 2002, when I walked out of Sky Harbor Airport, Phoenix. At that moment I noticed something special—it was 108 degrees! Wow! Back in England it was just over 50 degrees. That’s



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when I knew I had truly arrived in Arizona.

I caught the shuttle bus to my hotel. I was here at last, but what about that heat? "Fairly normal" the shuttle bus driver commented. If that was normal, I wondered how hot does it really get. Well, I found out three days later when it hit 116 degrees. My family joined me two months later. Now after fifteen months in the Valley of the Sun, we are fairly well acclimatized. I can play a complete round of golf, and while I drink about four gallons of water or even the infamous "Gatorade," I am proud of my feats of endurance. Even my wife who is from the north of England (where the sun hardly ever shines) is getting used to the long hours of sunshine day after day.

On my first full day, I made my way to campus and the School of Business. I walked to the chair's executive assistant's desk. This was where the fun began. "I need you to fill in these forms," the assistant said.

I sat down in my new office staring at the inch-deep pile of forms. Filling in forms is something that I am slowly getting used to. I used to be a lawyer before I found my current more honorable profession, so I have been used to filling in forms all my working life. But there seemed to be forms for everything: obtaining a Social Security number, choosing a healthcare provider (in the U.K. most of us simply endure the venerable National Health Service), and a whole host of others. And to make matters worse, at the end of December the dreaded IRS tax return forms arrived.

A Time of Uncertainty

These fifteen months have been a shock to all of our systems, a time of uncertainty, and more than anything, a time of considerable adjustment. We have noticed so many differences since arriving here. Some of them were, I suppose, only to be expected. But some were totally confounding. Whilst my American colleagues made every effort to make us feel at home, they were not used to hiring non-U.S. academics. I do not think that the department was able to appreciate what moving from so far away entailed, especially for someone with a young family. It is not like moving from another state. Issues such as schooling, work for spouses, even finding out if my wife was allowed to work took weeks

of phone calls and wading through mountains of often misleading information.

The following are a collection of the various obstacles that we have faced over the last fifteen months, followed by some suggestions as to how others planning on taking jobs in the U.S. can overcome the vast majority of the obstacles we have ourselves faced. I would hasten to add that whilst the list of obstacles will make me sound like a "whinging pom," as my Australian cousins would describe me, this is not meant to be just a chance to whine but hopefully it will enable others to avoid these problems.

Moving costs and relocation budget

The university provided a relocation budget, and at first the amount seemed very generous. As it turned out, the budget basically covered the shipping costs for bringing some furniture and personal belongings. I still had to cover the cost of shipping my academic books and papers, air flights, and living expenses (a hotel for a week, and rent for a month until I got paid).

In respect to getting our possessions to America, the department e-mailed me a standard list of companies that would be able to ship our possessions. All five companies featured the word "global" in their title. I called every single one of them and got the same response: They could ship anything for me to anywhere, but only if it all took place within America. I naively asked why they were called "global." "It's a marketing thing" I was told. (More like a misleading thing, I thought!)

I eventually found a company who shipped my possessions. There were only two further problems: one, the cost of the shipping basically consumed my entire relocation budget; and, two, the dock workers on the West coast of America went on strike. A shipment that was supposed to take eight weeks ended up taking five and a half months.

Finding somewhere to live

My family and I had visited Arizona in April 2003 on a house-hunting trip. After looking at numerous houses, we decided to wait until we were in Arizona on a permanent basis. I suppose that the big problem with buying a house is that there are so many to choose from. It is imperative that you find

a good realtor to help you with this. We were recommended to a very nice lady who drove us around to view many houses. This was after having spent a couple of hours talking about the type of house that we wanted. The real problem was obtaining finance. We were at the mercy of the finance institutions due to our lack of a U.S. credit history.

Making family adjustments

When my family arrived in Arizona, it was a big adjustment for them. We had to find a preschool for my daughter and get her registered with a local doctor. What was missing was something for my wife to do during the day as she did not know anyone in Arizona. Apart from taking my daughter to and from preschool, she very soon felt quite lonely.

Obtaining a Social Security number

I was told on my arrival in the U.S. that I would need to obtain a Social Security number. So I made my way to the local office with my paperwork in hand, where I was greeted by a large room full of people and a three-hour wait. Eventually my number was called, and I handed all my paperwork that I had been told to bring with me to a staff member. To my concern, I was told that in the light of September 11th, the paperwork was taking much longer and that I might be lucky if I heard something in three weeks. After that time was up, I received an acknowledgement informing me that my Social Security number would arrive in another two weeks.

Opening a bank account

In the U.K. this is a relatively simple activity. You need to produce some identification such as a passport and deposit some money. Well, I was told that Bank of America and Bank One were the two main banks here in Arizona. So this seemed easy enough. I walked into a branch of one of those banks, where a customer service person directed me to a teller. With my travelers' checks in hand, I asked to open an account.

