

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

**BOARD SUBMITTAL CHECKLIST NO. 1
CAPITAL PROJECT - STAGE I SUBMITTAL ^{/1}
(General Project Information)**

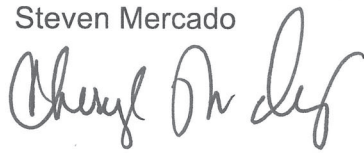
CAMPUS: The University of Alabama, Tuscaloosa, Alabama


PROJECT NAME: Student Health and Wellness Building

MEETING DATE: April 11-12, 2024

- 1. Board Submittal Checklist No. 1
- 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 Submittal by the Board of Trustees
- 4. Executive Summary – Proposed Capital Project ^{/2}
- 5. Supplemental Project Information Worksheet – Exhibit “K”, Board Rule 415
- 6. Campus map(s) showing project site

Prepared by: Steven Mercado

Approved by: 



^{/1} Reference Tab 3F – Board Rule 415 Instructional Guide
^{/2} Reference Tab 3E – Board Rule 415 Instructional Guide



Office of the
President

March 5, 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 I submittal for the Student Health and Wellness Building New Construction project.

The resolution requests authorization to establish a preliminary project scope, budget, and funding, 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 at their regular meeting on April 11-12, 2024.

Sincerely,

A handwritten signature in black ink, appearing to read "Stuart R. Bell".

Stuart R. Bell
President

Enclosure



THE UNIVERSITY OF ALABAMA

Approving the preliminary project scope and budget for the New Student Health and Wellness Building

RESOLUTION

WHEREAS, in accordance with Board Rule 415, The University of Alabama (“University”) is requesting approval of a Stage I submittal for the Student Health and Wellness Building New Construction project (“Project”) to be located at the East Bryce Campus near the southwest corner of Kilgore Lane and Peter Bryce Boulevard; and

WHEREAS, the proposed Project will provide much needed space for multiple divisions of UA Student Life including the Counseling Center, Collegiate Recovery and Intervention Services, Health Promotion and Wellness, and the Women and Gender Resource Center and will enable these student-centric departments to make expansions and enhancements to existing programs and service offerings, furthering the mission of service to students; and

WHEREAS, the new facility will increase support for student health and wellbeing, promoting a holistic view of student wellness that considers the total student and entirety of the student experience to help them establish and maintain a lifelong approach to wellness, which is an attractive offering to potential students and their families, enhancing the University’s opportunities for increasing recruitment and enrollment as well as helping to retain current students; and

WHEREAS, the relocation of the Counseling Center, Collegiate Recovery, and the Women and Gender Resource Center is necessary as these programs are currently housed in the South Lawn Building for which the property lease expires June 2026; and

WHEREAS, the new construction will allow for the colocation of these divisions which will better serve the student population and enhance operations by providing a facility that maximizes operational efficiency with shared areas as appropriate while also meeting the specific needs of each program including welcoming confidential counseling spaces, an abundance of natural light, and private entrance areas as needed; and

WHEREAS, the proposed Project will include an approximately 60,000 gross square feet (“GSF”) facility with one-story of program space and will be architecturally aligned to complement the surrounding facilities and take advantage of the surrounding green space; and

WHEREAS, to mitigate the effects of continued industry lead time issues and deliver the Project as efficiently as possible, the Project will be separated into two (2) packages: Package A – Site Development, Package B – Main Construction; 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 Central Reserves in the amount of \$4,000,000 and Future Revenue Bonds in the amount of \$44,000,000 for a total project cost of \$48,000,000 and will eliminate an annual lease expense in the amount of \$253,992; and

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

BUDGET:	PRELIMINARY
Package A – Site Development	\$ 750,000
Package B – Main Construction	\$ 33,000,000
Landscaping	\$ 575,000
Furniture, Fixtures and Equipment	\$ 2,300,000
Owner Furnished Contractor Installed (OFCI) Equipment	\$ 1,000,000
Security/Access Control	\$ 600,000
Audio Visual	\$ 600,000
Telecommunication/Data	\$ 600,000
Contingency ¹ (5%)	\$ 1,766,250
UA Project Management Fee ² (3.5%)	\$ 1,298,194
Architect/Engineer Fee ³ (4.9%)	\$ 1,873,025
Commissioning	\$ 100,000
Other ⁴	\$ 820,550
Escalation ⁵	\$ 2,716,981
TOTAL PROJECT COST	\$ 48,000,000

¹Contingency is based on 5% of the costs of the Packages A-B, Landscaping, and OFCI Equipment.

²UA Project Management Fee is based on 3.5% of the costs of the Packages A-B, Landscaping, OFCI Equipment, and Contingency.

³Architect/Engineer Fee is based on 4.9% of the costs of the Packages A-B, Landscaping, OFCI Equipment, Furnishings, Fixtures, and Equipment, and Audio Visual.

