



# **Guide to Integrated Cluster Project Planning**



## **IC Project Planning Guidebook**

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## **Executive Summary**

Congratulations for participating and leading a Plymouth State University Integrated Cluster Project. This guidebook is designed to assist you in planning, submitting, implementing, and recording all aspects of your project. The Guidebook is organized into 3 sections. Section 1 provides guidance by addressing the definition of a Cluster Project. Section 2 provides detail on planning, requesting approval, implementing, and reporting on a project. Section 3 provides information on project support: personnel planning, travel planning, purchasing supplies, catering, etc. If you have any questions, please feel free to contact your cluster leaders or colleagues on the IC Project Review Team.

## **SECTION 1 IC Project Guidelines**

1. **Purpose.** The purpose of this guidebook is to help students, faculty, and staff build Integrated Cluster Projects.
2. **As you plan your project, consider the University's mission.**

**Mission.** Plymouth State University serves the state of New Hampshire and the world beyond by transforming our students through advanced practices where engaged learning produces well-educated undergraduates and by providing graduate education that deepens and advances knowledge and enhances professional development. With distinction, we connect with community and business partners for economic development, technological advances, healthier living, and cultural enrichment with a special commitment of service to the North Country and Lakes Region of New Hampshire

3. **Integrated Cluster Project Defined**

Well-defined activities or a series of sustainable activities that join students, faculty, staff, alumni, and the community to solve real-world problems or provide cultural enrichment through research, scholarship, and the development of creative works. Meant to be integrative and complementary to course curricula and programs of study, cluster projects have clearly-stated rationale, goals, and objectives that make explicit the interdisciplinary nature of project activities. Cluster projects integrate knowledge, skill-building opportunities, and mentor or advisor expertise to produce authentic outcomes. Intended to support and reflect the missions of the Integrated Clusters and the University, cluster projects are an integral and sustained part of student and community learning at Plymouth State University.

4. **IC Project Guidelines/Criteria.** The project proposal planning guidelines provided below are a reflective set of criteria to assist in developing a proposal that leverages PSU's capabilities and demonstrates its potential impact.
  - a. **IC Project Review Criteria.** As an IC Project Team Leader, please review the below questions to help refine the IC Project Concept as well as ensure the developing IC Project is in line with the basic criteria
    - i. Does the project advance and support the Integrated Cluster's missions and visions?
    - ii. Does the project foster diversity and collaboration across and between disciplines?
    - iii. Does the project address a relevant real-world problem or an important in-depth issue?
    - iv. Does the project establish relationships with partners and stakeholders external to the university?
    - v. Does the project foster student engagement?
    - vi. Do the project goals and objectives relate to course curricula and/or programs of study?

## SECTION 2 – IC Project Process

### 5. The IC Project Proposal and Budget Request Process

- a. Step 1 – Formulate a concept for your project in accordance with the definition of an IC Project.
- b. Step 2 – Review this Guidebook to understand the project submission process.
- c. Step 3 – Coordinate development of your proposal with Cluster leadership.
  - i. If the IC Project is a student led Project a Faculty Advisor must be identified.
  - ii. Assemble your project team and develop your project
  - iii. Develop a *concise description to aid in publicizing the project*
  - iv. Develop IC Project Goals, Objectives and Outcomes (*for all constituents involved-- detailed, measurable anticipated objectives and student, faculty, partner outcomes*)
  - v. Develop IC Project Rationale and Impact Statement (*how the project furthers and supports PSU mission and vision specific to our transition to a more relevant, uniquely academically attractive experientially project based educational experience.*)
  - vi. Develop IC Project budget in accordance with the guidelines provide in the IC Project Logistics section of this guidebook.
  - vii. Confirm IRB requirement if relevant
  - viii. Confirm faculty release requirements if relevant
  - ix. Coordinate external partnerships and MOU requirements if relevant
- d. Step 4 – Submit request to IC leadership
- e. Step 5 – Project Review, Approval, Endorsement.
  - i. For Projects <= \$5,000 the IC leadership may approve, request rework or reject the project unless it includes faculty release time.
  - ii. For Projects >\$5,000 the IC leadership endorses to the IC Review Team who will review and either approve, request rework or reject.
- f. Step 9 – Once a project is approved, the IC Project leader will meet with relevant staff to obtain an activity code, review the approved funding and address procedures for fund application and reimbursement. (Stephanie Oleson is key staff for projects as of 8-28-17.)

