

**UNIVERSITY OF ALABAMA SYSTEM  
BOARD RULE 415  
BOARD SUBMITTAL CHECKLIST CRITERIA**

**BOARD SUBMITTAL CHECKLIST NO. 1 & 2  
CAPITAL PROJECT - STAGE I & II SUBMITTAL <sup>/1</sup>  
(General information, Architect Ranking, Project Scope and Project Budget) <sup>/8</sup>**

**CAMPUS:** The University of Alabama, Tuscaloosa, Alabama

**PROJECT NAME:** Alpha Delta Pi Bedroom Renovation

**MEETING DATE:** February 1-2, 2024

- ☒ 1. Board Submittal Checklist No. 1 and 2
- ☒ 2. Transmittal Letter to Chancellor from Campus President requesting 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 and II Submittal (General Information, Architect Ranking, Project Scope and Project Budget; authority to proceed with Owner/Architect contract negotiations) by the Board of Trustees
- ☒ 4. Executive Summary – Proposed Capital Project <sup>/2</sup>
- ☒ 5. Executive Summary – Architect, Engineer, Selection Process (include Interview Outline). <sup>/3, /4, /5</sup>
- ☒ 6. Supplemental Project Information Worksheet – Exhibit “K”, Board Rule 415
- ☒ 7. Campus letter requesting approval of the ranking of firms and authority to Submit to the Physical Properties Committee for approval – signed by Chair of the Physical Properties Committee and UA System Senior Vice Chancellor for Finance and Administration <sup>/6</sup>
- ☐ 8. Preliminary Business Plan (if applicable) <sup>/7</sup>
- ☒ 9. Campus map(s) showing project site

Prepared by: Michael Hand

Approved by:

*[Handwritten signature: J. Leopold]*  
*[Handwritten signature: CM]*  
*[Handwritten signature: MA]*

<sup>/1</sup> Reference Tab 3H – Board Rule 415 Instructional Guide

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

<sup>/3</sup> Reference Tab 3K – Board Rule 415 Instructional Guide

<sup>/4</sup> Reference Tab 3L – Board Rule 415 Instructional Guide

<sup>/5</sup> Reference Tab 3M – Board Rule 415 Instructional Guide

<sup>/6</sup> Reference Tab 3N – Board Rule 415 Instructional Guide

<sup>/7</sup> Reference Tab 3V – Board Rule 415 Instructional Guide

<sup>/8</sup> After Completion of negotiations on Owner/Architect Agreement, provide notification to Chair of Physical Properties Committee and Senior Vice Chancellor for Finance & Administration, Reference Tab 3-O-Board Rule 415, Instructional Guide

December 18, 2023

Chancellor Finis E. St. John IV  
The University of Alabama System  
500 University Boulevard East  
Tuscaloosa, Alabama 35401

Dear Chancellor St. John:

I am pleased to send to you for approval under Board Rule 415 the attached documents for a Stage I and II submittal for the Alpha Delta Pi Bedroom Renovation Project.

The resolution requests authorization to establish the preliminary project scope, budget, and funding, as stipulated, and to enter into an Owner Designer Agreement with TRI Architecture + Interior Design of Birmingham, Alabama, as the principal design firm for this project.

The item has been thoroughly reviewed and has my endorsement. With your concurrence, I ask that it be added to the agenda for The Board of Trustees of The University of Alabama at their regular meeting on February 1-2, 2024.

Sincerely,



Stuart R. Bell  
President

Enclosure



## **THE UNIVERSITY OF ALABAMA**

### **Approval of the preliminary project scope and budget; providing authorization to execute an Owner/Architect Agreement for the Alpha Delta Pi Sorority House Bedroom Renovation**

#### **RESOLUTION**

WHEREAS, in accordance with Board Rule 415, The University of Alabama (“University”) is requesting approval of Stage I and Stage II submittals for the Alpha Delta Pi Bedroom Renovation project (“Project”) to be located at 675 Judy Bonner Drive; and

WHEREAS, the Project will provide for the renovation of twenty-eight (28) bedroom units, consisting of single, double, and triple occupancy rooms, at the Alpha Delta Pi Sorority House (“Chapter”), providing the Chapter members with an enhanced living environment and increasing the Chapter’s recruiting potential for future membership growth; and

WHEREAS, the Project consists of replacing the existing freestanding furniture with custom millwork including built-in beds, desks, storage, and updated closets as well as fresh paint and enhanced lighting throughout the rooms; and

WHEREAS, TRI Architecture + Interior Design, Birmingham, Alabama (“TRI”), recently served as the designer of record on a University project with similar size, scope, and schedule, providing insight that will facilitate an efficient design process; and

