VirginiaTech

July 1, 2017

MEMORANDUM

TO: Rosemary Blieszner
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FROM: Timothy L. Hodge

SUBJECT: Equipment Trust Fund Phase 31 – Call for Requests

It is time to begin the 31st phase of the Higher Education Equipment Trust Fund program. Virginia Tech was allocated $10.33 million of the $68 million funding approved by the 2017 General Assembly for Phase 31 of the ETF program and an additional $5.24 million for research. The $10.33 million is designated for equipment purchases in two areas: equipment replacement and microcomputers. I am writing to advise you of the key dates for Phase 31 and to transmit the general instructions for acquiring equipment through the Trust Fund program.

Equipment lists must be entered into the web-based system before August 31st so that the University can meet the SCHEV timeline. The University is optimistic that it will receive approval to issue purchase orders in late October or early November. The calendar of internal due dates has been set accordingly and is attached for your review (Attachment C).

Closure of Phase 31 is planned for June 2018. Ordering and receiving equipment purchases of $15.5 million during this limited time period will be a challenge. Please consider this when you develop equipment requests for your area. No item should be ordered that would require a delivery period in excess of eight months. This will allow sufficient time for processing the requisition, delivery of the equipment and payment of the invoice.

Invent the Future

The procedures for compiling the lists to submit to State Council are the same as those used in previous phases. You will recall that State Council allows us to itemize equipment purchases that equal, in value, the allocation plus up to thirty percent to allow for quick substitutions during the ordering phase. Because the State Council and the Virginia College Building Authority have restricted purchases to those items on the approved list, alternative purchases should be identified on the listing in case one of the high priority items is not available. The thirty percent margin will allow for this exchange, but please remember that the sum of purchases cannot exceed the amount allocated to your area. For Phase 31, we encourage the purchase of equipment items with a minimum cost of at least $2,000.

Consistent with prior communications on the 2017-18 ETF allocations, the allocations by college or vice presidential area are shown on Attachment B, with an additional column showing the thirty percent margin. Please provide departmental allocations for your area as soon as possible to allow each department to enter requests totaling 130 percent of the allocation. Please forward a copy of the departmental allocations to Courtney Long (cblong4@vt.edu) by August 31, 2017.

To prepare the files that will be submitted to the State Council, we will again use a web-based collection process for obtaining the list of equipment items. To access the program, go to our home page at http://www.obfp.vt.edu.   An ETF Web User Guide (Attachment E) and a list of items excluded from funding from ETF (Attachment A) are attached to this memorandum and are posted on our web site. SCHEV intends for the 2017-18 Equipment Trust Fund allocations to help achieve the following goals:

- Significantly reduce the amount of obsolete technology and equipment.
- Provide every student access to an appropriate level of information and technology.
- Establish a statewide network that supports and encourages sharing and cooperation.
- Provide every faculty member with appropriate equipment and training to use technology in support of teaching and learning.
- Support faculty in the introduction of new ways of instruction and learning, provide courses customized to student needs, and take advantage of distance-learning opportunities.
- Install high quality, easy-access, network-deliverable student support services, such as transcripts, grades, class scheduling, and account balance and payment information.
- Install management information systems that are flexible and directly accessible to users to help support administrative restructuring and cost-containment.

Accordingly, allocations may be used to purchase technology and equipment for the following Educational and General programs: Instruction, Research, Academic Support, Student Services, and Institutional Support. Allocations should not be used to purchase technology and equipment for use in Public Service or Operation and Maintenance of Plant.

It is sometimes necessary for a department to request additional equipment items after SCHEV has approved the list. The form for requesting approval of additional equipment items and assignment of new SCHEV reference numbers is shown on Attachment D. This form will be available for downloading from our web site. Upon completion, the form should be sent to Courtney Long. She will provide the department with a new SCHEV reference number. We ask that these forms not be submitted before January 31st.

Please submit your Phase 31 request list through the web-based system by August 31, 2017. Questions about the Equipment Trust Fund program or compilation of the list should be directed to Courtney Long at 1-7450 and technical questions about the web-based submission process should be directed to Brad Sumpter at 1-0631.

