INSTRUCTIONS TO THE SCIENTIFIC PROJECT ENCUMBRANCE REQUEST (SPER)

The SPER can be used to encumber the following projects for which the funding has been identified and received, but the exact source and specific details for accomplishment are yet to be determined:

1. Major, multi-year scientific projects, e.g., development of observing and computing facilities.
2. Division scientific computing development and upgrades.
3. Instrumentation development. Field program preparation and participation, including deployment requirements and participation by NCAR scientists.
4. A periodic maintenance for scientific facilities, including reserves for aircraft inspections and maintenance of shops or systems supporting facilities.
5. Major scientific workshops, e.g., those undertaken through longer-range inter-agency planning.
6. Bridge funding for multi-year, multi-agency funded scientific activities that support the on-going NSF program, but are not within the NSF base budget.

Once the SPER Budget Transfer Form has been submitted and approved, any changes in funding level, costs, or programmatic intent of the SPER will require a SPER change order. The word "Change Order" should be written at the top of a new SPER Budget Transfer Form and the original SPER # should be indicated.

Division: The name of the NCAR division managing the project
Project Name: The project name
SPER #: Identifying number to track request in the accounting system. Number is supplied by Accounting.
Date: Date of the request
Principal Investigator: The responsible person managing the project.
Prog/Div Administrator: The responsible person for the fiscal management and monitoring of the SPER account(s). This may or may not be the Division Administrator.

Provide a brief description and justification of the project. For a SPER change order, give the reasons for the changes. Reference the appropriate SPER criteria number, shown on the form.

Estimate the total cost of the project by fiscal year and by cost category. Salaries and Benefits for non-regular employees can be committed in this project encumbrance request. Regular employees working on this project must be included in the division's base program (new funds budget).

Separate account key or keys (if multiple fund sources) in which project expenditures and encumbrances for the SPER will be accumulated. Can be the same as the funding source account if the funds budgeted and expenditures in the funding source account is exclusively for the SPER project. Accounts with non-SPER activity cannot be used as a SPER account, i.e. operating accounts with other unrelated activity.

If the SPER account is new, please attach an account key setup form.

The fund source account may be different than the SPER account when the fund source account has other costs unrelated to the SPER.

Fund Source examples would be NSF CORE, NSF GTCP, NSF CMAP, NSF GRANT, NSF Special, DOE, NASA, FAA ... For every fund source listed there should be a corresponding SPER account number. If there are multiple fund source accounts with the same fund source, for example, funds from several NSF CORE accounts will be used, only one SPER account is needed.