### 6. Project Implementation

- a. Once the IC Project is approved the IC Project Leader is responsible for implementing the project as well as ensuring the project process receives the appropriate level of publicity. A key part of the Cluster concept is to gain the widest visibility for the good work students, faculty and staff are doing.
- b. All IC Project Team members should continually seek opportunities to tell their story via a number of social media platforms. Promotion and updates will attract more student participation, more partnerships, and enhance the University's position as a unique, innovative, experiential learning institution.

### 7. Project Close out

- i. Completion Report
- ii. Budget Close out

## SECTION 3 – IC Project Logistics

8. The following section is meant to be a general guide to the processes for successfully requesting and employing granted funds. Also included are frequently asked questions or concerns. Not all parts of this section may apply to your project as it is meant as a general guideline for all Integrated Cluster Projects. For any additional questions you might have beyond this manual, contact Stephanie Oleson ([sm1010@plymouth.edu](mailto:sm1010@plymouth.edu)) in Cluster Support.
9. Budget Planning.
  - a. Budget Basics. A request and budget spread sheet is included in Appendix A. The Budget matrix is self-explanatory but the below information may prove helpful in developing the total cost of the project.
  - b. Personnel Planning.
    - i. **Financial Compensation - Teaching Lecturer**
      1. When preparing your Integrated Cluster Budget there are a few reminders regarding any teaching lecturers you may be utilizing.
      2. When paying teaching lecturers there are different pay ranges depending on whether they are unionized or not.
      3. FICA costs will additionally be taken out of this funding line and will vary depending on whether the lecturer is unionized or not.
      4. *These variables will have significant effect on how quickly your budgeted monies are spent.*
      5. **What you should do if:**
        - a. The Teaching Lecturer is NOT scheduled to teach this semester/year. You will need to have an appointment letter sent over from your discipline/cluster leader to Jennifer Smith at [jmsmith10@plymouth.edu](mailto:jmsmith10@plymouth.edu) . It is also important to note in the communication to Jennifer if the Lecturer is Union versus Non-Union due to possibly different compensation.
        - b. The Teaching Lecturer IS scheduled to teach this semester. A letter of agreement will need to be sent over from your discipline/cluster leader to Jennifer Smith at [jmsmith10@plymouth.edu](mailto:jmsmith10@plymouth.edu) to make an amendment to the Lecturer's current contract. This should include the stipend amount, which will be paid out as a stipend above/beyond their regular contract.
    - ii. **Financial Compensation – Artists or Presenters.** When special artists or presenters are part of your Integrated Cluster Projects, you will need to ensure that a Standard Performance Agreement is completed and signed by all necessary parties prior to the date of their arrival.
    - iii. **Financial Compensation – Partners.** When working with outside partners on Integrated Cluster Projects where they will be charging the University a fee, you will need to have a signed letter of agreement with the fee charged for their services. Additionally, a New Vendor contract for those who have never done business with the University (or those who may have changed the names of their business) and a W9.
    - iv. **Financial Compensation – Student Workers, Graduate Assistants and other workers—** See Stephanie Oleson for details.

c. Resource Planning

- i. **PCARD** – This is a University purchasing credit card. If you personally (or your department's administrative staff) have a PCARD already, please do not use them for Cluster projects as they are drawn from your Department's account and make tracking spending more difficult.
  1. The Integrated Cluster program has its own PCARD which draws directly from Cluster funding and is managed by Cluster Support in the Academic Affairs office. If you need something ordered contact Stephanie Oleson ([sm1010@plymouth.edu](mailto:sm1010@plymouth.edu)) in Cluster Support for these items.
  2. Additionally the Integrated Cluster program has (2) PCARDS. While these are intended specifically for when travelling as part of your Integrated Cluster project, exceptions can be made with pre-approval. These cards are to only be used for the purchase of train or bus passes, vehicle parking and meals. **NO** other use is permitted without prior exception. **ALL** receipts must be saved and turned in at the end of travel. These funds also draw directly from Cluster funding.
  3. To utilize one of these Integrated Cluster PCARDS please contact Stephanie Oleson ([sm1010@plymouth.edu](mailto:sm1010@plymouth.edu)) in advance. You will be notified when you may pick up the PCARD from Cluster Support. You will be required to sign out the card and receive an instructional packet with envelope for your receipts. Upon return, the envelope with PCARD and receipts should be turned into either Stephanie Oleson or Kristen Hersom. *\*NOTE\* Failure to follow these required policies may result in no longer having use of these PCARDS.*
  4. **\*\*Utilizing these cards\*\***
    - a. Keeps all Cluster transactions in Cluster budget funding;
    - b. Requires no FOAPAL changes;
    - c. No waiting for reimbursements;
    - d. Less frustrations for your administrative staff, students (who may not be able to afford upfront costs for reimbursements) and yourself.
- ii. **Invoices.** When utilizing a service from a vendor there are a few very important steps which need to be considered prior to using their services. The most important considerations are:
  1. **How much is the product purchase price?**
    - a. <\$3,000 - competitive shopping encouraged but not required
    - b. **\$3,000-\$4,999** – Require formal quote from supplier (includes contracts for services)
    - c. \$5,000-\$34,999 – Require formal quotes from 3 vendors (informal bid)
    - d. \$35,000 + - Requires formal bid by Purchasing Agent (includes services)
  2. **Has this vendor has ever done business with the University before?**
    - a. If the answer to this question is yes, that's great news! Please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support and send over the invoice. Each invoice must have the business or individual's name (depending on their tax status), payment remittance address and invoice number. *IF* there are any discrepancies (eg: the vendor used to be paid personally but has now become a business and is billing as a business, etc.), the vendor may have to submit an updated vendor form.
    - b. If the answer to this question is no, that's an easy fix! The new vendor (aka independent contractor) will need to complete a PSU New

