

the Sustainability Projects Fund  
of McGill University



# Guide to SPF Project Management



# Table of Contents

- 2** **GUIDE OVERVIEW**
- 3** **WHEN TO CONTACT US**
- 4** **HELPFUL REMINDERS**
- 5** **DELIVERABLES**
- 8** **PROJECT EXPENSES**
- 11** **HIRING STAFF**
- 15** **BRANDING & SIGNAGE**
- 16** **EVENTS**
- 18** **RESOURCES**

# Congratulations on your successful application!

If you are reading this guide, you have completed the SPF application process and have successfully secured funding for your project. Congratulations! Now, it is time for the fun part– starting and running your project!

You should be well-prepared to kick-off your project because of all of the careful planning done during the application process, but you may be wondering things like: “how does my team receive the funding?” or “what do I do if I need to hire someone?”

This guide is a good place to find most of the information that you need to run your project. Take time to flip through and familiarize yourself with the contents. Even if you do not need to know some of the information now, you may need it later!

Now, let’s get started!



## What do I do if I have a question or need help with my project?

Remember that you are never alone when you start your new project. You've done a lot of work to gather support of team members and various stakeholders across campus. Make sure to utilize the skills and knowledge of these valuable resources when managing your project! In addition, you have access to a network of current and past SPF project teams in the SPF Facebook group (you might want to use this platform to contribute to the group and help other project teams too!).

The [SPF Steward](#) and [SPF Administrator](#) are also here to help and look forward to keeping in touch with you about your project! Here are some reminders of how and when to reach out to the SPF Staff :



### Use Your “SP” Number

Every SPF Project receives an identifying code (SPXXXX) with their award letter. Please use this code in the subject line of all of your e-mails with the SPF Staff.



### Keep Us in the Loop

If there's an important part of your project happening, such as an event, please let us know!



### Reach Out for Help

If you are overwhelmed or having difficulties with your project, reach out ASAP! We are glad to consult with you and help you keep your project on track. Remember to always reach out in the following situations:

- Your **project scope** is changing
- Your **project budget** is changing either by line items/categories or you anticipate **you may go over budget**
- Your **project leadership** or **employed staff** are changing

# What do I need to remember to do throughout my project?

Projects can be long and complex, and you're not always thinking of things like taking photos. To help, we've created a quick checklist of helpful things to remember. Looking at this list once a month will help you stay on track!

## Monitor Success Indicators

In your award letter, you received several success indicators to monitor throughout your project. Make sure to take notes and keep track of these!

## Take Photos and Video

Don't forget to document the different aspects of your project through photos and videos! These are deliverables required by the SPF for the project webpage.

## Attend Workshops

The SPF may offer workshops, which will provide valuable information to help you with your project. There are also other workshops given on the McGill campuses that could be useful.

## Submit Deliverables

Make sure to keep up-to-date with the [deliverables](#), which happen throughout the course of your project.

## Keep Track of Expenses

Keeping track of expenses is important for your budget. Make a habit to update your budget as you spend money.

## Inform Us of Events

Let us know about your events as they happen so we can be informed and share them with our community!

## Submitting deliverables on-time ensures your funding

What is a deliverable? A deliverable is a type of output that is simply a document, file, or other material produced for your project. They provide a great way to manage, document, and share your project with others, including the SPF! Every SPF project is required to submit certain deliverables in order to receive funding for a project. Check out the list of deliverables below and consult the following pages as well as the [SPF Project Resources Dropbox](#) for more resources!

Project  
Start



### Project Timeline

The project timeline document is a tool for you to use to organize and manage your project activities and outputs. **You must submit this before spending funds.**



### Photos

Photos are a great way to document and share your project with others.



### Progress Report

The progress report gives you the opportunity to reflect on your project at the halfway point. A template will be sent to you a month or two in advance with an update on your project expenses.



### Video

A video is a great tool to share your project with others and document your experiences.