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 6% basis for this project based on the anticipated bid date of December 2024 as included in the Project Status.

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 costs incurred in connection with the acquisition, construction, and installation of the Project paid prior to the issuance of the Bonds; and

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

1. The University does hereby declare that it intends to allocate a portion of the proceeds of the Bonds to pay or to reimburse the Board for capital expenditures incurred after the date that is no more than 60 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 installation of the Project. This portion of this resolution is being adopted pursuant to the requirements of Treasury regulations Section 1.150-2(e).
2. The Stage I submittal package for the Project is hereby approved.
3. The preliminary Project Scope, Budget, and Funding, as stipulated above, are hereby approved.

EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT
BOARD OF TRUSTEES SUBMITTAL

MEETING DATE: April 11 - 12, 2024

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Student Health and Wellness Building New Construction

PROJECT NUMBER: 410-24-3631

PROJECT LOCATION: East Bryce Campus, South of Kilgore Lane

ARCHITECT: To be determined

THIS SUBMITTAL:

- Stage I
- Stage II
- Campus Master Plan Amendment
- Stage III
- Stage IV

PREVIOUS APPROVALS:

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input checked="" type="checkbox"/> Building Construction	Classroom Facilities	~1%	676
<input type="checkbox"/> Building Addition	Laboratory Facilities	~ 0%	192
<input type="checkbox"/> Building Renovation	Office Facilities	~46%	27,479
<input type="checkbox"/> Equipment	Special Use Facilities	~ 2%	1,153
	General Use Facilities	~ 15%	9,057
	Central Service/ Support	~ 2%	911
	Circulation Area	~ 12%	7,047
	Building Service Area	~ 2%	1,350
	Mechanical Area	~20%	12,135
	TOTAL	100%	60,000

BUDGET		PRELIMINARY
Package A – Site Development	\$	750,000
Package B – Main Construction	\$	33,000,000
Landscaping	\$	575,000
Furniture, Fixtures and Equipment	\$	2,300,000
Owner Furnished Contractor Installed (OFCI) Equipment	\$	1,000,000
Security/Access Control	\$	600,000
Audio Visual	\$	600,000
Telecommunication/Data	\$	600,000
Contingency ¹ (5%)	\$	1,766,250
UA Project Management Fee ² (3.5%)	\$	1,298,194
Architect/Engineer Fee ³ (4.9%)	\$	1,873,025
Commissioning	\$	100,000
Other ⁴	\$	820,550
Escalation ⁵	\$	2,716,981
TOTAL PROJECT COST	\$	48,000,000
Total Construction Cost per square foot		
\$609		

¹Contingency is based on 5% of the costs of the Packages A-B, Landscaping, and OFCI Equipment.

²UA Project Management Fee is based on 3.5% of the costs of the Packages A-B, Landscaping, OFCI Equipment, and Contingency.

³Architect/Engineer Fee is based on 4.9% of the costs of the Packages A-B, Landscaping, OFCI Equipment, Furnishings, Fixtures, and Equipment, and Audio Visual.

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

⁵ 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 December 2024 as included in the Project Status.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:	
(Utilities, Housekeeping, Maintenance, Insurance, Other)	
60,000gsf x ~\$10.25/sf*	\$ 603,244.99
Total Estimated Annual O&M Costs:	\$ 603,244.99

*This cost will be offset by elimination of the O &M and lease cost associated with the South Lawn Office Building. The lease expires in 2026 and the building will be returned to DCH.

FUNDING SOURCE:	
	University Central Reserves \$ 4,000,000
	Future Revenue Bonds \$ 44,000,000
O&M Costs:	University Annual Operating Funds \$ 603,244.99

NEW EQUIPMENT REQUIRED	
OFCI Equipment:	\$1,000,000
	Electrical Equipment and Generator
Total Equipment Costs:	\$1,000,000

PROJECT SCOPE:

The Student Health and Wellness Building New Construction Project (“Project”) will be a one-story building. The ground floor will be approximately 60,000 gross square feet (“gsf”) that will be offices for multiple divisions of UA Student Life including the Counseling Center, Collegiate Recovery and Intervention Services, Health Promotion and Wellness, and the Women and Gender Resource Center. The construction of a new building dedicated to Student Wellness and Wellbeing promotes the importance of serving students holistically while on campus. The Project allows for the expansion of space necessary for each department to meet and prepare for the growing student need and demand for services and programs that are essential for student success and is consistent with UA’s vision of being a “student-centered research university and an academic community united in its commitment to enhance the quality of life for all Alabamians and the citizens of the nation and the world.” This project will enhance the overall student experience and provide state of the art facilities for these important services.

Long lead items will be Owner Purchased Contractor Installed to mitigate the effect of continued supply chain challenges. The long lead items the project intends to purchase will be electrical equipment and a generator.

