

**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: University Services Campus Renovations (former Partlow campus)
Meeting Date: November 2 – 3 , 2017

- * 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

This Project is being submitted as an amendment to the Campus Master Plan.

Prepared by: Jennifer F. Sn

Approved by: [Signature]

/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

UNIVERSITY SERVICES CAMPUS RENOVATIONS

WHEREAS, in accordance with Board Rule 415, The University of Alabama (“The University”) is requesting approval of a Stage I submittal for the University Services Campus Renovations project (“Project”) located at the former Partlow Campus on Ruby Tyler Parkway; and

WHEREAS, on September 12, 2014, the Executive Committee of the Board of Trustees approved the purchase of the Partlow Campus, comprised of Parcel 1 containing 42.19 acres and Parcel 2 containing 75.48 acres for a total of 117.67 acres; and

WHEREAS, on February 6, 2015 the Board of Trustees approved the Campus Master Plan Amendment for the Partlow Campus which recognized the use of the campus for business and support functions and the uses proposed herein are consistent with that plan; and

WHEREAS, the retention of Building 1024 (Cottage 1), is not reflected on the aforementioned Campus Master Plan Amendment and the University has determined it appropriate to retain the building at this time; and

WHEREAS, The University is requesting approval to amend the Campus Master Plan to include the retention of the building; and

WHEREAS, the proposed Project will entail the renovation of four (4) buildings totaling approximately 59,302 gross square feet for use by Construction Administration (Building 1024 – formerly Cottage 1), Design and Engineering services (Building 1023 – formerly Cottage 4), Furnishings and Design (Building 1021 – formerly Cottage 3) and Environmental Health and Safety (Building 1017 – formerly Cottage 7); 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 University funds in the amount of \$9,431,296; and

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

BUDGET:	PRELIMINARY
Construction – Construction Administration, building 1024	\$ 1,764,200
Construction – Design and Engineering, building 1023	\$ 1,800,000
Construction – Furnishings and Design, building 1021	\$ 1,600,000
Construction – Environmental Health and Safety, building 1017	\$ 1,600,000
Landscaping	\$ 80,000
Furniture, Fixtures and Equipment	\$ 601,860
Security/Access Control	\$ 100,000
Telecommunication/Data	\$ 200,000
Contingency* (10%)	\$ 684,420
UA Project Management Fee** (3%)	\$ 225,859
Architect/Engineer Fee*** (~8.5%)	\$ 574,957
Expenses (Geotech, Construction Materials Testing)	\$ 100,000
Other Fees and Services (testing, advertising, printing)	\$ 100,000
TOTAL PROJECT COST	<u>\$ 9,431,296</u>

*Contingency is based on 10% of the total cost of construction and landscaping.

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

***Architect/Engineer Fee is based on 6.8% of the total cost of construction plus a 1.25 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.
3. The Campus Master Plan for The University of Alabama be, and hereby is, amended to reflect the retention of Building 1024 (Cottage 1) to be located on University property.




Division of
Financial Affairs

MEMO

October 4, 2017

To: Stuart R. Bell

From: Lynda Gilbert 

Subject: Board Item – Action: Stage I Submittal:
University Services Campus Renovations

Pursuant to Board Rule 415, The University of Alabama (“The University”) is requesting approval from The Board of Trustees of The University of Alabama (“Board”) of a Stage I submittal for the University Services Campus Renovations project (“Project”) located at the former Partlow campus on Ruby Tyler Parkway with a proposed Project total budget of \$9,431,296.

The proposed Project will entail the renovation of four (4) buildings to house campus support services departments including Construction Administration, Design and Engineering Services, Furnishings and Design, and Environmental Health and Safety.

The University is also requesting an amendment to the Campus Master Plan to reflect the retention of Building 1024 (Cottage 1), which was shown to be demolished per the Partlow Campus Master Plan amendment as approved by the Board in February 2015.