Project  
Finish



### Final Report

A final report allows you to reflect on the project, share what you did (or didn't!) accomplish, what you learned, and what you would recommend to others. A template will be provided a month before it is due.

## Photos are a great way to make a visual link to your project!

The SPF encourages you to take photos of all of the cool things happening on your project! This way you'll have a great way to share and remember what you accomplished. Here are some things to remember when taking photos:

### Helpful Links:

- [General Photo Tips](#)
- [Rule of Thirds](#)
- [Taking Action Photos](#)
- [Other Photo Tips](#)



### Take lots of photos

It is easy to forget about photos, so try and make a habit of taking pictures of your project activities from the very beginning. Also, taking lots of photos means you'll have a few that come out great.



### Get Consent

If your photos include people, then we need to have their permission to share or post their photos. You can find the guidelines and permission form [here](#).



### Share them with the SPF

We are excited to receive photos from your project to put on your project webpage and sometimes to share through our social media. Send photos as soon as you have them! Email them to our [Multimedia Intern](#).



### Tips on taking a good photo

Here are a few quick tips to taking good photos:

- Take both portrait (vertical) and landscape (horizontal) orientation shots. Landscape works best for videos and the SPF website.
- Take action photos: for example, instead of taking a photo of your new equipment, take a photo of someone using it!
- Try to take pictures that have a high quality resolution.

## A video shares the story of your SPF project with others!

The SPF asks for a video of your project to put on our website and to share through social media. This is a great opportunity to showcase your project and share the team's story. Here are some things to consider:

### Helpful Links:

- [Video guide on how to make an SPF video](#)
- [Videos of other SPF projects](#)
- [Filming Tips](#)
- [Tips on Filming Interviews](#)  
(13, 14 & 15 are most important!)
- [Open Source Video Editing Software List](#)
- [Bensound Music](#)
- [Audionautix Music](#)



### Help for your SPF video

It is good to try to make a video even if you are not a pro! For small projects, you may even want to use a [free animated video service](#) to share your story. If you are stumped or need help putting footage together, please check out the helpful links or contact the [Multimedia Intern](#) to discuss any assistance you may need.



### Tell Your SPF Story

These questions are a starting point for a great video:

- Who is working on the project?
- What is the project about?
- What are its potential or actual impacts?
- Why are the SPF funds useful to your project?
- What are the project's accomplishments so far?
- How can someone find out more and get in touch?



### Get Consent

If your video includes people, then we need to have their permission. You can find the guidelines and permission form [here](#). Additionally, if you use music, it must be with the artist's consent or free to use without permission (see helpful links, on left).



### Include the SPF Branding

In the [SPF Project Resources Dropbox](#), you will find the SPF video introduction and ending. If assembling your SPF video on your own, please use these files to start and finish the video.



## How do I know how much I have to spend?

Monitoring and keeping track of your project's financial status can be tricky. However, keeping good records from the very beginning will help! Here are some helpful reminders:

### **Track Actual Expenses**

When you created your budget, you estimated what you would spend on certain items. While managing your project, you will know the real costs as you spend the money. Recording these actual expenses **throughout your project** is important. It will help you stay within your budget and know how much money you have left.

### **Keep Records**

Making a scan or copy of any receipts or documents you have can help you keep track of what you spend.

### **Check with a Budget Update**

While it is ultimately your team's responsibility to keep track of expenses, the SPF Administrator will also give you an update on the expenses that have been processed through the office at least once every three months and/or before your Progress Report is due.

### **Track Taxes**

McGill usually receives a tax rebate for any tax charged on purchases. This money is reimbursed to your account after being processed. The resulting net tax applicable to purchases after rebates, is 6.937%. When accounting for your expenses, you can use this tax rate and check the final amount with a budget update from the SPF.



**Quick Tip:** If you realize that the items/costs estimated in your budget may change significantly, please alert the SPF Administrator in advance for guidance.

## How do I purchase or pay for items funded by the SPF?

As you already know, the SPF does not provide award money to your team at the beginning of the project. Instead, the SPF **purchases items for you or reimburses you or others** for the money spent throughout the project.