WHEREAS, due to the minimal nature of the design elements required for the project and the application of repetitive design for the bedrooms, as well as TRI’s knowledge of University Standards, design principles, and procedures that will greatly facilitate the design and administrative process, the University is requesting approval to waive the Consultant Selection Process and to utilize TRI for the Project; and

WHEREAS, the University has negotiated a final design fee based on 7.1% of the cost of construction, and a credit of the full 25% renovation factor, representing a savings of \$26,625, which is a financial benefit to the University; 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 Alpha Delta Pi Chapter Reserves in the amount of \$2,020,095, which the University has verified, and the Chapter is current with their existing note; and

WHEREAS, the Project will eliminate deferred maintenance liabilities in the amount of \$275,000 or, approximately 14% of the Project costs; and

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

<b>BUDGET:</b>		<b>PRELIMINARY</b>
Construction	\$	1,500,000
Contingency* (10%)	\$	150,000
UA Project Management Fee** (4.5%)	\$	74,250
Architect/Engineer Fee*** (7.1%)	\$	106,500
Other****	\$	75,000
Escalation*****	\$	114,345
<b>TOTAL PROJECT COST</b>	<b>\$</b>	<b>2,020,095</b>

\*Contingency is based on 10% of construction.

\*\*UA Project Management Fee is based on 4.5% of Construction and Contingency.

\*\*\*Architect/Engineer Fee is based on 7.1% of Construction.

\*\*\*\*Other expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

\*\*\*\*\* Escalation is currently based on an anticipated 1% inflation per month through September of 2024 and 0.5% per month thereafter. Therefore, escalation is calculated on a 6% basis for this project based on the anticipated bid date of October of 2024 and a delivery summer of 2025 as included in the Project Status.

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 Project scope, budget, and funding, as stipulated above, are hereby approved.
3. Stuart R. Bell, President; Matthew M. Fajack, Vice President for Finance and Operations and Treasurer; or those officers named in the most recent Board resolutions granting signature authority for the University be, and hereby are, authorized to act for and on behalf of the Board to execute an architectural agreement with TRI Architecture + Interior Design, LLC of Birmingham, Alabama, for architectural services in accordance with Board Rule 415 for this Project.



**EXECUTIVE SUMMARY**  
**PROPOSED CAPITAL PROJECT**  
**BOARD OF TRUSTEES SUBMITTAL**

<b>MEETING DATE:</b>	February 1-2, 2024
<b>CAMPUS:</b>	The University of Alabama, Tuscaloosa, Alabama
<b>PROJECT NAME:</b>	Alpha Delta Pi Bedroom Renovation Project
<b>PROJECT NUMBER:</b>	832-24-3543
<b>PROJECT LOCATION:</b>	675 Judy Bonner Drive
<b>ARCHITECT:</b>	TRI Architecture + Interior Design

**THIS SUBMITTAL:**

- ☒ Stage I
- ☒ Stage II, waiver request
- ☐ Campus Master Plan Amendment
- ☐ Stage III
- ☐ Stage IV

**PREVIOUS APPROVALS:**

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input type="checkbox"/> Building Construction	Sorority	~100%	4,801
<input type="checkbox"/> Building Addition			
<input checked="" type="checkbox"/> Building Renovation			
<input type="checkbox"/> Equipment			
TOTAL		100%	4,801

<b>BUDGET</b>	<b>PRELIMINARY</b>
Construction	\$ 1,500,000
Contingency* (10%)	\$ 150,000
UA Project Management Fee** (4.5%)	\$ 74,250
Architect/Engineer Fee*** (7.1%)	\$ 106,500
Other****	\$ 75,000
Escalation*****	\$ 114,345
<b>TOTAL PROJECT COST</b>	<b>\$ 2,020,095</b>
<b>Total Construction Cost per square foot \$344</b>	

\*Contingency is based on 10% of the costs of Construction.

\*\*UA Project Management Fee is based on 4.5% of the costs of Construction and Contingency.

\*\*\*Architect/Engineer Fee is based on 7.1% of the costs of Construction.

\*\*\*\*Other fees and expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

\*\*\*\*\* Escalation is currently based on an anticipated 1% inflation per month through September of 2024 and 0.5% per month thereafter. Therefore, escalation is calculated on a 6% basis for this project based on the anticipated bid date of October of 2024 and a delivery summer of 2025 as included in the Project Status.

