CIG Administrative Support Plan

The following is the proposed delineation of duties involving the CIG Administrator, JISAO’s Finance Manager, Budget Analyst and Administrative Specialist. Back-up support for the above duties will have to be identified. The JISAO Assistant Director will decide how work assignments will be given to JISAO administrative staff in support of CIG, and will train all CIG personnel on the various procedures for obtaining needed services. JISAO’s departmental Finance Manager will continue to have general oversight of JISAO grant-related business (including CIG), and will work with his staff and the CIG administrator to provide grant pre- and post-award services and payroll support.

CIG Administrator (Adrienne):

In collaboration with the JISAO Assistant Director, directs all administrative and business operations and services for the Climate Impacts Group. The Administrator tasks include:

- Oversees/manages all CIG budgets (currently 40) using MyFinancial Desktop.
- Works with UW/JISAO’s fiscal systems that are designed to meet auditing standards, communicating with GCA, OSP, the College and other departments, and other central administrative offices as needed/requested (responding to requests via email and GrantTracker, etc.).
- Advises PIs on grant proposals; prepares proposal budgets and other documents.
- Prepares and submits proposals via SAGE and using Grants.gov, NSF Fastlane, and other sponsoring agencies/foundations’ specific systems; has established relationships with sponsors’ grants and contracts offices and with OSP.
- Analyzes project resources and subsequently makes recommendations regarding the allocation of resources by doing cost analyses, budget projections in MyFinancial.
- Administers subawards to other institutions and personal services contracts.
- Maintains and regularly updates salary distribution spreadsheets and authorizes salary distributions for payroll coordinators (of JISAO and other departments).
- Authorizes/approves all project expenditures based on the status of the budget(s) involved (including travel and purchasing).
- Serves as the first point of contact for the group and is the hub of communication; oversees the organization of conferences and meetings.
- Interprets, advises, and implements University policies and procedures regarding financial and personnel matters as necessary on a day-to-day basis.
- Prepares Human Resources or JISAO forms for hiring staff, for promotions and submits them to JISAO Assistant Director.
• Arranges for the publication of reports/promotional materials/other documents, working with graphic designers/printers/Creative Communications, etc.
• Writes memos, letters, and reports.
• Assists co-directors with tasks as needed (letters/correspondence, scheduling, computer maintenance issues, etc.)
• Schedules conference calls
• Maintenance of printers (including meter readings and submittal to vendor)

At certain times of the year, extra support, particularly with the preparation and submission of grant proposals, will be required due to the increased needs of the Dean’s office. A clear plan for how much time and effort this will require will be needed from the CIG Administrator.

**JISAO Staff:**

**Finance Manager:**
• Provides general oversight and management services for all JISAO budget and grant-related business (including CIG)
• Works with his staff and CIG administrator to provide pre- and post-award services and payroll support
• Provides proposal-related services when needed (preparation and submission)
• Maintains financial and proposal records for grants, contracts, gift, revenue, and RCR budgets.
• May respond to GrantTracker requests

**Budget Analyst (Deborah):**
• Reconciles CIG budgets on MyFinancial Desktop, ensuring that all backup documentation is present and filed
• Prepares expense transfers, TRANSPASUs, NCE (no cost extensions), cost share documents, etc.
• Creates invoices for cost-reimbursable contracts (when required)
• Assists with budget close outs
• Petty cash reimbursements
• Cash transmittal forms and deposits of revenue

**Administrative Specialist (Collen):**
• Handles travel arrangements, estimates, securing budget authorizations, and reimbursements
• Handles purchasing of supplies and equipment using a variety of methods including Procard, non-Procard through purchase requisition, subawards, personal services contracts, and others, using the Keynes system.
• Maintains equipment inventory records.
• Arranges for FedEx pickup/delivery; receives other deliveries as necessary
• Facility work requests

Tasks CIG will need to cover or eliminate:

• Respond to publications requests
• Read CIG mail account daily and disseminates messages
• Mail pick up and delivery
• Collect and submit time sheets
• Send out calendar polls for scheduling meetings/events
• Maintain reservation calendars for conference room and projector
• Pay for software purchases
• Run errands
• Provide reception for guests
• Attend to printers’ and projector’s daily maintenance needs
• Computer software updates and tech support

Issues to discuss/resolve:

Conference/meeting coordination and organizing: A plan to support these responsibilities will have to be agreed on at a later date. Locating and arranging venues, AV, catering, Procard payments, materials preparation, working with UW conference staff on logistics, invoicing, name tags, etc.

• Likely oversight/management/logistical and financial support -- Lara and Adrienne
• Hosting several webinars per year. Lara or Ingrid. CIG administrator could interface with the possible vendors (to arrange for date and time, payment; with Regonline; with the participants, etc.

How will this work? What will be required?

• Mary will decide how the work assignments will be given to staff. All staff involved will attend 1-2 meetings to brainstorm what might make the most sense. When the plan is finalized, we will train all CIG personnel so that everyone knows the correct procedures and how to obtain needed services.

• CIG personnel will need to use JISAO procedures and forms for requesting travel reimbursements and purchase requests. However, since Adrienne will still approve/authorize all expenditures, CIG will need to determine it’s new processes and be trained by JISAO in its procedures.

• The CIG administrator can use this document or provide a separate list to the CIG staff to help them know who to go to for assistance.
• Both the CIG and JISAO staffs agree to communicate regularly and effectively through email, phone and meetings.

• The agreed-upon plan will be implemented on a trial basis and is subject to change. It will be reviewed and re-evaluated in three months (March 1) and again in another three months (June 1) by JISAO and CIG management, or earlier if either or both CIG and JISAO make such a request.