The teller asked me for some identification, so I produced my British passport. "And what is your Social Security number?" I told her that I didn't have one yet, but that I had applied and heard that it would

take up to three weeks. "Sorry, but I cannot open you an account without one," she replied. Fortunately, I had brought a reasonable sum of money in travelers' checks with me.

I was talking to my real estate agent later that day, venting my frustration at not being able to open an account. She gave me the name and number of a friend of hers who worked at the same bank but in the downtown Phoenix branch. I contacted the realtor's friend and set up an appointment to see her the next day. At the meeting she told me that not having a Social Security number was not a problem. Fifteen minutes later I emerged from the bank, now the proud possessor of a bank account. Apparently the branch that I first went to was used to opening bank accounts for students, but obviously not for faculty members.

Renting cars

I needed to be able to get around in Arizona until I could buy a car. The university suggested their rental company. Of course, I would be able to get their corporate rate. So I contacted the rental company and a car was delivered to my hotel room. The car would cost me around \$100 a week, which was fine, but when you added in the insurance and because I was driving on a British license, the insurance brought the total weekly rental charge to just under \$225. I had the rental car for just over eight weeks, so in the end it cost me \$1,800. You may ask why I had the rental car for so long. Well, I hadn't planned to, but that was how long it took me to buy a car. Only one final challenge remained—driving on the *wrong* side of the road.

Sorting through healthcare plans

Here in America there are a multitude of healthcare schemes. In the UK we are not used to having a choice. I realize that this may sound silly, but when you are faced with a choice of many different doctors and healthcare schemes, it can be a little overwhelming.

Getting a driver's license

This was an interesting experience. Even after twenty years of holding a British driving license, I needed to apply for one here in Arizona. I went along to the local Department of Motor Vehicles (DMV) and was greeted by a vast sea of people, all of whom were either trying to take their driving test, apply for new registration plates, or possibly just trying to get out of the heat of an August day. I took my number and sat down. An hour and forty-five minutes later my number was called. I explained that I wanted to apply for a driving license and produced all my documentation including my passport and H1B visa. The person behind the desk stared at my visa intently.

I must admit that it is getting a little wearing, if not tiresome now, having to explain that I am from London, and, no, I do not know the queen or any of her relatives.

Finally he said, "Never seen one of these before. I'll have to call the INS [Immigration & Naturalization Service]. And with that he disappeared to make the phone call. Well, it was 2:00 p.m. in Arizona, but 5:00 p.m. in

New York where the INS is based. It took three hours before he managed to track someone down who could verify my visa.

By that time I was feeling a little frustrated. I had been allowed into the U.S., received my Social Security number, but was considered a suspicious person by the DMV. And what happened next didn't make me feel any better: I finally managed to take my written test—and managed to fail it.

The next day, I passed it and took the actual driving test, which lasted little more than two minutes. Once I had maneuvered in between four plastic cones, we set off out on the streets. By the time I had gone half a block, the driving test instructor said that he had seen enough and approved my license.

I noticed something about my license a little later. I am down as weighing 168 pounds, something I have not weighed since I was fifteen years old. Also, apparently, I am a female! Well, I have checked, and I can assure you that I am definitely not a female. I have informed the DMV of their error and was promised a new license. It arrived, and I am afraid to say that I am still 'female' and still weigh '168 lbs.' I must

admit that I am now too embarrassed to mention this again.

Learning the language

This was something that probably did not seem obvious, but has in fact turned out to be a source of great consternation. Despite being born in London, I have a very neutral English accent. But what I soon realized is that I obviously sound like an Australian, New Zealander, or South African to many people here in Arizona. I tend to laugh it off, but must admit that it is getting a little wearing, if not tiresome now, having to explain that I am from London, and, no, I do not know the queen or any of her relatives. And, no, I do not know Bob Smith who lives in London. Over eleven million people live in London, about three and a half times the number of people in Arizona.

I have now come to terms with the fact that my pants are actually on the outside of my underwear, instead of actually being my underwear. I am putting "gas" in my car, much to the delight of the environmentalists (at least I thought so), instead of putting "petrol" in it.

What has been most disconcerting is that wherever I go, shopping or dining, there are many people who simply fail to understand what I am saying, or look at me as if I have just stepped off the latest flight from Mars. That vision of "ET" flashes through my mind frequently.

Buying a car

In the land of the car, buying one turned out to be quite an experience! It was enough to put me off from ever wanting to buy a car again. It began only too well, and this should have given me a clue to the purgatory that was soon to prevail.

