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To: Frank Oldfield <frank.oldfield@pages.unibe.ch>
Subject: Re: Finances and futures
Date: Thu, 4 Feb 1999 11:43:09 -0700
Cc: messerli@giub.unibe.ch, domraynaud@glaciog.ujf-grenoble.fr, pedersen@eos.ubc.ca, k.briffa@uea.ac.uk

Hi Frank and friends - I'm happy to see the budget looking sound and feel Franks suggestions are good ones in terms of money to spend this year. Building on the Swiss paleoclimate course is a good idea, and, of course, we should decide on future REDIE investments at future SSC's. My gut feeling is that REDIE will have to continue to be a lower priority in the future, BUT that we should stay committed to getting scientists (including youngsters) from developing countries to our science mtgs - makes more sense than training probably, given tight budgets. Thanks,Peck

>Dear colleagues,

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>I now share with you some ideas about our financial situation in PAGES. I >think the information should be treated confidentially at this stage and >certainly with some discretion.

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>During the course of last year, it was very difficult to keep track of our >financial position from month to month, partly because it took our >financial contacts in the University of Bern an inordinately long time to >sort out the financial implications of the OSM, partly because, in the >course of doing this, they made some understandable but very significant >and confusing errors. Niklaus has now managed to sort these out and we also >have our confirmed budget for 1999 - which means that we can begin to do >some real planning.

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>The first significant point is that we are carrying over into 1999 a >surplus some US\$15k greater than we began with in 1998. In fact we have >been building up our 'carry-over' steadily since the beginning of 1996 and >it is now around \$67k - between 13% and 14% of our annual budget and a much >higher proportion of that part of our budget that is uncommitted each year. >Whilst I believe it would be unwise to eliminate it entirely, I do think we >should aim to reduce it significantly provided there is a good rationale >for the means we choose.

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>I have attached a summary of how I see things for 1999. You will see that >even if we spend all the funds committed to workshops at our Pallanza >meeting, we still have a very healthy surplus. On past experience, I do not >think this sum will be exceeded during 1999 - even if we have one or two >more urgent requests, they are more than likely to be offset by delayed >workshops, so I think this is actually likely to be an over-estimate. >Moreover, I have assumed that ALL the money allocated by IGBP for Synthesis >will be spent in 1999. We are under some pressure to do this, but the pace >of the exercise makes me suspect that we may have difficulty.

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>At the end of the Table, I list 3 additional commitments I would like to >propose for prioritizing and I discuss each briefly below:

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>1. REDIE (which you may remember stands for Regional Educational and >Infrastructure Efforts (about which we have, so far, said very little and >done even less).

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> In this area, one of the ideas gently simmering on the back burner has >been the notion of winning support from START to run something like a >Summer School for selected young scientists from developing countries. This >emerged from an informal discussion between ourselves in the Office, Bruno >and Roland Fuchs, the Director of START, when he was over here on a visit. >At the time, he seemed quite keen on the idea, but has since been silent. >No matter, I still feel it is an idea worth working towards at least up to >the pre-commitment stage and I have been exploring informally the >possibility of basing such a course in London.

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>This coming summer, I think we may have a chance to do a kind of partial >trial run. Thomas Stocker and Andy Lotter (a first class paleolimnologist

>here in Bern) plan to run a Summer School nearby this year. Thomas
>approached me some time ago to see if PAGES could support participation by
>any overseas students and my reply was a very cautious one to the effect
>that we would normally expect to be approached and have an input at the
>planning stage and that we would only really consider such a possibility in
>the context of training for scientists from developing countries. Having
>discussed the whole thing more fully with him, I begin to wonder whether
>it may offer quite an interesting possibility. My plan would be to seek
>nomination of/applications from say 3 to 5 young scientists from different
>parts of the developing/former eastern bloc world (representing each of the
>PEP Transects) and bring them to Bern both for the course and for a short
>period linked into the PAGES Office. The ideas behind the latter part of
>the suggestion would be to
> - support their participation if need be,
> - give them some sense of PAGES and its role in nternational global
>change science/IGBP etc and
> - solicit feedback and advice about what the shape of an ideal course for
>developing country scientists interested in PAGES activities might be.
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>I believe that even if we did not have something like REDIE in our
>Implementation Plan it should be an important commitment; since we do, it
>is an absolute obligation which we ignore at the risk of serious
>allegations of bad faith.
>
>2. I feel there will be a need to follow up my PEP II visit to Australia
>with something positive there. John Dodson is responding well to
>suggestions about more co-ordination and bringing in more colleagues to
>share the responsibility, but I think that if whatever we agree in Perth is
>actually to work, there will be a need to fund a WORKshop (as distinct from
>a mini-symposium) of thematic and/or regional co-ordinators to get their
>act together. We should offer money for this.
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>3. The difference it has made having Cathy Stickley (based at UCL) working
>for PEP III is fantastic, but we risk losing her input unless something can
>be done. I'm negotiating with ESF, but it will be over a year before their
>finely grinding mills deliver anything. Rick and Francoise are also going
>to apply to EC for Framework 5 funding, but that will be no quicker. I am
>seriously considering asking Zimmie to help bridge the gap since he did not
>quite close the door when I last talked this through with him, but I feel
>that if I do this, PAGES might need to put up a bit more colateral, the
>more so since we are in credit.
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>Both 2 and 3 reflect my view that the PEP's remain an absolutely vital part
>of the PAGES structure and need to be supported if that is the only way
>they can achieve their objectives.
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>All three of the above suggestions require some endorsement in principle
>before I take them any further. If we were to spend all the funds envisaged
>before the end of 1999, our budget credit would be very much reduced -
>probably by too much, but I believe the PEP funding would probably be paced
>over a longer period and that the other items in our budget are more likely
>to be marginally under- than over-spent, so I do not feel we are proposing
>any unreasonable risk.
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>I look forward to any reactions members of EXCOMM may have to these
>suggestions.
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>Withh all good wishes,
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>Frank
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