

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

**BOARD SUBMITTAL CHECKLIST NO. 3
CAPITAL PROJECT - STAGE III SUBMITTAL ^{/1}
(Architectural Design)**

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Beta Theta Pi Rear Addition

MEETING DATE: April 11 - 12, 2024

- ☒ 1. Board Submittal Checklist No. 3
- ☒ 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 Project Design (Architectural Design and authority to proceed with final construction documents) by the Board of Trustees
- ☒ 4. Executive Summary - Proposed Capital Project ^{/2}
- ☒ 5. Architectural rendering of project (Final design prior to the initiation of construction documents on the project)
- ☒ 6. Campus map(s) showing project site

Prepared by: Michael Hand

Approved by:

Tim Leopand

*OK
OK*

^{/1} Reference Tab 3H - Board Rule 415 Instructional Guide

^{/2} Reference Tab 3E - Board Rule 415 Instructional Guide



Office of the
President

February 28, 2024

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 III submittal for the Beta Theta Pi Rear Addition Project.

The resolution requests approval of the Architectural Design and a scope, budget, and funding revision for the project, as stipulated.

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 April 11 - 12, 2024.

Sincerely,

A handwritten signature in black ink, appearing to read "Stuart R. Bell". The signature is stylized with a large, looping "S" and "B".

Stuart R. Bell
President

Enclosure



THE UNIVERSITY OF ALABAMA

Approving the revised project scope and budget; approving the proposed architectural design for the Beta Theta Pi Rear Addition

RESOLUTION

WHEREAS, on February 2, 2024, in accordance with Board Rule 415, The Board of Trustees of The University of Alabama (“Board”) approved Stage I and Stage II submittals for the Beta Theta Pi Rear Addition project (“Project”) to be located at 960 University Boulevard; and

WHEREAS, the Project will allow for an addition to the north elevation (“rear”) of the Beta Theta Pi (“Chapter”) fraternity house, consisting of a 1,000 square foot extension to the existing game room and an additional 200 square feet of needed storage space for a total increase of 1,200 square feet; and

WHEREAS, the addition will enhance the functionality of the house and the student-life experience for both existing and future members by aligning the house with current trends in Greek life, which will aid in recruitment and Chapter growth; and

WHEREAS, to mitigate the impact to Chapter members during the Fall semester and to meet the Chapter’s request to occupy the additional space by the Spring 2025 semester, the University has sequenced the Project to include a preliminary Utility and Infrastructure relocation package ahead of the main construction package; and

WHEREAS, Ellis Architects (“Ellis”) of Tuscaloosa, Alabama, was engaged by the University and the Chapter to perform due diligence and programming services for this Project, thereby gaining valuable insight to the Project and specific Chapter needs; and

WHEREAS, this insight, as well as Ellis’s knowledge of University Standards, design principles, and procedures, will greatly facilitate an efficient design and administrative process; and

WHEREAS, Ellis has agreed to accelerate design services so that the Project can be completed, and the additional space fully utilized for the Spring 2025 semester; and

WHEREAS, on February 2, 2024, in accordance with Board Rule 415, due to the abovementioned benefits to the University, the Board authorized the University to waive the Consultant Selection Process and to utilize Ellis to provide design services for the Project; and

WHEREAS, the University has negotiated a final design fee based on 7.7% of the cost of the main construction package, with a 1.18 renovation factor, plus additional services of a not-to-exceed amount of \$1,000, less a credit of \$9,700, which represents a discount of approximately 23% of the standard fee; and

WHEREAS, the engineering services for the Construction – Utilities & Infrastructure Package will be a direct engineering services agreement between the University and a civil engineering firm to ensure coordination with critical University utilities in the area and City of Tuscaloosa requirements; and

WHEREAS, to best serve the members and further support Chapter operations, the Chapter desires to minimally increase the size of the addition by 300 square feet for a total of 1,500 square feet which will more fully utilize the available lot and provide additional program benefit into the future for the Chapter; and

