

F3.36 Space Improvement / Renovation Program Policies and Procedures

Effective Date: 5/8/07

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I. PURPOSE

The Space Improvement / Renovation Program is established to support the College in its efforts to efficiently and effectively plan for alterations or redesigns to academic, residential, athletic, recreational and administrative space.

II. DEFINITION

Space improvements/renovations projects are defined as alterations to the design or configuration of an existing facility and/or new construction which results in a permanent change to the facility. These projects will generally fall into two categories: 1) small scale, relatively low in cost, which do not involve reallocation of space; examples would be when an office requests to lay out its space more efficiently using partitions and space-saving office furnishings or refurbishing program involving expenditures for painting and flooring, and 2) renovations that are more extensive, involve greater costs, include major structural changes to the functional use, and/or ownership of an existing space; the most common example would involve dividing or expanding a space which may require some or all of the following: electrical, HVAC, telecommunications, network services and structural changes, etc.

III. PROCEDURES

A. Project Planning

When a space improvement/renovation project has been identified, the requesting department is required to complete a Preliminary Approval Form for Space Improvement/Renovations Projects. This form must be completed for all proposed projects, including grant funded projects. The completed form should include as much detail on the project scope plan, including an outline of the project objectives, timeframe/schedule, equipment and furniture needs and programmatic impact and relationship to the Campus Master Plan. The requesting department must have Division Head Approval to move forward to the Cost Estimate Phase.

B. Obtaining Cost Estimates

Once a project scope plan has been developed, the requesting department will be required to obtain cost estimates (i.e. formal bids, or letters of agreements) of the project by contacting the Assistant Vice President of Facilities (AVP) (or designee). Cost estimates would also include manpower (i.e. internal staff or external contractor), utility improvements (electrical, HVAC) and, if required by the project scope, a College approved architectural firm. (Please note: The requesting department must have approval from their Division Head to incur any pre-construction costs such as hiring of an architectural firm. The respective Division Head is responsible for funding these preliminary costs.)

C. Preliminary Project Approval

The requesting department is required to submit the Space Improvement/Renovation Project Preliminary Approval Form with any attachment (i.e. formal bids, architectural plans, etc.) to the Assistant Vice President of Facilities for final review and assessment. The form is then required to be reviewed by the Facilities Scheduling Committee (for project scheduling considerations), and approved by the appropriate Division Head before a project can be submitted to the formal budget process. A completed Capital Expenditure Justification Form must be completed to move the project to the formal budget process. Any project that costs more than \$250,000 must also comply with the Capital Planning and Spending Policy (separate document).

D. Formal Budget Submittal

The requesting department is required to complete a Capital Expenditure Justification Form for submittal to the Budget Office for the upcoming college-wide budget process. All departmentally submitted projects will be evaluated as part of the overall capital project plan for the upcoming fiscal year. Final approvals for funding (within available resources) will be based on project requests that; 1) address safety related problems and/or regulatory issues, 2) promote the long-range strategic plan, or 3) reduce costs of operations.

Although projects are required to be submitted in advance so they may be part of the formal budget process, occasionally a request will be proposed within the existing fiscal year. If this instance arises, the requesting department's Division Head will be required to seek approval from the Vice President for Finance and/or President to move forward on a project. The Vice President for Finance, in consultation with the Assistant Vice President for Facilities, will review the project request based on estimated costs, available funding options, and programmatic impact and any campus wide scheduling conflicts. The Vice President for Finance will notify the appropriate Division Head regarding project approval status.

E. Project Management Assignment

A Project Manager (PM) will be the person who oversees the project from the start of construction (including preconstruction) to completion. This person will be assigned by the Assistant Vice President of Facilities based on the length, cost and complexity of the project. This person may be the project requestor and/or a representative from Facilities. A Stonehill employee is required to oversee the project even if the project management is outsourced to a vendor or contractor.

F. Project Budget Management

Once a project has final budget approval and has been assigned a Project Manager, the Budget Office will assign a project account number for all accounting and payment of invoices. The Budget Office will work with the Project Manager in establishing line item budgets and will assist the Project Manager in reporting budget versus actual cost of the project. Any change in

budget scope for the project must be approved by the Budget Office and the Vice President for Finance.

