Administrative Advisor Procedures

The Administrative Advisor (AA) is the linkage between the SAAESD and faculty who are involved in regional multistate activities. The AA provides administrative leadership, whereas, the participants provide the scientific leadership. ***The principal role of the Administrative Advisor is to facilitate the multistate activity to make it possible for the technical committee[1] to function easily and to assure that their administrative needs and responsibilities are met***.

Members of the SAAESD and department heads or chairs are appointed by the SAAESD chair[2] as AAs to the following multistate activities:

- Multistate Research Projects (S-xxx)
- Southern Development Committees (SDC-xxx)
- Southern Coordinating Committees (SCC-xxx)
- Southern Advisory Committees (SAC-xxx)
- Southern Education/Extension Research Activities (SERA-xxx)
- Task Forces or Conferences

Administrative Advisors are assigned by the SAAESD chair during the annual review of appointments, at the initiation of new projects, or as needed to replace the AA. These appointments are harmonized across all members of the SAAESD, with concern both for individual and state workload and interest.

The ***AA is a facilitator*** working with the technical committee chair, who provides leadership for the multistate activity, the Multistate Research Committee (MRC), which reviews and approves project activities, and the ED's office that manages the multistate portfolio. The AA is expected to be familiar with the administrative procedures of the SAAESD and related activities at the state, regional and national level for the multistate activity (see: Guidelines for Multistate Research Activities).

AAs:
- serve as the communication link between the multistate activity and the SAAESD
- assure that the activity is effectively carrying out its functions
- provide guidance to the technical committee on administrative matters
- evaluate the level of effort and quality of the multistate activity

AAs are responsible for assuring reports are made by the multistate activity in a timely and meaningful way. During the lifetime of the multistate activity, the AA is responsible for ensuring that all information is uploaded into NIMSS (see page 6). The AA authorizes meetings of the technical committee in NIMSS prior to the meeting date and ensures meeting reports (SAES-422 Annual Accomplishment Reports) are uploaded in NIMSS within 60 days following the meeting.

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[1] *The technical committee is the research scientists and other participating members of a multistate activity, including the administrative advisor and the NIFA representative.*

[2] *AA appointments rest with the authority of the SAAESD. Department heads or chairs may serve as administrative multistate advisors for all activities except federally-funded multistate research (S-xxx) projects. For SERA's, it is recommended that an Extension AA also be appointed by the Extension association (ASRED). In the case of NRSPs, one AA from each region shall be appointed, with one of those to be designated as the lead AA.*

Summary Of Administrative Advisor Duties:

Management
- Ensure election of project leadership, including the chair, chair-elect, and secretary who will take notes in meetings[1]
- Update the technical committee on changes in the multistate research program
- Encourage broad participation in scientific expertise, including extension, from a multitude of states including those in different regions
- Consult with the leaders of the technical committee to achieve goals and meet deadlines
- Request NIMMS editor access from the SAAESD office for appropriate technical committee members to upload proposals and reports

[1]*Recommendation: officers serve for one-year terms in rotation, electing a new secretary each year*

Meetings:
- Authorize the annual meeting or activity in NIMSS prior to the planned meeting
- Assist the project leadership with the preparation of the meeting agenda, focusing on an agenda built around the project's objectives
- Ensure that individual SAES participant activity reports are submitted prior to the meeting[1]
- Encourage the recording of meeting minutes as a record of all decisions made and consensus developed by the project's participants.
- Ensure a strong commitment to the multistate activity as evidenced by annual meeting attendance (Appendix E guided participation)
- Encourage the NIFA representative to attend and report on NIFA opportunities and relevant programs at the annual meeting[2]
- Determine the date and location of the next annual meeting[3]
- Ensure that the SAES-422 annual report is uploaded to NIMSS 60 days after the meeting

[1] *Recommendation: individual SAES activity reports are best structured when aligned with relevant project objectives.*

[2]*Recommendation: if the NIFA representative cannot participate, meet with the NIFA representative in advance of the meeting and discuss opportunities or issues that need to be brought to the attention of the members.*

[3]*Recommendation: chair hosts the meeting each year or decide as a group the location of the next meeting at the current meeting.*

SAES-422 Annual Accomplishment Reports[1]:
- Encourage the project leadership to set deadlines for necessary committee or project activities
- Discuss and reinforce the need to demonstrate interdependence in the SAES-422 annual report
- Ensure that the members understand how to write an appropriate impact section of the report
- Encourage the project leadership to complete the SAES-422 annual report in a timely fashion and confirm that it was uploaded in NIMSS by the AA or project editor
- Review the SAES-422 annual report to determine if the results are clear, concise and usable and the project is achieving its objectives

