

BUDGET PROPOSAL FORMS

Technology, Equipment, and Facilities Construction/Renovation

PURPOSE & SCOPE

The purpose of this document is to provide guidance in the completion of the following types of budget proposals:

- Technology software and hardware purchases
- General equipment purchases
- Facilities construction, renovation or other improvement

The respective forms are also attached.

FORMS

Proposal Justification: All technology, general equipment, and facilities construction/ renovation proposals must be justified in writing, using the **“Proposal Justification”** form, by the department/division seeking its approval. The specific coverage and nature of the write-up will depend on the type of project and the cost involved. The following are key points that should be considered:

- The extent to which the proposal is consistent with the College’s strategic plan and furthers the College’s mission
- The cost of the proposal vs. its benefits, both qualitative and quantitative (i.e., additional revenues or future cost savings)
- The beneficiaries of the proposal (students; employees; community; etc.)
- Regulatory or safety concerns addressed by the proposal

Cost Estimate: In order to improve the accuracy of the College’s budget, each proposal must also be accompanied by a detailed cost estimate.

- If your proposal is for *the purchase of technology*, please use the **“Technology Cost Estimate”** form.
- If your proposal is for *the purchase of general equipment only*, please use the **“Capital Purchase Cost Estimate”** form.
- If your proposal is for *the construction, renovation, or other improvement of facilities*, please use the **“Capital Project Cost Estimate”** form. (Note: Facilities Management requires that you first complete a **“Space Improvement/Renovation Preliminary Approval Form”**. This form can be found at the Facilities Management website at <http://www.stonehill.edu/x10502.xml> or the Office of Budgeting & Financial Planning website at <http://campus.stonehill.edu/budget/>).

Note that all of the above cost estimate forms include a space for the signatures of individuals whom you should contact in preparing your cost estimate. These individuals must sign the form in order for your request to receive consideration.

Proposal Justification

To be used in conjunction with the following proposals: technology, general equipment, and facilities construction, renovation, or other improvements

Proposal Title:

Estimated Cost: \$

- (1) Check or **bold** all that apply:

This proposal furthers one of the College's institutional objectives or strategic focus areas outlined in the current strategic plan:

- Yes. If yes, please indicate the institutional objective or strategic focus area in the space below.
 No.

- This proposal addresses a regulatory, legal, or safety concern
 This proposal will generate revenue or will result in cost savings/efficiency improvements
 This proposal benefits ___ students ___employees ___the external community
 Other

- (2) In the space below, describe your proposal. In your justification, be sure to provide background information in order to place the proposal into context. Also, elaborate on the current situation, need or challenge that the proposal seeks to address. Then, describe how your proposal addresses this situation, elaborating on your responses to question 1 (above). Some justifications may require more space.

For all projects, indicate the proposed timeline for implementation.

Context: provide background information and the current situation, need or challenge

Proposal: indicate how the proposal addresses the current situation, need or challenge

Proposal (continued):

Timeline: Indicate the proposed project/implementation timeline

(3) How will this proposal be funded?

Grants/gifts

\$

Reallocation

\$

College funding

\$

(4) If funded by a gift/grant or reallocation initiative, please elaborate:

Technology Cost Estimate

To be used in conjunction with technology proposals

Indicate the technology proposal (attach written justification): _____

Technology proposal sponsor (*individual proposing the technology*): _____

Planned start date: _____ Planned finish date: _____

General ledger fund and org (*to be assigned by Controller*) Fund _____ Org _____

List the individuals to be given Banner access to this capital fund: _____

Estimate the cost of hardware and/or software. Also, indicate the dollar amount of costs that are recurring in nature.

Item Description	Quantity	Item Cost	Total Initial Cost	Recurring Cost
Total Project Costs				

For approved proposals only:

	Initial Cost	Recurring cost
Cost estimate reflected in Stonehill's capital budget:	\$ _____	\$ _____

Variance favorable/(unfavorable):	\$ _____	\$ _____
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If the proposal is instructional in nature, indicate the name and number of courses involved and the average number of students per year that will benefit from the project: _____

Will the equipment require an addition to or reconfiguration of space? ___Yes ___No

If yes, have you completed a Space Improvement form and Capital Project Cost Estimate form? ___Yes ___No

Proposal Sponsor

Chief Information Officer

VP of division proposing project

AVP for Planning

Capital Purchase Cost Estimate

To be used in conjunction with general equipment purchases

Indicate the capital purchase (attach written justification): _____

Capital purchase sponsor (individual proposing the purchase): _____

Planned purchase date: _____ Recommended vendor _____

General ledger fund and org (to be assigned by Controller) Fund _____ Org _____

List the individuals to be given Banner access to this capital fund: _____

Vehicle \$ _____

Equipment \$ _____

Other \$ _____

Total cost estimate: \$ _____

For approved proposals only:

Cost estimate reflected in Stonehill's capital budget: \$ _____

Variance favorable/(unfavorable): \$ _____

Will the equipment require an addition to or reconfiguration of space? Yes No

If yes, are these facility-related costs reflected above or elsewhere in the College's capital budget? Yes No

Proposal sponsor

Director of Purchasing

VP of division proposing project

AVP for Operations

AVP for Planning

VP for Finance & Treasurer

Capital Project Cost Estimate

To be used in conjunction with the construction, renovation, or other improvement of facilities

Indicate the capital project (attach written justification): _____

Capital project type: ___new construction ___building addition /renovation ___other

Capital project sponsor (individual proposing the project): _____

Space Improvement Form completed? _____ Planned start date: _____ Planned finish date: _____

General ledger fund and org (to be assigned by Controller) Fund _____ Org _____

List the individuals to be given Banner access to this capital fund: _____

Architect/design fees	\$ _____
General construction	\$ _____
HVAC	\$ _____
Furnishings	\$ _____
Other	\$ _____
Contingency	\$ _____
Total cost estimate:	\$ _____
<i>For approved proposals only:</i>	
Cost estimate reflected in Stonehill's capital budget:	\$ _____
Variance favorable/(unfavorable):	\$ _____

Proposal sponsor

VP of division proposing project

AVP for Operations

AVP for Planning

Director of Purchasing

Chief Information Officer (if applicable)

VP for Finance & Treasurer