**UW Bothell Template for**

**COVID Response Expenditure Request**

**Purpose:** To facilitate UW Bothell’s COVID expense submission to UW Seattle Office of Planning and Budgeting (OPB). Please complete this template and return to Fiscal and Audit Services at **uwbfisc@uw.edu**.

This form should be utilized to request consideration for a central expenditure that you believe is extraordinary in nature, directly related to the UW’s COVID response

and broadly institutional in scope.

**School/Unit Name**:

**Contact name**:

**E-mail**:

**Phone number**:

*Please select applicable checkboxes and type responses in text boxes where indicated.*

**Please identify the type/nature of the expenditure requested:**

[ ]  Labor – Existing UW Employee(s) or Request for New Hire(s) – see pages 2-3

[ ]  Supplies or materials – see page 4

[ ]  Contractual services – see page 5

[ ]  Equipment – Existing UW Equipment or Request to Acquire Equipment – see page 6

**Have you submitted a service request through one or more of the following departments** **(where applicable)?** (FAS note: The purpose of this question is to prevent duplicate requests.)

[ ]  UW Facilities – Seattle Campus

[ ]  UW Facilities – Bothell Campus

[ ]  UW Facilities – Tacoma Campus

[ ]  UW-IT – All Campuses

[ ]  No, I have not submitted a service request through one of the above departments

**LABOR**

**Please briefly outline the need you have identified**:

Respond here

**Will unit need to hire one or more new employees to meet the identified need?**

[ ]  Yes, one or more new hires are required

[ ]  No, I will use one or more existing salaried full-time employee(s)

[ ]  No, but I will need to authorize overtime for one or more existing non-salaried full-time employee(s)

[ ]  No, but I will need to increase the FTE of one or more existing part-time employees

**Will the duties/functions of this/these employee(s) directly relate to the UW’s COVID response?**

[ ]  Yes, the duties/functions directly relate to the UW’s COVID response

[ ]  No, the duties/functions are not directly related to the UW’s COVID response

**Please describe how these duties/functions are directly related to the UW’s COVID response:**

Respond here

**Where you are able to approximate, please provide dates and number of hours the employee(s) are anticipated to directly engage in the UW’s COVID response effort:**

Respond here

**Is the nature of this duty or function regularly performed during the normal course of your unit’s business operations?**

[ ]  Yes, the type/nature of this duty or function is regularly performed during the course of normal business operations

[ ]  Yes, but this represents extraordinary employee time/effort not regularly required during the course of normal business operations

[ ]  No, the type/nature of this duty or function is not regularly performed during the course of normal business operations

**Does the nature of the duty or function expected represent more than a de minimis (i.e. >5%) use of an existing UW employee’s time?**

[ ]  Yes

[ ]  No

**Have you identified one or more existing UW employee that will perform the required duties/functions?**

[ ]  Yes

[ ]  No

**Please enter the identified employee EIDs and Names – if too many to enter individually, please provide an Excel spreadsheet with this information:**

**Is the nature of the expected duties within the normal scope of the identified employee’s position responsibilities?**

Respond here

[ ]  Yes

[ ]  No

**Do you have other employees within your unit that perform the duties/functions you described above as part of their regular position responsibilities?**

[ ]  Yes

[ ]  No

**SUPPLIES OR MATERIALS**

**Please briefly outline the need you have identified (description, quantity, approximate price of each unit and approximate total price)**:

Respond here

**Does the type/nature of this expenditure require your business unit to procure supplies or materials from an external source?**

[ ]  Yes, I will need to procure from an external source

[ ]  No, I have internal stock that I will use

**Will ALL of the supplies or materials needed (either to be procured or existing from stock) be utilized entirely for the UW’s COVID response?**

[ ]  Yes, all of the supplies/materials needed will be utilized entirely and directly for the UW’s COVID response

[ ]  Yes, but some or all of the supplies/materials needed are expected to have utility beyond the UW’s COVID response

