

GUIDELINES for CTL Discipline/Program Workshop Project Management:

2008-2009

Once you have received approval for funding of your workshop, there are a number of steps to complete. The following checklists and descriptions are provided to help you plan and manage your workshop. The first section explains how funds will be transferred to your campus. The next three sections are a checklist of items to do before, during, and after the workshop. An explanation of paperwork to complete is included in the "before" section. Also included is a suggested timetable and examples of the paperwork involved. If you have any questions, please contact Martin Springborg (651-649-5981 / martin.springborg@so.mnscu.edu) or Yvonne Shafer (651-649-5947 / yvonne.shafer@so.mnscu.edu).

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Transfer of funds

Step One: Have your business/grants office complete and fax a copy of the Grant Funds Transfer Form to the CTL office (fax: 651-649-5749). This form is given to the lead workshop planner upon notice of funding. We must have this form completed in our office before we can transfer any funds to your campus. We will be transferring the funds to your campus account in MAPS as an inter-Minnesota State Colleges and Universities transfer. As with most other grants, you may not pay for expenses from another cost center and reimburse these expenses from your CTL Grant funds. Please contact the CTL immediately if you have any questions about managing your CTL Grant funds.

We will transfer the full amount of your grant to the campus. However, if your project budget calls for a stipend for a workshop planner, that stipend will not be paid until a final report has been accepted by the CTL. Stipends for planners not on your campus will be also be paid by the CTL upon acceptance of your final report.

Step Two: The CTL will let you know when funds have been transferred. Contact your business office or office of sponsored programs to ensure that the requested funds have actually been transferred to your grant cost center. If you have not received the funds after 3 weeks, contact the CTL. You may also want to take this opportunity to set up a regular schedule of budget reports for the ongoing management of your grant.

Before the workshop

Getting started

- ❑ Your campus business office will establish a cost center specific to your grant and return the Grant Funds Transfer Form to CTL for transfer of funds. CTL will then transfer your grant funds to the newly established cost center.
- ❑ Review institutional rules and processes for accessing funds for purchases and for contracted work.
- ❑ Follow up with business manager to make sure that funds have been appropriately allocated.
- ❑ Organize your planning! Establish a recordkeeping system and location for managing funds and workshop information. Keep copies of all workshop-related correspondence (including e-mail), especially correspondence with the MnSCU Center for Teaching and Learning. Keep copies of all receipts, purchase orders, and reimbursement requests. You may want to get monthly reports from your business office showing activity in your cost center. (Financial reports are often designed by and for financial professionals. Ask for assistance if you find these reports difficult to decipher.)

Paperwork to File

These forms are required by the State of Minnesota. All forms are available on the CTL Web site or the MnSCU Web site at <http://www.finance.mnscu.edu/contracts-purchasing/index.html>. Your business office also has the forms; please use their versions. **Be sure to keep track of all expenses.**

- ❑ System Out of State Travel/Special Expense Approval/Authorization Form
<http://www.finance.mnscu.edu/accounting/businessoffice/forms/index.html>
 - The purpose of this form is to get proper prior approval for special expenses.
 - Please use the version designed by your campus business office. The sample in the above link is designed for use in the Office of the Chancellor.

- You need to fill out this form to get approval for the meals and/or refreshments (coffee, tea, and pop) for the group attending your discipline workshop. If the following situations apply, also request approval for them on the same form:
 - 1- Meals which exceed maximum allowed per bargaining agreement
 - 2- Meals for individual within work area attending meeting/conference (if the workshop is at a campus, and faculty from that campus are attending)
 - 3- Other special expense (specify description, quantity, unit cost, total)

Special Expenses could include anything other than normal office supplies needed for the workshop. Then, under the Itemized Estimate of Costs, fill in the amounts for meals and any special expenses.

- This form must be filled out and given to your campus business office **before you start** requesting purchase orders. Do this form first!