WHEREAS, the Chapter further desires to reduce operational expense related to exterior maintenance and to provide an outdoor gathering space for its members by including a hardscape patio directly adjacent to the east of the addition; and

WHEREAS the University, on behalf of the Chapter, is requesting a budget increase from \$1,171,205 to \$1,384,904, to account for the aforementioned additional scope and related revisions to soft costs; and

WHEREAS, responsible officials at the University have received renderings for the Stage III submittal and are recommending approval of said design; and

WHEREAS, the Project will be funded from Beta Theta Pi Chapter Reserves in the amount of \$1,384,904, which the University has verified, and the Chapter is current with their existing note; 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 revised budget for the Project is as stipulated below:

BUDGET:		REVISED
Construction – Addition Package	\$	741,200
Construction - Utilities & Infrastructure Package	\$	125,000
Landscaping	\$	25,000
Security & Access Control	\$	50,000
Telecomm & Data	\$	50,000
Contingency ¹ (10%)	\$	89,120
UA Project Management Fee ² (4.5%)	\$	44,114
Architect/Engineer Fee ³ (~7.4%)	\$	69,522
Other ⁴	\$	125,000
Escalation ⁵	\$	65,948
TOTAL PROJECT COST	\$	<u>1,384,904</u>

¹Contingency is based on 10% of the Construction Packages and Landscaping.

²UA Project Management Fee is based on 4.5% of the Construction Packages, Landscaping, and Contingency.

³Architect/Engineer Fee is based on 7.4% of the Construction - Addition Package plus a 1.18 Renovation Factor, plus \$1,000 in NTE Additional Services, less a \$9,700 credit, plus a lump sum engineering fee of \$11,250 for the Construction – Utilities & Infrastructure Package plus \$3,500 in NTE Additional Services, less a credit of \$1,250 that will be a direct engineering services agreement between the University and a civil engineer to ensure coordination with critical University utilities in the area.

⁴Other expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

⁵Escalation 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 5% basis for this project based on the anticipated bid date of July 2024 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 III Architectural Design submittal for the project is hereby approved.
2. The revised scope, budget and funding as stipulated above are hereby approved.

EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT
BOARD OF TRUSTEES SUBMITTAL

MEETING DATE:	<u>April 11-12, 2024</u>
CAMPUS:	<u>The University of Alabama, Tuscaloosa, Alabama</u>
PROJECT NAME:	<u>Beta Theta Pi Rear Addition</u>
PROJECT NUMBER:	<u>908-24-3527</u>
PROJECT LOCATION:	<u>960 University Blvd</u>
ARCHITECT:	<u>Ellis Architects, Inc., Tuscaloosa, AL</u>

THIS SUBMITTAL:

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

PREVIOUS APPROVALS:

February 2, 2024
 February 2, 2024

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input type="checkbox"/> Building Construction			
<input checked="" type="checkbox"/> Building Addition	Fraternity	100%	1,500
<input type="checkbox"/> Building Renovation			
<input type="checkbox"/> Equipment			
TOTAL		100%	1,500

BUDGET	Current	Revised
Construction – Addition Package	\$ 575,000	741,200
Construction - Utilities & Infrastructure Package	\$ 125,000	125,000
Landscaping	\$ 25,000	25,000
Security & Access Control	\$ 50,000	50,000
Telecomm & Data	\$ 50,000	50,000
Contingency ¹ (10%)	\$ 72,500	89,120
UA Project Management Fee ² (4.5%)	\$ 35,888	44,114
Architect/Engineer Fee ³ (~7.4%)	\$ 57,045	69,522
Other ⁴	\$ 125,000	125,000
Escalation ⁵	\$ 55,772	65,948
TOTAL PROJECT COST	\$ 1,171,205	1,384,904
Total Construction Cost per square foot \$637		

¹Contingency is based on 10% of the costs of the Construction Packages and Landscaping.

²UA Project Management Fee is based on 4.5% of the costs of the Construction Packages, Landscaping, and Contingency.

