UNIVERSITY OF ALABAMA SYSTEM BOARD RULE 415 BOARD SUBMITTAL CHECKLIST CRITERIA

BOARD SUBMITTAL CHECKLIST NO. 1 & 2 CAPITAL PROJECT - STAGE I & II SUBMITTAL /1

(General information, Architect Ranking, Project Scope and Project Budget) /8

CAMI	PUS:		The University of Alabama, Tuscaloosa, Alabama
PROJ	ECT NA	ME:	H.M. Comer Hall 1st & 2nd Floor Interior Renovations
меет	TING DA	ATE:	June 6 - 7, 2024
V	1.	Board	d Submittal Checklist No. 1 and 2
V	2.	on the	smittal Letter to Chancellor from Campus President requesting project be placed e agendas for the forthcoming Physical Properties Committee and Board of ees (or Executive Committee) Meetings
V	3,,	Inform	osed Board Resolution requesting approval of Stage I and II Submittal (General mation, Architect Ranking, Project Scope and Project Budget; authority to ed with Owner/Architect contract negotiations) by the Board of Trustees
~	4.	Execu	ative Summary – Proposed Capital Project /2
V	5.		ntive Summary – Architect, Engineer, Selection Process (include Interview ne). /3, /4, /5
V	6.	Suppl	emental Project Information Worksheet – Exhibit "K", Board Rule 415
V	7.	the Ph Prope	ous letter requesting approval of the ranking of firms and authority to Submit to hysical Properties Committee for approval – signed by Chair of the Physical orties Committee and UA System Senior Vice Chancellor for Finance and histration 1/6
	8.	Prelin	ninary Business Plan (if applicable) 17
V	9.	Camp	ous map(s) showing project site
			Prepared by: Brittany Kyles Approved by: Tim leapane
/1 /2 /3 /4 /5 /6 /7	Reference Reference Reference Reference Reference After Cor	e Tab 3E e Tab 3K e Tab 3L e Tab 3M e Tab 3N e Tab 3V npletion	I – Board Rule 415 Instructional Guide Some Board Rule 415 Instructional Guide

Guide



April 30, 2024

Interim Chancellor Sid J. Trant The University of Alabama System 500 University Boulevard East Tuscaloosa, Alabama 35401

Dear Interim Chancellor Trant,

I am pleased to send to you for approval under Board Rule 415 the attached documents for a Stage I and a Stage II submittal for the H.M. Comer 1st & 2nd Floor Interior Renovations project.

The resolution requests authorization to establish a preliminary project scope, budget, and funding, as stipulated, and to enter into an Owner Designer Agreement with KPS Architects, 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 at their regular meeting on June 6-7, 2024.

Stuart R. Bell

President

Enclosure



THE UNIVERSITY OF ALABAMA

Approving the preliminary project scope and budget; granting authorization to execute an Owner/Architect Agreement for the H.M. Comer Hall 1st & 2nd Floor Interior Renovations

RESOLUTION

WHEREAS, in accordance with Board Rule 415, The University of Alabama ("University") is requesting approval of a Stage I and Stage II submittal for the H.M. Comer Hall 1st & 2nd Floor Interior Renovations ("Project") to be located at 245 7th Avenue; and

WHEREAS, the Project will enhance space on the first and second floors of H.M. Comer Hall to advance student success and capabilities for the Departments of Aerospace Engineering and Mechanics ("AEM") and Civil, Construction and Environmental Engineering ("CCEE") within the College of Engineering; and

WHEREAS, the project is comprised of a single construction package for the 1st and 2nd Floor Renovations, which will modify existing spaces to accommodate AEM and CCEE department head suites, and Owner Furnished Contractor Installed Equipment to successfully meet the project's schedule; and

WHEREAS, KPS Group, of Birmingham, Alabama, has successfully executed several renovations on Campus and was previously engaged by the University as Architect of Record to perform extensive renovations on H.M. Comer Hall in 2018; and

