**CSS-RA Procedure**

**Point of Contact for SPO and Donors:** Marguerite Judson

Single point of contact for BCMS / BCMO for E&I (excluding DSP) is Chris Mount

**Anyone seeking a SPO Award (Grant), IAO, or Business Contract receives permission from the unit head first, *before* taking any of the following steps.**

When a grant proposal or fund source is identified, validity of the source is verified by Marguerite Judson. Once the source is verified, the pre-award process begins.

**Pre-Award:**  Proposal Development

1. Development Director, Program Manager (PM) or Program Staff identifies funding source.
2. CSS-RA confirms programmatic approval from Department Head and funding approval from Marguerite.
3. CSS-RA establishes timelines/deadlines for submission process indicating dates and actions and distributes timelines to the team creating the proposal as the initiator of the request describes. Targets are three weeks ahead of SPO deadline for starting budget and narrative (much longer for government grants).
4. Communicate with PM about required documents and identify personnel working on the project.
5. CSS-RA will talk to appropriate Financial Analyst and PM about the budget development and budget justification and identifying cost share if needed.
	1. Coordinate with Marguerite if budget categories are flexible as categories/descriptions can influence some donors.
	2. Budgets to be submitted should be reviewed by Program Manager and budget reviewer of record (Laronda Chambers, Chris Mount or Michele Robinson) before final submission.
6. CSS-RA will coordinate with PM to gather subrecipient documentation.

**Pre-Award**: Submission Process

1. RA will communicate with PM to gather required documents for submission: Request for Waiver of Indirect Costs, 700U, cost share or matching, subaward commitment forms, etc.
	1. Must be completed, approved and submitted to SPO 7 business days prior to sponsor deadline. (This includes time to obtain VC approval.)
2. RA and Marguerite will coordinate to ensure the accuracy of documents needed for proposal submission.
3. VC approves proposal and it’s sent to SPO for review.
4. RA will coordinate with SPO for any questions or concerns they have during the 5-day review period.
5. RA coordinates with appropriate Financial Analyst to request a fund advance if needed.

**Post Award:** New award set-up

1. RA will receive Notice of Award from SPO with new fund number.
2. RA notifies Marguerite and PM that grant was approved.
3. RA will upload the budget in BFS and will monitor BAIRS for completion and accuracy.
4. RA will notify appropriate Financial Analyst and PM when funding is available and spending can begin.

RA will submit subaward requests to SPO and create POs in BearBuy for subawards payment.

**Post-Award Administration & Fund Management**

1. RA will coordinate with Financial Analyst, PM and Marguerite regarding financial reports due to the sponsor, more than 30 days before report due date. And coordinate with PM and Marguerite more than 30 days before narrative reports are due.
2. RA will monitor budget and provide monthly financial reports.
3. RA will reconcile expenses monthly.
	1. Communicate with Financial Analysts about required expense transfers.
4. RA will approve purchases and travel & entertainment in BearBuy as a requisition approver.
	1. Verify allocability of expenses and that required signatures are on file in BearBuy.
5. RA will coordinate with PM and Financial Analysts to create customized invoices.
6. RA will assist central campus offices in responding to auditing requests by internal and external auditors.
	1. RA will notify Financial Analyst of audit requests and RA will work to collect requested backup.
	2. RA will gather backup documentation and confirm completion with Financial Analyst.

**Award Closeout Process**

1. CSS-RA will review funding and communicate with Financial Analyst to see if a no-cost extension in necessary.
	1. CSS-RA will draft a template for no-cost extension request and coordinate with PM to prepare and submit to SPO.
2. Prepare closeout strategy. Assigned Financial Analyst will coordinate with PM to plan for close of fund and work with RA to:
3. Correct/transfer expenses including payroll
4. Enter accruals for anticipated expenses
5. Coordinate with PM on final payments to subrecipients
6. Notify recharge units and departments with allocated funds to update chartstrings.
7. Coordinate with Marguerite for any final reports needed by funder.
8. Closeout Process can be found at <http://controller.berkeley.edu/contracts-grants-accounting/training>