³Architect/Engineer Fee is based on 7.4% of the costs of the Construction - Addition Package plus a 1.18 Renovation Factor, plus \$1,000 in NTE Additional Services, less a \$9,700 credit, plus a lump sum engineering fee of \$11,250 for the Construction – Utilities & Infrastructure Package, plus \$3,500 in NTE Additional Services, less a credit of \$1,250 that will be a direct engineering services agreement between the University and a civil engineer to ensure coordination with critical University utilities in the area.

⁴Other fees and expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

⁵Escalation 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 5% basis for this project based on the anticipated bid date of July 2024 as included in the Project Status.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:		
(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 fraternity members.**

FUNDING SOURCE:

Chapter Funds \$ 1,384,904

O&M Costs:

\$ NA*

NEW EQUIPMENT REQUIRED**Total Equipment Costs:**

N/A

PROJECT SCOPE:

The proposed Beta Theta Pi Rear Addition project (“Project”), located at 960 University Boulevard, will consist of an addition to the existing recreation room at the rear of the fraternity house. The renovation will enhance the functionality of the current recreation room and bring the house closer to current trends in Greek life which should aid in future recruitment and chapter growth.

The addition includes a 1,200 square foot extension of the current recreation room, approximately doubling the size of the space, as well as a 300 square foot storage room for much needed storage capacity, making the total Project addition approximately 1,500 square feet. The area to the east of the new addition will be replaced with hardscape to make a new outdoor gathering area, reducing maintenance expenses for the Chapter and further aiding in chapter growth.

The addition will be in general alignment with the back of the adjacent Phi Gamma Delta and Sigma Nu houses. Careful attention will be made to ensure that the materials used in the addition will match the existing house.

The Project will be executed in two phases: a preliminary Utility and Infrastructure relocation package, tentatively planned for Summer 2024, and the Addition package, to be executed Fall 2024.

PROJECT STATUS		
SCHEMATIC DESIGN:	Date Initiated	December 2023
	% Complete	100%
	Date Completed	January 2024
PRELIMINARY DESIGN:	Date Initiated	January 2024
	% Complete	100%
	Date Completed	February 2024
<u>Utility and Infrastructure Package</u>		
CONSTRUCTION DOCUMENTS:	Date Initiated	February 2024
	% Complete	100%
	Date Completed	March 2024
SCHEDULED BID DATE:		April 2024
<u>Addition Package</u>		
CONSTRUCTION DOCUMENTS	Date Initiated	March 2024
	% Complete	30%
	Date Completed	June 2024
SCHEDULED BID DATE:		July 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 gathering space in the recreation room and storage needed for the house. The addition will increase room functionality and bring the house up to current trends in Greek life.