Requisition for Purchase

<http://www.finance.mnscu.edu/accounting/businessoffice/forms/index.html>

- This form is used to start the process of paying a vendor. Complete these forms 3 months before the event.
- A Requisition for Purchase Order must be filled out for each of the various vendors you are using. This includes hotels, caterers, printing, facilities, and associations that are paying for specific things for your workshop.
- You will need to consult with your business office regarding who should sign the purchase orders. It may be your campus CAO or your dean. Send the requests for purchase orders to your campus business office.
- A copy of the purchase order will be sent to the vendor and to the faculty planner.

Consultant/Professional/Technical Contractual Services and Honoraria

<http://www.finance.mnscu.edu/contracts-purchasing/contracts/forms/index.html>

- Use a contract for non-system speakers. Travel expenses should be included in the contract. Lodging expenses can be covered by the lodging purchase order and so would not need to be listed in the contract. Be sure the speaker's address (to send contract and payment), social security number and/or federal ID number are on the contract.
- Fill out contracts three months before the workshop. Send to your campus business office.
- If an employee from the Office of the Chancellor presents at the workshop, s/he should not be paid an honorarium. Office of the Chancellor staff must have their department pay for any lodging expenses, if applicable.

Invoices

- Invoices are the final billing charges for services completed. Payment is made after invoices are filed.
- These should be provided by the speaker/consultant and vendors at the workshop.

- If the speaker doesn't have an invoice, you may create out one for them and have them sign it at the workshop. Include the speaker's address, social security number, etc.
- Be sure that the corresponding purchase order number is on the invoice.
- Return all invoices and expenses to your campus business office after the workshop.

☐ SEMA4 Employee Expense Report

<http://www.finance.mnscu.edu/accounting/businessoffice/forms/index.html>

- Full lodging expenses, mileage and meals not covered by the agenda **are not included in CTL funding**. Participants may be reimbursed for these expenses via their own personal professional development funds. The form should be processed on their own campus.
- The purpose of this form is for participants to be reimbursed for personal expenses. If participants will be paying for their lodging rather than a direct billing to your cost center, please contact your business office to ensure that a SEMA4 can be processed against your cost center.
- Be sure the participant has his/her employee ID number on the form and that they have signed it. If this is not done, the form cannot be processed.

Workshop Program

- ☐ Finalize program – speakers, sessions led by colleagues, hands-on experiences, special activities or tours, etc. Consider a balance between active time and reflective time.
- ☐ Prepare contract(s) for any speakers from outside the system. Consult with your campus business office and/or CTL on contracts. Be sure all information is filled in properly. Submit to your campus business office.
- ☐ Recruit other interested faculty to assist you to register participants, facilitate discussions, etc.
- ☐ Arrange for your speaker's accommodations and transportation.
- ☐ Expenses for speakers should be covered 100%. Lodging expenses (as stated in your proposal) can be paid using the same purchase order to cover participants' lodging. Tell the hotel the name of the speaker and that you should be billed for 100% of room and tax. Other travel expenses will be reimbursed from your cost center and will require original receipts. The contract should include a reimbursement form along with further information. **See *Site Arrangements* below for further detail.**
- ☐ Prepare an evaluation form for participants. Samples are available on the Discipline Workshop Web site page for Planners: Management Guidelines. Include at least one open-ended question that inquires about the impact of the workshop on the participants' teaching and learning. Sample evaluation forms are available on the CTL Web site at http://www.ctl.mnscu.edu/programs/discipline_work/planners_mang.html.

- ❑ Consider activities to follow up the workshop. This could include setting up a google group, listserv, mailing materials to participants, etc. Contact your CTL discipline workshop program director for ideas.