The Project will be funded from University Funds in the amount of \$9,431,296. This Project will eliminate \$9,431,296 in campus deferred maintenance liability.

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 November 2 – 3, 2017.

LG/ccj

pc w/atcmts: Michael Rodgers
Michael Lanier
Tim Leopard
Tom Love

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**EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT**

BOARD OF TRUSTEES SUBMITTAL

Meeting Date: November 2 – 3, 2017

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: University Services Campus Renovations

PROJECT LOCATION: Former Partlow Campus on Ruby Tyler Parkway

ARCHITECT: Multiple, 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"/> New Construction			
<input type="checkbox"/> Building Addition			
<input checked="" type="checkbox"/> Building Renovation	Office & Administrative	100%	59,302
<input type="checkbox"/> Campus Infrastructure			
<input type="checkbox"/> Equipment			
<input type="checkbox"/> Other			
TOTAL		100%	59,302

BUDGET	Preliminary
Construction – Construction Administration, building 1024	\$ 1,764,200
Construction – Design and Engineering, building 1023	\$ 1,800,000
Construction – Furnishings and Design, building 1021	\$ 1,600,000
Construction – Environmental Health and Safety, building 1017	\$ 1,600,000
Landscaping	\$ 80,000
Furniture, Fixtures and Equipment	\$ 601,860
Security/Access Control	\$ 100,000
Telecommunication/Data	\$ 200,000
Contingency* (10%)	\$ 684,420
UA Project Management Fee** 3%)	\$ 225,859
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Expenses (Geotech, Construction Materials Testing)	\$ 100,000
Other Fees and Services (testing, advertising, printing)	\$ 100,000
TOTAL PROJECT COST	\$ 9,431,296

*Contingency is based on 10% of the total cost of construction and landscaping.

**UA Project Management Fee is based on 3% of the total cost of construction, landscaping and contingency.

***Architect/Engineer Fee is based on 6.8% of the total of cost construction plus a 1.25 renovation factor.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:	
(Utilities, Housekeeping, Maintenance, Insurance, Other)	
59,302 GSF x ~\$7.02/GSF:	\$ 416,443
TOTAL ESTIMATED ANNUAL O&M COSTS:	\$ 416,443

FUNDING SOURCE:	
Capital Outlay:	
University Funds	\$ 9,431,296
O&M Costs: University Annual Operating Funds	\$ 416,443

NEW EQUIPMENT REQUIRED:	
N/A	

RELATIONSHIP & ENHANCEMENT OF CAMPUS PROGRAMS:

The University Services Campus (USC) (former Partlow Campus) project (“Project”) will provide space for the growth needs of service support departments that have been assigned to the USC. These non-academic units support the campus operations, growth, and improvements. This off-campus location supports their mission and allows their operation to occur in a back-of-house location.

The assigned departments work extensively with external vendors and the public and this new location will provide ease of access for users and external partners. This reassignment from the core campus area will then provide for the reallocation of the vacated space or land to departments and programs that are integrally involved with students and faculty.

Overall, this Project will provide approximately 59,302 gross square feet (GSF) of total space comprised in four (4) buildings for offices, meeting rooms, and support facilities.

The four (4) departments include Environmental Health and Safety, Construction Administration, Design and Engineering, and Furnishings and Design. The Departments will be co-located to support necessary functional adjacency and collaboration, which will support efficient operations.

ATTACHMENT NO. 1

Project: University Services Campus Renovations

BOT Submittal: Stage I

Meeting Date: November 2 – 3, 2017

Project Summary

UNIVERSITY SERVICES CAMPUS RENOVATIONS

The University Services Campus (USC) (former Partlow Campus) Renovations project (“Project”) will provide space for the growth needs of service support departments that have been assigned to the USC. These non-academic units support the campus operations, growth, and improvements. This off-campus location supports their mission and allows their operation to occur in a back-of-house location. The assigned departments work extensively with external vendors and the public and this new location will provide ease of access for users and external partners. Overall, this Project will provide approximately 59,302 gross square feet (GSF) of total space comprised in four (4) buildings for offices, meeting rooms, and support facilities.