### Helpful Links:

- [Overview of McGill Procurement and Payment Methods](#)
- [How to Purchase Goods and Services](#)
- [List of McGill Suppliers](#)  
(requires you to log in with your McGill ID)
- [Macdonald Campus Student Society Green Procurement Policy](#)



### Before Making A Purchase

Please consider these important notes before making your purchase:

- In general, out-of-pocket payments should be a **last resort** as it may take 2-3 months to receive reimbursement.
- Always consider the McGill Marketplace first, as it has McGill-approved suppliers and caterers.
- You must use a McGill-approved caterer for events catered on the downtown campus.
- A quote is required for any purchase over \$2,500 **before** placing an order or receiving goods/services.
- If a purchase is over \$25,000, then [additional restrictions apply](#).

The following pages offer more information on different payment and purchasing options. However, before you purchase any items for your project, it is best to contact the SPF Administrator to discuss purchasing options.

**Note:** If another McGill Department or Unit has agreed to make purchases on your behalf, please contact the SPF Administrator to arrange for reimbursement or coordination with your department.

## How do I purchase or pay for items funded by the SPF?

### McGill Marketplace

[McGill Marketplace](#) (MMP) is a virtual shopping mall that gives you access to McGill's preferred suppliers, including Staples, lab resource suppliers, and caterers. Log-in with your username and password [here](#). To make a purchase, shop and [assign your cart](#) to the SPF Administrator for approval and payment. Once the SPF completes the order and it is approved, a purchase order will be issued.

If you are unable to make the purchase through the MMP shopping cart, then you must get a quote from the supplier and provide it to the SPF Administrator. Once the quote is processed and approved by McGill, a purchase order will be issued to the supplier. The supplier can then provide an invoice to request a payment. Since McGill will only pay invoices that reference a valid purchase order number, you must provide a quote to the SPF Administrator and wait for McGill to issue the purchase order **before** you accept any services or goods. This process generally looks like this:



It is always best to use a [McGill-approved supplier](#). For those suppliers, payment will be issued directly via check or direct deposit within 45 days from the invoice date. If you require the services of an *individual* never paid by McGill, then they must complete and return p. 1 of this [questionnaire](#) along with a quote before starting work.

It takes additional time to set-up new suppliers in MMP; these suppliers should expect payment **2 months** from the date the SPF receives the initial quote. (Once properly set-up, they will need to submit an invoice for payment.)

### Helpful Links:

- [Overview of McGill Procurement and Payment Methods](#)
- [How to Purchase Goods and Services](#)
- [List of McGill Suppliers](#) (requires you to log in with your McGill ID)
- [Macdonald Campus Student Society Green Procurement Policy](#)



## Purchasing & payment, cont'd

### P-Card

If your purchase is not travel related and is payable by credit card over phone or the internet, P-Card (department credit card) may be the most suitable purchase option. This is the best option for one-time payments to suppliers who accept credit card payments. Certain restrictions apply. Contact the SPF Administrator for payment on your behalf.

### Timesheets

See [Hiring Staff - Paying Staff](#) for more information.

### Expense Report

An expense report is used to reimburse out-of-pocket expenses. This payment method should be used as a last resort. Please consider all other purchase methods first. **Original receipts are necessary** and must be provided to the SPF within **one month of the purchase date**. If the receipt does not show proof of payment, additional proof (ex. a copy of bank statement) may be required. To have your request processed, complete the 'Expense Reimbursement Information Sheet' (see template in the [SPF Project Resources Dropbox](#)) and return it with the original receipts to the SPF. Since this process requires input time and several signatures before being submitted to the Travel Desk, please submit promptly.

#### Helpful Links:

- [McGill's Reimbursement of Expenses Policy](#)
- [Sample Invoice Template](#)



## How do I hire staff on my SPF project?

### HR Process made simple:

Contact the [SPF Administrator](#). If an SPF hire, then...