Vendor and W9 forms. These forms will need to be completed and submitted to Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support prior to utilization of their services to avoid any delay in payments. You may either email Stephanie to request these forms or go to the PSU Purchasing webpage. Please keep in mind that each invoice submitted must have the business or individuals name (depending on their tax status), payment remittance address and invoice number.

- c. If the answer is **"I'm not sure"**, please send over an email to Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support prior to utilization of their services to find out. The email will need to include the business or individuals name (depending on their tax status and if the vendor may have been paid personally but has now become a business) and payment remittance address.
  - d. **\*\*Completing New Vendor Forms Beforehand\*\***
    - i. Establishes and/or verifies a vendor code ahead of time with USNH;
    - ii. Allows for prompt payments.
- iii. **Conference Room Reservations.** For conferences which will be hosted on or off Plymouth State University Campus grounds please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with the following information:
1. Conference name;
  2. Conference date and times;
  3. Conference attendance expectations;
  4. Where you would like the conference held, and a backup location in the event it is taken;
  5. Any special configurations or equipment which will be needed for the event.
  6. *If refreshments or food will need to be served, please see page 6.*
- iv. **Conferences/Trainings/Seminar Attendance.** For conferences, trainings or seminars which will be attended as part of your budgeted Integrated Cluster Project, please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with the following information:
1. Which payment method will be required for attendance;
    - a. *A simple online registration.*
    - b. *An invoice paid in lieu of attendance.*
    - c. Conference/Training/Seminar name;
    - d. Conference/Training/Seminar date and times;
    - e. Conference/Training/Seminar cost;
    - f. Conference/Training/Seminar invoice for payment or link for online payment.
    - g. Vendor acceptable payment methods;
    - h. Any additional pertinent information.
- v. **Project Cost Sharing - Plymouth State University Department Partnerships.** When working with outside partners on Integrated Cluster Projects where they will be charging the University a fee, you will need to have a signed letter of agreement with the fee charged for their services. Additionally a New Vendor contract for those who have never done business with the University (or those who may have changed the names of their business) and a W9.



- vi. **Project Cost Sharing – External Partnerships.** When having special artists or presenters as part of your Integrated Cluster Projects, you will need to ensure that a Standard Performance Agreement is completed and signed by all necessary parties prior to the date of their arrival.
- vii. **Project Cost Sharing – External Partnerships In-Kind Donations.** When having special artists or presenters as part of your Integrated Cluster Projects, you will need to ensure that a Standard Performance Agreement is completed and signed by all necessary parties prior to the date of their arrival.
- viii. **Supplies – Food.** If your Integrated Cluster Budget included funding to provide beverages and/or food during conferences, off campus trainings/seminars or travel, please see the below information.
  - 1. On Campus conferences or local events:
    - a. Please see PSU requirements for catering contract to determine if Sodexo must be utilized or if qualifications exist to utilize an outside food vendor.  
<https://www.plymouth.edu/dining/catering/compliance-with-contracted-provider/>
    - b. *Whether this is a Sodexo Catered event or external catered event please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with:*
      - i. *Date and time the food is needed for;*
      - ii. *Where the food should be purchased from (Sodexo or external vendor);*
      - iii. *Amount of people attending;*
      - iv. *Amount and type of Food and/or beverages which you would like ordered;*
      - v. *Any other special accommodations needed (eg: dietary restrictions or allergies).*
    - c. Off Campus Conferences/Seminars/Trainings or Travel:
    - d. *Contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with date(s) of travel to set up authorization;*
    - e. *Come to Cluster Support and sign out a MAGIC Card to take with you. (see page 2 for information regarding the MAGIC Card);*
    - f. *Review Per Diem Guidelines and enclosed packet materials;*
    - g. *Return all receipts and PCARD to Stephanie Oleson or Kristen Hersom in Cluster Support immediately upon return.*
- ix. **Supplies – Books.** If your Integrated Cluster Budget included funding for specialized books, please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with the book(s) information, when you need the book(s) by and where you would like it ordered from. Once payment has been authorized, the purchase will be processed.
- x. **Supplies – Computers/Electronics.** If your Integrated Cluster Budget needs to utilize computers/electronics for presentations, please see the below information:
  - 1. Borrowing Computers or Electronics:
    - a. If your Cluster has specific electronics or computers which may be needed for presentations, video recordings, slideshows, etc., please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support to verify availability with either IT's lending program or Integrated Cluster inventory. There is no charge associated with this.

