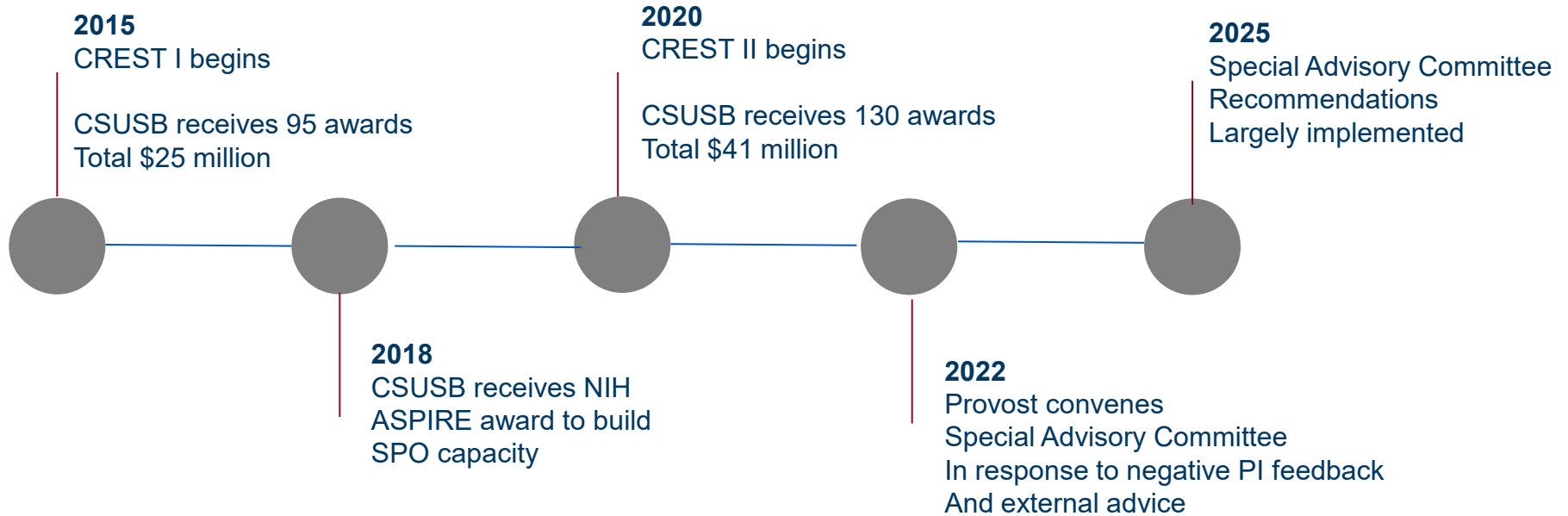


Case Study:

CSUSB CREST II FINANCIAL MANAGEMENT



Special Advisory Committee

Committee Charge

- Identify and address institutional hurdles PI face
- Suggest solutions to the problems
- Monitor implementation of changes

Membership

- Me (Chair, PI)
- Dean of CNS (also a PI)
- Director of Purchasing
- Chief of Staff, Academic Affairs
- Director of campus HR
- Director of SPO
- University Auditor
- University Controller

Changes (incomplete list)

2022

- No admin support for awards unless budgeted
- Disconnect between grant-funded purchasing/hiring and state side offices
- PI's had to access cumbersome systems to view balance
- PI's financial responsibilities unclear
- SPO lacked representation when making key campus decisions
- Too few grants analysts to support current level of activity

2025

- One grant support administrator hired
- PI responsibility training and spreadsheet developed and implemented
- Embedded employees to support grants now in HR and purchasing/accounts
- SPO representatives serving on important campus committees
- PI's and staff gained access to credit cards
- Campus encumbrances now tracked

The gold standard is to hire a dedicated project analyst (if you can afford one) to track all expenses to avoid overspending or overcommitting or misusing funds.

Table discussion starters

- What are the budget/financial hurdles you've encountered as you've pursued your project? How have you addressed them?
- What are some successful methods you've used to manage your budgets?
- If you are not a PI, what budgeting/spending questions do you have for others that might prepare you for this role in the future?

Delegate one person to share a summary at the end