Project Leader sends [Hiring Information](#)



Employee Fills [Paperwork](#)



Employee Signs Appointment Letter



Employee Starts Work



[Project Leader Supervises Employee](#)



[Employee Gets Paid via Timesheets](#)

Many projects do not have paid positions, but several do. If you have listed job positions in your application and you have included them in your project budget, then read on!

First answer the key question: **Will your McGill Department or Unit manage the hiring process or do you need SPF assistance?** Your team may wish to hire the staff through your current unit. The alternative option is to hire staff on your project under the Sustainability Projects Fund.

### Hiring Staff through Your Unit

If you choose to hire a staff through your unit and are using project funds to pay the salary for that person, then you must provide the SPF with:

- A copy of the hiring paperwork
- A copy of any payment information
- A copy of the job description

This must be provided before hiring the employee.

### Hiring Staff with SPF Assistance

If you need SPF assistance to hire your staff, then please contact the SPF Administrator. The SPF Administrator will help you decide on a hiring strategy and will provide you with all the necessary paperwork. Please see the process map on the left-hand side for a simple overview.

### Unsure?

If you are unsure, then the SPF Administrator can help you elaborate a strategy to hire staff on your project.



Quick Tip: When hiring, your team is encouraged to be inclusive of individuals who identify as members of marginalized communities (eg. women, Indigenous people, people of colour, LGBTTTQI persons, etc.).

## Hiring Paperwork Basics

After you have spoken to the SPF Administrator, you may be ready to hire a casual employee for your project. Here's a simple overview of what to do next:

### Send the Hiring Information to the SPF Administrator

In the [SPF Project Resources Dropbox](#) Hiring Resources folder, find the folder titled "Hiring Information for Letter." Fill out the following information in the enclosed file:

- The employee's name
- job title
- hourly wage
- primary duties
- and start and end date of employment.

Return the completed document to the SPF Administrator, so that a letter of appointment can be prepared for the new employee. Once this is prepared, the new employee must sign and return the letter.

### Have the Employee Fill Paperwork

In the [SPF Project Resources Dropbox](#), there will be a folder titled "Employment Forms." This folder includes:

- [Personal Tax Credits Return](#)
- [Source Deductions Return](#)
- [Personal Data Form](#)
- [Direct Deposit Form](#)
- and an AMUSE [Union Membership Form](#)

Every employee must have a SIN number and be legally able to work in Canada. If your prospective employee is an international student or worker (the SIN number begins with "9"), then please provide a copy of the person's work or study permit. Please have the new employee complete and compile these documents and then return them to the SPF Administrator.

#### Helpful Links:

- [Info on Work on Campus for International Students](#)
- [How to Apply for a SIN](#)



## Paying Your Casual Staff

All casual employees must fill out [timesheets](#) and return them to their project leader weekly to receive their pay. A timesheet form is provided in the [SPF Dropbox](#).

- Timesheets must be submitted **no later than bi-weekly** to the SPF Administrator, either in person or by e-mail.
- Pay is processed every two weeks according to McGill's [Bi-Weekly Hourly and Casual Pay Schedule](#).
- If you are the project leader, you are responsible for checking the timesheets to make sure that they are accurate and have the correct hours, including any breaks. Please sign on the "supervisor" line.
- No more than 40 hours may be worked/charged per week.
- Please fill out the highlighted items on the timesheet and include the Project Number (SPXXXX, noted in red):

### Helpful Links:

- [Timesheets](#)
- [Bi-Weekly Hourly and Casual Pay Schedule](#)
- [Payday 101 Video by AMUSE](#)



