# WCRP’s annual Budgeting and Spending Procedure

March 2024

WCRP is implementing a new procedure to distribute available resources across all of WCRPs international coordination activities. This procedure builds on five budget categories and requires a concise and clear procedure as to how funding needs are requested from all WCRP activities, and how available financial resources will be distributed, subsequently.

This document explains in detail the various budgeting categories, what they will and won’t cover, and what requests will be solicited from core activities, or the JSC. Funding will be requested via standardized templates following a clearly described procedure.

**Throughout this document the expression “core activities” refers to WCRP Core Projects, Lighthouse Activities, and the Academy.**

## 1 WCRP Budgeting Categories

Resources required for WCRP operations are divided into five different budget items:

1. Baseline funding of core activities, considering activity size
2. Strategic funds to support special (one time) core-project activities (e.g., workshops, conferences, etc.). These activities can either be initiated by core activities or the JSC (e.g., assessment papers, new research efforts, etc.).
3. Funds to support capacity building efforts (e.g., Global South Fellowships)
4. Funds required to support overarching operational activities (e.g., communication)
5. Funds to support WCRP’s Lighthouse Activities and the WCRP Academy.

**Baseline funding** of core activities: Base funding concerns regular operations of core activities as defined and documented in the science plans of those activities. Base funding typically covers needs related to the usual science coordination which can be identified or justified through science plans (e.g., number of working groups, number of face-to-face meetings required per year and other infrastructure related costs). The funds distributed will depend on the science requirements and breadth of the activity and, thus, will vary between activities. They can also vary between core projects. Baseline funding will be reviewed only every 2-3 years. Once approved, the agreed baseline funding amount will be provided annually and can be spent as approved by the steering group (SSG) of the given activity. The annual allocation will depend on availability of funds.

Not considered under this category are funds related to the other budget items outlined below. This includes funding related to the running of the International Project Offices (IPOs), which are regulated under individual agreements with WMO.

**Strategic funds:** Strategic funds are allocated annually at the discretion of the JSC and will be distributed to address one-time efforts or to address urgent, new needs. The JSC also plans to use these funds to improve connections and integration across the program.

Funds can be applied for once a year ahead of the annual JSC session. In special cases (discussed in advance with the JSC), proposals in between JSC sessions may be considered if funds are available. The funds will be allocated based on proposals submitted by core activities for specific expenses (e.g., specific conferences or workshops, assessments, etc.) or to support strategic activities proposed by the JSC (e.g., overarching operational activities, such as communication activities, planning workshops, conferences, assessment papers and/or special reports that require resources/personnel, etc.). These projects, events or activities will be time-limited (e.g., for one-time conference support or a short-term research activity) and should be associated with a specific deliverable (e.g., a scientific assessment paper). Such projects can be performed in collaboration with core activities or within specific core activities. They can likewise be performed as new short-term projects outside of core activities and with outside partners.

Not considered under this category are travel requests, fellowships and others items that fall under the other budget categories.

**Funds to support capacity building:** These funds include support for capacity building such as summer schools, WCRP Academy activities, and other capacity-related and training activities. The WCRP Global Fellowship also falls under this category. These funds can also be used to address processes to provide better access to infrastructure.

Themes for WCRP Global Fellowships can be proposed by the JSC or by core activities. Global Fellowships are specifically intended to support the initiation of activities in Least Developed Countries (LDC) and Small Island Developing States (SIDS). See the [list of nations](https://www.wcrp-climate.org/about-wcrpx/governance/terminology-and-conventions). Different types of fellowships are possible (see separate guidance document), such as a short (1 – 4 months) project.

Core activities proposals will be considered once a year ahead of the annual JSC session. JSC members can also make proposals for these funds individually or together with core activities, including the Academy.

Not considered under this category are the procurement of equipment. If there are any special requirements or requests, they should be raised initially with the WCRP secretariat.

**Funds to support overarching operational activities**, such as

* Communication and outreach efforts
* JSC Operations
* Strategic workshops
* Science Partnerships, Coordination and Collaboration
* Communication, Engagement and Outreach
* Advancing International Coordination

Core activities also can request funding for the development of tools that enhance their operational capacity, such as the development of communication platforms or the purchase of virtual conference software and related support. There is no template for this category of funding, but it can be included in core activity annual report/requests to the JSC.

**Funds to administratively support WCRP’s LHAs and the WCRP Academy**: Both the LHAs and the Academy need dedicated administrative personnel to move forward. Until additional and external funds are obtained (e.g., from an external agency) to sustain these support units, some of the WCRP income must be utilized. This includes existing capacity that is available from within the WCRP Secretariat. These funds are at the discretion of the JSC.