The scope of renovations for all four (4) facilities is similar and primarily addresses code compliance, HVAC, plumbing issues, interior finishes, and technology integration. This includes, but is not limited to:

- Replacement of Fire Alarm system to comply with current code and campus standards including the Event Notification System.
- Installation of a new Mechanical System. Alabama Department of Mental Health (“ADMH”) had previously decommissioned the campus steam system and chilled water and there was no conditioned air in the building.
- Integration with the University’s Building Automation System to ensure centrally controlled and diagnostic capabilities.
- Installation of new technology infrastructure including phone, data and wifi.
- Installation of new lighting and lighting control systems.
- Installation of new audio/visual equipment as needed to support meetings and training
- Replacement of existing plumbing systems and fixtures.
- Installation of new security and access control components
- General exterior painting and refurbishment

As new roofs were installed on these buildings in the early 2000s, the exterior envelopes are in better condition than the Kidd Building, where Environmental Health and Safety (“EHS”) is currently located.

EHS will utilize building 1017, formerly labeled as Cottage 7, which contains 14,375 GSF. EHS currently utilizes one of the Kidd buildings on the Peter Bryce Campus which is shown to be removed on the 2017 Master Plan in order to facilitate construction of the new Alumni Hall. Furthermore, the existing building has significant deferred maintenance issues and does not include important code requirements to appropriately

support EHS operations. The renovated facility will support all EHS functions and programs including Fire Safety, Environmental Compliance including MS4 permitting (requirement for stormwater) and Chemical Management, Food Safety, General Safety, Hazardous Materials Management.

As previously included in Tab 4 of the Annual Consolidated Capital Projects and Facilities Report, Project Delivery Services is comprised of Construction Administration, Design and Engineering Services, and Furnishings and Design. The Departments will be co-located with one another to support necessary functional adjacency and collaboration. Construction Administration will be located in building 1024 (former Cottage 1) which is comprised of 15,276 GSF. Design and Engineering Services will be located in building 1023 (former Cottage 4) which is comprised of 15,276 GSF. Furnishings and Design will be located in building 1021 (former Cottage 3) which is comprised of 14,375 GSF.

Attachment K to Board Rule 415

Supplemental Project Information Worksheet
Annual Capital Development Plan

FY: 2017 – 2018

Project Name/Category: University Services Campus Renovations
Ruby Tyler Parkway

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	.86	% increase	59,302*	GSF
<input type="checkbox"/> replace space inventory		% replacement		GSF
<input type="checkbox"/> renovation of existing space only				GSF

*The University recognizes buildings acquired through purchases into the campus space inventory when the buildings come into service.

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

Comments:

Construction Administration, Furnishings and Design, and Facilities Operations currently share the Facilities Administration Building. The building is beyond capacity requiring the departments to make adjustments by using remote sites, and converting closet space into offices.

Relocating these functions to the University Services Campus (USC) will allow the grounds department to be moved from their current location at the intersection of Marris Spring and Campus Drive. The removal of grounds from this area is indicated on the Master Plan and frees up the area for other development.

Relocating Environmental Health and Safety from the Peter Bryce Campus frees up the land area for the development of the new Alumni Building.

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

If Campus Master Plan amendment required, explain:

In February 2015, The Board of Trustees of The University of Alabama approved the Partlow Campus Master Plan, which reflected the demolition of Building 1024 (Cottage 1). After evaluation of the structure and recognizing the need for additional space, the University has deemed it appropriate to retain the facility.

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	4 buildings		59,302	¹
400 Study Facilities				
500 Special Use Facilities				
Ruby Tyler Balance				
600 General Use Facilities				
700 Support Facilities				
Warehouse				
800 Health Care Facilities				
900 Residential Facilities				
000 Unclassified Facilities				

Comments/Notations:

Data reported on latest fiscal year data available.
 Utilization factor based on Scheduled Operating Hours at each Campus – outlined below in notations.

