

Guidance for Completing the Used Equipment and Equipment Accessory Purchase Request Form

The form on the following page is to be used when purchasing equipment and/or equipment accessories/attachments valued at a purchase price of \$2,000 or over. This form shall be completed by the requesting department and submitted to Procurement Services for approval PRIOR to purchasing the item.

Instructions: Please fill out Pages 2-3 and return to Procurement Services for review. Attach any quotes, warranty documentation, and inspection reports, if available, to the form when submitting.

Definitions:

Equipment: Any non-consumable item that can be used on its own for a particular purpose. Examples include, but are not limited to: tractors, vehicles, grand pianos or other large musical instruments, medical equipment, scientific equipment.

Equipment Accessory: Any item that can be added or attached to a piece of equipment to enhance or modify its use or versatility. Examples include, but are not limited to: snow plow attachments, fork lift attachments, scientific lab equipment microscope attachments, mower attachments.

Subject Matter Expert (SME): A person who is an authority in a particular area or topic who is able to inspect the condition of the equipment/accessory requested. Inspection does not need to be performed in-person. Examples of University SMEs include, but are not limited to: Facilities for most used equipment/machinery/automobiles, Music Chair or qualified music instructor for used musical instruments, etc. Contact Procurement Services if assistance is needed to determine an appropriate SME to contact.

Funding Source/FOAP: Procurement will verify budget availability prior to approval of purchase.

Business Case: The business case provided in the form should give the following information, in detail:

- Why should the University purchase this particular piece of equipment or equipment accessory?
- Describe the value of purchasing used rather than new equipment. Provide your documented market comparisons, research, or any other information helpful in making the used vs. new purchase determination. For example: time saved, money saved, offsets current contracted services, etc.
- Describe the lifespan (expected usable life) of the used equipment compared to the purchase of new equipment.

Other Factors to Consider:

- How big is the equipment? Where will it be housed? If indoors, is there a designated space big enough and available?
- How will it be delivered? Will it need to be uncrated and/or assembled? Is the pathway for delivery clear (doorway sizes, elevator use, ramps/stairs, etc.)
- Does the equipment require any special utilities such as power, water, network access, or other accommodations that would necessitate construction or Facilities/IT involvement?
- Will staff/faculty need to be trained in its use? Is there extra costs for training?
- Do you need to ensure budget is available for supplies and/or ongoing maintenance and support?

Used Equipment and Equipment Accessory Purchase Request

This form is required when procurement of used equipment and/or equipment accessories or attachments are valued at \$2,000 or greater (total purchase price). This form must be completed by the Requester/Requesting Department and submitted to Procurement Services for approval *PRIOR to purchasing the equipment*. Refer to Page 1 of this form for completion guidance. Address questions to Procurement Services at procure@umw.edu or call 540/654-1127.

Requesting Department Information

Requester Name/Contact: _____ Requesting Department: _____

Title: _____ Date: _____

Used Equipment Information

(Include the following: Equipment name/description, make/model/serial #, if applicable, location where equipment will be stored, etc.)

Business Case for Purchase

(Provide, in detail, the business case for this purchase. See Page 1 for guidance on questions that should be answered in this section.)

Subject Matter Expert (SME) Inspection Information

Was an inspection performed? Yes No

- If Yes, fill out the following inspection information.
- If No, please provide a justification as to why one was not performed in the SME Inspection Affidavit section.

SME (Printed) Name: _____ SME Title: _____

SME Inspection Affidavit:

By signing below, I certify that the equipment described above is a good value for UMW's purchase and use.

SME Signature: _____ Date: _____

Form Continues on Page 3

Financial Information

Budget: Fund _____ Org _____ Account _____ Program _____ Activity Code _____

Is ongoing annual maintenance/support required? Yes No

If Yes, what is the estimated annual budgeted cost? _____

Attach any quotes, warranty information, ongoing maintenance agreements, inspection reports, etc.

Chief Procurement Officer Approval

Name (Printed): _____ Date: _____

Signature: _____