

# Curricula and publications: contracting with external businesses

Developed by

University of Missouri Extension

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This document describes the first steps to take if you want to engage external business services to develop a new MU Extension curriculum or publication.

## Overview

In the event that a faculty member or program leader requires an outside agency to assist with curriculum development or publication editing, MU Extension has worked with UM Supply Chain Management to approve vendors capable of providing such services on an on-demand basis. The use of these vendors is not mandated as there are entities on campus or within colleges that may be contracted to provide identical services. The vendors listed below are approved to assist whenever specialized services are needed or existing campus or college resources do not have the capacity to support an initiative.

Having this preapproved list allows MU Extension employees to do the following:

- Contact vendors directly to scope projects and get pricing.
- Contract directly with vendors for agreed-upon scope and pricing.
- Submit a vendor purchase agreement, instead of justification for use of a vendor, to Heather Reed of Supply Chain Management at [reedhr@umsystem.edu](mailto:reedhr@umsystem.edu) each time a

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contract is made with one of these vendors (see appendix 3).

- Pay vendors directly for contracted services.

Extension and UM Supply Chain Management do not recommend one particular vendor over another. It is the responsibility of faculty and program leaders to conduct due diligence with vendors for each project initiated.

## Considerations when negotiating project pricing

As using outside vendors to provide curriculum and publication services is new to Extension staff, the following should be considered and discussed thoroughly with any faculty member or program leader contracting for services:

- Document the full scope of the project and the deliverables that your company will provide.
- Be specific about what services are within the scope of the project (see table 1).
- Identify the responsibilities of all parties during the project and what your company will be held accountable to provide.
- Agree on timelines for interim and final deliverables and who will provide each.
- Discuss project management roles and responsibilities.
  - Project management responsibilities include facilitation and documentation of recurring meeting notes, project status reporting, and issue escalation and resolution.
- Agree on a not-to-exceed cost estimate with contingency dollars factored in for the unexpected (typically 10 percent of the cost of a project).

Information to be considered as part of Scope of Services shall include any or all of the following:

- **Business Requirements** – Describe the extent of the services to be performed, and the overall objectives of the agreement. Enumerate the specific duties to be performed and the expected outcomes. Include a detailed listing of responsibilities.
- **Technical Requirements**– Identify any technical requirements necessary to achieve or facilitate the successful completion of the services being performed. (May not be applicable for all services.)
- **Milestones or Deliverables** – Provide a schedule for when specific tasks must be completed or when the University should expect the deliverables as listed. Identify what happens if not met. Identify if status updates are required, and frequency.
- **Ongoing Support and Maintenance** – Include a list of vendor responsibilities after the conclusion or development of project. (May not be applicable for all services.)
- **Place of Performance**: Identify where the services will be performed. If performance will occur at multiple University locations, indicate which tasks must be completed where. If service will be at the vendor's facility, only state that requirement.
- **Payment** – Include the total cost of the services being performed, including how cost is determined, and the expected payment schedule.

## Vendor purchase agreement

A vendor purchase agreement must be completed and emailed to Heather Reed of Supply

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Chain Management at <mailto:mreedhr@umsystem.edu> each time an outside vendor is contracted with for services.

We have provided an example external vendor contract.

### Contacts for questions or feedback:

Publications: Victoria Knapp, 573-882-6845,  
[knappv@missouri.edu](mailto:knappv@missouri.edu)

Contracts or vendor feedback: Kyle Flinn, 573-882-6382, [flinnk@missouri.edu](mailto:flinnk@missouri.edu)

Curricula: Jessica Gordon, 573-884-3177, [gordonjes@missouri.edu](mailto:gordonjes@missouri.edu)

## Beginning a publication project

### Before developing a new publication

If you are considering developing a new publication, explore the MU Extension website to discover what publications exist on the same topic. If any exist, consider how the one you have in mind fits with them, and whether reviewing or revising one of them instead of developing a new one would be more helpful to our audience.

After you have explored the current MU Extension publications and determined that the one you would like to develop is not redundant, consult with the faculty director of your extension academic unit for approval to develop the new publication.

Contact the Nexus team at [nexus@missouri.edu](mailto:nexus@missouri.edu) to request a publication number.

Provide the following information:

- Type of publication: guide, manual, curricula, etc.
- The college, program or series it fits into
- The working title of the publication
- The ways the publication will be disseminated: online in full-text, online as a PDF, in print
- Related MU Extension publications

This information will be used to identify the appropriate series and number to assign to the publication. The Nexus team will send you the publication number, which you will need to provide to your editor.