McGill University - Admin Support staff Casual Employee Time Sheet						
Top portion to be completed by the casual employee and submitted to supervisor. Bottom portion to be completed by the department/unit.						
Please refer to payroll deadlines at: <a href="http://www.mcgill.ca/hr/getting-paid/timesheets">http://www.mcgill.ca/hr/getting-paid/timesheets</a>						
Name (Last & First) _____			McGill ID # _____			
PLEASE PRINT CLEARLY						
Department/Unit: <b>SPXXXX</b>			SIN # (optional) <b>1st time only</b>			
Workweek: From Sunday (date): _____			To Saturday (date): _____			
Information applies to 1 week, where a week for EI purposes starts on Sunday and finishes on Saturday						
Project/Task Identifier (where applicable)	Day of the week	Time In	Time Out	Time off (e.g. lunch hour)	Total Hours	Comment and or general nature of work performed
To be completed in pen by the casual employee						
	Sunday					
	Monday					
	Tuesday					
	Wednesday					
	Thursday					
	Friday					
	Saturday					
					Total hours	
					Hourly rate	
					Total (excludes 4% vacation pay)	
Casual employee's Signature and Date signed _____						
This Timesheet must be submitted no later than Monday, 12 noon of the week following your period of employment.						
Departmental Office use only. (Do not forward to the Payroll Office)						Pay date: Thursday
FUND	ORGANIZATION	ACCOUNT #	PROGRAM	ACTIVITY	LOCATION	
				<b>SPXXXX</b>		
FFM/PI or delegate: Print name _____		FFM McGill ID (required) _____		FFM/PI or delegate: signature & date _____		
Delegate ID (if applicable) _____						
Supervisor/Manager's: signature and date _____			Enter Work Category code		Enter Non-Academic Reason Code	
Entered into POPS/Web: signature & date _____			C-Clerical work T-Technical work M-Manager & Librarians S-Supervisors U-Trades & Services <input type="checkbox"/>		E-Student S-Vacant position ID # C-Peak week >= 6 hours D-Peak week < 6 hours L-Vacation - ID # M-Maternity Leave ID # S-STD - ID # T-LTD - ID # X-Extended unpaid leave - ID # (ID # of person being replaced)	
Reviewed/Approved POPS/Web data: signature & date _____			Work Study/Summer Career Placement Program No: _____ If applicable			
The original signed form MUST be retained in the department/unit for 7 years at a minimum, as supporting documentation in the event of an internal/external audit!						

## Supervising staff and ensuring your team's safety

As a project leader, you have a responsibility to ensure employee safety and wellbeing while at work. Every employee has basic rights according to the law and any applicable union agreements— see the [AMUSE Union Collective Agreement](#) and the [Québec labor standards](#) for more information. Please consult the following list for things to remember and how to ask for help, if needed:

### Helpful Links:

- [AMUSE Union Collective Agreement](#)
- [Labor Standards in Québec](#)
- [Safety Training at McGill](#)
- [McGill Emergency Management and Preparedness](#)
- [McGill Laboratory Safety Policies](#)
- [McGill Environmental Health and Safety](#)



## Work Schedules, Breaks, and Leaves

- Many casual employees don't have a set schedule. If there is a regular schedule, please communicate it to the employee in advance and share with the SPF Administrator.
- Casual employees can claim a paid 15 minute break if they work more than 4 consecutive hours. Those working more than 5 consecutive hours can have a 30 minute unpaid meal break. The employee must report this on their timesheet.
- Sometimes there are situations when an employee needs to take a leave from work. If this is the case, please notify the SPF Administrator.

## Health, Safety, and Emergencies

- Health and safety is important to your project. Before work starts, identify the nearest first-aid kits for staff and ensure that they receive any necessary training. For laboratory work, please abide by the [McGill laboratory safety policies](#).
- If you need to purchase safety equipment required to perform your tasks, please contact the SPF Administrator.
- **In the case of an emergency, please call 911.** If you are calling from a cell phone, also call University Security at **514-398-3000 (Downtown)** or **514-398-7777 (Macdonald)**.
- If anyone has an emergency on your project, after seeking immediate help, please notify the SPF Administrator.