WHEREAS, KPS Group's familiarity with the College of Engineering, their recent engagement on the College's Master Plan strategy, and their understanding of University standards, design principles, and procedures will facilitate an efficient and cost- effective design and administrative process; and

WHEREAS, KPS Group is committed to completing the designs by the end of June 2024, allowing the project to bid in late June 2024 and construction to begin with the utmost expediency to finish by the desired date of August 2024 so as to minimize the impact to the student experience and College operations, the University is requesting approval to waive the Consultant Selection Process and to utilize the engineering design services of KPS Group for the Project; and

WHEREAS, the University has negotiated a design fee of 7.0% of the cost of construction for the Project, with a 25% renovation factor, plus \$87,500 for additional services, programming and phasing planning including future work and reimbursables and less a credit of \$58,000 for KPS' familiarity with the facility and recent Master Planning Strategy with the end users, for a total cost savings of \$58,000 which represents a 39% reduction of the standard fee for this type of project (Group III) and 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 in the amount of \$750,000 from College of Engineering Reserves and \$1,850,000 from Office of Academic Affairs Reserves for a Total Project Cost of \$2,600,000 and will address campus deferred maintenance (capital renewal) liabilities in the amount of approximately \$150,000; and

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

BUDGET:	PRELIMINARY
Construction	\$ 1,658,926
Owner Furnished Contractor Installed Equipment	
	\$ 30,000
Furniture, Fixtures and Equipment	\$ 300,000
Security/Access Control	\$ 20,000
Telecommunication/Data	\$ 15,000
Audio Visual	\$ 50,000
Contingency¹ (10%)	\$ 168,893
UA Project Management Fee² (4.5%)	\$ 83,602
Architect/Engineer Fee3(~8.75%)	\$ 177,281
Other Fees and Services4	\$ 96,298
TOTAL PROJECT COST	\$ 2,600,000

±Contingency is based on 10% of the cost of construction and Owner Furnished Contractor Installed Equipment.

2UA Project Management Fee is based on 4.5% of the cost of construction, Owner Furnished Contractor Installed Equipment, and contingency.

³Architect/Engineer Fee is based on 7.0% of the cost of construction and Owner Furnished Contractor Installed Equipment plus a 1.25 renovation factor, plus \$87,500 of additional services, programming and phasing planning including future work and reimbursables, and less a \$58,000 credit.

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

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.

ALSO, BE IT FURTHER RESOLVED THAT, Stuart R. Bell, President; Cheryl Mowdy, Interim Vice President for Finance and Operations and Treasurer; or those officers named in the most recent Board Resolution granting signature authority for the University be, and hereby are, authorized for and on behalf of the Board to execute an owner designer agreement with KPS Group of Birmingham, Alabama, for architectural services in accordance with Board Rule 415 for the Project.

EXECUTIVE SUMMARY PROPOSED CAPITAL PROJECT BOARD OF TRUSTEES SUBMITTAL

MEETING DATE:	June 6-7, 2024
CAMPUS:	The University of Alabama, Tuscaloosa, Alabama
PROJECT NAME:	H.M. Comer Hall 1 st & 2 nd Floor Interior Renovations
PROJECT NUMBER:	245-24-3576
PROJECT LOCATION:	245 7th Avenue, Tuscaloosa, AL 35401
ARCHITECT:	KPS Group Architects Pending Approval

THIS SUBMITTAL:	PREVIOUS APPROVALS:
⊠ Stage I	
⊠ Stage II	
☐ Campus Master Plan Amendment	
☐ Stage III	
☐ Stage IV	

fice Facilities	((0)	
ice i delities	~66%	3,315
dy Facilities	$\sim 4\%$	200
ecial Use Facilities	~ 6%	280
ntral Service/ oport	~ 17%	830
culation Area	~4%	195
ilding Service	~ 3%	180
TAL	100%	5,000
	ecial Use Facilities ntral Service/ oport culation Area ilding Service	cecial Use Facilities ~ 6% Intral Service/ ~ 17% Opport culation Area ~ 4% Ilding Service ~ 3%