## 2 Annual Budgeting and Spending Process

A Budget Task Force of the JSC will perform the steps involved in working out the annual budget for all WCRP activities. Starting in 2024, the procedure required to identify the annual financial needs entails the following steps:

* Each year the JSC requests proposals for financial support from each core activity and from the JSC itself.
* All core activities will be asked to detail their baseline funding needs every 2-3 years. Core activities will be asked to provide a budget request for their regular activities and a respective budget justification, implementing not more than a 50% face-to-face meeting requirement. CMIP and CORDEX requirements should be included in this request within their core project. This will also identify the baseline funding needs for the coming year. If justified, core activities can revise this in the following year if needed.
* All core activities will be asked to send in proposals for specific activities taking place in 2025 covered by the strategic funds. A parallel inquiry will also go to JSC members.
* Core activities will be asked to provide proposals for capacity building efforts as specified above. A respective inquiry with respect to Global Fellowships will also go to the JSC members.

Based on the received information, a JSC budget task team will put together a proposal for an annual budget, taking account of the available funding to be distributed. The JSC will decide on the budget.

* Based on the income and all requested funding, the budget task team will draft a proposed annual budget, identify funded strategic activities within core activities and/or the JSC, and identify capacity building efforts and Global Fellowships to be funded. This includes the funds required to support WCRP Lighthouse Activities and the WCRP Academy.
* Based on the proposals from the finance task team, the JSC will decide on an annual budget for WCRP and will identify topics for which extra income will need to be solicited.

The first time this will concern the 2025 budget. The following years will build on this experience.

## 3 Timeline of Budgeting Process

* Requests from core activities will be solicited and submitted to the JSC ahead of the annual JSC meeting – ideally late March or early April.
* Funding requests will be discussed ahead of the annual JSC session by the JSC. Approval will occur at the time of the annual JSC session.
* For intersessional activities, the JSC will review and approve proposals to support the activities out of session.

Appendix:

***WCRP Activity Finance Template***

***2025 Finance Request***

***(due date: 15 April 2024)***

***Instructions***

*Please complete the below templates to allow the WCRP Joint Scientific Committee (JSC) to make informed decisions on the financial needs of WCRP core activities for the following year.*

***To note:***

*Finance requests from WCRP core activities are split into four subsections summarised below. Templates are available as appendices:*

1. ***Baseline Funds*** *are your ongoing annual needs for essential meetings of your groups that occur in the following year, bearing in mind that at least 50% of meetings should be virtual. It will be based on the number of activities as well as the availability of funds. Groups that include WCRP key activities (i.e., CMIP within ESMO, and CORDEX within RIfS) should include the annual activities of these as well.*
2. ***Strategic Funding*** *are requests for additional proposals for specific/strategic activities that require additional financial support above and beyond the baseline support (e.g., high-level conferences, assessment papers, producing specific products). These can be joint with other core activities and cover more than a single year if required. They should typically lead to a specific outcome or product.*
3. ***Capacity Building*** *relate to a variety of capacity building activities summer schools, field work schools or Global South Fellowships. Joint proposals with other core activities or partners are encouraged, especially with the WCRP Academy.*
4. ***Overarching operational activities****: suggestions to the JSC to cover additional overarching operational activities such as communication, video conferencing, etc.*

*Requests from core-activities will be submitted to the JSC ahead of the annual JSC meeting. But for activities that only come to light between JSC sessions, the JSC will have the ability to approve out of session – pending availability of funds.*

***1.Baseline Fund Request: {Core Activity Name}***

*Please specify the required baseline funding for your core activity. This funding will cover essential meetings/workshops and other base-line activities* ***that occur on an annual basis****, as well as the associated funding needs, noting that at least 50% of meetings should be virtual (please note face-to-face, hybrid and virtual meetings).*

|  |  |  |
| --- | --- | --- |
| *Activity Name* | *Funding Request (CHF)* | *Brief Explanation* |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

***2. Strategic Funding Request: {Core Activity Name}***

*Please include any additional requests for additional proposals for specific/strategic activities that require additional financial support above and beyond the baseline support (e.g., high-level conferences, assessment papers, specific products). For multiple proposals please provide info for each activity separately.*

1. ***Activity Name:***
2. ***Funding requested (in the case of multi-year proposals please list requirements per year):***
3. ***Brief Explanation (2 page maximum):***
4. ***Links to other WCRP or external activities (1 page maximum):***
5. ***Final Product/Outcome (1 page maximum):***

***(Include appendices if required)***

***3. Capacity Building Funding Request: {Core Activity Name}***

*Please include proposals for any capacity building activities such summer schools, field work schools etc. Joint proposals with other core activities or partners are encouraged, especially the WCRP Academy. You can also include a proposal for a Global South Fellowships. For multiple proposals please provide info for each activity separately.*

1. ***Activity Name:***
2. ***Funding requested:***
3. ***Brief Explanation (1 page maximum):***
4. ***Links to other WCRP or external activities, in particular the WCRP Academy (1 page maximum):***

***(include appendices if required)***

***4. Overarching operational activities: {Core Activity Name}***

*Please include proposals to the JSC to cover additional overarching operational activities such as communication, video conferencing, etc.*

1. ***Request:***
2. ***Funding requested:***
3. ***Brief Explanation (1 page maximum):***
4. ***Links to other WCRP or external activities (1 page maximum):***

***(include appendices if required)***