Site Arrangements

- ❑ Submit to your campus business office an Out of State Travel/Special Expenses Approval/Authorization form before you begin making purchases.
- ❑ Submit to your campus business office a Requisition for Purchase, if needed, for each of your vendors. This includes any associations that will pay bills and need to be reimbursed.
- ❑ Confirm arrangements with hotel.
 - Planners should establish an agreement with the hotel/motel to bill your campus business office directly, using a Request for Purchase Order. The signed agreement will be returned to the facility and a copy sent to the faculty planner. After the workshop, the planner will initial the bill for verification; and then it will be sent to the campus business office.
 - Often **government/state rates** are available for hotel arrangements. The planner(s) should set a block of rooms aside at this special rate.
 - Overnight lodging will not be provided for participants whose work location is within 35 miles of the workshop site.
 - Incidentals (movies, phone calls, room service etc.) are not reimbursable. These charges are to be paid by the participants at checkout time.
 - The funds provided by CTL cover 50% of participants' (double-room) lodging expenses for those system employees in travel status at the designated facility only. The hotel guest is responsible for 100% of incidental expenses, i.e., room service and other. Overnight lodging will **not** be provided for participants whose work location is within 35 miles of the workshop site.
 - Cancellations must be made according to hotel/motel regulations. Any "no show" or late cancellation charges are the responsibility of the individual. This information should be listed on registration materials.
 - Individuals will call the hotel directly to make room reservations. Discuss with the hotel how roommate assignments will be handled for those who desire to share a room.
 - Give a copy of the CTL Lodging Policies to the hotel.
- ❑ Confirm arrangements for meals and breaks. A Request for Purchase Order for the total number of expected participants should be done. Select the menu. Discuss when final participant numbers need to be given to the food provider. We suggest that you ask if a continental breakfast can be left out for the morning and "refreshed" (coffee refilled). An afternoon break with refreshments and water available at the tables are appreciated by participants.

- Confirm arrangements for meeting rooms. Decide how you want furniture to be arranged and what extra tables you will need for registration, resources, and food.
- Check on equipment needs of any presenters. Make arrangements for equipment with the staff at the workshop site.

Publicity

- Develop publicity materials to send to faculty within your discipline/program.
- To acknowledge the Office of the Chancellor's support, please include the following sentence on flyers, registration forms, Web sites or other materials:
This program is (was) made possible through a Center for Teaching & Learning discipline workshop grant funded by the Minnesota State Colleges & Universities System Office of the Chancellor.
- Include the Minnesota State Colleges & Universities logo on the same materials. It is available at
http://www.chancellor.mnscu.edu/employee/publications/logos/logo_system.html .
- CTL staff will assist in obtaining names of faculty. Be sure to invite all potential system participants. CTL can assist with mailing workshop information.
- Send copies of workshop publicity information to the CTL office for use on the CTL Web site and other printed material.
- CTL will send e-mail announcements of funded workshops to all campus CTL leaders who will in turn notify faculty on their campus of the opportunity.
- CTL will create a Web page for each workshop which will include purpose, program description, schedule, registration information and contact information. We can also link to your own Web site.

Registration

- On-line registration is available using the CTL Web site. Work with CTL to customize the registration template as needed. Confirmation e-mails are automatically generated. You will be given regular database reports at your request.
- If you want to do a paper registration, design a registration form using the template provided. Please include information on what expenses will be covered. At the bottom of your registration, please include the following ADA language:
 Individuals with a disability who need a reasonable accommodation to participate in this event please contact (*name*) at (*phone number - include 800 number and TTY number if*

you have one) or through the Minnesota Relay Service at 1-800-627-3529 (*if you do not have a TTY number*) by (*date*).

CTL can upload this document on the Web page for your workshop.

- Work with the CTL staff to send out invitations and registration forms.
- Manage the registration list.

Participant Materials

- Prepare a workshop packet for each participant. The recommended items include:
 - An agenda (please include the system logo)
 - List of participants with contact information
 - Information regarding consultant/speaker
 - Specific workshop materials
 - Employee Expense Report
 - Workshop evaluation form (see examples online)
 - Name tag for each participant
 - Other materials of your choosing

During the Workshop

- If applicable, ask participants to fill out their State Employee Expense Report. Be sure their ID is on it and that they have original receipts for all expenses.
- Ask speakers for their invoice. If they do not have one supply one for them.
- Remind all participants to fill out an evaluation form.