Attachments

Cc: Candice Albert
Amy Burchett
Sherri Cook
Feride Daku
Martin Daniel
Jeff Earley
Beth Ebel
Pascha Gerni
Bruce Heath
Mary Helmick
Tim Hodge
Kay Hunnings
April Hylton
Stephen Kleiber
John Krallman
Monika Lawless
Courtney Long
Brad Martens
Ken Miller
Ed Nelson
Beth Osborne
Brenda Reed
Kathy Rogers
Julie Rosenberger
Janet Sanders
Brian Shabanowitz
Marty Simpson
Cindy Spangler
Rick Sparks
Ken Smith
Wendell Vest

EXCLUDED FROM FUNDING FROM ETF
FOR 2017-18

<u>The Following Items:</u>   <u>In the Following Programs:</u>

a. Library Books, Films, Videotapes, DVDs,   All Programs
    and Library Materials

b. Microfilm Collection and Materials   All Programs
    (Readers are allowed.)

c. Library Shelving   All Programs

d. Office Appurtenances   All Programs
    (Blinds, Carpets, File Cabinets and Similar Items)

e. Office Furniture   All Programs
    (Desks, Chairs, Tables, and Similar Items)

f. Transportation Equipment   All Programs

g. Equipment Normally Affixed to a Building   All Programs
    or Functional as a Part of an Operating
    System of a Building

h. Climate Control and Security Systems   All Programs

i. General Telecommunications Equipment   Public Service and
                                                                    Physical Plant

j. Buildings   All Programs

k. Equipment with a Useful Life Less than   All Programs
    3 Years

l. General Applications Software   All Programs
    (Microsoft Excel, Word, etc.)

m. Items Costing Less than $500   All Programs

n. Used Equipment (can include reconditioned or factory
    rebuilt equipment if company offers same factory warranty)   All Programs

o. Copiers and Fax Machines   All Programs

p. Maintenance agreements, site licenses, warranties,   All Programs
    training and consulting services

q. Boats   All Programs

2017-18 Equipment Trust Fund Allocations (Phase 31)

	2017-18 Allocation	30% Margin	130% of 2017-18 Allocation
Agriculture	531,024	159,307	690,331
Architecture	300,013	90,004	390,017
Business	156,439	46,932	203,371
Engineering	1,645,145	493,544	2,138,689
Liberal Arts & Human Sciences	394,608	118,382	512,990
Sciences	764,113	229,234	993,347
Veterinary Medicine	273,690	82,107	355,796
Natural Resources	211,452	63,436	274,888
Library	400,000	120,000	520,000
Academic Computing (AIS)	600,000	180,000	780,000
Faculty Development Institute	1,363,241	408,972	1,772,213
Research Computing	621,735	186,521	808,256
Classroom Media Projects	100,000	30,000	130,000
Virginia Tech Transportation Institute	500,000	150,000	650,000
VTC Research Institute	357,609	107,283	464,892
Faculty Startup	2,000,000	600,000	2,600,000
OVPRI for Strategic Investments in Shared Services	1,448,206	434,462	1,882,668
High Performance Computing (HPC)	1,448,206	434,462	1,882,668
Interactive Neuromotor Research Center	1,000,000	300,000	1,300,000
Extended Cognition Unit	620,000	186,000	806,000
Ballston - Energy Innovation	500,000	150,000	650,000
Library Digital Media	60,000	18,000	78,000
Transformation Health Behavior Research	55,000	16,500	71,500
OVPRI - Export Control Compliance	30,000	9,000	39,000
Library Equipment Support - D-Hub (Humanities)	25,000	7,500	32,500
Contingent Allocation	166,616	49,985	216,601
Phase 31 Allocation	$ 15,572,097	$ 4,671,629	$ 20,243,726

PHASE 31 CALENDAR

2017

June 30	Office of Budget and Financial Planning (OBFP) sends Phase 31 Equipment Trust Fund allocations and instructions to Deans/Vice Presidents.
July 5	Web-based collection system opens for users to enter equipment request information.
August 31	Last day to enter equipment request information; web-based collection system closes to users.
September 5-8	OBFP aggregates the equipment requests; reviews the requests for ineligible items, assigns reference numbers, and prepares the data for submission to SCHEV.
September	OBFP submits equipment list to SCHEV for review and approval.
November-December	OBFP returns approved lists to departments after notification by SCHEV.

2018

March 30	Final day for departments to enter ETF requisitions into HokieMart.
June 20	Deadline for ETF invoices to be submitted to Controller's Office for payment. Please remember to work with Fixed Assets to ensure that all equipment is properly tagged and inventoried.

