


**University of Alabama System
Board Rule 415 (2/2005)
Board Submittal Checklist Criteria**

*** Board Submittal Checklist No. 1
Capital Project – Stage I Submittal /1
(General Information Package)**

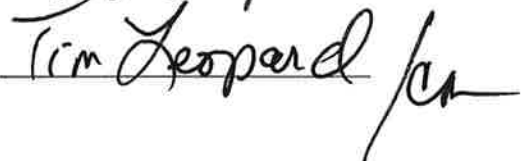
Campus: The University of Alabama
Project Name: Paty Residence Hall Renovation
Meeting Date: September 20 – 21, 2018

- * 1. Completed Board Submittal Checklist No.1
- 2. Transmittal Letter to Chancellor from Campus President requesting the project be placed on the agendas for the forthcoming Physical Properties Committee and Board of Trustees (or Executive Committee) meetings
- 3. Proposed Board Resolution requesting approval of Stage I Submittal by UA Board of Trustees
- 4. Campus correspondence/photos providing supporting project information
- 5. Completed Executive Summary – Proposed Capital Project /2
- 6. Completed Supplemental Project Information Worksheet – Attachment “K”, Board Rule 415
- 7. Campus map(s) showing Project site
- 8. Business Plan

Prepared by:



Approved by:



/1 Reference Tab 3F – Board Rule 415 Instructional Guide

/2 Reference Tab 3E – Board Rule 415 Instructional Guide

- * Basic documents required for this Board Submittal Package. Include other supporting materials, correspondence, etc., as may be required to fully describe or illustrate project being submitted for approval to Physical Properties Committee and Board of Trustees.

RESOLUTION

PATY RESIDENCE HALL RENOVATION

WHEREAS, in accordance with Board Rule 415, The University of Alabama (“University”) is requesting approval of a Stage I submittal for the Paty Residence Hall Renovation (“Project”) consisting of 90,384 gross square feet located at 210 McCorvey Drive; and

WHEREAS, the proposed Project will assist the University in providing capacity for high demand on-campus housing while meeting the needs and expectations of students and providing a safe environment; and

WHEREAS, the Project location and program have been reviewed and are consistent with the University Campus Master Plan, University Design Standards and the principles contained therein; and

WHEREAS, the Project will be funded from Housing and Residential Communities Reserves in the amount of \$15,600,000 and will address \$14,820,000 in campus deferred maintenance liability; and

WHEREAS, the preliminary budget for the Project is as stipulated below:

BUDGET:	PRELIMINARY
Construction – Renovation	\$ 11,450,000
Window Procurement Package	\$ 350,000
Landscaping	\$ 100,000
Security/Access Control	\$ 700,000
Telecommunication/Data	\$ 515,000
Contingency* (10%)	\$ 1,190,000
UA Project Management Fee** (3%)	\$ 392,700
Architect/Engineer Fee*** (~6.37%)	\$ 728,875
Expenses (Construction Materials Testing and Special Inspections)	\$ 90,000
Other Fees and Services (Testing, Advertising, Printing)	\$ 83,425
TOTAL PROJECT COST	\$ 15,600,000

*Contingency is based on 10% of the costs of construction, window procurement and landscaping.

**UA Project Management Fee is based on 3% of the costs of construction, window procurement, landscaping and contingency.

***Architect/Engineer Fee is based on 4.9% of the cost of construction, window procurement and landscaping plus a 25% major renovation factor.

NOW, THEREFORE, BE IT RESOLVED by The Board of Trustees of The University of Alabama that:

1. The Stage I submittal package for the Project is hereby approved.
2. The preliminary budget for the Project as stipulated above is hereby approved.




Division of
Financial Affairs

MEMO

August 22, 2018

To: Stuart R. Bell

From: Matthew M. Fajack 

Subject: Board Item – Action/ Stage I Submittal:
Paty Residence Hall Renovation

Pursuant to Board Rule 415, The University of Alabama (“University”) is requesting approval from The Board of Trustees of The University of Alabama (“Board”) of a Stage I submittal for the Paty Residence Hall Renovation project (“Project”) located at 210 McCorvey Drive, with a projected total budget amount of \$15,600,000.