I started looking at various types of cars. I was like a kid in a candy store. A lot of shiny cars from Acura's to Toyota's, and so cheap compared to the U.K. Here in the America the prices were the same numbers as back home, but in dollars and not British pounds. The problems that were to frustrate me so badly soon began to manifest themselves. The first indication of trouble was when the talk turned to how I was going to pay for the vehicle. I had a cash deposit of \$5,000, and needed to finance the balance, either on a lease or through repayment financing.

"How long have you been in the U.S., sir?" the dealer asked.

"About four days," I replied.

The look on the dealer's face should have been enough to warn me that I should have stood up and headed back to my hotel. In the U.K. I had the highest possible credit rating that an individual could have, but I had no credit history here in the U.S. Unfortunately, the global economy does not extend to credit histories.

There was no way that I was going to be granted any finance. After the seventh or eighth time of getting that same look from the car dealer's finance person, I was in despair. I needed a car, and I had a fantastic new job with a huge salary. But how could I convince the car companies of my ability to pay for the car? The actual cost of the car was about one fifth of my total first year's salary, but it might as well have been twice my annual salary.

One of the dealers was very persistent, despite my obvious credit problems. He suggested trying to contact his finance department to see if they would do a credit check in Europe for me. This was a glimmer of hope, but one that was soon to prove to have a sting in the tail. Yes, the credit check was done, and the finance was granted, but as I had no credit history here in the U.S., the interest rate was double what it should have been. I had a car, a Beetle Turbo S, but it came with the price tag of a mid-range Mercedes.

Completing tax returns

In the U.K. if you work for an employer, for example, a university, your income is taxed at source and there is no need to complete a tax return unless you run your own business, which I once did. Here in America I was told that the tax return is a more usual way of life and despite all my taxes and deductions being taken by Arizona State University as my employer, I still needed to complete a tax return. I was advised to find a tax consultant to help me prepare my returns.

I tried contacting a number of accountants and consultants, but without much success. As soon as I informed them that I was from the U.K., they seemed to lose interest or suddenly realize that they had already far too much work to take on a new client.

Finally, I found a firm of accountants and tax consultants, one of whose partners

was an adjunct professor for the Department of Finance at Arizona State University. They agreed to take me on as a client and arranged an initial meeting. The meeting was itself fairly painless, and I managed to provide most of the information that they needed. They informed me that they would need to do some "research" into my H1B status (as a non-U.S. citizen I am allowed to work in the U.S.).

All the necessary forms were completed and sent to me for my signature, along with their bill. The "research" they undertook is obviously a very lucrative business as the final bill exceeded the original estimate by some \$600. I wish my own research generated such income!

There was only one other problem. Because my wife and daughter were on an H4 visa, they were not entitled to obtain a Social Security number. As a result, they were both required to obtain individual tax payer identification numbers. The problem was that we were not told of this until the IRS had calculated my tax rebate, resulting in my not being able to claim my wife and daughter as my dependants, and therefore having to pay considerable more tax than necessary.

Some Recommendations and Advice for Others

The following is an attempt to suggest some ways of overcoming the many obstacles that non-U.S. citizens coming to the U.S. may encounter. Some of the obstacles are simply hurdles that one must go through, but I hope that my thoughts may make the transition slightly easier.

Relocation budget and getting your possessions to America

Be aware that your relocation budget is likely to only cover a small shipment of your possessions and a small amount of furniture. If you move to the East coast of America, it is a little cheaper.

It is worthwhile considering buying in the U.S. many of the things that you will need. First, with the difference in voltage, many electrical items will not work without expensive adapters. And second, you will want your furniture to fit in with the style of properties here in the U.S., which can be quite diverse. Finally, many of the items are cheaper here in the U.S. and where they are not, the price differential is

wiped out by the high cost of shipping items across the Atlantic.

Finding somewhere to live: Buying a house

First and foremost, you need to find a good realtor. We found our realtor from personal recommendations from a number of my colleagues at work. The realtor does most of the work of estate agents and to some extent solicitors in the U.K. Make sure that the realtor is not representing both the sellers and yourselves.

Be prepared to see numerous properties. Also the U.S. housing market is much slower than in the UK. Prices are rising slowly. A good tip is to think about schooling for your children. Every state will have a Web site where you can extract many details about each school including their recent performance. Most schools are duty bound to accept children if you live in their designated area.

Secondly, you need to shop around for finance. Your lack of credit history is against you, so remember to bring copies of bank statements from the U.K.; and copies of letters from your solicitor if you are selling property in the U.K. Every piece of information helps, as you are starting your credit history from scratch.

Support for your family

In terms of your visas and their entitlements and conditions, a great Web site is <http://www.usaimmigration.service.org/v.htm>. It contains a lot of information, and also don't forget that the university should have an international programs office where there may be a number of former INS employees, who are a mine of information. But be warned that these people can be gatekeepers in the extreme. They follow strict processes and procedures that at first can be a little frustrating, but stick with it as they can be very helpful.