<b>ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&amp;M) COSTS:</b>		
(Utilities, Housekeeping, Maintenance, Insurance, Other)		
0 sf x ~\$0.00/sf	\$	NA
Total Estimated Annual O&M Costs:	\$	NA*

**\*O&M costs will be funded by the chapter from rental income and other charges to sorority members. There is no projected change in O&M costs resulting from this project scope.**

<b>FUNDING SOURCE:</b>		
	Chapter Funds \$	2,020,095
<b>O&amp;M Costs:</b>	University Annual Operating Funds \$	NA

NEW EQUIPMENT REQUIRED	
Total Equipment Costs:	N/A

**PROJECT SCOPE:**

The proposed Alpha Delta Pi Bedroom Renovation project ("Project"), located at 675 Judy Bonner Drive, will consist of a renovation of the twenty-eight (28) member bedrooms of the Alpha Delta Pi Sorority House. The renovation will enhance the functionality of the rooms and bring the house closer to current trends in Greek life which should aid in future recruitment and chapter growth.

The scope of the Project includes replacing existing freestanding furniture with painted built-in beds, dressers, desks, storage and updated closets.

The bedrooms will also receive updated finishes.

There will be no work in the facility outside of the bedrooms.

**PROJECT STATUS**

SCHEMATIC DESIGN:	Date Initiated	February 2024
	% Complete	0%
	Date Completed	March 2024
PRELIMINARY DESIGN:	Date Initiated	April 2024
	% Complete	0%
	Date Completed	June 2024
CONSTRUCTION DOCUMENTS:	Date Initiated	July 2024
	% Complete	0%
	Date Completed	September 2024
SCHEDULED BID DATE:		October 2024

*\*N/A on Stage I Projects*

**RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS**

The proposed project will enhance the student-life experience for existing and future members by providing additional space and storage within the bedrooms, increasing room functionality, and bringing the house up to current trends in Greek life.

## Attachment K to Board Rule 415

### Supplemental Project Information Worksheet Annual Capital Development Plan

**FY: 2023 – 2024**

**Project Name:** Alpha Delta Pi Bedroom Renovation  
**Project Address** 675 Judy Bonner Drive  
**Location:** UA Project No: 832-24-3543  
**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		4,801 GSF

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

Comments:

Not Applicable – interior renovation only and use does not change.

**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:



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				
000 Unclassified Facilities				
WWW Circulation Area				
XXX Building Service Area				
YYY Mechanical Area				

Data reported on latest fiscal year data available.

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

Comments/Notations:

Not applicable for Greek Housing.

The Chapter currently has full occupancy of all bedrooms.

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

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

Comments:

Project will improve the aesthetic, and provide better use of bedroom spaces, which will enhance the living experience for existing and future student members.

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:

Michael Hand, UA Project Manager

Jason Bigelow, UA Staff Architect  
 Teresa Rivadeneira, Proposed Designer of Record  
 Ashley Green, House Corporation President  
 Anne Frances Lipsomb, House Corporation Treasurer  
 Alison Gaston, Chapter President & Former Property Manager

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

<b>Source(s)</b>	<b>New Funds (FY_____)</b>	<b>Reserves</b>	<b>Status <sup>/7</sup></b>
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Education Sales/Services			
• External			
• Internal			
Direct Grants			
Gifts			
Bonds			
Existing Net Assets			
Other – Chapter Funds	\$2,020,095		Pending
<b>Totals</b>	<b>\$2,020,095</b>		<b>Pending</b>

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

**Comments:**

Alpha Delta Pi will fund the Project from Chapter Funds. The University has confirmed availability of the funds for the Project. The Chapter is current with their loan.

**8. 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</b>	<b>Successive Five (5) Year Projections /9</b>
Maintenance			
Elevator Service			
Building Repairs			
Building Services			
Electric, Natural Gas, Steam			
Chilled Water			
Water and Sewer			
Insurance			
Safety Support			
Operations Staff Support Funding			
Other –			
<b>Totals</b>	<b>Not Applicable</b>	<b>Not Applicable</b>	<b>Not Applicable</b>

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

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

**Comments:**

All O&M costs are the responsibility of the Chapter and will be funded from rental income and other charges to the Sorority members.

There will be no change in the Chapter's O&M costs related to this Project.

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

<b>Source(s)</b>	<b>Occupancy Yr /9 (FY _____)</b>	<b>Future Years /10</b>	<b>Status /7</b>
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Educational Sales & Services			
• External			
• Internal			
Direct Grant(s)			
Reallocated Funds /11			
Gifts			
Other			
<b>Total/YR</b>	<b>Not Applicable</b>	<b>Not Applicable</b>	<b>Not Applicable</b>

/9 Initial Full Yr of Occupancy

/10 Next Five (5) Yrs Occupancy

/11 Funds Reallocated from other sources

/7 Approved, allocated, pending

Comments:

Ongoing O&M costs will be funded by the Chapter from rental income and other charges to Sorority members.

