Trip Report
Federal Demonstration Partnership
Submitted by Faculty Representatives L. Sutter
January 12-13, 2015

Presentations available at: http://sites.nationalacademies.org/PGA/fdp/PGA_153323

Notes presented herein also include notes provided by Laura McCabe, Michigan State University, for general distribution to the FDP Faculty Representatives.

General Announcements

Payroll Certification Pilot Update – The goal is to simplify effort reporting through the process of payroll certification to reduce faculty administrative burden. Four schools are involved in pilot study, all have been audited, and audit reports are pending for 3. Due to reconciliation issues, the audit report for UC-Irvine yielded “no opinion.” Attendees were encouraged not to read too much into this and wait for results of the other audits.

Agency Updates

The following is a summary of key information provided in the federal agency updates.

ONR

- ONR has implemented a new grant system effective November 2014.
- New grants will be issued under the new system but incremental funding for grants issued before FY15 will remain under the old system.

AFOSR

- Timely billing is essential. Late billing jeopardizes funding on present efforts and awards of new grants. Obligation rate determines AFOSR future dollars.
- AFOSR is currently referencing the federal terms and conditions on the National Science Foundation (NSF) page. A DOD R&D Terms and Conditions Working Group is creating new terms and conditions which will be posted on the ONR page when completed.

Army

- USAMRMC BAA For Extramural Medical Research, Announcement No: W81XWH-BAA-15-1
- Pre-application needed for Broad Agency Announcements. eBRAP will be used for summary statements; submissions with errors will need to be resubmitted. Animal or human studies use must get a second approval after proposal is funded. This can take up to 1 year.

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1 Laura McCabe, Ph.D.
Director, Molecular Metabolism and Disease Program, Professor, Department of Physiology
Department of Radiology, Biomedical Imaging Research Center
Michigan State University
USDA

- Farm Bill Implementation - Centers of Excellence (Section 7128) FY15 RFAs will provide priority funding across competitive research and extension programs. Outreach webinars discussing the program will be scheduled in late Jan. Program has new matching requirement of 100%
- Other Farm Bill Funded RFAs for Release 1/30/15
  - Biomass Research Development Initiative $6m
  - Specialty Crops Research Initiative $51m
  - Community Food Projects $9m
- Other grant RFPs to be issued in near term. See: http://www.nifa.usda.gov

NIH

- National Research Service Awards (NRSA) stipends to increase, salary cap to increase to $183K effective 1/11/15. See NOT-OD-15-048 and NOT-OD-15-049 for details.
- Genomic data sharing plan promoted on many grant apps
- New 5-page bio-sketch not in effect until May 25, 2015
- SBIR/STTR due dates changing to April 5th (no Aug 5th submission), Sept 5th and Jan 5th.
- Policy for Institutional Oversight of Life Sciences Dual Use Research of Concern (the Policy) issued on September 24, 2014.
  - Applies to all New and Renewal awards issued on applications submitted on or after January 25, 2015, and to all non-competing continuation awards issued on or after January 25, 2015.
  - Institutions have one year (until September 24, 2015) to establish the necessary infrastructure to come into full compliance with the Policy. See NOT-OD-15-017 for more information.
- R03, R21s will go through ASSIST (application submission system).

NSF

- Proposal Award Policies and Procedures Guide (PAPPG) went into effect Dec 26th, 2014. New clarifications are on:
  - Deadline policy (if NSF is closed due to bad weather then grant deadlines are extended to the next day)
  - Budget justification (3 pages for proposal and for each subaward)
  - 2 month PI salary (across grants)
  - Automated compliance checking (system won't allow submission of a non-compliant proposal)
- Upcoming IT Activities
  - SciENcv internal NSF and FDP pilot (Jan & Feb)
  - Notifications and requests migrating to research.gov
  - ORCiD test in April (allow investigators to submit ORCiD ID as optional field in profile).
GUIRRL

- Last Conference: The Big Data Revolution: What Does It Mean for Research?
- Next Conference: Cross-Sector Impact of the Smart Grid

Plenary

Topic: New Research Terms & Conditions
Speakers: Michelle Bulls, National Institutes of Health; Jean Feldman, National Science Foundation

After Uniform Guidance implementation, NIFA, NIST, NASA, NIH, NSF, Commerce, DOE, FAA and EPA are developing new Research Terms and Conditions (T&C) and want FDP input as well as broad community input on future posted drafts. The new Uniform Guidance regulations made the exiting T&C obsolete. The new T&C will provide a framework for national policy requirements and will be maintained by NSF. The adopting agencies will add their own agency-specific requirements as needed. Participation agencies will each develop an implementation plan including a listing of their agency-specific requirements.

