


**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: Performing Arts Center  
Meeting Date: April 3 – 4, 2014

- \*  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 – Exhibit “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.

March 6, 2014



Chancellor Robert Witt  
The University of Alabama System  
401 Queen City Avenue  
Tuscaloosa, Alabama 35401


Dear Chancellor Witt:

I am pleased to send to you for consideration by the Board of Trustees at its April 4, 2014, meeting the following resolution:

- Board Item – Action: Stage I Submittal: Performing Arts Center

Please contact us if you have questions or need additional information.

Sincerely,



Judy Bonner  
President

JB/dj

Enclosure



RESOLUTION

PERFORMING ARTS CENTER

WHEREAS, in accordance with Board Rule 415, The University of Alabama (“University”) is requesting a Stage I submittal for the Performing Arts Center project (“Project”) located on the Peter Bryce campus at a projected cost of \$60,000,000; 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 Future Revenue Bonds in the amount of \$30,000,000 and University Funds, including gifts, in the amount of \$30,000,000; and

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

BUDGET:	PRELIMINARY
Construction	\$ 48,550,000
Utilities and Infrastructure	\$ 980,000
Landscaping	\$ 450,000
Furniture, Fixtures, and Equipment	\$ 1,750,000
Security/Access Control	\$ 185,000
Telecommunication/Data	\$ 750,000
Contingency* (5%)	\$ 2,499,000
UA Project Management Fee** (2%)	\$ 1,049,580
Architect/Engineer Fee*** (5.6%)	\$ 3,023,680
Expenses (Geotech, Construction Materials Testing)	\$ 350,000
Other Fees and Services (surveys, testing)	\$ 412,740
<b>TOTAL PROJECT COST</b>	<b>\$ 60,000,000</b>

\*Contingency is based on 5% of the total of all construction costs, utilities and infrastructure, and landscaping.

\*\*UA Project Management fee is based on 2% of the total of all construction costs, utilities and infrastructure, landscaping, and contingency.

\*\*Architect/Engineer fee is based on 5.6% of the total of all construction costs, and utilities and infrastructure plus \$250,000 for theatre consultation if needed.

WHEREAS, officials at The University of Alabama have determined that the Board will incur certain costs in connection with the acquisition, construction, and installation of the Project prior to the issuance of the Bonds, and the Board intends to allocate a portion of the proceeds of the Bonds to reimburse the Board for certain of the costs incurred in connection with the acquisition, construction, and installation of the Project paid prior to the issuance of the Bonds;


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

1. The Stage I submittal for the Project is hereby approved.
2. The University of Alabama does hereby declare that it intends to allocate a portion of the proceeds of the Bonds to reimburse the Board for expenses incurred after the date that is no more than sixty days prior to the date of the adoption of this resolution, but prior to the issuance of the Bonds in connection with the acquisition, construction, and installment of the Project. This portion of this resolution is being adopted pursuant to the requirements of Treasury Regulations Section 1.150-2(e).
3. The preliminary budget is established as stipulated above.

March 6, 2014

THE UNIVERSITY OF  
**ALABAMA**  
FINANCIAL AFFAIRS

**MEMORANDUM**

**TO:** Judy Bonner  
**FROM:** Lynda Gilbert   
**RE:** Board Item – Action: Stage I Submittal: Performing Arts Center

Pursuant to Board Rule 415, The University of Alabama (“University”) is requesting approval for a Stage I submittal for the Performing Arts Center project (“Project”) located on the Peter Bryce campus at a projected cost of \$60,000,000. Of this cost, \$30,000,000 will be funded from Future Revenue Bonds and the remaining \$30,000,000 will be funded from University funds including gifts.

The proposed Project will consist of the demolition of the North Wing of the Bryce Main building and the construction of an approximately 109,017-square-foot performing arts center for the Department of Theatre and Dance (“Theatre and Dance”). The proposed Project will provide a multi-functioning, state-of-the-art venue for Theater and Dance performances. The Project will include a 350 seat drama theater, 450 seat dance theater, and a 250 seat studio theatre that will address the Department’s growing needs and demands for performance space, seating capacity, and functionality. The building will also contain support spaces such as a scenery shop, costume studios, and rehearsal hall. In addition, faculty office and classrooms will be relocated to the adjacent Bryce Admissions building.