PROJECT STATUS		
SCHEMATIC DESIGN:	Date Initiated	August 2023
	% Complete	50%
	Date Completed	March 2024
PRELIMINARY DESIGN:	Date Initiated	April 2024
	% Complete	0%
	Date Completed	June 2024
CONSTRUCTION DOCUMENTS:	Date Initiated	June 2024
	% Complete	0%
	Date Completed	December 2024
SCHEDULED BID DATE:		December 2024

**N/A on Stage I Projects*

RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS
<p>This project will provide additional space for the Counseling Center, Collegiate Recovery and Intervention Services, Health Promotion and Wellness and the Women and Gender Resource Center and enhances the existing programs and services for each department, allowing each department to expand upon their mission of service to students.</p> <p>Increased support for student wellbeing is an attractive offering to potential students and their parents/families which enhances opportunities for increasing recruitment and enrollment as well as helping to retain current students.</p> <p>This project will allow these areas of the Division of Student Life – wellness areas to be located in close proximity in a new facility. Currently these offices are located in spaces with expiring lease agreements (summer 2026) or older facilities. Providing new programming and dedicated space for these services strengthens and affirms the commitment we have to student wellness and wellbeing.</p>

Attachment K to Board Rule 415

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

FY: 2023 – 2024

Project Name: Student Health and Wellness Building New Construction
Project Address/Location: East Bryce Campus, South of Kilgore Lane
University Project #: 410-24-3631
Campus: The University of Alabama, Tuscaloosa, AL

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

- increase space inventory 100 % increase 60,000 GSF
- replace space inventory _____ % replacement _____ GSF
- renovation of existing space only _____ GSF

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

Comments:

Three of the four programs to be housed in the new facility are currently located in a leased facility (South Lawn Building) with the lease expiring in Summer 2026. The leased facility will return to DCH at that time.

The remaining program, Health Promotion and Wellness, currently resides in Mary Burke Hall. Once relocated into the new facility, the vacated space will be used by other Student Life programs as necessary to best serve the increasing demand for these programs.

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:

The proposed site aligns with the 2017 Master Plan and was identified as a potential building location.

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				
110 Classroom	1	36	640	
200 Laboratory Facilities				
250 Research/Non-class Laboratory	1	7	95	
255 Research/Non-class Laboratory Service	1	0	95	
300 Office Facilities				
310 Office	107	119	16,369	
315 Office Service	26	50	3,665	
350 Conference Room	6	229	4,391	
355 Conference Room Service	1	1	23	
400 Study Facilities				
500 Special Use Facilities				
530 Media Production	1	12	400	
550 Demonstration	1	50	741	
600 General Use Facilities				
610 Assembly	2	985	9035	
615 Assembly Service	1	4	2,800	
650 Lounge	6	244	4,628	
655 Lounge Service	1	1	144	
670 Recreation	1	10	143	
680 Meeting Room	7	96	2,115	
700 Support Facilities				
730 Central Storage	3	3	928	
800 Health Care Facilities				
900 Residential Facilities				
000 Unclassified Facilities				

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:

Greg Vander Wal, Executive Director, Counseling Center and Executive Director, Collegiate Recovery and Intervention Services
 Elle Shabaan-Magaña, Women and Gender Resource Center
 Kelly Miller, Assistant Director, Collegiate Recovery and Intervention Services
 Charlotte Petonic, Assistant Director, Health Promotion and Wellness
 Ruperto Perez, Associate VP, Student Health and Wellbeing
 Matt Kerch, Executive Director, Housing and Residential Communities
 Steven Mercado, University Senior Project Manager

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

Source(s)	New Funds (FY 2023-2024)	Reserves	Status ^{/7}
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Education Sales/Services			
• External			
• Internal			
Direct Grants			
Gifts			
Bonds (Future Revenue)		\$44,000,000	Pending
Existing Net Assets			
Other (University Central Reserve)		\$4,000,000	Pending
Totals		\$48,000,000	Pending

^{/7} Approved, allocated, pending

Comments:

University Central Reserves and Future Revenue Bonds

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 2022 Base Data /8	First Full /YR Occupancy FY 2027	Successive Five (5) Year Projections /9
Maintenance	\$116,041.61	\$160,861.97	\$982,603.53
Elevator Service			
Building Repairs	\$38,683.89	\$53,625.28	\$327,562.73
Building Services	\$101,772.40	\$184,215.70	\$861,775.93
Electric, Natural Gas, Steam	\$121,999.88	\$169,121.49	\$1,033,055.64
Chilled Water			
Water and Sewer	\$6,543.84	\$9,071.36	\$55,411.15
Insurance	\$9,240.56	\$12,809.66	\$78,246.12
Safety Support	\$8,203.06	\$11,371.43	\$69,460.86
Operations Staff Support Funding	\$1,564.00	\$2,168.09	\$13,243.42
Other –			
Totals	\$404,049.30	\$603,244.99	\$3,421,359.38

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

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

Comments:

This cost will be offset by elimination of the O &M and lease cost associated with the South Lawn Building. The lease expires in 2026 and the building will be returned to DCH.

