

Old Dominion University
Higher Education Equipment Trust Fund
FY2019 Procedures

1.0 INTRODUCTION

The Higher Education Equipment Trust Fund (HEETF) was established by the General Assembly to provide funding to purchase equipment needed for instruction and research. The State Council of Higher Education for Virginia (SCHEV) works together with the Virginia College Building Authority (VCBA), and the Department of Treasury to administer HEETF through the financing of Trust Funds and the issuance of revenue bonds. Based on identified equipment needs, the General Assembly allocates appropriation to each Institution for the purchase of HEETF Equipment. Each institution then purchases equipment using their operating funds and submits requests for reimbursement from the Trust Fund.

Replacing General and Obsolete equipment is the primary focus for the Trust Fund; with an emphasis on accomplishing the following goals outlined by SCHEV:

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

2.0 PURPOSE

The purpose of this document is to clarify The Higher Education Equipment Trust Fund guidelines and establish consistent procedures for execution of the program.

3.0 DEFINITIONS

SYSTEM – An assemblage of instruments, modules, and components that together form a single functional unit which performs a specific task, and will remain assembled as a single functional unit for the entirety of its useful life. Examples: Oscilloscope with probes or recording spectrophotometer with demountable cell assembly and windows. Combining an iPad, cover, and Bluetooth keyboard do not qualify as a “system”.

RETENTION PERIOD – The time-frame in which equipment will remain in service for its original purpose. For example, computing equipment (Desktops, Laptops, Computer Monitors, iPads, and Printers) requires a minimum 3 year retention period while all other ETF

(96286) and sub-account code (5021).

- x Installation costs should be entered on the same purchase order as the equipment, but on separate line items.
- x Once an assemblage of components are deemed a "system", they may not be separated for partial disposal, i.e., a recording spectrophotometer with

- b. If software is approved (required to operate the research equipment) it should be noted with cost on the same line item as the equipment.
 - c. Multiple Vendors: While every effort should be made to utilize a single vendor for the purchase of a system, when multiple vendors are absolutely required,
 - i. Note in the comment section of the requisition “System involves multiple purchase orders ” and the associated requisitions or purchase orders, if available.
 - ii. General Accounting must be notified at the time the orders are created in eVA by sending a detailed list to FixedAssets@odu.edu including:
 - 1. Vendors’ names
 - 2. Descriptions
 - 3. Amounts.
 - iii. All POs associated with the “system” shall reference the same ETF authorization number.
8. For each line item on the purchase requisition enter the appropriate ETF budget code, ETF sub-account code and ETF number.
9. When submitting a paper requisition for more items than can be entered in the space allotted, attach the list of items and note in the description field that a detailed list is attached.
10. All ETF items, with the exception of equipment that requires special handling from vendors or freight companies, installation and/or calibration, must be delivered to ODU Property Control. The final delivery location must be stated on the requisition to include the building, room number, contact name and contact phone number of the person responsible for the department’s inventory of equipment, and any other special delivery instructions.
- B. Incomplete requisitions will be returned with deficiencies noted. Multiple line item requisitions submitted without corresponding ETF numbers will be returned. Corrected requisitions should be forwarded to Procurement Services for processing.
- C. All items delivered to Property Control will be tagged, added to the University’s inventory, and scheduled for immediate delivery upon completion of asset tagging and eReceiving process.
- III. Computer Purchases:
- A. All faculty and staff desktop and laptop computer purchases shall be made via existing University contract vendors: Dell and Apple. Details of the purchase program and order information for each vendor can be found at <http://www.odu.edu/facultystaff/computing/workstations/institutional-computer-purchase>
 - B. ETF Apple items must be purchased from the Bookstore. The ETF Purchase Authorization form may be found at <https://www.odu.edu/content/dam/odu/offices/monarch-techstore/docs/university-village-bookstore-etf-purchase-authorization-form.pdf>. ETF Apple computer purchases from the Bookstore are delivered to the Property Control warehouse by the Bookstore staff for inventory tagging. Property Control will coordinate the deliveries of the Bookstore ETF Apple

- purchases to the designated departments after tagging is complete.
- C. In addition, please note that it is not allowable to include add-on accessory items such as iPad cover's, keyboard's, cases, etc. in order to meet the \$500 cost requirement.
 - IV. Appropriate use of Banner expenditure sub-accounts on all requisitions are critical for inventory tagging requirements and reconciliation with Finance reimbursement submissions to SCHEV. Consider the purpose of the system (Laboratory Equipment, Medical and Dental Equipment, etc.) instead of the component parts when identifying the appropriate sub-account for a "system." A listing of expenditure sub-account codes may be found on the Budget Office website at:
<http://www.odu.edu/facultystaff/university-business/budget/resources>
 - V. Property Control will ensure the electronic receiver in Banner is completed appropriately for all purchase orders related to equipment delivered to Property Control. If equipment must be delivered directly to a department due to requirements for calibration and/or installation, please ensure that General Accounting is notified (FixedAssets@odu.edu) immediately upon receipt, so they can schedule an asset tagging appointment. The receiving -14.377 -6ical for0.pletemplet3.

the retention period. In addition, systems must remain intact throughout the

HEETF Exclusion List

<u>The Following Items:</u>	<u>The Following Programs:</u>
a. Library Books, Films, Videotapes, DVD's and Library Materials	All Programs
b. Microfilm Collection and Materials	All Programs
c. Library Shelving	All Programs
d. Office Appurtenances (Blinds, Carpets, File Cabinets and Similar Items)	All Programs
e. Office Furniture (Desks, Chairs, Tables and Similar Items)	All Programs
f. Transportation Equipment	All Programs
g. Equipment Normally Affixed to a Building or Functional as a Part of an Operating System of a Building	All Programs
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 7 Years and Computing Equipment with a Useful Life Less Than 3 years	All Programs
l. General Applications Software (Lotus, Excel, Word, etc.)	All Programs
m. Items Costing Less Than \$500	All Programs
n. Used Equipment	All Programs

Distribution List

OFFICE	Budget Unit Director	ETF Coordinator	ETF Contacts
Academic Affairs	Elaine Pearson	Elaine Pearson	Maria Bowman
College of Arts & Letters	Dr. Kent Sandstrom	Dr. Janet Katz	Dr. Janet Katz
College of Business	Dr. Jeff Tanner	Dr. Connie Merriman	John Barker
College of Education	Dr. Jane Bray	Khristy Horne	Khristy Horne
College of Engineering	Dr. Stephanie Adams	Nina Gonser / Dr. Ben Stuart	Keisha Riddick
College of Health Sciences	Bonnie Van Lunen	Deborah Bauman	Betsy Thomas
Distance Learning	Andy Casiello	Andy Casiello	Sabrina Bruno