[1]*Recommendation: SAES-422 annual reports are often transcripts of the meeting minutes combined with individual station reports. SAES-422 annual reports are most informative when developed using those materials to synthesize and summarize the accomplishments against the individual objectives.*

Engagement:
- Acquaint new members who join the regional project with the history and current activities of the project
- Review contributions of scientists assigned to the research project and contact SAES directors for those who are not participating to encourage removal from Appendix E
- Review the extramural funding portfolio of scientists engaged in the multistate activity that enhance selective objectives of the project
- Encourage dissemination of research results to stakeholders and work with the group on strategies to identify appropriate stakeholders

Leadership
- Understand the nature and the purpose of the regional project
- Advocate on behalf of the project, working with the technical committee to identify and develop meaningful impact statements
- Consider reaching out to the Multistate Research Fund Impacts Program to help prepare and share Impact Statements (https://www.multistateresearchimpacts.org/)
- Consider, when appropriate, linking or meeting with similar multistate projects to expand collaboration
- Encourage participation of investigators from other disciplines to increase the multidisciplinary nature of the activity, including Extension personnel
- Encourage participation of investigators from 1890 and 1994 Land-grant Universities
- Ensure the individual activities support the project objectives and demonstrate a level of interdependence in its approach[1]
- Review the outcomes of the proposed activity with the technical committee to determine if they are achievable

[1] Recommendation: Look for evidence that the investigators are working together on each objective, rather than a collection of individual investigators conducting research without some demonstrated level of interdependence.

Project Continuation or Termination:
- Conduct a midterm review of project at year three and share the review with the MRC
  - *The midterm review is an appropriate time to discuss with the technical committee whether the project will be continued (renewed) or terminated at the September 30 termination date.*
- Project Continuation: encourage the technical committee to start the process of writing the new project (renewal) approximately a year before the project termination date and upload the "Issues and Justification" in NIMSS no later than September of the year before the project will terminate
  - *The "Issues and Justification" serves as the "request to write" trigger for the initial evaluation and feedback from the MRC.*
  - *Failure to have an approved new project results in the current project ending on the termination date.*
- Project Termination: ensure the technical committee submits the final SAES-422 termination report within 6 months of the termination date
  - *The final SAES-422 termination report summarizes the accomplishments of an activity and communicates research achievements measured as results, outcomes, impacts, and benefits to a project's sponsors and stakeholders.*

AA Guidelines[1] to Establish New Multistate Research Projects:

Develop the group and establish leadership
- Identify a leader who will be responsible for moving the proposal forward
- Seek multidisciplinary collaborators from a minimum of two SAES
- Encourage diverse representation of participants across the LGU system at the writing stage

Define the objectives
- Look for areas of similarity and synergy
- Define 2-4 lines of effort where more than ½ the group are working
- Define potential goals/objectives for a 5-year project[2] and narrow to a manageable number of objectives (2-5 or 3-4 is the sweet spot)
- Avoid lumping too much into broad topics; choose what they would actually want to do together

Identify objectives where each participant can contribute
- Everyone does not have to work on every objective
- Participants can contribute to multiple objectives

Create small subset groups to develop skeleton ideas of how to approach each objective
- Select leaders for each objective
- Discuss possible activities

Establish the writing team
- 2 or more people per objective group
- 1-2 who will lead the writing group and draft the proposal
- 1-2 who will write a brief literature review
- Detail the objectives and procedures (activities)

Submission and reviews[3]
- Review the MRC deadlines with the SAAESD ED Office or the MRC Chair and convey deadlines to the writing committee
- Upload the "Issues and Justification" in NIMSS to initiate the "Request to Write" MRC evaluation
- Upload the final proposal in NIMSS
- Provide the SAAESD ED Office with the names and contact information for 5-6 peer reviewers
- Transmit the peer reviewers comments to the writing committee to consider project revisions[4]
- Upload the revised proposal into NIMSS

[1]These are informal guidelines to assist AAs in helping faculty to establish a new Multistate Research Project and can be shared with the writing team. New Multistate Research Projects can, but are not required, to be formed by initially establishing a Southern Development Committee.

[2] A Multistate Research Project normally has a life of five years with the scheduled termination on September 30 (i.e., the end of the Federal Fiscal Year).

[3]Proposals for new multistate projects can be initiated at any time; however, all approved projects begin on October 1. The peer review process can be lengthy and must be completed prior to the MRC evaluation. The MRC only meets to evaluate proposals three times a year (Winter: January-February; Spring: March-April; Fall: October).

[4]All peer reviewer comments should be addressed in a detailed email response sent to the SAAESD ED Office, which will be incorporated into the materials presented for the MRC evaluation of the project.

