

CCE Project Coordinator Responsibilities

NOTE: All forms and policies referenced can be found in the “Policies” section under the “About” tab on the CCE website. For Excel forms in particular, please follow the formats and do not replace cell formulas. Any financial information **MUST** be submitted (electronically) in Excel for calculations.

First: Submit project budget (use CCE Project Budget Template) and brief narrative for approval.

Once Approved in writing (e-mail or printed):

If CCE will transfer a portion of total project expenses or a grant award internally, please request an internal transfer, specifying the appropriate FOAP number that will be used for project expenses, once expenses start accruing.

If expenses will be charged directly to a CCE account, please obtain the proper FOAP account number from CCE.

In all cases, the project coordinator is responsible for any of the following that apply to the project in question:

1. If travel is involved, **coordinate** with network partner program directors regarding names of those travelers to determine overlap/availability/most efficient use of resources BEFORE extending invitations.
2. If stipends or other payments are to be paid, **determine** the individual’s ability to be paid for services, depending upon US visa status, location of work, etc. BEFORE agreements are made.
3. **Communicate** clearly to participants what expenses will be covered as well as booking and payment/reimbursement methods (see CCE Travel Policy and Procedures). Every case is unique.
4. **Obtain** any passport etc. information needed, work authorization or other forms, **prepare** visa invitations for signature, etc., and **provide** necessary materials to traveler.
5. **Prepare/process** all related payment requests using the appropriate forms and using the FOAP budget lines specified by CCE; please note each request requires backup in the form of an invoice or original receipt.
6. **Obtain** appropriate CCE signatures and **Submit** requests to CCE Finance Manager 2 days in advance of Finance check request deadline.
7. **Maintain** a CCE Project Expense List (in Excel, see format) of all actual and anticipated expenses related to the project; this would include:
 - Direct check or wire requests (for requests that combine many projects, such as American Express or Epic, list portions relevant to the project only) including payments to vendors and reimbursements to individuals.
 - Order confirmations if done through Purchasing
 - Anticipated institutional invoices (network partners billing Bard for expenses paid/reimbursed locally)
 - Placeholders for Annandale Campus services with *estimated* amounts (to be filled in with actual amounts when available); these include Bard Transportation, Central Services, catering, housing, bookstore, IWT, etc.; include details regarding project, vendor, individuals, date, purpose/project name, amount in USD.
8. Using subtotals from item # 7, **track** all actual expenses (see point #5) against budget using original template provided (Budget Performance Report).
9. **Prepare** a brief narrative report to accompany the Budget Performance report.

Important Note:

Citizenship/visa status, employment status, current physical address, location of work and institutional affiliation will determine whether compensation for services (rather than/or in addition to reimbursement of expenses) is possible, as well as how those payments will be accomplished.

- Current Bard employees will be paid additional compensation amounts via exception pay, payroll taxes will be deducted and the project will incur employee benefit expense of approximately 6% (so budget for that)
- All non-Bard employees must complete a Work Authorization Form and provide all relevant attachments; Non-US citizens who will perform the work on US soil must have the ability to earn money in the US, so the nature of the visa must be determined (is this covered on that form?)
- Generally, reimbursement payments for US residents who reside in the US and/or who have a US bank account will be paid through accounts payable and the check mailed via campus mail or to a US address (or held at CCE for in-person delivery); there is no domestic EFT option.