### Publication editing and layout deliverables

- A publication that
  - adheres to the guidelines in [MU Extension style](#), the AP Stylebook and The Chicago Manual of Style, in that order;
  - has been edited to a readability level of between fifth and eighth grade;
  - is chiefly the intellectual property of the authors (the authors are responsible for obtaining copyright license for any text or graphics that are not their own, and for ensuring proper credit is expressed in the publication); and
  - has been laid out according to the instructions in the How to Use the MU

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- Extension Guide Template file.
- An [InDesign package](#) containing
  - the final InDesign and IDML files,
  - the instructions file generated by InDesign,
  - a high-quality print PDF with hyperlinks enabled,
  - all fonts used in the publication, and
  - all graphic files used in the publication (see below).
- Graphics files that
  - are linked to and not just pasted in the InDesign file;
  - are print-quality, preferably 300 ppi;
  - are in CMYK or grayscale color mode; and
  - have alternative, or alt, text applied (using the Slice tool in Photoshop or Illustrator).
- An additional PDF saved at the smallest-file size setting for posting online.
- A Word file containing a summary of each table, to be used as alt text online.
- A Word file containing an abstract of the publication and a list of topics, if the full text of the publication will not be posted online.
- A “source” subfolder containing
  - editable vector graphics files;
  - uncropped, original-size photo and bitmapped files; and
  - Excel files used to generate graphs or charts.
- If the full text of the publication will be posted online, a “web graphics” subfolder containing web-ready graphics files that
  - are in RGB color mode and
  - are optimized for the web.
  - Note: The final size of the web graphics will be determined when the webpage is being designed.
- Files that adhere to MU Extension naming conventions, followed by the appropriate file extension:
  - Package folder and InDesign and IDML files: pubnumber\_status\_monthyear
    - New example: g212\_new\_082018
    - Revised example: n481\_revised\_112018
    - Reviewed with no changes example: mp595\_reviewed\_072018\_nc
    - Reviewed with minor changes example: g909\_reviewed\_122018\_mc
  - Graphics files: pubnumber\_figXX; for example, g5000\_fig01, mp203\_fig23
  - High-quality print PDF file: pubnumber-highres; for example, g909-highres
  - Smallest-file size PDF file: pubnumber (of at least six characters, using leading zeroes before number if needed); for example, n00481, mp0595, ewq3021
  - Word files:
    - Table summary: pubnumber\_tablesum; for example, g212\_tablesum
    - Abstract: pubnumber\_abstract; for example, g212\_abstract

## Publication editing deliverables

- A publication that
  - adheres to the guidelines in [MU Extension style](#), the AP Stylebook and The Chicago Manual of Style, in that order;
  - has been edited to a readability level of between fifth and eighth grade; and

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- is chiefly the intellectual property of the authors (the authors are responsible for obtaining copyright license for any text or graphics that are not their own, and for ensuring proper credit is expressed in the publication).
- A Word file containing the text of the publication with the various heading levels clearly differentiated.
- A Word file containing a summary of each table, to be used as alt text online.
- A Word file containing an abstract of the publication and a list of topics, if the full text of the publication will not be posted online.
- Files that adhere to MU Extension naming conventions, followed by the appropriate file extension:
  - Publication document: pubnumber\_status\_monthyear
    - New example: g212\_new\_082018
    - Revised example: n481\_revised\_112018
    - Reviewed with no changes example: mp595\_reviewed\_072018\_nc
    - Reviewed with minor changes example: g909\_reviewed\_122018\_mc
  - Table summary: pubnumber\_tablesum; for example, g212\_tablesum
  - Abstract: pubnumber\_abstract; for example, g212\_abstract

## Beginning a new curriculum

### Before creating a new curriculum

Before entering into a discussion with an outside vendor, consult with the faculty director of your extension academic unit for approval to proceed.

Contact Jessica Gordon, curriculum coordinator, at [gordonjes@missouri.edu](mailto:gordonjes@missouri.edu) for assistance and resources as you plan your program. Prepare a detailed outline of the course before contacting a vendor. Your outline should include the program short, medium and long-term goals, individual unit outcomes and specific learning objectives within each unit. See the complete list of documentation below.

Delivery format is a critical decision. Some audiences will dictate a program's delivery format. On the other hand, it may be your learning objectives that dictate the delivery format. It may be that you can design your program to be delivered in multiple formats. Have a discussion with your program unit director, the curriculum coordinator, and/or your vendor before settling on a specific delivery format.

Create a project folder and gather the following to inform your discussions with vendors:

- a. A summary of the need program is addressing.
- b. Information about the target audience.
- c. Any other background information on the project including short and long term outcomes
- d. A list of project content experts/authors, their discipline and contact information
- e. Current resources — any related guide sheets, existing handouts, PowerPoints, videos and images.
- f. Any existing media elements (graphics/animations/video/audio)
- g. What is the projects revenue generation potential?

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- h. Will your program include one or more new publications (participant manual, instructor manual)?
- i. Are you or the vendor going to provide training for the new curriculum to Extension faculty?

## Curriculum deliverables

A few things to keep in mind

- All programs, regardless of delivery format, must meet MU Extension quality criteria.
- All vendors must conduct usability testing for online courses.
- All vendor curriculum must be piloted with authentic users.
- All vendor-developed media must have records for associated image permissions and include media releases if appropriate.
- All aural media must be closed captioned by vendors.
- Online courses must utilize Universal Design to meet accessibility standards.
- MU Extension discourages the use of Rapid Development tools (e.g., Articulate Storyline, Adobe Captivate) or other SCORM compliant software to develop online course media.