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 2027)	Future Years ^{/10}	Status ^{/7}
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Educational Sales & Services			
• External			
• Internal			
Direct Grant(s)			
Reallocated Funds ^{/11}			
Gifts			
Other	\$603,244.99	\$3,421,359.38	
Total/YRF	\$603,244.99	\$3,421,359.38	

^{/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 cost will be funded from the University’s annual operating budget. This cost will be offset by elimination of the O &M and lease cost associated with the South Lawn Building. The lease expires in 2026 and the building will be returned to DCH.

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

\$ 0.00 0 % of Total Development Costs

Comments:

The South Lawn Building is currently being leased annually in the amount of \$253,992. The new Student Health and Wellness building will eliminate the need for this lease.

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:

- Previous planning (FY18-19) for renovation of Martha Parham West to accommodate Health Promotion and Wellness and Collegiate Recovery and Intervention Services.
- Expansion of existing departmental spaces
- Construction of new, separate facilities
- Updating multiple existing facilities instead of one co-located building (Osband, Parham, Burke, Bryant Dining)

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:

Construction of a new building dedicated to Student Wellness and Wellbeing promotes the importance of serving students holistically while on campus. The new facility provides for the expansion of space necessary for each department to meet and prepare for the growing student need and demand for services and programs that are essential for student success and is consistent with UA’s vision of being a “student-centered research university and an academic community united in its commitment to enhance the quality of life for all Alabamians and the citizens of the nation and the world.” This project will enhance the overall student experience and provide state of the art facilities for these important services.

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

Comments:

The first goal of the University’s strategic plan is to “provide a premier education that enhances the lives of our students, graduates, and the communities they serve.” This Project will advance that goal by:

Providing space for services that will truly enhance the student experience and the student learning experience. The University of Alabama values the health and wellbeing of each student. The Division of Student Life promotes a holistic view of student wellness that considers the total student and the entirety of the student experience to help them establish and maintain a lifelong approach to wellness. Through many initiatives led through these offices, we provide resources and opportunities so that each student can thrive in their time at the Capstone and beyond.

The second goal of the University’s strategic plan is to “increase the University’s productivity and innovation in research, scholarship and creative activities that impact economic and societal development.” This Project will contribute to that goal by:

Adding faculty and staff space for ongoing research, academic contribution, and furthering their areas of expertise. These offices are far reaching and support the campus and campus community providing important services, opportunities, and initiatives to enhance the UA experience.

The third goal of the University’s strategic plan is to “enrich our learning and work environment by providing an accepting, inclusive community that attracts and supports a diverse faculty, staff, and student body.” This Project will contribute to that goal by:

Promoting and highlighting these services to enhance individual experiences and attract more students, faculty, and staff to UA. Providing these valuable support services to our campus community will allow our community to be positively impacted by the valuable services housed in this building.

The fourth goal of the University’s strategic plan is to “foster an environment that will aid in the recruitment, retention, growth, and support of outstanding faculty and staff.” This Project will contribute to that goal by:

Investing in Wellness and Wellbeing, helping prospective faculty and staff understand the importance of these services to our campus community.

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

Comments:

The fifth Core Principle is “work to help lead a unified approach to improving the economy, opportunities, and comprehensive health care of all citizens of Alabama.”

The sixth Core Principle is “elevate the status, stature and influence of the University of Alabama System so that we can call on all people devoted to The University of Alabama, UA, UAH, and UAB Health System to unite for common purposes.”

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

Comments:

The foreseeable immediate impact on campus programs and enrollment if this project is not approved may include, but not be exclusive of, the following:

- Increased levels of student stress that leads to decrease in academic performance and success and eventual increased attrition from UA.
- Increased levels of student mental health issues that leads to declines in academic and personal success and eventual increased attrition from UA.
- Lack of adequate, expanded space and facilities to address student health and wellbeing which would lead to decreases in student academic performance, personal success, overall

satisfaction with UA, and eventual increased attrition.

- Lack of adequate, expanded space and facilities would impact campus programs and enrollment by limiting the ability to provide for the presently increasing student demand for services to address mental health and health prevention efforts which would lead to decreases in student academic performance, personal success, overall satisfaction with UA, and eventual increased attrition.
- Potential impact on future recruitment of students whose interests and whose parent and families interests increasingly focus on the adequacy and quality of student support services available for the student's wellbeing and health.

STUDENT HEALTH & WELLNESS BUILDING

LOCATION MAP

