

## SoK process to request an exception to the elimination of non-essential spending

In following the presidential mandate restricting non-essential spending, we ask faculty and staff who wish to request an exception to the spending freeze to follow these procedures.

All purchasing requests (submitted to an administrative assistant, placed on a PCard, or submitted for reimbursement) not being billed to a federal grant prior to **6/30** should be submitted to Nancy Stock at [nmstock@umich.edu](mailto:nmstock@umich.edu) and Lori Helvey at [lhelvey@umich.edu](mailto:lhelvey@umich.edu).

In your email request, please provide the following:

1. The funding source
2. A detailed explanation regarding why this request is essential to getting your work/research done and cannot wait until after 6/30
3. A copy of your KER
4. For orders over \$10,000, include the sole source document and quote

In our review of the exception request(s), the criteria that we will use includes:

- Is the expenditure consistent with leadership's message that we preserve financial resources where possible?
- Would delaying the expenditure for up to six months have long-term consequences?
- Is the expenditure required in order to carry out the teaching activities of our school?
- Is the expenditure required in order to mitigate potential enrollment losses?
- Is the expenditure required in order to carry out the terms of an externally-sponsored or donor-funded project?
- Would a delay of the expenditure cause harm to the institution?
- Is the purchase critically important during the pandemic?
- Would delaying the expenditure end up costing more because a contract is already committed to?

We are trying to follow as closely as possible the larger call to stop non-essential spending. We do not want to be part of the reason additional cuts need to be made. Thank you for your support during these unprecedented times.