Faculty Lunch Meeting

Faculty brainstormed in groups of 5-9 on future demonstration projects for: eRA, research pipeline, lab safety, human and animal subjects, outreach/publicizing FDP, membership, emerging research institutions, and the Faculty Workload Survey. Faculty were energized and presented ideas at a later session including: single IRB for multiple sites, reducing annual IACUC review for non-USDA species if there are amendments, more faculty involvement in FDP (this will take faculty effort), more faculty sessions and more time for faculty to work on developing projects.

Research Compliance Committee

- A wildlife FAQ for IACUC is still under review. It is expected to be completed by the next meeting (May 2015)
- The IRB Wizard pilot is still moving but slowly. More institutional involvement is needed to get enough data for a statistical analysis. The IRB Wizard is intended to only identify those experiments that are exempt.
- The vertebrate animal section working group has a proposed implementation plan for addressing gender, reproducibility, etc., that will be open for comments.
- More than 50% of clinical trials aren’t published with 30 months. NIH is trying to address this issue and has a notice of proposed rule making regarding registration and submission of clinical trials. They are looking for ideas to increase compliance and completion of trials. The proposal is posted for comments and ideas: Docket No. NIH-2011-0003.
- There was discussion of a single IRB for multiple sites to reduce burden, costs, time and enhance consistency
Uniform Guidance Procurement Working Group
Speakers: Fran Visconti and Jerri Cole, Boston College

The session was a presentation of actions taken at Boston College to implement the new UG procurement rules and to discuss potential demonstrations that could be conducted in this area. Key Points:

- No early adopters – no school in the audience indicated they are adopting the new procurement rules as of 12/26/15. All will take advantage of the waiver extended by OMB for universities.
- Documentation is seen as one of the key problems. How does a university document they obtained the best price for items where competitive quotes are not required but you need to document you sought the best price (i.e., over $3000 and less than $150K).
- Record keeping – Purchasing will keep records for three years from purchase. University is required to keep records for 5 years after the project ends. Needs to be coordination of this process between departments.
- At Boston College (and those responding in the audience) allowable and reasonable are determined by the Purchasing Department but allocable is determined by the PI or PIs department.
- Purchase done on a personal credit card then reimbursed with a check request represent a problem, potential way for losing control over micro-purchases.
- Under the UG procurement rules, the university cannot purchase from a faculty-owned company.
- The net result of the UG procurement rules has been to slow down faculty activities (purchases) and has caused a need to increase staffing in purchasing to review purchases.
- At Boston College, all purchases over $1000 are now reviewed.

STAR METRICS

STAR METRICS began with a FDP collaboration but is now trans-federal – NIH, NSF, USDA, OSTP and EPA. The goal is to provide an automated basis for science policy evaluation (i.e., where our science dollars are spent, jobs created, etc...). [http://federalreporter.nih.gov](http://federalreporter.nih.gov) documents the inputs, outputs and outcomes of federal investments and describes broader results of investments from 2004. This is open to the public for searching on topics, getting experts in areas, mining areas of research and in the future topic modeling (to see what topics are funded, patents, RPPR products). Over 100 campuses submit quarterly reports including job calculations, vendor info, geographic and historical data. The team is currently developing a common infrastructure across institutions (standard modular report); automated generation of workforce measures using existing databases. It was also discussed that an academic field is developing around analysis of the STAR METRICS data (see: the Committee on Institutional Cooperation at [http://www.cic.net/projects/umetrics](http://www.cic.net/projects/umetrics) or see the UMETRICS Initiative at [http://tinyurl.com/qcu9c3](http://tinyurl.com/qcu9c3)). Much of this work has focused on studying
where researchers go, what businesses form from university research, and what industries or other businesses are impacted by university-generated businesses.

**Big Data**

Data management was discussed at several sessions. Before doing studies investigators need to think about: what types of data they will generate, where they will store the data, what programs are needed to access the data, if and how they will share the data, how the data will be archived (who will pay for it). The importance of utilizing library resources at one's institution was emphasized. It seems that NSF and NIH are thinking about what this will look like in the future.