Prominently located on the new loop road planned for the Peter Bryce campus, the Project will provide a grand entry for performance events. The facility will also connect to the Bryce Main building via a new lobby providing a connection with the Bryce Admissions building for enhanced access for students, faculty, and staff.

The relocation of the Department of Theatre and Dance will make the vacated space available for pressing academic needs.



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 an Executive Summary, Project Summary, Location Map, Attachment K, and Resolution for your review. Subject to your

Performing Arts Center  
March 6, 2014  
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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 April 3 – 4, 2014.

LG/Ccb

Attachments

pc w/atcmts: Michael Rodgers  
Michael Lanier  
Tim Leopard  
Ben Henson  
Dennis McDaniel

**EXECUTIVE SUMMARY  
PROPOSED CAPITAL PROJECT**

**BOARD OF TRUSTEES SUBMITTAL**

Meeting Date: April 3 – 4, 2014

**CAMPUS:** The University of Alabama, Tuscaloosa, Alabama  
**PROJECT NAME:** Performing Arts Center  
**PROJECT LOCATION:** Peter Bryce campus  
**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 checked="" type="checkbox"/> New Construction	<input checked="" type="checkbox"/> Instructional	100%	109,017
<input type="checkbox"/> Campus Infrastructure	<input type="checkbox"/> Patient Care		
<input type="checkbox"/> Equipment	<input type="checkbox"/> Support		
<input type="checkbox"/> Other	<input type="checkbox"/> Intercollegiate Athletics		
<b>TOTAL</b>		<b>100%</b>	<b>109,017</b>

BUDGET	Percentage	Preliminary
Construction		\$ 48,550,000
Utilities and Infrastructure		\$ 980,000
Landscaping		\$ 450,000
Furniture, Fixtures, and Equipment		\$ 1,750,000
Security/Access Control		\$ 185,000
Telecommunication/Data		\$ 750,000
Contingency*	5%	\$ 2,499,000
UA Project Management Fee**	2%	\$ 1,049,580
Architect/Engineer Fee***	5.6%	\$ 3,023,680
Expenses (Geotech, Construction Materials Testing)		\$ 350,000
Other Fees and Services (surveys, testing)		\$ 412,740
<b>TOTAL PROJECT COST</b>		<b>\$ 60,000,000</b>

\*Contingency is based on 5% of the total of all construction costs, utilities and infrastructure and landscaping.

\*\*UA Project Management fee is based on 2% of the total of all construction costs, utilities and infrastructure, landscaping and contingency.

\*\*\*Architect/Engineer fee is based on 5.6% of the total of all construction costs, and utilities and infrastructure plus \$250,000 for theatre consultation if needed.

<b>ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&amp;M) COSTS:</b>		
(Utilities, Housekeeping, Maintenance, Insurance, Other)		
	(109,017 gsf x ~\$3.89 gsf)	\$ 423,733.43
<b>TOTAL ESTIMATED ANNUAL O&amp;M COSTS:</b>		<b>\$ 423,733.43</b>

\*Hardscape and Landscaping only

<b>FUNDING SOURCE:</b>		
Capital Outlay:		
	Future Revenue Bonds	\$ 30,000,000
	University Funds including gifts	\$ 30,000,000
O&M Costs:		<b>\$ 423,733.43</b>

<b>NEW EQUIPMENT REQUIRED:</b>	N/A
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**RELATIONSHIP & ENHANCEMENT OF CAMPUS PROGRAMS:**

Over the past ten years, undergraduate student enrollment in the Department of Theatre and Dance increased from 135 to 299 students or 121% without the addition of any facilities. This proposed Project will provide Theatre and Dance with a state-of-the-art performance center that includes a drama theater, dance performance space, and seat studio space into one facility. Further, the planned co-location with the Bryce Admissions building will provide synergies for the proposed Performing Arts Center in the future.



Supplemental Project Information Worksheet  
**Attachment K to Board Rule 415**

**FY: 2013-2014**

**Project Name/Category:** Performing Arts Center  
 Peter Bryce campus

**Campus:** The University of Alabama

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

<input checked="" type="checkbox"/> increase space inventory	<u>          .82          </u> % increase	<u>          109,017          </u> GSF
<input type="checkbox"/> replace space inventory	<u>                          </u> % replacement	<u>                          </u> GSF
<input type="checkbox"/> renovation of existing space only		<u>                          </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:

Vacated performance space in Rowand-Johnson Hall will be converted to academic space, which will allow for the addition of needed facilities in the center of campus for instruction in core curriculum courses.