BUDGET	PRE	CLIMINARY
Construction	\$	1,658,926
Owner Furnished Contractor Installed Equipment	\$	30,000
Furniture, Fixtures and Equipment	\$	300,000
Security/Access Control	\$	20,000
Telecommunication/Data	\$	15,000
Audio Visual	\$	50,000
Contingency ¹ (10%)	\$	168,893
UA Project Management Fee ² (4.5%)	\$	83,602
Architect/Engineer Fee ³ (~8.75%)	\$	177,281
Other ⁴	\$	96,298
TOTAL PROJECT COST	\$	2,600,000
Total Construction Cost per square foot \$372		

¹Contingency is based on 10% of the costs of Construction and Owner Furnished Contractor Installed Equipment.

²UA Project Management Fee is based on 4.5% of the costs of Construction, Owner Furnished Contractor Installed Equipment, and Contingency.

³Architect/Engineer Fee is based on 7% of the costs of construction and Owner Furnished Contractor Installed Equipment plus a 1.25 renovation factor, plus \$87,500 for additional services, programming and phasing planning including future work and reimbursables, and less a credit of \$58,000.

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

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) CO	STS:	
(Utilities, Housekeeping, Maintenance, Insurance, Other)		
	\$	N/A
Total Estimated Annual O&M Costs:	\$	N/A*

^{*}Renovation of existing space only. No additional square footage.

FUNDING SOURCE:

College of Engineering Reserves \$ 750,000 Office of Academic Affairs Reserves \$ 1,850,000

O&M Costs: University Annual Operating Funds \$ N/A

NEW EQUIPMENT REQUIRED		
HVAC Equipment & Controls		
	Total Equipment Costs:	\$30,000

PROJECT SCOPE:

The project consists of reutilizing spaces in the first and second floor of HM Comer to give engineering students, Aerospace Engineering and Mechanics (AEM) and Civil, Construction and Environmental Engineering (CCEE) departments separate areas for operation.

The renovation will include the "CUBE" area on the first floor and select offices on the East and West wings of the second floor, with new spaces being rebuilt to suit each respective department's needs.

First floor modifications will give students a secure area, accessible at all hours, where they can collaborate with other students, helping them to excel in their studies and gain even more value from their time at the University.

Currently, the AEM and CCEE departments are dissimilar in functions, but are housed with each other. Having their own areas on the second floor will allow them to operate more efficiently and effectively for their students' needs, allowing for more advancement to the College of Engineering as a whole.

PROJECT STATUS		
SCHEMATIC DESIGN:	Date Initiated % Complete Date Completed	March 2024 100% April 2024
PRELIMINARY DESIGN:	Date Initiated % Complete Date Completed	April 2024 100% May 2024
CONSTRUCTION DOCUMENTS:	Date Initiated % Complete Date Completed	May 2024 0% June 2024
SCHEDULED BID DATE:		June 2024

^{*}N/A on Stage I Projects

RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS

The first and second floor enhancements at HM Comer will give students, Aerospace Engineering and Mechanics (AEM), and Civil, Construction and Environmental Engineering (CCEE) departments room to operate in their own unique way and advance the College of Engineering to new levels. It will create an environment to nurture students as they grow and help promote the College of Engineering to future students as a place where they can excel.

The Aerospace and Mechanical Engineering (AEM) and Civil, Construction, and Environmental Engineering (CCEE) departments proposed to be in the facility are functionally dissimilar, but are currently housed in the same location. This project will allow for them to have their own administrative space for their unique programs. The new location will provide consolidated and easier access for campus customers and provide an identifiable location for the respective activities.