The University Services Campus renovation project (“Project”) will provide approximately 59,302 square feet of space for offices, meeting rooms and support facilities.

¹Construction Administration, Design and Engineering, Furnishings and Design, and Environmental Health and Safety departments (“Departments”) are currently at +100% occupancy in their existing facilities and have no room for growth.

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

Estimated new Funds from Tuition/Programs \$ NA Yr.

Comments:

These Projects will allow the Departments to more efficiently provide services to the campus community, which will ensure the delivery of projects to support the research and academic mission in a timely and effective manner.

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

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

Source(s)	New Funds (FY2017)	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	\$9,431,296		Allocated
Totals	\$9,431,296		Allocated

^{/7} Approved, allocated, pending

Comments:

This Project will be funded from University funds in the amount of \$9,431,296.

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 FY2018	Successive Five (5) Year Projections /9
Maintenance	\$113,872	\$115,238	\$ 597,270
Elevator Service			
Building Repairs	\$ 37,957	\$ 38,413	\$ 199,090
Building Services	\$ 99,302	\$117,691	\$ 520,848
Electric, Natural Gas, Steam	\$125,103	\$126,604	\$ 656,178
Chilled Water			
Water and Sewer	\$ 7,161	\$ 7,247	\$ 37,562
Insurance	\$ 5,748	\$ 5,817	\$ 30,149
Safety Support	\$ 4,517	\$ 4,571	\$ 23,692
Operations Staff Support Funding	\$ 852	\$ 862	\$ 4,466
Other – Supply Store expenses			
Totals	\$394,512	\$416,443	\$2,069,255

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

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

Comments:

Data was obtained from the following University Departments: Energy Management, Electrical Maintenance, Facilities Management, Environmental Health and Safety and Risk Management.

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

Source(s)	Occupancy Yr. /9 (FY 2018)	Future Years /10	Status /7
Tuition	\$416,443	\$2,069,255	Pending
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			
Total/YR	\$416,443	\$2,069,255	Pending

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

Comments:

On-going O&M costs will be funded with University Annual Operating Funds.

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

\$ 9,431,296 100 % of Total Development Costs

Comments:

The buildings were purchased from the Alabama Department of Mental Health. Complete renovations are required to bring the facilities to an acceptable condition and meet The University standards for building systems.

Addressing deferred maintenance will also allow the buildings to operate in an energy efficient manner.

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

Comments:

Increasing the footprint of the existing facilities operations building was not feasible due to lack of available parking and it would have required reworking of the existing infrastructure systems. The existing EHS building was in the way of the proposed new Alumni Hall and the architecture is not consistent with that of the main campus.

Renovation of the UCS buildings was the most economical choice for repurposing of office space, existing available parking, and existing infrastructure. Renovation costs are much less than that of constructing new facilities.

Location, type of building and occupancy were considered when determining renovation needs.

/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:

Facilities, Construction Administration, Furnishing and Design all support the mission of The University by ensuring quality, consistency and appearance of the campus. Each department required adequate facilities to allow them to be effectively productive.

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

Comments:

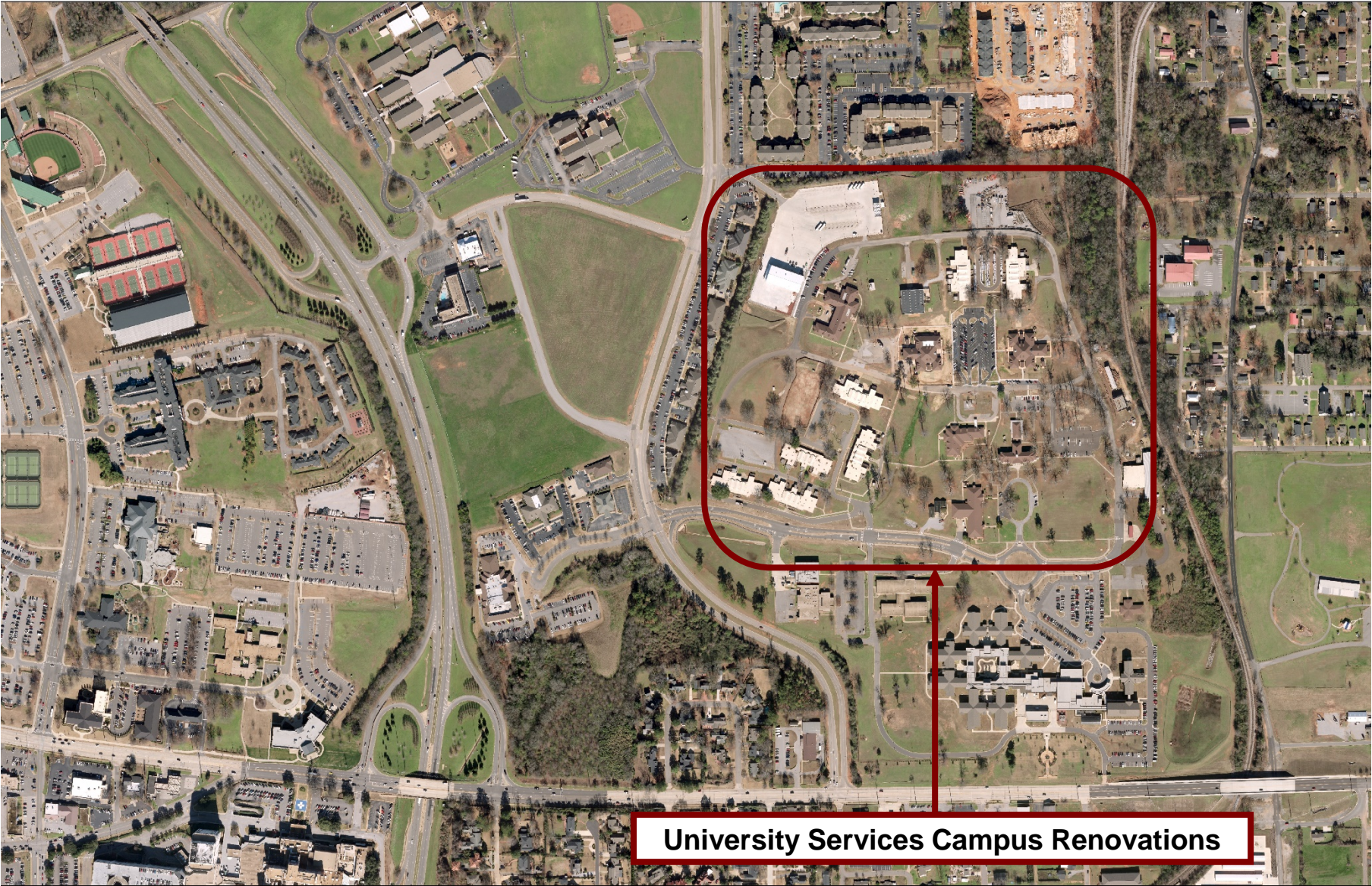
Construction Administration supports the strategic goals by working with all campus partners to further the vision of the campus. Providing facilities to support the vision is key to the continued growth.