The proposed Project will assist the University with addressing the high demand for on-campus housing. The renovated facility will also provide for capacity in the housing system so that strategic renovations can be made to existing facilities as part of the Housing and Residential Communities’ R&R Plan. Housing effects all areas of campus and providing an updated, enhanced and connected facility is the goal of this Project.

The proposed Project will entail the renovation of 90,384 gross square feet consisting of select demolition, interior fit up, lighting upgrades, restroom and plumbing renovations, security and access control upgrades, and exterior improvements. The interior fit up will include renovated casework in the bedrooms, wall furring to conceal exposed wire mold, and finish upgrades. The lighting upgrades will take place throughout the building and will replace existing fixtures with efficient LED. The plumbing upgrades will replace all existing fixtures in both the showers and restrooms. The select exterior improvements will include window replacement, re-working the south loading dock area, landscaping and irrigation.

The Project will be funded from Housing and Residential Communities Reserves in the amount of \$15,600,000 and will address approximately \$14,820,000 in campus deferred maintenance liability.

Paty Hall Renovation
August 22, 2018
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This Project location and program have been reviewed and are consistent with the Campus Master Plan, University Design Standards, and the principles contained therein. I have attached a Resolution, Executive Summary, Attachment K, Project Summary, and Location map for your review. Subject to your approval, I recommend this item be forwarded to the Chancellor for inclusion as an Action Item

on the agenda of the Physical Properties Committee at the Board of Trustees meeting scheduled for September 20 – 21, 2018.

MMF/ccj

pc w/atchmts: Michael Rodgers
Michael Lanier
Tim Leopard
Tom Love
Steven Mercado

**EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT**

BOARD OF TRUSTEES SUBMITTAL

Meeting Date: September 20 – 21, 2018

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Paty Residence Hall Renovation

PROJECT LOCATION: 210 McCorvey Drive

ARCHITECT: To be determined

THIS SUBMITTAL:	PREVIOUS APPROVALS:
<input checked="" type="checkbox"/> Stage I	_____
<input type="checkbox"/> Stage II	_____
<input type="checkbox"/> Stage III	_____
<input type="checkbox"/> Stage IV	_____

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input type="checkbox"/> Building Construction			
<input checked="" type="checkbox"/> Building Renovation	Residential Facility	100%	90,384
<input type="checkbox"/> Building Addition			
<input type="checkbox"/> Equipment			
TOTAL		100%	90,384

BUDGET	Preliminary
Construction – Renovation	\$ 11,450,000
Window Procurement Package	\$ 350,000
Landscaping	\$ 100,000
Security/Access Control	\$ 700,000
Telecommunication/Data	\$ 515,000
Contingency* (10%)	\$ 1,190,000
UA Project Management Fee** (3%)	\$ 392,700
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Expenses (Construction Materials Testing, Special Inspections)	\$ 90,000
Other Fees and Services (Testing, Advertising, Printing)	\$ 83,425
TOTAL PROJECT COST	\$ 15,600,000

*Contingency is based on 10% of the cost of construction, window procurement, and landscaping.

**UA Project Management Fee is based on 3% of the costs of construction, window procurement, landscaping and contingency.

***Architect/Engineer Fee is based on 4.9% of the costs of construction, window procurement and landscaping plus a 25% major renovation factor.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:

(Utilities, Housekeeping, Maintenance, Insurance, Other)

\$ 0*

TOTAL ESTIMATED ANNUAL O&M COSTS:

\$ 0*

*There is not an anticipated increase in O&M cost relative to this project. Increases in HVAC operating cost due to compliance with current code will be offset by the use of energy efficient LED lighting and improved windows.

FUNDING SOURCE:

Capital Outlay:

Housing Reserves \$ 15,600,000

Deferred Maintenance:

This project will address a current deferred maintenance liability in the amount of \$14,820,000.

O&M Costs: \$ N/A*

*Paty Residence Hall is an existing Auxiliary facility and accordingly is already funded. Ongoing O&M costs are funded from the annual operating budget for Housing and Residential Communities.