**Other Items**

**Grants.gov** The site will be down Feb 14-17* to upgrade the system (to Release 14) that will accept UTF-8 characters such as α, β, γ.

**SciENcv** (Science Experts Network Curriculum Vitae) Version 2.5 produces NSF-formatted bio-sketches (though does not check if CV exceeds the 2-page NSF limit) and the current and the to-be-adopted 5-page NIH bio-sketch. SciENcv draws material only from MyNCBI, eRA Commons, PubMed, and ORCiD. It appears that most of the development focuses on increasing capability to export what is in the system, not on how to get material into the system with minimal effort by faculty members.

**FDP Executive Committee Meeting**

- 438 pre-registered for the meeting
- The May 2015 and Fall 2016 meetings have less meeting rooms allocated by the hotel than were available for this meeting and attendance is expected to increase leaving few options (TBD).
  - Limit registration to three (3) per university
  - Obtain additional meeting space at an adjacent hotel
  - Experiment with a hybrid on-site/virtual meeting
- Meeting costs are increasing above revenue, The FDP Foundation is currently able to subsidize the costs (i.e., 20-30K per meeting). In the future it may be necessary to raise dues or meeting registration but no action is needed at this point.
- 2017 will be the next Faculty Workload Survey. There were discussions regarding the survey content and working to drill down more on institutional-specific issues that may be impacting administrative workloads on faculty.
- A template for an institutional-specific report based on the last Faculty Workload Survey is still under development.
**Sponsored Awards**  
**Fiscal Year 2015**  
**2nd Quarter**  
**Ended December 31, 2014**  
**TOTAL: $36,215,563**

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**Pre-Proposals Submitted**  
*(excluded from Proposals Submitted figures below)*  
**FYTD 2014:** 21  
**FYTD 2015:** 13

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### Proposals Submitted

<table>
<thead>
<tr>
<th>Sponsor</th>
<th>FY '15 as of 12/31</th>
<th>FY '14 as of 12/31</th>
<th>FY '15 as of 12/31</th>
<th>FY '14 as of 12/31</th>
<th>FY '15 as of 12/31</th>
<th>FY '14 as of 12/31</th>
<th>Variance</th>
<th>Variance</th>
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<td>1,007,477</td>
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<td>29</td>
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<td>37</td>
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<tr>
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<td>-</td>
<td>-</td>
<td>-</td>
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<td>-</td>
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<tr>
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<td>16</td>
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<td>1,904,218</td>
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<td>22</td>
<td>11</td>
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<td>Industrial</td>
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<td>99</td>
<td>109</td>
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<td>5</td>
<td>3</td>
<td>227,719</td>
<td>171,400</td>
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<td><strong>Subtotal</strong></td>
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<td>460</td>
<td>315</td>
<td>317</td>
<td>30,922,742</td>
<td>23,086,340</td>
<td>7,836,402</td>
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<tr>
<td>Gifts**</td>
<td>-</td>
<td>-</td>
<td>180</td>
<td>192</td>
<td>5,281,271</td>
<td>1,707,597</td>
<td>3,573,674</td>
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<td>Crowd Funding</td>
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<td>14,346</td>
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<td><strong>Grand Total</strong></td>
<td>501</td>
<td>460</td>
<td>507</td>
<td>516</td>
<td><strong>$36,215,563</strong></td>
<td><strong>$24,808,283</strong></td>
<td><strong>$11,407,280</strong></td>
<td>46.0%</td>
</tr>
</tbody>
</table>


**Gifts** represent non-contractual funding from corporations, foundations, associations and societies in support of academic programs, scholarships/fellowships, student design & enterprise, research, youth programs and special programs.
**Michigan Technological University**

