



MISSOURI S&T
NSF I-Corps Site Program

I-Corps Site Program Reimbursement Manual

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About the I-Corps Site

The Missouri University of Science & Technology I-Corps Site program will support teams through customer discovery and commercialization associated with an idea or technology. The program teaches entrepreneurial skills to teams of faculty, students, staff, alumni, and regional teams and focuses on developing potential I-Corps Teams for the National I-Corps program. The program typically lasts for 4 weeks. Teams will attend in-class sessions where they will receive instruction and mentorship.

Out-of-class work will focus on gaining a better understanding of customers and testing assumptions. Teams will conduct interviews with potential customers and record insights using a frame work called the Business Model Canvas and a digital tool. Twenty-eight interviews are required for each. Only STEM focused teams may receive a reimbursable micro grant, ranging between \$1000-\$2000 of which \$500 may be spent on prototyping, as a National Science Foundation (NSF) award for their participation after completing the requirements for the program. Teams will have 3 months from the time the team meets the program criteria (requirements) to use the reimbursable award for prototyping expenses and/or customer discovery. Exceptions may be made with the approval of the Program Director or Coordinator.

The I-Corps Site program runs multiple cohorts throughout the Fall and Spring semesters. A training program in the summer may be offered depending on demand. A limited number of teams academic or non-academic will be accepted into each site cohort. Business experience is not required to apply, though teams are expected to have an early-stage idea, research, or technology that qualifies as a STEM (science, technology, engineering, and mathematics) project. Application to the program is through an online process at <http://i-corps.mst.edu/>. Teams must be approved to participate by the Program Director or Coordinator.

General Guidelines and Responsibilities

The I-Corps Site program provides a Google shared folder for each Site Cohort (e.g., St. Louis-TREX, St. Louis UMSL, Rolla S&T) workshop which contains all program materials. All teams will post their weekly presentations in this Google folder.

Reimbursement for appropriate expenses happens **after** the completion of the Site workshop. In addition, to be reimbursed from the micro grant, certain criteria must be met:

1. **Session Attendance: Attendance at each of the 4 weekly sessions by at least one member of your team.** It may be a different team member, but someone from the team must be present for each session. If at any time, a team misses a session, they will be asked to join another cohort in the future. Attendance by Zoom is encouraged for those traveling.
2. **Documented Interviews:** The team's weekly **documented interviews (28 total interviews)** are an integral part of their deliverables. This is required and is part of how we measure

their progress. All interviews are to be posted on LaunchPad by midnight of the Sunday following the last session. Teams are encouraged to input weekly interviews and not fall behind.

3. **Weekly Lessons Learned PowerPoint Presentation (Weeks 2-3):** Each team will present a weekly in-class PowerPoint (Ppt) **summary** of progress using a specified format on weeks 2-3 (see Google drive for templates).
4. **Mentor Discussions:** Weekly 30-60 minute discussions are required for teams with their assigned Mentor.
5. **Final PowerPoint Presentation (Week 4):** A final “lessons learned” presentation (Ppt) is required on the 4th week.
6. **Micro Grant Qualifications:** Teams must complete the above requirements and the required 28 interviews by the end of the 4th week session (all interviews are to be posted on LaunchPad by Sunday evening at 11midnight), 80% (22 interviews) of the 28 required interviews **must be** a mix of face-to-face and video conference interviews or all face-to-face interviews.

For teams approved for the micro grant and using funds for customer discovery travel please read the following: All interviews conducted during approved travel must be logged into the digital tool (LaunchBoard or LaunchPad). To be reimbursed, the interviews must be completed and logged before you submit receipts and expense report.

TRAVELERS RESPONSIBILITY

- All travel has to be approved with a travel authorization form and must be authorized no less than 4 weeks before the travel. (page 8)
- Know University of Missouri System travel rules and regulations if you are employed by the UMS.
- Know I-Corps Site policies and procedures.
- Secure the **most** economical method of travel and food expenses.
- Maintain an accurate record of expenses, and mileage. Expense report can be found on the Google drive or email Misty House at housem@mst.edu for expense report template.
- Include all required receipts or/or documentation needed when submitting expense report.
- Submit claims for reimbursement for only actual allowed expenses within reimbursement rate limits or amounts approved by the I-Corps Site Program Director or Coordinator.
- It is expected that the Entrepreneurial Lead will be the person incurring the expenses. If other team members travel, there expenses must be approved by the Program Director or Coordinator ahead of time.
- University employees must submit their expenses through Travel and Expense

process or can work with Misty House housem@mst.edu to set up delegate access. All university employees will follow the travel policies in place by the UM system.