NEW EQUIPMENT REQUIRED:

RELATIONSHIP & ENHANCEMENT OF CAMPUS PROGRAMS:

The Paty Residence Hall (“Paty”) Renovation project (“Project”) will assist The University of Alabama (“University”) with addressing the high demand for on-campus housing. The renovated facility will also provide for capacity in the housing system so that strategic renovations can be made to existing facilities as part of the Housing and Residential Communities’ R&R Plan.

The proposed Project will address several areas that impact enrollment. Offering students a cost-effective on-campus housing option (traditional, mixture of double and single occupancy with community bath) is optimal to the ability to provide various price points for housing as the suite-style accommodations are more costly. Updates in Paty will address that demand for affordable on-campus housing that is appealing to students.

The proposed Project will also allow Housing and Residential Communities (HRC) the opportunity to offer the students development opportunities through the Living-Learning Communities program that will attract a broad range of users.

Lastly, this Project will permit HRC to retain Paty in its inventory and remain a viable revenue generator. If investments are not made, the building will become detracting resulting in students not opting to select Paty for housing.

Furthermore, safety and security of the residents will be improved through the incorporation of security and access control upgrades and the incorporation of current life safety technology.

ATTACHMENT NO. 1

Project: Paty Residence Hall Renovation

BOT Submittal: Stage I

Meeting Date: September 20 – 21, 2018

Project Summary

PATY RESIDENCE HALL RENOVATION

The Paty Residence Hall (Paty) Renovation project (“Project”), located at 210 McCorvey Drive, will entail the renovation of 90,384 gross square feet including select interior demolition, interior fit-up, lighting upgrades, restroom and plumbing renovations, security and access control upgrades, and selected exterior improvements. Paty Hall currently houses 488 residents but will be programmed for approximately 400 following the renovation.

With the proposed renovation, Housing and Residential Communities (HRC) will be able to make targeted improvements to the restroom facilities, shower areas, residential living spaces, and common study spaces that will offer students more amenities in the building. HRC will also be able to offer an increased number of desirable single spaces in the building through this Project, which will attract students to reside in Paty Hall. This renovation will allow HRC to open the building to other opportunities such as the relocation of the Culverhouse Business Living Learning Community (LLC) to Paty. The relocation of the Culverhouse LLC will facilitate the razing of Friedman in Summer 2019.

Through the creation of a faculty-in-residence apartment and the ability to make the building co-ed by wing, due to added access points and security measures, Paty will become The University of Alabama’s (“University”) first fully updated traditional residence hall on campus. This renovation will be the first in a series of renovations to address needs in other existing HRC facilities. Lastly, the reinvestment of Paty is needed to continue to offer students a lower price point for living on campus. This renovation will allow the University to maintain traditional rates at a level that provides students with a variety of price points when making their housing selection.

Security and access control enhancements will be a critical component of the Project with new closed-circuit television cameras, building entrance card swipe, and keyless unit entry door locks included in the scope of the project.

The interior fit-up will include renovated casework in the bedrooms, wall furring to conceal exposed wire mold, and finish upgrades. Existing lighting will be replaced with LED fixtures throughout the building. Plumbing upgrades will replace existing fixtures in all showers and restroom areas.

Finish upgrades will occur throughout the building. Common areas will be upgraded to current University design standards for materials and colors in line with other residential

facilities. Some enhanced layout in the common spaces will be considered to provide improved student gathering spaces.

The select exterior improvements include window replacement, re-working the south loading dock area, and landscaping and irrigation.

The facility will be upgraded to meet all current codes and standards. ADA access will also be addressed. The Paty Hall structural system is robust and the floor to floor elevations allow for adequate ceiling heights. The Project will primarily address deferred maintenance issues and essentially “reset” the life of the building. Given the central location, Paty Hall will efficiently serve the University community in a manner that meets students’ expectations for years to come.

The former dining hall space, most recently a computer lab, is not currently included in the renovation. That area is being programmed for potential academic use and will be considered at a later date.

Raising Cane’s will remain open during the renovation and is not included in the scope of the Project.

