



Purchasing Policy

I. Policy Statement

In response to the COVID-19 pandemic and subsequent financial pressures, this policy seeks to eliminate non-essential spending by enhancing the existing [Business Expense Policy and Guidelines](#) and [Travel Policy and Guidelines](#) for WPI-funded purchases. To the extent there is a conflict between the guidelines and this policy, this policy will control. **This policy is effective immediately but will be periodically reevaluated.**

II. Scope

This policy applies to all student, faculty and staff purchases using WPI Funds.

III. Definitions

“WPI Funds” means, for the purpose of this policy, funds provided through WPI’s operating budget. WPI Funds do not include (a) designated funds (i.e., professional development funds), (b) grants, or (c) gifts. The use of designated, grant, or gift funds are dictated by their controlling policies and/or agreements.

IV. Policy

A. Essential Purchases

All purchases must be essential. Please consult [Appendix A](#) for guidance on determining whether a purchase may be essential.

B. Approvals and Purchasing Limits

Purchases **under \$1,000.00** do not require pre-approval.

Purchases \$1,000 or more require advance approval in the form of a [Workday spend authorization](#) or [supplier invoice request](#).

All purchases must be processed in Workday within thirty (30) days of incurring the expense.

Any expenditure that does not follow this policy will be rejected. The purchaser may appeal the rejection, as set forth in Section D.

Requests to temporarily increase purchasing limits on PCards should be sent to pcardmin@wpi.edu. Requests should come from the Cost Center Manager, including justification for classifying the purchase as essential.



C. Specific Purchases

1. Personal Protective Equipment (PPE) & Related Supplies

Cleaning stations with supplies are located in each building and will be stocked by the Facilities Department. Departments that wish to purchase additional supplies should consult with the Procurement department to identify verified vendors, appropriate materials and allocate limited resources across the campus (regardless of funding source). Requests for PPE and related supplies should be sent to: Procurement Services at eproc@wpi.edu.

Consistent with the [Research Lab Reopening Guidance](#), each lab is encouraged to purchase PPE sufficient to carry out their research-related activities. Please contact your department head or EHS regarding the purchase of PPE, as it is in limited supply.

Campus Police should continue to purchase their PPE through their current purchasing processes.

2. Computer Equipment

For purchases of computer equipment, including computers, computer accessories, tablets, or other hardware/software, contact the WPI Information Technology Services (ITS) department. Email requests to its@wpi.edu and include the following: 1) a full description of item needed, part number(s) and rationale; 2) specify whether the computer equipment need is due to COVID-19; and 3) indicate the cost center to be charged.

3. Non-IT Equipment

All non-IT equipment purchases require a purchase requisition prior to purchase.

Purchases over \$10,000 must conform to WPI's existing [Bids & Quotations Process](#) (i.e., three (3) competitive bids or sole source justification) and must be initiated by creating a Workday purchase requisition.

4. Travel

All WPI-sponsored domestic and international travel is canceled until future notice. For current travel restrictions, please refer to wpi.edu/news/coronavirus/faqs#travel.



D. WPI's Commitment to Supplier Diversity and Environmentally-Friendly Purchasing¹

WPI is committed to fostering a culture of inclusion and care for the environment in all that we do. To that end, our procurement policies and practices reflect WPI's desires to 1) develop mutually beneficial relationships with small, local, underrepresented, and veteran-, women- and minority-owned businesses, and 2) purchase and use environmentally friendly products and services.

1. *Supplier Diversity*

WPI strives to enhance the economic opportunities for small, local, underrepresented, and veteran-, women- and minority-owned businesses in WPI's procurement process. WPI strongly encourages its community to seek opportunities to obtain goods and services from qualified diversity suppliers that provide competitive quality and pricing.

2. *Environmentally-Friendly Purchasing*

WPI recognizes that the purchase and use of products and services, as well as their ultimate disposal, can profoundly impact the environment. WPI strongly encourages its community to take a pro-active position in recognizing and exploring opportunities to procure "environmentally friendly" products and services and should factor environmental considerations into the purchasing process.

By factoring in environmental considerations to our purchasing decisions, WPI will remain fiscally responsible while attempting to promote practices that do not harm human health, are less polluting and minimize waste, maximize use of bio-based or recycled materials, conserve energy and water, and reduce the consumption or disposal of hazardous materials.

Please consult [Appendix B](#) for environmentally-friendly considerations in your purchasing.

3. Appeals

To appeal the denial of a purchase, please submit an appeal form using the link [here](#). An example of the appeal form is attached as [Appendix C](#).

4. Questions

For questions about this policy, please contact Olga Klochkova, Director of Financial Planning and Analysis at oklochkova@wpi.edu.