[ ]  No, the supplied/materials do not directly relate to the UW’s COVID response

**Please describe how the supplies or materials needed will be used in relation to the UW’s COVID response. Please be specific (location, purpose, etc.):**

Respond here

**CONTRACTUAL SERVICES**

*Please note: failure to follow federal contracting requirements when procuring and selecting contractors will put the UW at risk of not receiving reimbursement for associated response costs.*

*UW Procurement is available to assist with any questions you may have.*

**Please briefly outline the services you need to procure from a 3rd party (outline scope of work and approximate total price):**

Respond here

**Are ALL of the contractual services requested directly related to the UW’s COVID response?**

[ ]  Yes, the proposed services to be procured are entirely and directly related to the UW’s COVID response

[ ]  No, the proposed services to be procured do not directly relate to the UW’s COVID response

**Please describe the building location(s) of where services will be used or deployed. If not used/deployed to a specific location OR are consulting in nature, please indicate as such. Please be as specific as possible:**

Respond here

**EQUIPMENT**

**Please briefly outline the required equipment (description, quantity, approximate price of each unit and approximate total price):**

Respond here

**Does the type/nature of this expenditure require your unit to procure the equipment from an external source?**

[ ]  Yes, I will need to procure from an external source

[ ]  No, the UW owned this equipment prior to the COVID pandemic

[ ]  No, the UW already purchased this equipment as a result of the COVID pandemic

**Please describe how the required equipment will be used in relation to the UW’s COVID response. Please be specific (location, purpose, etc.):**

Respond here

**Considerations**

Please note you will be expected to maintain detailed documentation to facilitate future recovery opportunities. To facilitate your documentation efforts, you may be asked to use forms developed by the Federal Emergency Management Agency (FEMA) or similar derivatives developed by the UW.

For examplesof the types of information you may be asked to maintain, please refer to the following links:

* [Labor Summary Record](https://www.fema.gov/media-library/assets/documents/10588) (UW is evaluating options in Workday to facilitate)
* [Supplies and Materials Summary Record](https://www.fema.gov/media-library-data/20130726-1608-20490-7634/90_124.pdf)
* [Contract Work Summary Record](https://www.fema.gov/media-library-data/20130726-1608-20490-0322/90_126_04_2010.pdf)
* [Rented Equipment Summary Record](https://www.fema.gov/media-library/assets/documents/10597)
* [Owned (Force Account) Equipment Summary Record](https://www.fema.gov/media-library/assets/documents/10608)

**Please submit this template to Fiscal and Audit Services at** **uwbfisc@uw.edu****.**

Fiscal and Audit Services will include this template in a single campus submission to the UW Seattle Office of Planning and Budgeting. Please contact **uwbfisc@uw.edu** with any questions.

FAS will compile all the UW Bothell requests and forward onto OPB for their review.

**What happens after submission to OPB?**

After submission of a request for a resource or expenditure, a member of the Office of Planning and Budgeting will triage the request to the appropriate Executive Approver noted below:

|  |  |
| --- | --- |
| Scope  | Executive Approver |
| Facilities and Facilities Services Related | Lou Cariello, Vice President, UW Facilities |
| Human Resource and Personnel Management Related | Mindy Kornberg, Vice President, UW Human Resources |
| Academic and Learning Technologies Related | Phil Reid, Vice Provost, Academic Student Affairs |
| Broadly Information Technology Related | Aaron Powell, Vice President, UW Information Technology |
| Broadly Environmental Health and Safety Related | Margaret Shepard, Chief Strategy Officer, UW Executive Office |

Once a decision has been reached by the Executive Approver, OPB will provide the requester with one of the three possible outcomes, as well as additional information on how to proceed with processing the requisition.

Possible outcomes:

1. The request is approved to be expended to central funds.
2. The request is approved to be expended to your local business unit.
3. The request is within the scope of normal business operations, if you elect to move forward, the cost would be expended to your local unit.

Every effort will be made to reach a decision within one business day of request submission.

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