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*
(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.

<table>
<thead>
<tr>
<th>Item Description</th>
<th>Quantity</th>
<th>Item Cost</th>
<th>Total Initial Cost</th>
<th>Recurring Cost</th>
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Total Project Costs

For approved proposals only:

Cost estimate reflected in Stonehill’s capital budget: $_________  $_________

Variance favorable/(unfavorable): $_________  $_________

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 ___________________________

Rev 7/09
# Capital Purchase Cost Estimate

To be used in conjunction with general equipment purchases

Indicate the capital purchase (attach written justification):

<table>
<thead>
<tr>
<th>Category</th>
<th>Cost</th>
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<tbody>
<tr>
<td>Vehicle</td>
<td>$____</td>
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<tr>
<td>Equipment</td>
<td>$____</td>
</tr>
<tr>
<td>Other</td>
<td>$____</td>
</tr>
<tr>
<td><strong>Total cost estimate:</strong></td>
<td>$_____</td>
</tr>
</tbody>
</table>

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

Rev 7/09
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:  $___________

For approved proposals only:

Cost estimate reflected in Stonehill’s capital budget:  $___________

Variance favorable/(unfavorable):  $___________

Proposal sponsor

VP of division proposing project  Director of Purchasing
AVP for Operations  Chief Information Officer (if applicable)
AVP for Planning  VP for Finance & Treasurer