

To: The Campus Community

From: Rob Alsop, Vice President for Strategic Initiatives

Date: July 25, 2022

Subject: Spend Guidelines for FY2023 (Effective August 1, 2022)

West Virginia University's commitment to the wellbeing of our Faculty, Staff and Students is unwavering. The past two years have been challenging in many ways, but they have also taught us valuable lessons about our ability to conduct business in flexible and efficient ways. Through prudent fiscal management, the University was able to mitigate revenue loss, realize cost savings and preserve cash. However, we simply cannot afford to revert to the pre-pandemic level of expenditures - University resources remain limited, and we must continue to utilize the lessons learned during these past two years to control our spending.

All of you deserve enormous credit in helping the University reduce spending amid a global pandemic. We need your continued help in maintaining the campus-wide spending guidelines we implemented in FY2022 and carrying them into FY2023.

Effective August 1, 2022, the following spending and approval guidelines will apply. Please note that colleges and units can choose to implement tighter spending and approval restrictions based on their priorities and budget situation.

Purchases

- All purchases (except travel and hospitality) greater than \$5,000 must be approved by the dean of a college or the vice president of a unit. The dean or vice president may elect to delegate the approval authority to their respective business officer or strategic business advisor.
- When determining the appropriate way to buy goods and services:
 - Mountaineer Marketplace catalogs should be used whenever possible to order goods. If items aren't available in a catalog, submit a non-catalog order form before the goods and services are provided.
 - The PCard should be used for specific types of small dollar orders of goods per the [Purchasing and Payment Guidelines](#).
 - Office supplies, furniture, and computer supplies should be purchased through Mountaineer Marketplace and not on the PCard. Small dollar supplies needed in case of emergency (example – laptop charger) are permitted on the PCard.

Hospitality

- All hospitality expenses, regardless of the dollar amount, must be approved by the dean of a college or the vice president of the unit prior to the event unless funded by a WVU Foundation account. The dean or vice president may elect to delegate the approval authority to their respective business officer or strategic business advisor.
- All expenses must comply with the [University's Hospitality Policy](#). Please keep in mind that this policy prohibits using state funds for refreshments at meetings with no external visitors. In addition, employee-only meals should only be provided if a meeting extends beyond 2 hours and occurs at mealtime.

Travel

Although travel was restricted since April 2020 because of the pandemic, the University allowed business-related travel in FY2022 with some limitations. All faculty, staff and students are expected to continue to exercise fiscal responsibility and prudent fiscal management when considering FY2023 travel arrangements. In addition to the existing procedures in the travel manual, the following guidance will apply in FY2023-

- Before any travel, please determine whether a virtual attendance option is available and if so, whether it will be more effective and efficient compared to in-person attendance. If choosing to attend in-person, please provide an explanation as part of the MyExpenses approval process (virtual option unavailable, presenting at the conference, required for tenure/promotion etc.).
- All non-grant funded overnight travel – both domestic and international and regardless of the dollar amount - must be approved by the college dean or unit vice president prior to booking any reservations. The emailed approval and justification must be attached to the expense report in MyExpenses for the PCard and/or reimbursement expenses related to the trip. The college dean or unit vice president can delegate approval authorization to others in the college. As part of the decision to delegate, the college dean, unit vice president, or business officer should reach out to Mark Gavin (in the case of academic units) and Anjali Halabe (in the case of non-academic units) for a discussion.
- Travel on externally funded grants and sponsored projects and Foundation back bill accounts should follow existing approval processes as detailed in the University's Travel Manual. Any travel expenses charged to sponsored awards should be in compliance with the award terms and conditions and be allocable to the sponsored award.
- At this time MyTravel is strongly encouraged for all air and rental car reservations, regardless of the funding source. **We expect MyTravel will become mandatory effective September 15, 2022.** After that date, MyTravel should be used to book travel unless the travel falls under the exceptions listed in the [University's Travel Manual](#).
- All travel expenses, including allowable mileage reimbursements and other travel costs for remote/hybrid employees, must comply with the [University's Travel Manual](#).

Exceptions to the above must be approved in writing by WVU's Senior Associate Vice President of Finance and/or WVU's Chief Procurement Officer, and where appropriate WVU's Provost Office.

WVU faculty and staff are reminded that all WVU-related purchases made, whether on PCard, Mountaineer Marketplace or otherwise and whether for the state, foundation or research corporation: (1) must be for a legitimate and justifiable business purpose, (2) must be in accordance with WVU's purchasing, PCard, hospitality, and travel and expense guidelines, and (3) are subject to audit.

For questions or concerns, please contact the Procurement, Contracting and Payment Department at: PCPS@mail.wvu.edu.