COVID-19 Purchasing Support and Cost Containment Plan

Updated April 13, 2020

This supersedes the purchasing guidance shared on 3.20.2020

On April 2, 2020, Governor Ralph Northam directed state agencies to focus on ways to cut budgets as Virginia prepares for a looming recession caused by the COVID-19 pandemic.

Agencies have been directed to “eliminate discretionary spending for the remainder of the current fiscal year, prepare for budget reductions in the next biennium, re-examine funding for new initiatives…”.

What does this mean for William & Mary?

COVID-19 will have far-reaching financial impacts on our students, employees, community, campus partners, and the greater nation. For this reason, we are asking all employees to curtail any purchases that are not mission critical for the remainder of the fiscal year. This directive will apply to all new purchases with the exception of externally funded research and expenses necessary to support directives of the Emergency Management Team.

The ability to limit expenditures now will create flexibility for us to address any downturns in revenue as the community, Commonwealth, nation, and the world respond to the economic impact of the COVID-19 pandemic.

What does “mission critical” mean?

Mission-critical expenditures have university-wide impact, including those that:

- Ensure our ability to deliver the essential elements of our curriculum, or to meet obligations of externally-funded research;
- Support student enrollment as the university’s primary source of revenue;
- Sustain or enhance our ability to generate positive net revenue, realized in the near term and preferably ongoing; and
- Uphold the legal obligations and accreditation standards of the university.

Many of our activities are not mission-critical, but are mission-optimal. Under normal operating circumstances, mission-optimal expenditures benefit the university by enhancing scholarship and our ability to generate impactful research, creating the margin of excellence that establishes our programs and services as a leader in the industry, and allowing W&M to offer a complement of activities that supports essential functions.

Does this apply to all fund sources?

Yes. All funds are university funds. The ability to limit expenditures now will create flexibility for us to address any downturns in revenue as the community, Commonwealth, nation, and the world respond to the economic impact of the COVID-19 pandemic.
Purchases that are deemed mission-critical shall continue to follow current processes for IT approval for all IT/AV items, use contract suppliers where possible, and follow existing pCard policies and procedures.

Supervisors should approve all purchases for their department. Supervisory approval should be acknowledged via email, sign-off, or other. Verify correct departmental index (we encourage tracking of orders related to COVID-19 for general awareness). All purchases are subject to additional university approval.

Orders over $100 should be reviewed and approved prior to purchase by the respective VP or Dean.

**Equipment.** Equipment orders, including those supported through the Equipment Trust Fund, are discouraged at this time. Contact Procurement Services for non-IT equipment requests.

**Grants.** Grant funded purchases (indexes beginning with “7”) do not require additional approval from department chairs, program directors, VP’s or Deans. However, all grant-related purchases, including those purchased with a small purchase charge card, require pre-authorization from the Office of Sponsored Programs and may require additional justification.

**Small Purchase Credit Card “SPCC”.** Cabinet members are asked to minimize SPCC cardholders in each area and retain only those necessary for mission-critical support.

**Supplies.** For mission-critical supplies, TSRC has adapted processes to support off-campus delivery. See guidance on the Procurement website.

**Office Equipment.** As outlined in the campus telework policy, and COVID-19 FAQs for teleworking, the university will provide equipment and materials needed by employees to effectively perform their duties; however, the university will not duplicate resources between the central work place and the alternate work location. Telecommuting employees may use university-owned equipment off-campus for legitimate university purposes. If you have materials and supplies in your work office that you need to support working from home, please coordinate retrieving those items from the office with your supervisor. If you must go to work to retrieve any items, please ensure that you are following all public health safety protocols.

**Remote Connectivity:**

**Technology**
Information Technology (IT) provides a varied toolset to accommodate remote work. Visit RemoteIT to evaluate tools already available for whole university use. Tools include online meetings, conferencing, document sharing, managing office calls, etc.

**HotSpot/Mifi**
On an as needed basis, employees who must work remotely in support of the health of themselves and/or campus, with the prior written approval of their supervisors, may consider activating the hotspot on their cellular device through their current service provider to obtain internet service. Employees should check
with their service providers; several service providers have announced free hotspot and upgrades in service over the next 60 days during COVID-19. Also noteworthy, hotspots and MiFi’s may be shared. An employee may be able to use/share a family member’s MiFi.

In the event costs are incurred, at the conclusion of the COVID-19 event, within 60 days employees must submit documentation for reimbursement. A phone bill showing additional data charges will be acceptable documentation. Reimbursement costs will be covered by the university.

**Stipend Availability**

In limited situations, if the hotspot plan outlined above does not provide adequate services, employees may request a limited-time stipend, or increase in their current stipend amount, to supplement the cost of accessing the network. Complete the new stipend request form located on the Finance Forms page [https://finopsforms.wm.edu/forms/](https://finopsforms.wm.edu/forms/)

**Examples of ineligible purchases/reimbursements:** Equipment that is purchased to permanently upgrade a work environment is not eligible for reimbursement, for example:

- at-home printer
- WiFi extender, routers
- headphones
- printer ink (employees should use W&M methods of electronic signature)
- utility costs
- printer paper (unless paper documents are required)

**Conferences/Memberships.** While it is recognized that certain memberships are considered mission critical, this is a good time to re-examine the value of all current memberships. In a similar fashion, employees are encouraged to delay enrollment in future conferences. If it is imperative to register early, please contact Procurement Services to include provisional language in any future commitments.

**Reimbursement Protocol**

To prevent delays in processing, reimbursement requests should include the VPRF along with proper documentation, business purpose, and appropriate approvals. Please note reimbursements may be denied if there is not a clear business expense and documentation that the purchase was essential to support continuity of operations from a remote location, and/or if pre-approval documentation to incur the expense is not included.