

FREY FOUNDATION

TECHNOLOGY REPLACEMENT AND PURCHASE GUIDE

Purpose:

The purpose of this document is to outline the process by which the Frey Foundation (foundation) acquires, replaces, and disposes of computer hardware equipment as well as the purchasing of desktop computers, laptops, and cell phones for staff. Maintaining a regular IT lifecycle promotes increased security, less downtime and increased productivity.

Scope:

This guidance applies to all full-time and part-time employees and to the purchase of all technology equipment issued by the foundation.

Computer Equipment Purchased by the Frey Foundation:

All computer equipment purchases must be requested through the Chief Financial and Operations Officer (CFOO) before any purchases are made to ensure that all procedures and standards are consistent with the policies of the foundation.

Standard Computer Configurations:

A standard configuration is established by the managed IT service provider (the IT provider) on an annual basis or more frequently if needed. Any upgrades to the hardware configuration beyond the scope of the standard configuration will be issued on an as-needed basis and must be approved by the CFOO and issued by the IT provider.

- Full-time staff will receive the standard device package listed below unless justification can be provided and approved by the CFOO. Any upgrades to the hardware configuration beyond the scope of the standard configuration must be approved in advance.
- Any personnel replacing an existing position will inherit the computer used by the previous incumbent unless the previous computer has exceeded its useful life. All inherited computers should be reimaged by the IT provider prior to passing to new personnel.

Standard Device Package:

- Standard laptop configurations will include a laptop, docking station, external monitor, wireless keyboard, and mouse.
 - ADA provisions will be accommodated.
- Standard cellphone options include one of the following:
 - Remain on current personal cell phone service-- a monthly stipend of \$70 will be provided.
 - Use foundation-provided service, including a cell phone of employer's choice.
- Carrying cases, additional docking stations and monitors, scanners, recording devices, external hard drives, specialized software, and other accessories may be purchased with CFOO's approval.

Submitting Request and Placing Order:

All computer equipment purchases outside the standard configuration must be requested through the CFOO in writing before any purchases are made. After the request is verified and authorized by the CFOO, and a quote is generated, the IT provider can then begin to create a requisition. The Program & Accounting Associate (PAA) will support the requestor through this process.

Note: When requesting for a computer that does not have the foundation's standard configuration, the requestor will have to provide additional justification/reasons for the requested configuration.

Receiving and Accepting the Order:

All computers and equipment ordered through the managed IT service provider is to be delivered to the IT provider.

All equipment and any additional peripheral devices not ordered through the IT provider needs to be delivered to the Frey Foundation at:

40 Pearl Street SW
Grand Rapids, MI 40503

During the receiving process, the receiving entity will make sure that:

- The products conform to the purchase order requirements and other relevant documents (quote)
- There is no damage or breakage.
- Delivery documentation (packing list, certifications, etc.) is acceptable
- Minimum standard configuration is applied to the device.

Tagging Fixed Assets:

The PAA will receive confirmation from the receiving entity that the order conforms to the purchase order requirements and other relevant documents. The PAA will assure asset tags are affixed to the equipment and the equipment information is added to the technology inventory file.

Equipment Replacement Cycle:

Staff will be assigned one primary computer. The computer assigned to a user, as their primary system will be the machine covered under the Computer Replacement Cycle. Those users with equipment issued prior to the issuance of these guidelines will be provided new equipment based on the original acquisition date.

The general guidelines for replacement of primary systems are:

- Desktop: Five years from the date of purchase unless the machine can no longer be supported by the managed IT provider due to security concerns, warranty expiration or platforms can no longer be supported. Please note, desktops are no longer included in the standard device package. Desktop computers will be retired and replaced with the standard laptop package.
- Laptop: Four years from the date of purchase unless the machine can no longer be supported by the managed IT provider due to security concerns, warranty expiration or platforms can no longer be supported.
- Cellphone: Three years from the date of purchase unless the machine can no longer be supported by the cell phone provider due to security concerns, warranty expiration or platforms can no longer be supported.
- Tablets (examples: Microsoft Surface Pro, Apple iPad): Five years from the date of purchase unless the machine can no longer be supported by the manufacturer due to security concerns, warranty expiration or platforms can no longer be supported.
- Computer peripherals: Five to ten years from the date of purchase unless the machine can no longer be supported by the manufacturer due to security concerns, warranty expiration or platforms can no longer be supported.
- TV screens and video conferencing equipment: Ten years from the date of purchase unless the machine can no longer be supported by the manufacturer due to security concerns, warranty expiration or platforms can no longer be supported.
- Servers & Network Equipment- Five to Ten years from the date of purchase based on the managed IT service recommendations unless the machine can no longer be supported by the manufacturer due to security concerns, warranty expiration or platforms can no longer be supported.

Note: Computers that are part of the replacement cycle will be replaced with a new standard computer, which will be paid for by the foundation. The foundation will also purchase a new standard machine for a newly created position.

Replacement Due to Misuse or Negligence:

It is the employee's responsibility to properly maintain all supplied equipment using protective equipment and appropriate storage. It is the employee's responsibility to report any damage, theft, or loss of foundation property (loss) to the CFOO within one business day of occurrence. The foundation reserves the right to review all reported losses to determine the nature of the incident. Misuse of property due to negligence beyond normal wear and tear, constitutes that the foundation will provide one replacement within the Equipment Replacement Cycle listed above. Additional losses within the original equipment replacement cycle will be compensated by the responsible employee based on 50 percent of the replacement cost.

Willfulness misuse of property constitutes that the full replacement cost will be compensated by the responsible employee and additional repercussions up to immediate termination and possible criminal action.

Personal Use of Business Property:

All foundation-provided equipment remains the sole property of the foundation. Personal use of technology may not interfere with ongoing business operations. The foundation maintains the right to search, monitor, and enter employee email and files found on the foundation computers at any time without prior notice.

Disposal of Computers and Peripherals:

Computers and computer parts that can no longer be supported by the managed IT service provider or are no longer supported by the manufacturer must be discarded. These machines are a security risk to the foundation. The IT provider will work with users to save the data, provide an upgraded machine, and wipe the data off the device. The machine will be disposed of in an environmentally friendly manner.

Definitions:

- **Compensate:** Employees will be required to reimburse the foundation for replacement costs by cash or check in an agreed-upon schedule with the CFOO
- **Negligence:** A failure to behave with the level of care that someone of ordinary prudence would have exercised under the same circumstances. The behavior usually consists of actions but can also consist of omissions when there is some duty to act (e.g., a duty to help victims of one's previous conduct).
- **Willfulness:** The intentional and malicious destruction of or damage to the property of another.