BETA THETA PI REAR ADDITION

SITE PLAN



BETA THETA PI REAR ADDITION

EXISTING SOUTH ELEVATION
NO WORK AT THIS ELEVATION



BETA THETA PI REAR ADDITION

VANTAGE POINTS



BETA THETA PI REAR ADDITION

VIEW 1 EXISTING
LOOKING SOUTHWEST FROM 4TH STREET



BETA THETA PI REAR ADDITION

VIEW 1 PROPOSED
LOOKING SOUTHWEST FROM 4TH STREET



BETA THETA PI REAR ADDITION

VIEW 2 EXISTING
LOOKING SOUTH FROM 4TH STREET



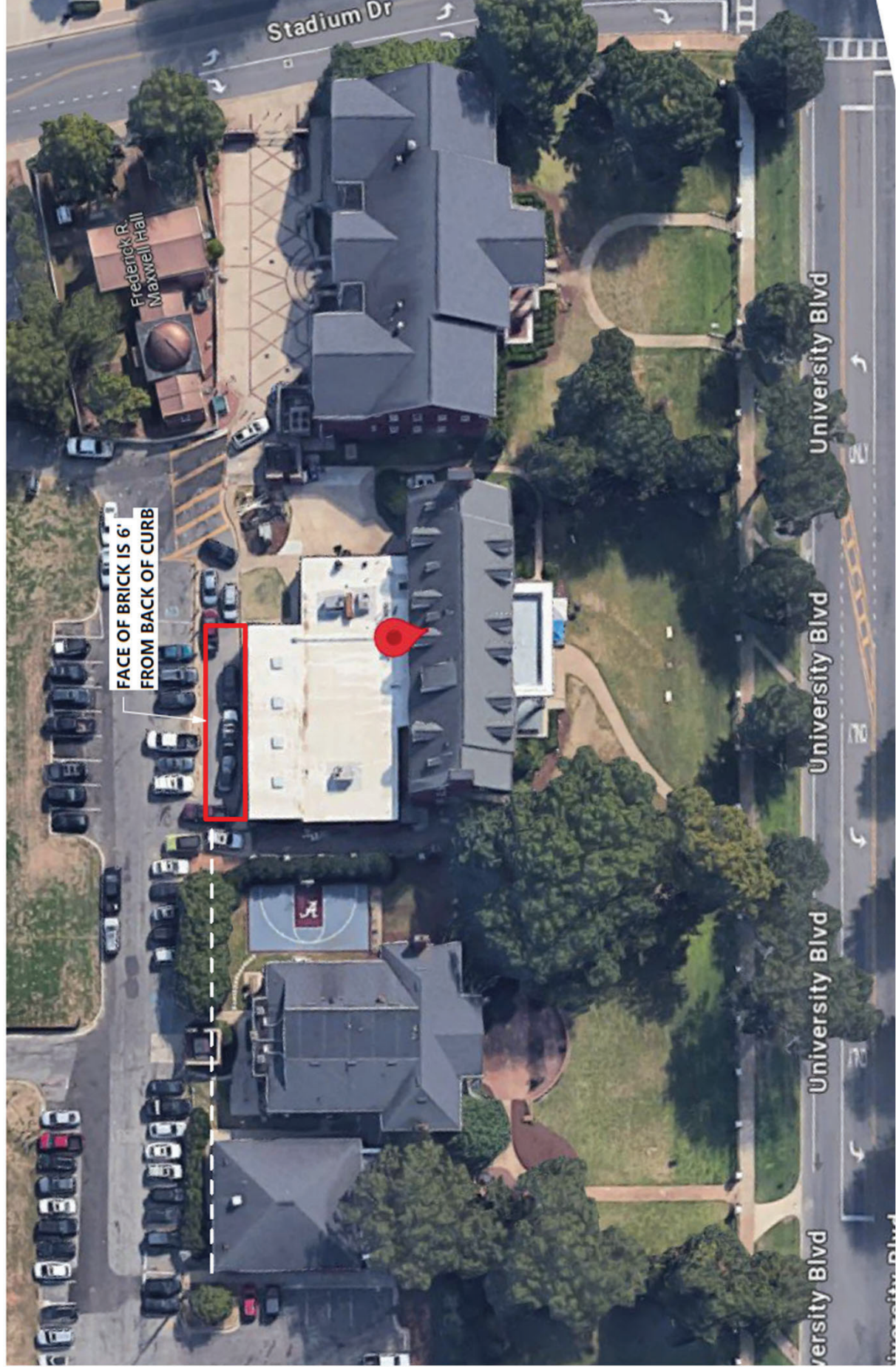
BETA THETA PI REAR ADDITION

VIEW 2 PROPOSED
LOOKING SOUTH FROM 4TH STREET



BETA THETA PI REAR ADDITION

AERIAL SHOWING ALIGNMENT



BETA THETA PI – REAR ADDITION

MASSING STUDY

Name of Building	Height from Finished Floor to Roof Ridge	Width	Depth
Beta Theta Pi	47 feet	120 feet	148 feet
Delta Kappa Epsilon	43 feet	133 feet	113 feet
Phi Gamma Delta	37 feet	129 feet	106 feet

Original Depth of
Beta Theta Pi was 122 ft.

BETA THETA PI REAR ADDITION

LOCATION MAP