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

Proposed New Space/Facilities				Utilization Data FY: _ /1	
Classification	Number (Units)	Capacity (Persons)	Area (GSF)	% of available scheduled hrs /2	
1. Instruction:					
a. Seminar Rooms /3					
b. Class Rooms /4					
c. Lecture /5					
d. Laboratories (Dance Education)					
2. Office/Support:					
a. Faculty					
b. Administration					
c. Research					
d. Other-Performing arts support, shops			21,223	90 %	
3. Campus Recreation					
4. Intercollegiate Athletics					
5. Libraries					
6. Residence Halls					
7. Performing/Arts	3	1,050	28,804	90 %	
8. Special Labs /6					
9. Research Laboratories					
10. Other (TBD)			58,990	90%	

Comments:

Performance utilization data is based on 2013 Rowand-Johnson.

The University of Alabama is evaluating the utilization of the 58,990 square feet. Specific space classification for this square footage will be determined upon completion of programming.

/1 Latest Fiscal Year Data Available  
 /2 Utilization Factor based on Scheduled Operating Hours on Campus  
 /3 10-20 person capacity  
 /4 20-125 person capacity  
 /5 125 person capacity and above  
 /6 Sculpture, art, broadcast studios and seminar areas

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

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

Comments:

The Performance Arts Center (“Project”) will allow the University to provide major benefits for the student experience on campus.

First, by relocating the Theatre and Dance performance components of the College of Arts and Sciences, the Project will allow for the vacated space in Rowand-Johnson Hall to be used for instruction in core curriculum courses.

Second, from Fall 2004 to Fall 2013, undergraduate student enrollment in the Department of Theatre and Dance (“Theatre and Dance”) increased from 135 to 299 students or 121% without the addition of any facilities. The Dance program has become a nationally recognized program through its affiliation with the American Ballet Theater. The Theatre program currently has two performance spaces in Rowand-Johnson Hall— the Gallaway Theatre and the Bales Theatre—which are not constructed in a manner that is supportive of current trends in the performing arts. The Gallaway Theatre, which seats 305, is a standard proscenium theatre with the audience all facing the stage opening. The Bales Theatre is a thrust space with a small stage with seating for an audience on three sides. Bales Theatre seats 149. Morgan Auditorium is the only performance space for the Dance program.

This proposed Project will provide Theatre and Dance with a state-of-the-art performance center that includes a 350 seat Drama Theater, 450 seat dance performance space, and a 250 seat studio space into one facility. Further, the planned co-location with the Bryce Admissions building will provide synergies for the proposed Performing Arts Center in the future.

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

<b>Source(s)</b>	<b>New Funds (FY2013-2014)</b>	<b>Reserves</b>	<b>Status <sup>/7</sup></b>
Tuition			
Student Fees			
Investment Income			
Auxiliary Income <ul style="list-style-type: none"> <li>• External</li> <li>• Internal</li> </ul>			
Education Sales/Services <ul style="list-style-type: none"> <li>• External</li> <li>• Internal</li> </ul>			
Direct Grants			
Bonds- Future Revenue	\$30,000,000		Pending
Existing Net Assets/Gifts	\$30,000,000		Pending
Other- Crimson Tide Foundation			
<b>Totals</b>	<b>\$60,000,000</b>		<b>Pending</b>

<sup>/7</sup> Approved, allocated, pending

Comments:

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

<b>Operations and Maintenance (O&amp;M) Annual Costs Projections</b>			
<b>Expense</b>	<b>FY 2014- 2015 Base Data /8</b>	<b>First Full /YR Occupancy FY 2015-2016</b>	<b>Successive Five (5) Year Projections /9</b>
Maintenance	\$ 55,598.67	\$ 58,378.60	\$ 338,707.58
Elevator Service	\$ 6,000.00	\$ 6,300.00	\$ 36,552.05
Building Repairs	\$ 18,532.89	\$ 19,459.53	\$ 112,902.52
Building Services	\$127,315.20	\$133,680.96	\$ 775,605.27
Electric, Natural Gas, Steam	\$166,417.00	\$174,737.85	\$1,013,813.77
Chilled Water			
Water and Sewer	\$ 11,159.00	\$ 11,716.95	\$ 67,980.72
Insurance	\$ 9,811.53	\$ 10,302.11	\$ 59,771.92
Safety Support	\$ 6,541.02	\$ 6,868.07	\$ 39,847.95
Operations Staff Support Funding	\$ 2,180.34	\$ 2,289.36	\$ 13,282.65
Other			
<b>Totals</b>	<b>\$403,555.65</b>	<b>\$423,733.43</b>	<b>\$2,458,464.43</b>

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

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

Comments:

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

Source(s)	Occupancy Yr <sup>/9</sup> (FY 2015-2016)	Future Years <sup>/10</sup>	Status <sup>/7</sup>
Tuition	\$250,002.73	\$1,450,494.02	Pending
Student Fees			
Investment Income			
Auxiliary Income <ul style="list-style-type: none"> <li>• External</li> <li>• Internal</li> </ul>			
Educational Sales & Services <ul style="list-style-type: none"> <li>• External</li> <li>• Internal</li> </ul>	\$ 4,237.33	\$ 24,584.64	Pending
Direct Grant(s)			
Reallocated Funds <sup>/11</sup>			
Gifts	\$ 38,136.01	\$ 221,261.80	Pending
Other and State Appropriations	\$131,357.36	\$ 762,123.97	Pending
<b>Total/YR</b>	<b>\$423,733.43</b>	<b>\$2,458,464.43</b>	<b>Pending</b>

<sup>/9</sup> Initial Full Yr of Occupancy  
<sup>/10</sup> Next Five (5) Yrs Occupancy  
<sup>/11</sup> Funds Reallocated from other sources  
<sup>/7</sup> Approved, allocated, pending

Comments:

O&M costs of the Performing Arts Center will be funded from the University’s annual operating budget.

**8. Development expenditures for this Project being used to reduce the current deferred maintenance/facilities renewal liabilities for the Campus?**

\$ \_\_\_\_\_ \*\* \_\_\_\_\_ % of Total Development Costs

Comments:

\*\*Because the physical condition of this portion of the building has declined to the point where a renovation is no longer a viable option, no calculation of deferred maintenance is appropriate.

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

Comments:

The alternative would be continuing to use the existing facilities.

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

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

Comments:

If this Project is not approved, the ability of Theatre and Dance to grow will ultimately be limited, and the quality of the student experience could diminish. Theatre and Dance will continue to be strained by growing enrollment and the distribution of current facilities across campus. The accrediting body has previously expressed concerns relative to the appropriateness of facilities. This Project will help eliminate those concerns.

**ATTACHMENT NO. 1**

Project: Performing Arts Center  
BOT Submittal – Stage I  
Meeting Date: April 3 – 4, 2014

## **Project Summary**

### **PERFORMING ARTS CENTER**

The Performing Arts Center project (“Project”) will consist of the demolition of the North Wing of the Bryce Main building and the construction of an approximately 109,017-square-foot performing arts center for the Department of Theatre and Dance (“Theatre and Dance”). The proposed Project will provide a multi-functioning, state-of-the-art venue for theater and dance performances. This facility will allow the department to combine all performance and academic functions around a single area of campus.

The Project will provide a 350 seat drama theater, 450 seat dance theater, and a 250 seat studio theater that will address the department’s growing needs and demands for performance space, seating capacity, and functionality. The building will also contain support spaces such as a scenery shop, costume studios, and rehearsal hall. In addition, faculty office and classrooms will be relocated to the adjacent Bryce Admissions building.

Prominently located on the new loop road planned for the Peter Bryce campus, the Project will provide a grand entry for performance events. The facility will also connect to the Bryce Main building via a new lobby. Connecting the old and new will provide two main entry and exit points for productions allowing for smooth transitions. The Project will connect to the Bryce Admissions building for enhanced access for students, faculty, and staff. Additionally, courtyards created between the buildings have the potential to be developed to serve as event support areas for an outdoor venue.

The relocation of Theatre and Dance will make the vacated space available for other pressing academic needs.



# LOCATION MAP



Performing Arts Center