¹ Nothing in this policy shall be interpreted as requiring a purchaser to procure products that do not perform sufficiently for their intended use, exclude satisfactory competition, or are not available at a reasonable price or in a reasonable period of time.



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Policy Sponsor: Chief Financial Officer

Responsible Department: Finance

Effective Date of Original Interim Policy (i.e., date of Presidential Approval): April 15, 2020

Effective Date of Revised Interim Policy (i.e., date of Presidential Approval): September 9, 2020

Effective Date of this Policy (i.e. date of Presidential Approval): October 28, 2020

Revision Date: December 17, 2020 (includes new section IV(D))



Appendix A Guidance on “Essential” Spending

To assist those making purchasing decisions while these guidelines are in effect, please consider these questions:

Most likely essential:

1. Is this critical to continuing a program?
2. Is this a regulatory, compliance or safety issue?
3. Is this a major program disruption?
4. Is this for an online/on campus academic program?

Maybe essential:

1. Is this a minor program disruption?

Not essential:

1. Can this expense be delayed?
2. Is there a lower cost or no-cost alternative?
3. Can arrangements be made to get the item on campus?

The following are examples of what would – and would not – qualify as “essential” operating expenses and what action you should take:

<u>Example Expense</u>	<u>Essential (Yes/No/Maybe)</u>	<u>Action</u>
Personal Protection Equipment/supplies	Yes	Contact eproc@wpi.edu for ordering guidance (does not apply to research labs or WPI police)
Computer equipment	Maybe	Email ITS@wpi.edu prior to incurring expense
Computer upgrade to home computer	No	Do not purchase
Printers	No	Do not purchase
Conferences, including online	Maybe	Must obtain approval by Department Head prior to purchase
Costs for official mailings	Yes	Reimburse through Workday
Donations	No	Do not donate
Food/catering/meals	No	Do not purchase/delay
Gift cards	No	Do not purchase
Memberships	No	Do not purchase/delay
New Temporary help/Overtime	No	Do not engage new temporary help or overtime for non-emergency task
Office ergonomics	Maybe	Email ehs@wpi.edu to determine necessity prior to expense
Office Supplies	Maybe	Purchase is acceptable only if the supplies would normally be used on campus
Software	Maybe	Email ITS@wpi.edu prior to incurring expense
Travel	No	Currently prohibited due to COVID-19



Appendix B

Considerations for Environmentally-Friendly Purchasing

The WPI community can help positively impact the environment in its purchasing decisions by considering the following:

- Consolidating orders
- Making use of electronic catalogs
- Buying items which contain recycled material
- Choosing renewable resources
- Opting for the non-hazardous alternative
- Looking for the most energy efficient model
- Buying locally
- Buying only what you need

When determining whether a product is environmentally preferable, the following attributes should be considered:

- Durable, not single use or disposable
- Made of recycled materials
- Biodegradable
- Recyclable
- Made from raw materials obtained in an environmentally sound, sustainable manner
- Produced by companies with good environmental track records
- Causes minimal environmental damage during normal use or maintenance
- Carcinogen-free
- Compostable
- Energy efficient
- Heavy metal free (e.g., no lead, mercury, cadmium)
- Low-toxicity
- Made from rapidly renewable materials
- Reduced greenhouse gas emissions
- Reduced packaging
- Resource efficiency
- Upgradeable
- Water efficient



Appendix C

REIMBURSEMENT/PAYMENT APPEAL FORM

Use this form to appeal a transaction that was denied reimbursement or payment under the WPI Purchasing Policies. Appeals must be submitted within 30 days of the notification that a transaction will not be reimbursed. Appeals will be reviewed monthly. You will receive an email notification of the appeal decision from the finance office.

1. EMPLOYEE INFORMATION

You may be contacted for further questions or clarifications.

Name: _____ Department/Division: _____

Phone: _____ Email: _____

2. TRANSACTION INFORMATION

Compose a detailed written justification of your request for an exception to WPI Purchasing Policies in the space below.

Amount: \$ _____ Supplier Name: _____

Workday Document Number (Expense Report or Invoice Request): _____

Spend Authorization Number: _____

Date of purchase: _____ Date of submission: _____

Detailed explanation of the charge: _____

Reason transaction was not reimbursed:

Reason for appeal:

3. SIGN

Employee Signature: _____

Once electronically signed by an employee, this form will automatically be forwarded to a supervisor and a cost center manager via DocuSign for an electronic signature, and then forwarded to the finance office.

<p>Supervisor:</p> <p style="text-align: center;">I Support This Appeal</p> <p style="text-align: center;">I Do Not Support This Appeal</p> <p>Signature: _____</p>	<p>Cost Center Manager (if different from supervisor):</p> <p style="text-align: center;">I Support This Appeal</p> <p style="text-align: center;">I Do Not Support This Appeal</p> <p>Signature: _____</p>
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