TO: University Unit Finance Leads  
FROM: Jonathan Pruitt, Vice Chancellor for Finance and Operations  
       Michael Barker, Vice Chancellor for Information Technology Services  
DATE: March 18, 2020  
SUBJECT: COVID-19 Campus Procurement Guidelines

In response to the current unprecedented situation resulting from COVID-19, the University is assessing its financial situation and identifying approaches to address emerging challenges. In an effort to preserve our financial flexibility going forward, as of today we are implementing the following guidelines for non-personnel expenses, the use of corporate credit cards (P-cards) as well as providing specific guidance on addressing technology needs for remote instruction and tele-work. These additional guidelines have been reviewed and approved by University leadership, are effective immediately and apply to all UNC-CH campus units.

**General Procurement**

Procurement of the following will require approval from either the Chancellor, VC for Finance and Operations, or AVC for Finance and Budget:

- A purchase over $50,000;
- Contracts where the University would be required to advance or spend more than $50,000 over the life of the contract;
- Capital improvement payments over $50,000;
- P-Card expenditures exceeding existing individual purchase limits;
- Consulting agreements;
- Cash advances greater than, or cumulatively exceeding $5,000;
- Vehicle leases or purchases;
- Furniture purchases;
- Unit Renovations (Non-Capital Improvements); and
- Meetings or entertainment expenses greater than $1,000

**Travel**
University travel is currently suspended. The travel team is working diligently to obtain reimbursements and cancel trips previously booked. Please review current travel FAQs (https://finance.unc.edu/news/2020/03/09/qa-university-business-travel-affected-by-coronavirus/) and contact the travel team (travel_team@unc.edu) if you have any questions on cancellation or payment status.

**Corporate Card (P-Card)**

All P-card transactions will be subject to rigorous monitoring to ensure appropriate usage. Home office charges are prohibited on the P-Card unless they conform to technology resources guidelines described below. Reimbursements will NOT be paid for items like furniture, desks, chairs, etc. for the set-up of home offices. Purchases may be allowed to directly facilitate online instruction or remote work, as described below. Prior to any purchase being initiated, approval by your Dean or Department Head is required.

**Technology Resources Required for Remote Instruction or Remote Work**

1. ITS is requesting that the College and Schools identify instructors who lack viable computing devices at their remote work location so that ITS can provide loaner laptops to them. University Departments/Divisions/Colleges/Schools/Institutes should identify instructors and staff who require loaned ITS computing devices for the planned remote work site. All requests should be made by the Dean or Director listing the employee name, PID, and prospective location of the loaner item(s); please use http://go.unc.edu/laptoploaner. ITS is working on a central location and an appointment/pickup system for delivery of these loaner laptops. Please keep in mind that there is a finite number of laptops available for loan and we do not anticipate expanding that supply in the near term.

2. For individuals who have viable computing devices at their remote work location, but do not have important peripherals—e.g., webcam, headset with microphone —ITS and Procurement will:
   a. Provide a list of recommended peripherals (https://its.unc.edu/workremote/device-recs/);
   b. Arrange for departmental purchases of these items through ePro and allow for at-home or to-home delivery;
   c. Permit faculty and instructors to purchase webcam and/or headset on personal credit cards and be reimbursed—up to the dollar limit set by Procurement equal to the cost of purchasing the recommended peripheral.

Please keep in mind that any purchases in this category remain property of the University.

3. Allow instructors / staff to take home their desktops, monitors, keyboards, mice, and other peripherals if this is preferred. We are requesting Campus Units to maintain a list of property that is being relocated from University offices and locations to assist with remote instruction and remote work. Any equipment or device that contains or stores Personally Identifiable Information (PII), Protected Health Information (PHI) or other sensitive University information are required to consult with their unit’s Information Security Liaison (ISL) prior to moving equipment off campus. Please contact the ITS Security Office.
(security@unc.edu) if you do not know who your unit’s ISL is. Please remember that all equipment relocation is governed by the Transfer of Equipment to Other Institutions Policy (Policy 603.6).

4. Purchases must be notated (or coded) to indicate they are associated with the COVID-19 emergency move to remote instruction and remote work. This will greatly assist our efforts to be reimbursed for these expenses in the event governmental funds become available for this purpose.

We are providing this guidance to ensure clarity regarding appropriate expenditures going forward and to assist faculty and staff in addressing needs for remote instruction or tele-work. Our objective is to eliminate, as much as possible, the need for faculty and/or staff to come to campus; we are therefore making emergency adjustments to facilitate, as expeditiously as possible, remote work and remote instruction while ensuring appropriate fiscal controls.

As always, we are available to address unique situations and circumstances, so please feel free to contact ITS (https://help.unc.edu/sp ,) and Procurement (purchasing.team@unc.edu) with questions. Thank you for your patience and understanding as we navigate this unprecedented situation.

cc: Nathan Knuffman, Deputy Vice Chancellor for Finance and Operations
Stephen J. Agostini, Associate Vice Chancellor for Finance and Budget
Beau Jimmerson, University Procurement Director
Anna Wu, Associate Vice Chancellor for Facilities Services