Attachment K to Board Rule 415

**Supplemental Project Information Worksheet
Annual Capital Development Plan**

FY: 2017 – 2018

Project Name/Category: Paty Residence Hall Renovation
210 McCorvey Drive
Campus: The University of Alabama

1. Will this Project increase the current space inventory on campus or replace existing space?

- | | | |
|---|---------------------|-------------------|
| <input type="checkbox"/> increase space inventory | _____ % increase | _____ GSF |
| <input type="checkbox"/> replace space inventory | _____ % replacement | _____ GSF |
| <input checked="" type="checkbox"/> renovation of existing space only | | <u>90,384</u> GSF |

2. If this Project will replace existing space inventory, how will vacated space be utilized or assigned after this Project is completed?

Comments:

The Paty Residence Hall Renovation project (“Project”) consists of renovation of the existing 90,384 space. The facility will be taken off-line, and students will be assigned to other facilities for the upgrades to be completed in a cost-effective manner.

3. Is the proposed Project location consistent with the Campus Master Plan and University Design Standards and the principles contained therein?

- Yes No, A Campus Master Plan Amendment Is Required

4. Provide information on classification of new space provided by this Project and latest utilization data on similar type space on campus.

Proposed New Space/Facilities				
Classification	Number (Spaces/Rooms)	Capacity (Persons)	Area (GSF)	Existing Space Utilization Data (See Notations)
100 Classroom Facilities				
200 Laboratory Facilities				
300 Office Facilities				
400 Study Facilities				
500 Special Use Facilities				
600 General Use Facilities				
700 Support Facilities				
800 Health Care Facilities				
900 Residential Facilities				
920 Sleep/Study with Toilet or Bath	479	400	90,384	*

Comments/Notations:

Data reported on latest fiscal year data available.

Utilization factor based on Scheduled Operating Hours at each Campus – outlined below in notations.

Rooms are total rooms in the building that include sleep/study, bathrooms, halls, closets, storage, mechanical, etc.

Capacity is the number of beds available for rent.

*Housing occupancy rate was over 94% for fiscal year 2017 to 2018. Paty Hall occupancy for 2017 to 2018 was 98%.

Paty Residence Hall (“Paty”) currently houses 488 residents but will be programmed for approximately 400 following the renovation. This renovation will facilitate the razing of Friedman Hall in the summer of 2019. This is in accordance with Housing and Residential Communities’ (HRC) Housing Phasing Strategy and is the first major renovation of existing HRC facilities per the plan.

5. How will this Project enhance existing/new programs and undergraduate/graduate enrollments?

Estimated new Funds from Tuition/Programs \$ N/A Yr.

Comments:

The Project will include numerous elements that positively impact enrollment. Offering students a cost-effective on-campus housing option is optimal to the ability to provide various price points for housing as the suite-style accommodations are more costly. Updates in Paty will address that demand for affordable on-campus housing that is appealing to students.

The Project will also allow HRC the opportunity to offer Living Learning Communities that will attract a broad range of users.

The Project will also enhance safety and security, which is a key factor in the selection of a college.

Lastly, this Project will permit HRC to retain Paty in its inventory and remain a viable revenue generator. If investments are not made, the building will become detracting resulting in students not opting to select Paty for housing.

6. Has a facility user group been established to provide input for planning, programming, and design purposes? Yes In-Progress

If yes, list key members of user group:

Dr. Steven Hood, Associate Vice President of Student Life
Dr. Matthew Kerch, Executive Director for Housing and Residential Communities
Dr. Laura Sanders, Director of Residential Communities
Amanda Ingram, Director of Housing Operations
Steven Mercado, University Project Manager
Garrett Goodman, University Architect
Sam Chen, Staff Mechanical Engineer

7. **Source(s) of funding for Total Project Development Costs.**

Source(s)	New Funds (FY 2018)	Reserves	Status ^{/7}
Tuition			
Student Fees			
Investment Income			
Auxiliary Income <ul style="list-style-type: none"> • External • Internal 			
Education Sales/Services <ul style="list-style-type: none"> • External • Internal 			
Direct Grants			
Gifts			
Bonds			
Existing Net Assets			
Other – Housing		\$15,600,000	Pending
Totals		\$15,600,000	Pending

^{/7} Approved, allocated, pending

Comments:

This Project will be funded by Housing and Residential Communities Reserve funds in the amount of \$15,600,000.