After the Workshop

- Write thank-you letters to speakers, etc.
- Send all invoices (speakers, hotels, catering, etc.) to your campus business office.
- Consider what activities should follow the workshop. This could include setting up an email list group, mailing materials to participants, etc. Contact CTL program directors for ideas.
- Go to My Grants at <http://www.ctl.mnscu.edu/grants/application/index.html> and complete a final report for your workshop. Report on outcomes and objectives that you selected when you applied for funding.

- At the conclusion of the workshop/conference, send the following four items to Discipline Workshop program directors at:

Minnesota State Colleges & Universities
Center for Teaching and Learning
Wells Fargo Place
30 7th St, E., Suite 350
St. Paul, MN 55101-7804

1. A summary of your workshop evaluations.
2. A summary of **your** impressions of the workshop and its outcome results in the form of a report.
3. A packet of all materials from your conference: announcements, advertising, agendas, handouts, participant list, evaluations, tabulation of evaluations and your impressions of the workshop.
4. A printout from your campus business office showing activity in your cost center. Prepare a final expense table using the attached form located toward the end of this document. If you have funds left in your cost center, CTL will arrange for the monies to be transferred back to CTL. If you are over your budget, contact your CTL program director.

Workshop Timeline

There are many steps involved in planning a workshop. The purpose of the table below is to show the range of tasks and the level of administrative support that CTL can provide. If your application for funding is approved, you will receive more specific information about how to proceed.

Timeline	Overall Task	Responsibility of Planners	Responsibility of CTL Staff
Before application for funds	Assemble planning committee	<ul style="list-style-type: none"> • Include faculty representing each type of system institution 	<ul style="list-style-type: none"> • Help identify planning committee members
	Workshop dates and locations	<ul style="list-style-type: none"> • Make final decision 	<ul style="list-style-type: none"> • Offer suggestions
	Workshop goals and agenda	<ul style="list-style-type: none"> • Make final decisions • Arrange for speakers, presenters, tours 	<ul style="list-style-type: none"> • Offer several general templates
6 months before workshop	Apply for funds	<ul style="list-style-type: none"> • Contact CTL prepare proposal • Once funding is confirmed, work with campus business office and CTL to process appropriate forms, including Grant Funds Transfer Form 	<ul style="list-style-type: none"> • Offer guidance review proposals

Timeline	Overall Task	Responsibility of Planners	Responsibility of CTL Staff
3 - 4 months before workshop	Site Arrangements	<ul style="list-style-type: none"> • Arrange for lodging block and payment • Arrange for workshop facilities • Arrange for meals • Arrange for equipment • File appropriate paperwork (e.g. special expense requests, purchasing requisitions, speaker contracts) 	<ul style="list-style-type: none"> • Offer guidance on procedures • add event to CTL events listings
	Publicity	<ul style="list-style-type: none"> • Give CTL details for Web site and events calendar (see Event Detail Form) • Design Web graphics, announcements, and other publicity • Arrange for creation of Web site or pages (if non-CTL, advise CTL of URL; if CTL, complete Event Detail Form) • Give CTL details for events calendar 	<ul style="list-style-type: none"> • Provide you with a list of faculty in target programs or disciplines • Announce workshop to CTL Campus Leaders • Provide design assistance (upon request) • Mail workshop information • Host Web page(s) (upon request) • Add event to CTL events listings