AA Guidelines for Midterm Reviews

Midterm evaluations for five-year projects are important to evaluate the health of the project and to determine whether the objectives are being accomplished. Midterm evaluations are also valuable to determine the contributions of individual members and the level of interrelationships among individual members. Finally, this is a time when corrections can be made if needed, especially if the technical committee is planning to prepare a proposal to continue the project for another five-year period.

About six months prior to the start of the project's third year, AAs and committee members should ensure that all annual reports are complete and have been submitted to the NIMSS system.

Materials needed for a midterm review:

Evidence of Committee Activities and Meetings: All committees should be meeting annually. This is indicated by the AA's authorization of the meeting in NIMSS. Meeting authorizations and submission of subsequent annual reports is a primary indicator that the technical committee is still active. Inactive projects can be terminated prior to their expiration date.

Annual reports (SAES-422): Must be uploaded into NIMSS within 60 days of each annual meeting and no later than December 15, at the end of year two. Committee's reports can be checked in NIMSS by selecting Meetings/Reports >> Reports >> Search for Reports and use your current project number as the search parameter. All projects should have a minimum of two annual reports in NIMSS by the time of midterm review.

AA Midterm Review: The AA's NIMSS-based review form should be completed no later than December 15. The SAAESD office will assign this NIMSS form (Appendix I) to the AA earlier in the summer/fall. After the review has been assigned, AAs can find it in NIMSS under Reviews >> Submit a Review.

Midterm review materials are evaluated by the SACs (Southern Advisory Committees) and the MRC (Multistate Research Committee) and the process is an important facet of our overall project renewal system. Projects that do not submit the required midterm review materials may subject to early termination by the Multistate Review Committee

Administrative Advisor (AA) NIMSS Summary:

Adapted from User Guide for the National Information Management Support System (NIMSS). To access the full User Guide go to https://www.nimss.org/ click on the Directory tab.

Meetings and Reports

All multistate project meetings must be authorized in the NIMSS by the project AA or their designate. All multistate projects are required to meet annually and submit an annual report via NIMSS within 60 days of the meeting. If reports for any past meetings are missing or not AA approved, the system will not allow a new meeting to be authorized.

Authorizing an Annual Meeting

1. Log into NIMSS at www.nimss.org.
2. Select Reports/Meetings >> Meetings >> Authorize an Annual Meeting.
3. Enter all of the meeting information into the Meeting Authorization form.
4. Click the Create Meeting button, down on the lower right side of your page.
5. If you need to make any changes, contact your regional NIMSS system admin (http://www.nimss.org/directory/regional_offices)

Submitting an Annual Report

1. Sign into NIMSS at www.nimss.org. If you can't remember your password, select "Forgot Password and follow the instructions. If the system doesn't recognize your email or if you've changed stations, please contact your regional NIMSS system admin for assistance.
2. Once you've signed in, go to **Reports/Meetings >> Draft/Edit Report**. If you are authorized to submit the report on your committee's behalf as the AA or project editor, the project should come up for you automatically. If it does not, contact your project AA or you regional NIMSS system admin to be given the appropriate editing access. Click the "new report" or "edit report" button to submit the annual report (SAES-422).
3. Use the links on the left side of the screen to edit the report by sections. Start with the Basic Info section and update the report date and designate if the report is a termination one or not. If the minutes are part of the annual report, you may use the "minutes" link to post the brief summary of the minutes as well as the file (using the "browse" button to search for the file on your computer, but be sure the file is .pdf to avoid any viewing errors. NIMSS displays .pdfs the best over all other formats). Be sure to click the Save button before moving to a new section.
4. When you're done, click the "submit report" link. Check over the report to make sure everything looks correct. If not, go back and correct the sections, save, then submit again. This will send notification to the AA that is ready for approval. If you are the AA, then the report is immediately marked as approved.
5. If you need to edit an approved report, contact your NIMSS Regional System Administrator (RSA, Cindy Morley) for help. They are able to return reports to Draft status.

Approving an Annual Report

When one of your project editors submits a report, NIMSS will send you an email notification. As AA, it's your responsibility to look over the report, make sure it meets the requirements, then approve it.

1. Log into NIMSS (www.nimss.org)
2. Go to Meetings/Reports, then Reports
3. Select Approve Report
4. To view this report, click View Report under the report date. Make sure the report is complete, follows the Appendix D format, and is multistate in nature, featuring collaborative accomplishments and impacts. Lists of only individual station reports are not acceptable.
5. To approve this report, click Approve

Assigning Editors to Projects and/or Proposals

Proposal/project editors have access to upload proposal materials and annual reports.
1. Log into NIMSS and select Projects Proposals >> View All.
2. Search for the desired proposal number; be sure to include the "temp" designation.
3. Click View, click into the Outline, then click on Assign Editors (near the bottom, on the left)
4. Click Add Editor and begin entering the name of the desired editor into the box. Their full name should appear if they are in NIMSS.
5. To add more, click Add Editor button
6. Click Save when done.