TRAVEL

Travel while conducting I-Corps Site business may be reimbursed for all reasonable and necessary expenses in accordance with I-Corps Site guidelines. Technical conferences or meetings are not covered by I-Corps Site micro grant. However, travel to a trade show or expos are an allowable expense. The method of transportation that best meets the needs of the project should be selected by the traveler. Travelers are responsible for selecting the most cost-effective means of travel. No international travel is permitted.

An Authorization for Travel form for customer discovery must be submitted no later than 3 months after completing the Site workshop and at least 4 weeks prior to the proposed travel. The form can be found on page 8 of the Reimbursement Manual. Participants will be notified if their travel has been approved or not. Further information may be required to complete the approval process. If requesting attendance at a customer discovery event occurring after the 3 month deadline and within 6 months of completing the workshop an exception may be granted. However, an approval form for the event must be submitted within the 3 month deadline following completion of the workshop. For example, Sybil completes the workshop May 31st. She submits a travel authorization form before August 31st to attend an expo in Denver on November 15th.

PERSONAL VEHICLES

Personal vehicles used will be reimbursed based on the approved map mileage of the most direct route, plus any costs of parking and tolls. The mileage reimbursement rate is set by the Controller's Office by January 1 for each calendar year and posted on the Controller's website. For 2017 the reimbursement rate for mileage is 0.37¢

SPOUSAL/DEPENDENT/GUEST TRAVEL

Reimbursable expenses incurred by non-team members will not be allowed. Only expenses incurred by I-Corps Site team members will be reimbursed. It is expected that the number of team members traveling, is limited.

MEALS

Excluded Meal Allowances

If meals are included in conference registrations, covered by other payments, or paid by others, the traveler is not allowed to claim these expenses for reimbursement.

University Employees must follow University policy in regards to per diem/meal reimbursement. Reasonable meal costs are reimbursable when sufficient documentation of the business purpose and the team members in attendance at the meeting are provided. Itemized receipts are required for meals. Documentation should include either the names of the team member or members. Meals are not reimbursable for non-team members.

LODGING

Reasonable and necessary amounts are allowed for lodging. When two or more individuals share the same room, the total claimed for reimbursement must not exceed the total paid for the room. A receipted, itemized statement furnished by the hotel or motel is required for all lodging expenses. Summary statements provided by credit card companies will not be accepted as justification for reimbursement.

PROTOTYPE EXPENSES

All prototyping expenses must be approved before they are purchased. Materials, supplies, components, modest amounts of equipment, and some fees paid for use of equipment at commercial shops e.g. Tech Shop in St. Louis are permitted. Detailed documentation and receipts are required for reimbursement. Receipts must show payment using a check or card. Cash receipts for prototyping will not be accepted for reimbursement. Membership fees are not reimbursable. Some software may be reimbursed but must be approved by the Program Director.

Prototyping Equipment Expenses not allowed

- Tools
- Equipment
- Computers and Peripherals

If you have additional questions about prototyping expenses please contact the I-Corps Site Program Director, Bonnie Bachman at bachmanb@mst.edu

OTHER EXPENSES

Reimbursements will be made for other expenses under the following circumstances:

- Miscellaneous Transportation & Related Expenses - When necessary to carry out purpose of trip.
- Registration or Other Meeting Expenses - When necessary to carry out purpose of trip.

EXPENSES NOT ALLOWED

Only expenses essential to the transaction of I-Corps Site team business are reimbursable. Examples of expenses that are not reimbursable in most cases include but not limited to;

1. Additional hotel expenses, e.g. hotel gym fee, mini-bars, movies, laundry, and vehicle fines.
2. Alcohol purchased during a meal or otherwise
3. Marketing costs (e.g., business cards, web domain) or payment for a creation of a logo
4. Office supplies (e.g., stationery, folders, notebooks)
5. Posters and art materials carrying cases
6. Any form of compensation (e.g., gift cards or cost of food for interviewees)

For additional questions, please contact the I-Corps Site Program Coordinator Misty House at housem@mst.edu



NSF I-Corps Site Program

AUTHORIZATION FOR TRAVEL

TODAYS DATE: _____ DATE(s) OF TRAVEL: _____

NAME OF TRAVELER: _____

TEAM NAME: _____

BRIEF DESCRIPTION OF PROJECT (25 words or less)

PURPOSE OF TRAVEL;

___ Customer Visits

___ Trade Show - **Name and URL** _____

___ Conference/Exhibition - **Name and URL** _____

___ Other - **Name and URL** _____

DESTINATION: _____

ESTIMATED EXPENSES:

	Number of days	Price per day	Total Cost
Car Rental			\$
Hotel			\$
Airfare			\$
Meal Reimbursement			\$
Registration Fee			\$
Total Requested			\$

Personal Vehicle Mileage Expected: _____

SIGNATURE and DATE: _____

Traveler

I have evaluated this travel and determined it to be an appropriate use of I-Corps funds.

SIGNATURE and DATE: _____