**Total Research Expenditures by College/School/Division**

**Fiscal Year 2015 & 2014**

**As of December 31, 2014 and December 31, 2013**

<table>
<thead>
<tr>
<th>College/School/Division</th>
<th>FY2015</th>
<th>FY2014</th>
<th>Variance</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration*</td>
<td>1,923,860</td>
<td>2,520,499</td>
<td>(596,639)</td>
<td>-23.7%</td>
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<td>College of Engineering</td>
<td>12,418,386</td>
<td>11,860,861</td>
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<td>6,987,218</td>
<td>6,137,197</td>
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<td>Pavlis Honors College</td>
<td>144,933</td>
<td>166,938</td>
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<td>Keweenaw Research Center (KRC)</td>
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<td>Michigan Tech Research Institute (MTRI)</td>
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<td>School of Business &amp; Economics</td>
<td>786,357</td>
<td>665,665</td>
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<td>School of Forest Resources &amp; Environmental Science</td>
<td>2,638,009</td>
<td>2,875,138</td>
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<td>School of Technology</td>
<td>224,155</td>
<td>236,859</td>
<td>(12,704)</td>
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<td><strong>Total</strong></td>
<td>32,655,602</td>
<td>33,582,699</td>
<td>(927,097)</td>
<td>-2.8%</td>
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*Includes the Vice Presidents, Provost, CIO, Exec Director Financial Services & Operations and others who report to a VP, Provost or the President. Except for the research institutes that report to the VPR.
### SPO & IIE Metrics

<table>
<thead>
<tr>
<th>Metric</th>
<th>Administration</th>
<th>College of Engineering</th>
<th>College of Sciences &amp; Arts</th>
<th>Keweenaw Research Center</th>
<th>Michigan Tech Research Institute</th>
<th>Pavlis Honors College</th>
<th>School of Business &amp; Economics</th>
<th>School of Forest Resources &amp; Env Science</th>
<th>School of Technology</th>
<th>Totals</th>
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<tr>
<td>Provisions Submitted</td>
<td>18</td>
<td>252</td>
<td>69</td>
<td>39</td>
<td>44</td>
<td>2</td>
<td>5</td>
<td>66</td>
<td>6</td>
<td>501</td>
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<tr>
<td>Awards Received</td>
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<td>201</td>
<td>39</td>
<td>33</td>
<td>29</td>
<td>23</td>
<td>4</td>
<td>64</td>
<td>4</td>
<td>507</td>
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<td>61,203</td>
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<td>129,000</td>
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<td>-</td>
<td>8,150</td>
<td>-</td>
<td>11,550</td>
<td>-</td>
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<td>-</td>
<td>-</td>
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<td>-</td>
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<td>Other</td>
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<td>28,365</td>
<td>-</td>
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<td>-</td>
<td>80,989</td>
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<td>-</td>
<td>468,109</td>
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<td>State of MI</td>
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<td>2,035,221</td>
<td>78,137</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>100,962</td>
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<td>-</td>
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<tr>
<td><strong>Total</strong> by Division</td>
<td>4,007,346</td>
<td>15,498,820</td>
<td>5,277,377</td>
<td>5,097,946</td>
<td>3,435,527</td>
<td>338,629</td>
<td>332,250</td>
<td>2,073,288</td>
<td>154,380</td>
<td>36,215,563</td>
</tr>
</tbody>
</table>

| Fiscal Comparison              | 1,234,369      | 11,169,280             | 2,940,833                 | 1,822,020                | 4,838,392                      | 476,328             | 91,000                        | 1,980,920                                 | 44,462              | 24,808,283 |
| Percent Change                 | 224.6%         | 38.8%                  | 79.5%                     | 179.8%                   | -25.0%                         | -28.9%              | 4.7%                          | 247.2%                                    | -                   | 46.0%    |

