

To: Executive Leadership Team, Deans, and Budget Officers  
From: Paula Congelio, Vice President and Chief Financial Officer  
Date: April 24, 2023  
Re: FY23 Spend / Purchasing

In November and again in January, new spending guidelines were distributed in order to help navigate the challenging financial period we are in. This was also further explained at the April Campus Conversation by President Gee and Vice President for Strategic Initiatives Rob Alsop.

Despite the necessity to follow the revised spend guidelines, Finance has not seen a reduction in spending since the date of those communications through the current date. At the time, we had instituted a mandatory approval of all expenses over \$5,000 by the Dean/VP. We are lowering that threshold to \$2,500 effective immediately for all non-externally grant funded purchases/expenses. In addition, the approval workflows in Mountaineer Marketplace will be updated and transactions above that threshold will be routed to the Dean/VP/delegate. PCard expenses \$2,500 or greater will continue to require the Dean/VP/delegate's approval attached to the expense report in MyExpenses. It is imperative that we closely scrutinize expenses and do not proceed with any purchases that are not critical in nature.

Guidelines for all approved purchases:

- Mountaineer Marketplace catalogs should be used whenever possible to order goods. If items are not available in a catalog, submit a non-catalog order form before the goods and services are purchased.
- PCards 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 delayed. If they must be purchased, they should be purchased through Mountaineer Marketplace and not on a PCard. Small dollar supplies needed in case of emergency (example – laptop charger) are permitted on a PCard.
- Confirming orders should not be occurring unless in an emergency. ***A separate e-mail will be sent regarding confirming orders.***
- 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.

Exceptions to the above guidelines must be approved in writing by WVU's vice president of finance and/or WVU's chief procurement officer, and where appropriate the WVU Office of the Provost.

While we know this is a challenge, I do want to stress that it is manageable if we work together to make these adjustments. If you have any questions, please feel free to contact me or send an email to [budgetsupport@mail.wvu.edu](mailto:budgetsupport@mail.wvu.edu). We will be monitoring this email and will reply as soon as possible. Thank you for your continued support.