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

\$ 275,000 14 % of Total Development Costs

Comments:

The Project will replace original flooring and paint the bedroom surfaces. The Chapter budgets appropriate R&R funds to address these issues.

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

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

Comments:

The Chapter discussed replacing existing furniture instead of adding millwork. However, the upgraded built-in furniture is the best option to improve the bedroom functionality and storage and will provide the enhanced experience that Sorority members expect.

**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 bring Alpha Delta Pi's bedrooms more in line with other Greek houses as well as residential housing on campus.

It will improve the Chapter's ability to recruit and retain members by providing an updated living environment that is comparable to the offering of other Chapters.

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

Comments:

The Project will further the University's strategic goal of attracting and supporting a diverse student body through housing enhancements for the student population who participate in Greek organizations.

**14. Which of the six University of Alabama system Core Principles does this project support?**

Comments:

This Project will ensure accountability and maintenance of the highest standards of excellence (UAS core Principle 3) by assisting the Greek Life community in maintaining those standards for students within the chapter and future new members of Alpha Delta Pi.

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

Comments:

Lack of improvement will hinder the organization from being able to provide the best living opportunity for in-house members. If not approved, there could be a negative impact on the Chapter's ability to be competitive during recruitment. The upgraded bedrooms will support the Chapter's efforts to grow, engage, and enhance their members' experiences.





December 13, 2023

Dr. Dana S. Keith  
Senior Vice Chancellor for Finance and Administration  
Sid McDonald Hall  
500 University Boulevard, East  
Tuscaloosa, AL 35401

Trustee Marietta M. Urquhart  
Chair, Physical Properties Committee  
Sid McDonald Hall  
500 University Boulevard, East  
Tuscaloosa, AL 35401

RE: Request for Waiver of Consultant Selection Process  
Alpha Delta Pi Bedroom Renovation  
UA Project No.: 832-24-3543

Dear Dr. Keith and Trustee Urquhart,

The University of Alabama ("University") is requesting a Waiver of the Consultant Selection Process for the Alpha Delta Pi Bedroom Renovation project ("Project") located at 675 Judy Bonner Drive.

The University proposes to utilize TRI Architecture and Interiors of Birmingham, Alabama, ("TRI") as the principal design firm for this Project. The services of TRI are proposed due to the firm having recently served as designer of record on a University project with similar size, scope, and schedule with a successful completion. This insight will facilitate an efficient design process. Additionally, due to the minimal nature of the design elements required for the project and the application of repetitive design for the bedrooms, the University is requesting the abovementioned waiver of the Consultant Selection Process and approval to utilize TRI Architecture and Interiors for this Project.

The University has negotiated a design fee of 7.1% of the cost of construction with a full credit of the standard 1.25 renovation factor representing savings of \$26,625, for a final design fee of \$106,500. The negotiated fee reflects a 20% reduction off the standard fee for this type of project (Group III).

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Cost of the Work		Percentage Fee for Building Group III		Major Renovation Factor		Credits		Fee
\$1,500,000	x	7.1%	+	25%	-	\$0	=	\$133,125
\$1,500,000	x	7.1%	+	25%	-	\$26,625	=	\$106,500

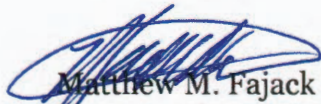
**The proposed fee represents a significant financial benefit to the University with a discount of \$26,625, or approximately 20% of the standard fee for the Project.**

Approval is hereby requested for:

1. Waiver of the Consultant Selection process.
2. TRI Architecture and Interiors of Birmingham, Alabama, as the design service provider for the Project at a negotiated design fee based on 7.1% of the cost of construction, with a full credit of the standard 1.25 renovation factor representing savings of \$26,625, for a final design fee of \$106,500.
3. Submittal to the Physical Properties Committee for review and approval.

For your convenience, a Project Summary has been attached. If you have any questions or concerns, please feel free to contact me.

Sincerely,



Matthew M. Fajack  
 Vice President for Finance and Operations  
 and Treasurer

MMF/ccj

Attachment

Pc w/atchmnts:

Michael Rodgers  
 Tim Leopard

Matt Skinner  
 Michael Hand

Jessica Morris

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\*\*\*\*\*

☒ Recommended for Approval

☐ Not Recommended for Approval. Submit to Physical Properties Committee

DocuSigned by:

*Dana S Keith*

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Dr. Dana S. Keith, Senior Vice Chancellor for Finance and Administration

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☒ Recommended for Approval

☐ Not Recommended for Approval. Submit to Physical Properties Committee

DocuSigned by:

*Marietta Urquhart*

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Trustee Marietta M. Urquhart, Chair for Physical Properties Committee



# ALPHA DELTA PI BEDROOM RENOVATION

## LOCATION MAP