**Disclosures Received**
- 75.53% 11.13% 6.67% - 6.67% - 15 22 -31.8%

**Non-Disclosure Agreements**
- 4 32 3 11 2 2 - 1 - 55 48 14.6%

**Patents Filed or Issued**
- 67.50% 15.83% - - - - 16.67% - - 6 11 -45.5%

**License Agreements**
- 56.25% 12.50% 6.25% 18.75% - - - 6.25% - 116,354 119,514 -2.6%

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1. Combined Metrics from the Sponsored Programs Office (SPO) and Innovation & Industry Engagement (IIE)
2. Percentages reflect the proportional contribution from each division (calculated by dividing the sum of the fractional contributions of all inventors for each unit by the total number of inventors).
3. Institute for Leadership & Innovation is reported under Pavlis Honors College as of fiscal year 2015.
<table>
<thead>
<tr>
<th>Industry Segment</th>
<th>Proposals Submitted FY '15</th>
<th>Proposals Submitted FY '14</th>
<th>Awards Received FY '15</th>
<th>Awards Received FY '14</th>
<th>Awards Received ($) FY '15</th>
<th>Awards Received ($) FY '14</th>
<th>Variance $</th>
<th>Variance %</th>
</tr>
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<tbody>
<tr>
<td>Automotive</td>
<td>47</td>
<td>38</td>
<td>81</td>
<td>73</td>
<td>2,983,819</td>
<td>2,374,398</td>
<td>609,421</td>
<td>25.7%</td>
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<td>Business &amp; Economics</td>
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<td>6</td>
<td>14</td>
<td>136,027</td>
<td>166,068</td>
<td>(30,041)</td>
<td>-18.1%</td>
</tr>
<tr>
<td>Chemical</td>
<td>6</td>
<td>13</td>
<td>17</td>
<td>16</td>
<td>219,539</td>
<td>323,216</td>
<td>(103,677)</td>
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</tr>
<tr>
<td>Civil</td>
<td>2</td>
<td>7</td>
<td>20</td>
<td>20</td>
<td>301,540</td>
<td>456,023</td>
<td>(154,483)</td>
<td>-33.9%</td>
</tr>
<tr>
<td>Consumer Products</td>
<td>16</td>
<td>19</td>
<td>25</td>
<td>39</td>
<td>326,948</td>
<td>714,525</td>
<td>(387,577)</td>
<td>-54.2%</td>
</tr>
<tr>
<td>Defense &amp; Space</td>
<td>13</td>
<td>17</td>
<td>21</td>
<td>21</td>
<td>467,766</td>
<td>648,020</td>
<td>(160,254)</td>
<td>-24.7%</td>
</tr>
<tr>
<td>Energy</td>
<td>10</td>
<td>9</td>
<td>34</td>
<td>38</td>
<td>2,370,034</td>
<td>621,417</td>
<td>1,748,617</td>
<td>281.4%</td>
</tr>
<tr>
<td>Environmental</td>
<td>6</td>
<td>3</td>
<td>3</td>
<td>5</td>
<td>65,750</td>
<td>12,336</td>
<td>53,414</td>
<td>433.0%</td>
</tr>
<tr>
<td>Health</td>
<td>11</td>
<td>7</td>
<td>17</td>
<td>9</td>
<td>338,494</td>
<td>105,572</td>
<td>232,922</td>
<td>220.6%</td>
</tr>
<tr>
<td>Industrial Engineering</td>
<td>4</td>
<td>8</td>
<td>11</td>
<td>10</td>
<td>81,000</td>
<td>104,632</td>
<td>(23,632)</td>
<td>-22.6%</td>
</tr>
<tr>
<td>IT Services</td>
<td>3</td>
<td>4</td>
<td>6</td>
<td>11</td>
<td>33,388</td>
<td>146,674</td>
<td>(113,286)</td>
<td>-77.3%</td>
</tr>
<tr>
<td>Mining &amp; Metals</td>
<td>18</td>
<td>8</td>
<td>31</td>
<td>21</td>
<td>512,835</td>
<td>205,347</td>
<td>307,488</td>
<td>149.7%</td>
</tr>
<tr>
<td>Other</td>
<td>4</td>
<td>3</td>
<td>9</td>
<td>13</td>
<td>118,439</td>
<td>141,677</td>
<td>(23,238)</td>
<td>-16.4%</td>
</tr>
<tr>
<td>Technology</td>
<td>4</td>
<td>5</td>
<td>5</td>
<td>6</td>
<td>34,250</td>
<td>60,428</td>
<td>(26,178)</td>
<td>-43.3%</td>
</tr>
<tr>
<td>**Total</td>
<td>146</td>
<td>148</td>
<td>282</td>
<td>298</td>
<td>8,009,809</td>
<td>6,080,333</td>
<td>1,929,476</td>
<td>31.7%</td>
</tr>
</tbody>
</table>

*Gifts represent non-contractual funding from corporations, foundations, associations and societies in support of academic programs, scholarships/fellowships, student design & enterprise, research, youth programs and special programs.

**Gift numbers include Industry gifts ONLY, not others including Association or Society gifts.
Procurement “Claw” (Section 200.320)

1. **Micro Purchases**
   - Up to $150K
   - Rate quotations
   - No cost or price analysis
   - $3K
   - No quotations
     - Equitable distributions

2. **Small Purchases**

3. **Sealed Bids**
   - > $150K
   - Construction projects
   - Price is a major factor

4. **Competitive Proposals**
   - > $150K
   - Fixed price or cost reimbursement
   - RFP with evaluation methods

5. **Sole Source**
   - Unique
   - Public emergency
   - Authorized by agency (or PTE)
   - No competition