Attachment K to Board Rule 415

Supplemental Project Information Worksheet Annual Capital Development Plan

FY: 2023 - 2024

Project Name: Project Address/Location: Campus:		H.M. Comer Hall 1st 245 7th Avenue, Tu The University of A		enovations	
1.	Will this Project increspace?	ease the current spac	e inventory on campu	s or replace	existing
	increase space in	ventory	% increase		GSF
	replace space inv	entory	% replacement _		_ GSF
	renovation of exi	sting space only		5,000	_ GSF
2.	assigned after this Pro	_ <u>_</u>	ventory, how will vaca	teu space be	umzeu or
3.			stent with the Camp ciples contained therei		Plan and
	⊠ Yes □ No,	A Campus Master Pla	n Amendment Is Requi	red	
	If Campus Master Plan	amendment required	, explain:		
	N/A				

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					
	310 Office	11	47	3,315	1	
	315 Office Service	5	-	830	1	
	350 Conference Room	1	54	280	2	
400	Study Facilities	1	6	200	2	
500	Special Use Facilities					
600	General Use Facilities					
700	Support Facilities					
	730 Central Storage	2	-	180		
800	Health Care Facilities					
900	Residential Facilities					
000	Unclassified Facilities					
www	Circulation Area	1	-	195		
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:

- 1. Current office allocation within HM Comer does not support Department Head needs, and is not able to accommodate growth.
- 2. Current meeting and collaboration spaces are at capacity and not able to accommodate study needs.

5.	How will this Project enhance existing/new	w programs and	l undergradı	uate/graduate
	enrollments?			

Estimated new Funds from Tuition/Programs	\$ <u>N/A</u>	Yr.
Comments:		
First Floor:		

Renovation of the CUBE area will allow improved access hours and oversight for students to use for student projects.

Second Floor:

The Aerospace and Mechanical Engineering (AEM) and Civil, Construction, and Environmental Engineering (CCEE) departments proposed to be in the facility are functionally dissimilar but are currently housed in the same location. This project will allow for them to have their own administrative space for their unique programs. The new location will provide consolidated and easier access for campus customers and provide an identifiable location for the respective activities.

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

If yes, list key members of user group:

- Dr. Clifford Henderson, Dean of the College of Engineering
- Dr. Mark E. Barkey, Department Head of Aerospace Engineering and Mechanics
- Dr. Michael Kreger, Department Head of Civil, Construction, and Environmental Engineering
- Cris Porter, Director of Engineering Services, College of Engineering
- Julie Ember, Director of Financial Affairs, College of Engineering
- Brittany Kyles, Project Manager, University of Alabama Construction Administration
- Dean Shackleford, Assistant Project Manager, University of Alabama Construction Administration
- Donald Simpson, KPS Group Architects

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

Source(s)	New Funds (FY 2023)	Reserves	Status /7
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Education Sales/Services			
• External			
• Internal			
Direct Grants			
Gifts			
Bonds			
Office of Academic Affairs Reserves	\$1,850,000		Pending
College of Engineering Reserves	\$750,000		Pending
Other (see below)			
Totals	\$2,600,000		

^{/7} Approved, allocated, pending

Comments:

- This project will be funded from College of Engineering Reserves for \$750,000 and OAA funds for \$1,850,000.

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 2014- 2015 Base Data /8	First Full /YR Occupancy FY 2024	Successive Five (5) Year Projections /9			
Maintenance						
Elevator Service						
Building Repairs						
Building Services						
Electric, Natural Gas, Steam						
Chilled Water						
Water and Sewer						
Insurance						
Safety Support						
Operations Staff Support Funding						
Other –						
Totals	N/A	N/A	N/A			

^{/8} Latest Fiscal Year Data used as Base Year for Projections

Comments:

HM Comer is an existing education and general facility, and accordingly O&M costs are already funded. There is no incremental increase in O&M resulting from this Project.

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

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

Source(s)	Occupancy Yr /9 (FY 2024)	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			
Total/YR	N/A	N/A	N/A

^{/9} Initial Full Yr of Occupancy

Comments:

HM Comer is an existing education and general facility, and accordingly O&M costs are already funded. There is no incremental increase in O&M resulting from this Project.

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

\$	150,000	6	% of Total Development Costs
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Comments:

The Project will address worn finishes that have been in place since the facility was renovated. Systems are in good condition and compliant with current code.

