



## 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](mailto: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](mailto: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](mailto: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](http://wpi.edu/news/coronavirus/faqs#travel).

## D. 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 B](#).



## E. Questions

For questions about this policy, please contact Olga Klochkova, Director of Financial Planning and Analysis at [oklochkova@wpi.edu](mailto:oklochkova@wpi.edu).

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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

**Comment Period:** September 10 – October 10, 2020

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



## 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 <a href="mailto:eproc@wpi.edu">eproc@wpi.edu</a> for ordering guidance (does not apply to research labs or WPI police)
Computer equipment	Maybe	Email <a href="mailto:ITS@wpi.edu">ITS@wpi.edu</a> 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 <a href="mailto:ehs@wpi.edu">ehs@wpi.edu</a> 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 <a href="mailto:ITS@wpi.edu">ITS@wpi.edu</a> prior to incurring expense
Travel	No	Currently prohibited due to COVID-19



## Appendix B

### 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.

Supervisor:  <input type="checkbox"/> I Support This Appeal  <input type="checkbox"/> I Do Not Support This Appeal  Signature: _____	Cost Center Manager (if different from supervisor):  <input type="checkbox"/> I Support This Appeal  <input type="checkbox"/> I Do Not Support This Appeal  Signature: _____
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