- b. If your Cluster has specific electronics or computers which were budgeted as part of your Cluster Project, please see below:
    2. Purchasing Computers or Electronics:
      - a. Depending on the type of computer/electronics which are needed, prior approval may be required before the purchase can be made. A consult must also take place with IT.
      - b. If the pricing exceeds \$5,000, a University bidding process will be required.
      - c. In the event this item must be put out to bid due to pricing, the lowest bidder is generally the chosen service provider and an exception is usually only made for extenuating circumstances. Please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with the computer/electronics information, when you need the computer/electronic by and where you would like it ordered from or the bidders information. Once payment has been authorized, the purchase will be processed. *All properties once purchased become property of the Plymouth State University Clusters. Upon project completion they will be turned in to become part of the Cluster repository for future projects.*
- xii. **Supplies – Specialized Equipment.** If your Integrated Cluster Budget included funding for specialized equipment needs, please see the below information:
1. Depending on the type of equipment which is needed, prior approval may be required before the purchase can be made.
  2. If the pricing exceeds \$5,000, a University bidding process will be required.
  3. In the event this item must be put out to bid due to pricing, the lowest bidder is generally the chosen service provider and an exception is usually only made for extenuating circumstances.
  4. Please contact Stephanie Oleson ([saoleson@plymouth.edu](mailto:saoleson@plymouth.edu)) in Cluster Support with the equipment information, when you need the equipment by and where you would like it ordered from or the bidders information. Once payment has been authorized, the purchase will be processed. *All properties once purchased become property of the Plymouth State University Clusters. Upon project completion they will be turned in to become part of the Cluster repository for future projects.*
- xii. **Travel Reimbursements.** *Reimbursable Per Diem dining and travel is calculated by location of travel. To determine what allowable per diem is for your trip please go to: <http://www.gsa.gov/portal/content/104877> (The per diem allowance under the "MEALS" section should be completed for each day of stay/travel. IF meals are provided from another source during your travel, such as the host or accommodation, please check the box indicating those meals.)*
1. *Mileage should be calculated at current USNH reimbursable amounts which may be found here: <https://www.plymouth.edu/office/purchasing/travel-office/reimbursement/mileage-reimbursement/> (see attached form)*
  2. **Non-Employee Travel Expenses:**  
<https://www.plymouth.edu/office/purchasing/travel-office/reimbursement/non-employee-travel/> (see attached form)
  3. *For a full list of PSU reimbursable travel expenses you may go here: <https://www.plymouth.edu/office/purchasing/travel-office/reimbursement/reimbursable-travel-expenses/>*
  4. **Backup Documentation for Cluster Purchase**
    - a. Who: Name of Cluster and Purchaser

- b. What: What was purchased
- c. Where: Where it was purchased
- d. When: When it was purchased
- e. Why: Cluster Number and purpose as pertains to project
- f. Total Cost: \$\$
- g. RECEIPTS

xiii. **Student Travel Requirements.** *Reimbursable Per Diem dining and travel is calculated by location of travel. To determine what allowable per diem is for your trip please go to: <http://www.gsa.gov/portal/content/104877> (The per diem allowance under the "MEALS" section should be completed for each day of stay/travel. IF meals are provided from another source during your travel, such as the host or accommodation, please check the box indicating those meals.)*

1. *Mileage should be calculated at current USNH reimbursable amounts which may be found here: <https://www.plymouth.edu/office/purchasing/travel-office/reimbursement/mileage-reimbursement/> (see attached form)*
2. *Non-Employee Travel Expenses: <https://www.plymouth.edu/office/purchasing/travel-office/reimbursement/non-employee-travel/> (see attached form)*
3. *For a full list of PSU reimbursable travel expenses you may go here: <https://www.plymouth.edu/office/purchasing/travel-office/reimbursement/reimbursable-travel-expenses/>*