Inviting Participants to Proposals/Projects
1. Proposals need to be set to Draft Proposal status before participants can be invited. This function will not work if the proposal is set to Under Review. Approved projects must be active and not expired/terminated.
2. Log into the NIMSS, www.nimss.org
3. Under Participants on the left-side menu bar, select Invite Participants
4. Enter the project or proposal number in the search box in the upper left corner and click Filter
5. Click Invite Users next to the proposal of interest
6. Enter the number/ID of the previous project (so those participants also get this email invite)
7. Set the due date for submission of Appendix E forms
8. Click Send Invite

Approving Submitted Proposals

As an AA, your committee will upload material for their renewal proposal, then submit it for you to approve.
1. You can find these proposals after logging in under Action Items, and then click My Project Proposals.
2. Please review the proposal material in the outline, then click AA Approve.
3. You can approve proposals either before or after you complete the AA review, assigned to you by your RSA. Approving proposals and completing the review are two separate tasks.

Synopsis of Multistate Activities[1]

Multistate Research Project (S-xxx)
Projects that involve integrated, potentially interdisciplinary, and multistate activities; have expected outcomes, including original research results; convey knowledge; and are peer reviewed. APPENDIX A - Format for Multistate Research Project Proposals.

Southern Development Committee (SDC-xxx)
Committees of duration less than two years for the purpose of developing a Multistate Activity; have the expected outcome of a full proposal for a particular Multistate Activity; and are peer reviewed. APPENDIX A - Format for Multistate Research Project Proposals

Southern Coordinating Committees (SCC-xxx)
Activities that provide a mechanism for addressing critical regional issues where multistate coordination or information exchange is appropriate within a function (ie. research, education or extension); have expected outcomes; convey knowledge; and are peer reviewed. APPENDIX B - Format for Coordinating Committees and Education/ Extension and Research Activity Proposals.

Southern Education/Extension and Research Activity (SERA-xxx)
Activities that serve to integrate education (academic and/or extension) and research on a particular topic where multistate coordination or information exchange is appropriate; have expected outcomes; convey knowledge; and are peer reviewed. APPENDIX B - Format for Coordinating Committees and Education/ Extension and Research Activity Proposals.

Southern Advisory Committee (SAC-xx)
Committees of department chairs/heads from a particular discipline that exchange information and serve a multistate administrative function through review of multistate activities, but are not peer reviewed.

Southern 500 Series (S-5xx)
Committees formed, for a maximum of two years, to provide a mechanism for response to acute crises, emergencies, and opportunities using the multistate research approach. Activities may range from formally organized research on targeted objectives to very informal research coordination or information exchange activity, depending on the circumstances; have expected outcomes; convey knowledge; and are peer reviewed.

National Research Support Project (NRSP-xx)
Activities that focus on the development of enabling technologies, support activities (such as to collect, assemble, store, and distribute materials, resources and information), or the sharing of facilities needed to accomplish high priority research, but which is not of itself primarily research; funded through off-the-top MRF Hatch appropriations; and are peer reviewed.

[1]*Described in National Guidelines for Multistate Research Activities.*

APPENDIX I

Midterm Review of Multistate Research Projects
(To Be Completed During the Third Year of Project)

Activity Number:
Title:
Administrative Advisor:
Proposed Termination Date:

1. Progress Report: Describe results since the project was last approved; compare actual accomplishments with the objectives in the project; reasons should be given if project objectives were not met. Rate this project on accomplishment of stated objectives.
    Excellent   Comments:
    Good
    Fair
    Unacceptable

2. Linkages: Provide evidence that collaboration occurs among project participants and with other projects/agencies. How well is the technical committee working together? Document any linkages. Rate this project on linkages.
    Excellent   Comments:
    Good
    Fair
    Unacceptable

3. Funding: Has outside funding been obtained from other federal and state agencies or the private sector by the technical committee to support project activities? Rate this project on its accomplishments in leveraging outside funding to help solve the problem being investigated.
    Excellent   Comments:
    Good
    Fair
    Unacceptable

4. Information and Technology Transfer: Document information and technology transfer, which is required for every project supported by Multistate Research Funds. Rate this project on plans or accomplishments for delivering the results to users which include other researchers (journal articles, technical reports, etc.), Cooperative Extension Service, industry, producers, students, etc.
    Excellent   Comments:
    Good
    Fair
    Unacceptable

Recommendation:
_____ Approve/continue with normal revision.
_____ Approve/continue with revision (provide specific recommendations).
_____ Disapprove/terminate at termination time (provide specific reasons).

Signature:

Date