EQUIPMENT TRUST FUND PHASE 31

REQUEST FOR APPROVAL OF ADDITIONAL EQUIPMENT

Department: _____ _____
          (No.)   (Name)

                                                                                                   _____
                                                                                                   Mail Code

Requested By: _____

    Telephone: _____   E-mail: _____

Item Requested: _____   **Quantity:** _____

Price: $_____   **Model No.:** _____

Manufacturer: _____

Purpose of Equipment (Check <u>ONLY</u> <u>ONE</u>):

  Instruction _____   Research _____   Public Service _____
  Academic Support _____   Student Services _____   Institutional Support _____

Justification: (Please provide a brief explanation for requesting a new number, if this is a substitution; include the affected SCHEV reference numbers for the replaced items.)

OBFP Use Only: Approved: _____Yes _____ No   Program: _____

                                                        HEGIS: _____

                                      Fund Number: _____

SCHEV Reference No(s): _____

                                   Record added: _____

ETF Request System User Guide

The ETF Request system is a web-based application designed for collection of equipment request data for submission and approval by the State Council of Higher Education for Virginia. This system is administered by the Office of Budget and Financial Planning.

HOW TO

The following set of instructions will instruct the user on how to use the ETF Request System to create, modify, and delete equipment requests.   Also how to use the batch upload for multiple requests, the reporting features, and the admin tools for administrators.

Accessing the System

The ETF Request system can be accessed by clicking the Equipment Trust Fund link on the Office of Budget and Financial Reporting website or by using the following URL: **https://etfrequest.vpfin.vt.edu**. To access the system the user must have a current Virginia Tech PID and password and be a designated ETF Request System user.

Steps to access the system:
1. Navigate to the ETF Request System authentication page via Login by one of the methods described above
2. Enter your Virginia Tech PID and password and press the Login button
3. The New Request screen is displayed.

Add New Request

Steps to add a new request:
1. Click the New Request link from the navigation bar.

2. Complete the following fields appropriately

a. Department Name – The department that is requesting the item. Must be within same senior management and only departments you have access to will show up in drop-down

b. Model – Provide a current model number for the requested equipment. This information may change at time of purchase; however, it is required for the approval process.

c. Description – Provide a brief description of the equipment. Please remember that this description should be singular in nature (i.e. Computer, Autoclave, etc.)

d. Manufacturer – Provide the name of the manufacturer (not the vendor)

e. Unit Price – Provide an estimate of the cost for the requested equipment.

f. Quantity – Number of requested equipment.

3. Press the Add Request button.

4. User will be notified that the request has been successfully saved.

User may also add request by using the modify table. At bottom of table you fill out fields just like the new request page. When all the information is entered, click the add button. User should see request loaded into table if valid request.

Batch Upload

To upload multiple requests, you can use the batch upload function to import them at one time. To do this:

1. Download the ETF Batch Request Template from here: **http://www.obfp.vt.edu/ETF/ETFRequestBatchTemplate.xlsx**.

2. Save the template to your computer and enter the requests that are to be made.

3. In the application, click the Batch Upload link from the navigation Bar.

4. Click the browse/choose file button and select the desired file to upload

5. Click the upload and view button. The requests will show on page in table. Review the requests and make sure the information is correct. Un-check the requests with errors.

6. Once ready, click save requests. User will be redirected to the Modify table where you can see the requests that were just saved.

Modify Previous Request

Steps to modify a previously entered request:

1. Click the Modify/Delete link from the navigation bar.

2. A list of equipment requests that you have access to will be displayed in a tabular format.

3. Find the equipment request that you would like to modify and press the edit link.

4. That equipment request edit text-boxes will be displayed with the requested information. Modify this information as needed.

5. Press the Update button when finished.

6. User should see the changes made in the table if so the request has been successfully modified.

Delete Previous Request

Steps to delete a previously entered request:

1. Click the Modify/Delete link from the navigation bar.

2. A list of equipment requests that you have access to will be displayed in a tabular format.

3. Find the equipment request that you would like to delete and press the Delete link.

4. Press OK on the confirmation popup to delete the request.

5. User should not see the request in the table now, if so that verifies that the deleted equipment is no longer present.

Create Report

To view a detailed report of the requested equipment for a department or senior management perform the following steps:

1. Click the Create Report link from the navigation bar.

2. On the Report Creation screen, select the type of report you would like to create.

3. Select the department or senior management that you would like the report to use.

4. Press the Download Report button. The report will be generated on screen.

5. User may print the report or save it as an Excel, PDF, or Word document.

Contact Information

The ETF Request System is administered by Finance Information Technology. Please refer to the following contact list when assistance is needed:

- For general policy related questions related to the current ETF phase contact **Courtney Long** at cblong4@vt.edu or 540-231-7450.
- For help with technical problems contact email fitdev@vt.edu.