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

Comments:

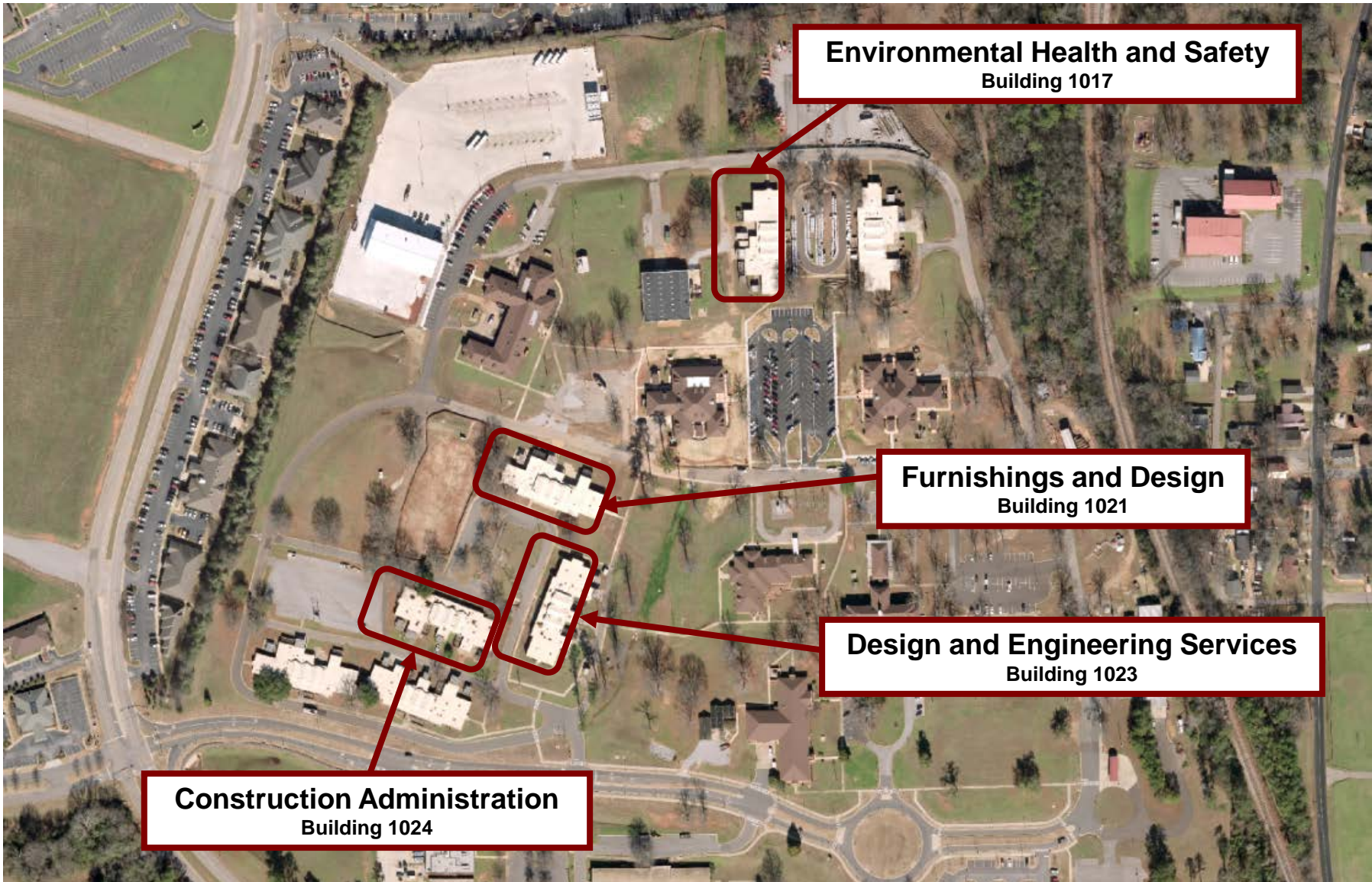
The immediate impact would be a reduction in the ability of the effected departments to be effectively productive. The campus appearance, limiting construction impacts, and reduced functionality could see a shift in an unacceptable direction. These department take great pride in producing some of the finest buildings in the nation for The University of Alabama.

LOCATION MAP



University Services Campus Renovations

UNIVERSITY SERVICES CAMPUS RENOVATIONS



Environmental Health and Safety
Building 1017

Furnishings and Design
Building 1021

Design and Engineering Services
Building 1023

Construction Administration
Building 1024