## How do I recognize the SPF on my project materials?

The SPF is proud to fund your project and we would love for others to know that too! We ask that you recognize the SPF in your print and digital communications, as well as on any physical installations, including:

### Helpful Info:

To get the official SPF colours for your document, check out the guides below:

#### Official Dark Green

R: 120 C: 59  
G: 160 M: 19  
B: 63 Y: 100  
K: 3  
Hex: 78A03F

#### Official Grey Green

R: 204 C: 21  
G: 218 M: 5  
B: 181 Y: 34  
K: 0  
Hex: CCDAB5



### Websites & Online Posts

If you have a separate project website or plan to post project information or documents online, please acknowledge the SPF by using one of the SPF logos. Here's a great [example!](#)

### Print Materials

Please include one of the SPF logos on any print materials for your project, including posters, flyers, etc.

### PowerPoint Presentations

Making a PowerPoint about your project? Please include one of the SPF logos in your presentation.

### Video

Your video should acknowledge the SPF, find more [here](#).

### Equipment or Installations

If the SPF provided funds for equipment or an installation on your project, please [contact us](#) to get a sticker or plaque to display.

We provide logos in the [SPF Project Resources Dropbox](#). Whenever possible, please use the full SPF logo that includes text and the SPF martlet. If you are unable to include a logo, but can add text, please use the following credit:

**This project is supported by the  
Sustainability Projects Fund.**

## Hosting an event?

As part of your SPF project you may host one or more events. Here are some simple things to keep in mind as you plan your event:

### Helpful Links:

- [SSMU Green Events Guide](#)
- [Sustainable Concordia Sustainable Event Guide](#)



### Tailor to Your Audience

The design of your event should match the type of audience you hope to reach. For example, professors and staff have very full schedules and prefer shorter, focused events during working hours. Students are more likely to prefer evening events. The tone and look of your event should also make your audience comfortable.



### Make it Green & Accessible

You are running a sustainability event, right? So please do what you can to “walk the walk” in how your event is run. Here are some ideas:

- Minimize waste—use reusable dishes, only print what you need, etc.
- Provide ways to recycle and, if feasible, compost
- Serve as much locally-sourced food as possible
- Choose a wheelchair-accessible venue
- Offer services to help folks who might otherwise find it challenging to attend your event—childcare, translation, etc.



### Make an Event Plan

After you have thought about the audience and how to make it green, write out a plan to make the event run smoothly. Think about how many people you will have, what venue you will use, the flow of events, and how you will pay for everything.



Quick Tip: If you have a guest speaker, who you plan to give a token payment to for facilitating the event, then please contact the SPF administrator before your event.

# Hosting an event? continued

## Tell People About It

Good communications are key to a successful event. Promote your event through all the channels available to you and don't be afraid to be creative. Things like humour, good graphics and a personal touch can really help your event stand out from the crowd. The Office of Sustainability can help promote your events through its platforms, so please share info with us! Finally, don't forget to post pictures and other relevant content after the event—people love this. Here are some channels to consider:

- [MOOS social media & website](#)
- [EnviroComm newsletter](#)
- [What's New at McGill for staff](#)
- [What's New at McGill for students](#)
- [McGill homepage](#) (for high-profile events with great pictures)

## Be Smart with Social Media

It is easier to promote an event on social media if there is something to link to (e.g. Facebook event page). PDFs don't work on social media. Also remember to:

- Use the hashtag #McGillSPF in your event promo to acknowledge SPF funding
- Choose and share a short, memorable hashtag (e.g. #Catalyst2017) for your event so participants can livetweet and generate buzz.



Quick Tip: If your event is newsworthy, contact campus media several days in advance to see if they will cover it (e.g. McGill Reporter, McGill Tribune, McGill Daily, Le Délit, CKUT, and TV McGill)

## Need more information?

Hopefully, you have found most of the information that you need in this document. If not, feel free to reach out to the SPF Facebook group, check out the [SPF Dropbox](#), or to contact the SPF staff using the information below.

### Contact us:

Kim McGrath  
SPF Steward  
[kim.mcgrath@mcgill.ca](mailto:kim.mcgrath@mcgill.ca)

Krista Houser  
SPF Administrator  
[krista.houser@mcgill.ca](mailto:krista.houser@mcgill.ca)