8. Estimate of operations and maintenance (O&M) costs for the initial occupancy year and projections for succeeding five (5) year period.

Operations and Maintenance (O&M) Annual Costs Projections			
Expense	FY 2017-2018 Base Data /8	First Full /YR Occupancy FY2020	Successive Five (5) Year Projections /9
Maintenance			
Elevator Service			
Building Repairs			
Building Services			
Electric, Natural Gas, Steam			
Chilled Water			
Water and Sewer			
Insurance			
Safety Support			
Operations Staff Support Funding			
Other – University Funds			
Totals	N/A	N/A	N/A

/8 Latest Fiscal Year Data used as Base Year for Projections

/9 Combined Costs for next Five (5) Years of Occupancy

Comments:

There is not an anticipated increase in O&M cost relative to this Project. Increases in HVAC operating cost due to compliance with current code will be offset by the use of energy efficient LED lighting and improved windows.

9. Source of funds for projected ongoing operations and maintenance (O&M) costs for this project.

Source(s)	First Full /YR Occupancy FY2020 /9	Future Years /10	Status /7
Tuition			
Student Fees			
Investment Income			
Auxiliary Income <ul style="list-style-type: none"> • External • Internal 			
Educational Sales & Services <ul style="list-style-type: none"> • External • Internal 			
Direct Grant(s)			
Reallocated Funds /11			
Gifts			
Other – University Funds			
Total/YR	N/A	N/A	N/A

- /9 Initial Full Yr. of Occupancy
- /10 Next Five (5) Years Occupancy
- /11 Funds Reallocated from other sources
- /7 Approved, allocated, pending

Comments:

Paty Residence Hall is an existing Auxiliary facility and accordingly is already funded. Ongoing O&M costs are funded from the annual operating budget for Housing and Residential Communities.

10. Are development expenditures for this Project being used to reduce the current deferred maintenance/facilities renewal liabilities for the Campus?

\$ 14,820,000 95%

Comments:

The Project will significantly address campus deferred maintenance liabilities as the facility and the support infrastructure are at the end of their expected service life. The building structure and exterior are appropriate for reuse.

11. What other development alternatives were considered in the planning process for this Project? /13

Comments:

New construction of a 500-bed facility was considered and determined not to be cost-effective given the value of the existing structure and facade. Renovation is also optimal as the renovation can be completed much quicker than new construction, thereby minimizing the loss of the inventory. HRC funds will fund the Project in an effort to keep rental prices lower, providing a variety of pricing options for students. Levels of finishes will also be considered, and decisions will be made based on longevity of lifecycle for building components and total value for the institution, while producing high quality residential facilities that represent the University in a positive manner.

/13 Renovation vs. new construction, adaptive reuse of underutilized buildings, etc.

12. Explain how the project will promote adequacy of campus facilities in relation to the University's Mission and scope of programs and/or services:

Comments:

This Project will provide needed updates to an aging facility and will modernize building components to meet student needs and expectations.

13. How does the project correlate to the University's strategic goals?

Comments:

As the institution continues to expand there is a continued need to broaden the services provided to on-campus students. Renovation of existing facilities will allow HRC to offer lower price points below the suite style rate for students. The upgrades bring older facilities new bathrooms, updated common space, and updates to living areas that are essential to students' out of classroom experiences. These updates and renovations will ensure that students have a safe and secure place to live and learn in out of class environments.

14. What would be the immediate impact on campus programs and enrollment if this project is not approved?

Comments:

Due to its age and lack of modern amenities, Paty is gaining the reputation of being sub-par in terms of on-campus living. If renovations and improvements are not completed in the near future, there will more than likely be an increase in the number of vacancies in the building as well as additional complaints from students and parents. These upgrades and updates will bring new life to the building, while providing a quality experience at less costly rates for students.

LOCATION MAP