For families, moving to America can be a lonely and difficult period. More often than not, a spouse or partner will not be allowed to work. But if your department is prepared to sponsor your spouse or partner, he or she should apply for permanent residence as soon as possible. This can be a lengthy process, but having a PhD makes individuals eligible for the fast-track to permanent residence, although this can still take at least two years.

My wife was fortunate because she was soon given an office in which to work on her PhD that she was doing back in the UK. Another department in the school was interested in her research work.

Obtaining a Social Security number

There is not much you can do about this. The forms can be downloaded from <http://www.socialsecurity.gov> and completed prior to your arrival. There are many branches of the Social Security Administration in all large towns, and receiving a number should be a priority on your list of things to do in the first few days of arriving in the U.S.

Opening a bank account

Contact one of the large banks as soon as possible after you arrive in the U.S. If you are coming over for a house hunting trip, that is a good time to try and open a bank account. Contact your department to find out which bank the University uses. Also, there are lots of credit unions, which are very much like the old building societies in the U.K. It is worthwhile considering joining one of these, but be careful. Many of them expect you to be in the country for six months before allowing you access to some of their services, but for a basic checking account they are an option worth considering.

Renting cars

By all means rent a car, but keep the time as short as possible—renting here in the U.S. is very expensive. Also, if you see a good deal, don't forget to add in the cost of all the various insurances that the rental company will want you to take out. Basically, look to buy a car as soon as possible.

Choosing a healthcare provider

Talk to your new colleagues about which of the myriad of healthcare schemes they belong to. There are many, and while the costs may sound daunting, healthcare policies are worth every penny. PPO-based schemes are practical because they allow you to go to a wide choice of doctors and specialists.

Next step is to find a local doctor. Most of the healthcare providers will have a list on their Web site of doctors who accept their healthcare scheme. Be aware that the

list may not be exactly up to date, but will be a good starting point. Once you have found a doctor who seems appealing (the Web sites provide a lot of background information), contact the doctor to arrange an appointment.

Don't be afraid to change your doctor. We did a few times and now we have found a very good practice. Your doctor, who is subject to the healthcare scheme you select, will refer you to various specialists as the need arises. We have a primary care doctor for my wife and me, and another who specializes in caring for children.

Also, doctors in the U.S. do not make house calls.

Getting a driving license

My only advice is to go to the DMV office closest to the university. There they are most likely to be familiar with H1B visas.

Learning the language

All I can suggest here is that anyone coming to the U.S. must simply accept that the culture is very different. Just try to remember that people here are on the whole very friendly and that they will often stop you after hearing your accent to ask where you are from.

Also, they have *baked beans* here, but they are not what you may be used to in the U.K. Whilst there are many U.K. products sold here, if you are a fan of cheese, we have yet to find a decent source of supply, especially for my favorite *torte dolcelate*. But certainly try the local food—it is usually wonderful, fairly cheap, and there are a wide range of restaurants.

Buying a car

It is well worth bringing sufficient cash with you to buy a car outright. Car dealers here in the U.S. are high-pressure sales experts and having cash is one way to obtain a good discount. The price of cars is virtually the same, albeit in dollars, so many cars are significantly cheaper. Petrol, or *gasoline*, is about a third of the price in the U.K. The cars and SUVs (Sport Utility Vehicles) tend to have significantly bigger engines in the U.S., and therefore consume more gasoline per mile than similar vehicles in the U.K.

After researching the type of vehicle you want to buy, it is well worth your time to send a fax or e-mail to all the local deal-

ers who stock the vehicle and make them an offer for the vehicle you want to buy. If you ask for their best price, you will never get it. They are completely reluctant to allow you to walk off their car lots with any kind of written price unless you have bought a vehicle.

Also it is worth noting that car dealers place certain orders for vehicles once or twice a year. It is very difficult to go to a dealer and place an order for a specific vehicle with a certain specification. Consequently, in September and October of each year the car dealers are ready for the next year's models and looking to get rid of their stock or current year models. Good bargains can be had, but you need to do your research.

Completing Tax Returns

A good way of finding a tax consultant or an accountant is to contact the state association of tax consultants and accountants. They will generally provide you with the names of a number of tax consultants/accountants. Your tax return is due by April 15th each year, and it is worthwhile starting the process in late December or early January. Your employer will provide you with a couple of forms setting out the taxes you have paid, but it is worthwhile keeping every single receipt that you receive in daily life. There are so many items that can be claimed for. And, as an academic, don't forget to claim all the books that you bought during the course of the year.

In Closing . . .

At the end of the day, and now after fifteen months, we look back on these obstacles and laugh about them. But as you are experiencing them, they can be very frustrating and unsettling. Sharing horror stories with colleagues not only relieves some of the frustration, but also helps your colleagues to help you—and I will add that my colleagues have been great in helping to overcome many of the obstacles that we have encountered. ■

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