Timeline	Overall Task	Responsibility of Planners	Responsibility of CTL Staff
2 months before workshop	Registration	<ul style="list-style-type: none"> • Create registration process (you may choose to work with CTL to open online registration) • Communicate with site (e.g. facilities and food providers, speakers, and ASL interpreters) 	<ul style="list-style-type: none"> • Activate online registration form (This can be done as early as you provide us with a completed Event Detail Form.) • Provide lead workshop planner with frequent updates to registration list/information
1 month before workshop	Participant Materials, etc.	<ul style="list-style-type: none"> • Design evaluation form (CTL has examples available) • Collate conference packet (CTL has folders available) • Use registration list to prepare name badges (if CTL is managing online registration, we will create name badges for you) • Arrange with CTL a brief welcoming role (at registration tables or general opening session) • Lead, answer questions, put out fires, etc. 	<ul style="list-style-type: none"> • Advise on evaluation • Provide folders and other Office of the Chancellor handouts, e.g., eFolio, Minnesota Online, Minnesota Transfer, etc. (upon request—no later than 1 week before event) • Prepare name badges (upon request) • Attend workshop and welcome attendees

Timeline	Overall Task	Responsibility of Planners	Responsibility of CTL Staff
After workshop	Workshop Follow-up	<ul style="list-style-type: none"> • Summarize evaluations • Coordinate follow-up activities • Submit report and final budget per project management guidelines 	<ul style="list-style-type: none"> • Coordinate follow-up activities

**[Name of Workshop]
For [Discipline/program]
Registration Form**



**Minnesota
STATE COLLEGES
& UNIVERSITIES**

**[Date]
[Location]**

Name _____
Institution _____
Address _____

Phone _____ E-mail _____

I will attend:
 Workshop on [day 1]
 Workshop on [day 2]

Meal needs:
 [Meal 1]
 [Meal 2]
 [Meal 3]
 I would like vegetarian meals.

Lodging needs:
 I live within 35 miles of the workshop and do not require lodging.
 I live more than 35 miles from the workshop location and require lodging. I will call [lodging site] and make my own arrangements.

Special Needs:
 I require the following accommodations:

Mail to:

Individuals with a disability who need a reasonable accommodation to participate in this event please contact [name] at [phone number – include 800 number and TTY number if you have one] or through the Minnesota Relay Service at 1-800-627-3529 [if you do not have a TTY number] by [date].

This program is (was) made possible through a Center for Teaching & Learning grant with generous funding from the Minnesota State Colleges & Universities System Office of the Chancellor.

[Name of Workshop]

for [Discipline/Program]

[Date]



Minnesota
STATE COLLEGES
& UNIVERSITIES

Participant Checklist – Keep this!

- Send in registration form by [date]
- If there are changes in my attendance/meal, contact [planner]
 - I will attend:**
 - ___ Workshop on [day 1]
 - ___ Workshop on [day 2]
 - Meal needs:**
 - ___ [Meal 1]
 - ___ [Meal 2]
 - ___ [Meal 3]
 - ___ I would like vegetarian meals.
- I am responsible for arranging my lodging and will cancel my room if necessary. The funds provided by CTL cover 50% of participants' (double-room) lodging expenses for those system employees in travel status at the designated facility only. The hotel guest is responsible for 100% of incidental expenses, i.e., room service and other. Overnight lodging will **not** be provided for participants whose work location is within 35 miles of the workshop site.
 - I will be responsible for 100% of the lodging costs if I do not cancel my lodging according to hotel policy.
- Request any special accommodations. Individuals with a disability who need a reasonable accommodation to participate in this event please contact [*name*] at [phone number – include 800 number and TTY number if you have one] or through the Minnesota Relay Service at 1-800-627-3529 [if you do not have a TTY number] by [date].
- Bring the following to workshop:
 - ...
- Apply for reimbursement from personal or program/discipline campus-based professional development funds for following items:
 - Transportation
 - Meals
 - Dinner the evening before the workshop/conference can be claimed for all participants who are in travel status.
 - Breakfast en route can be claimed for those participants who leave home before 6:00 a.m. or if they are in travel status.
 - Dinner following the workshop/conference can be claimed for all participants who cannot be home before 7 p.m.