^{/10} Next Five (5) Yrs Occupancy

^{/11} Funds Reallocated from other sources

^{/7} Approved, allocated, pending

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:

Hardaway Hall was considered for the department suite relocation. However, Hardaway Hall requires significant renovations, and we were advised to not have any new activity in the building.

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:

The University of Alabama's Mission includes advancing the intellectual and social condition of people in the state, nation, and world. The Mission also emphasizes the quality of programs of teaching, research, and service. To elaborate on section five's comments, the main goal is to provide students access to more secure workplaces at all hours to promote student success in their studies, and to provide a well-suited facility for the Aerospace Engineering and Mechanics (AEM) and Civil, Construction and Environmental Engineering (CCEE) departments to function more efficiently and productively.

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 more secure collaboration meeting space necessary to prepare students for contemporary cooperative environments that rely heavily on cross-functional teams.
- Providing more space for administrative support services that are critical to ensuring
 the continued excellence of people and programs that result in a premier education and
 operational efficiency.

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

Comments:

The first Core Principle is "assure that everything we do is for the purpose of improving the lives and health of the citizens of the State of Alabama." The Project directly improves the learning experience and support services that prepare Alabama students for engineering careers by enhancing student-focused facilities in HM Comer.

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, UAB, UAH, and UAB Health System to unite for common purposes." This Project improves the learning facilities of the State's flagship engineering school, which in turn, elevates the stature and influence of both The University of Alabama and the University of Alabama System.

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

Comments:

Not approving this project would constrain the University's ability to appropriately serve the engineering students with educational experiences in the CUBE, the ability for the Aerospace Engineering and Mechanics (AEM) and Civil, Construction, and Environmental Engineering (CCEE) departments to administratively serve their students, and the College of Engineering to further support the faculty research and teaching mission in the College of Engineering.



April 30, 2024

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

H.M. Comer Hall 1st & 2nd Floor Interior Renovations

UA Project No.: 245-24-3576

Dear Dr. Keith and Trustee Urquhart,

The University of Alabama ("University") is requesting a Waiver of the Consultant Selection Process for the H.M. Comer Hall 1st & 2nd Floor Interior Renovation project ("Project") located at 245 7th Avenue, Tuscaloosa, AL 35401.

The University proposes to utilize KPS Group, Inc., Birmingham, AL, ("KPS") as the principal design firm for this Project. The services of KPS are proposed due to the firm having familiarity as the consultant for the Master Planning Strategy for the College of Engineering and for being the Architect of Record for the previous comprehensive renovation project of the H.M. Comer Hall. This insight will facilitate an efficient and effective design process. Accordingly, the University is requesting approval to utilize KPS Group, Inc. for this Project.

The University has negotiated a design fee of 7.0% of the cost of construction for the Project, with a 25% renovation factor, plus \$87,500 for additional services, programming and phasing planning including future work, and reimbursables and less a credit of \$58,000 for KPS' familiarity with the facility and recent Master Planning Strategy with the end users. The negotiated fee reflects a 39% reduction of the standard fee for this type of project (Group III) with a total cost savings of \$58,000.

Phase I Cost of the Work		Percentage Fee for Building Group III		Major Renovation Factor		Credits		Fee
\$1,688,926	X	7.0%	+	25%	-	\$0	=	\$147,781
\$1,688,926	X	7.0%	+	25%	-	\$58,000	=	\$89,781

The proposed basic fee represents a financial benefit to the campus and a savings of \$58,000 or approximately 39% of the value of the standard fee for the Project.

Consultant Selection Process Waiver HM Comer 1st and 2nd Floor Interior Renovations April 30, 2024 Page 2

Approval is hereby requested for:

- 1. Waiver of the Consultant Selection process.
- 2. KPS Group, Inc., Birmingham, AL, as the design service provider for the Project at a negotiated design fee based on 7.0% of the cost of construction for this renovation, respectfully, plus a 25% renovation factor and \$87,500 for additional services, programming and phasing planning including future work and reimbursables, and less total credits in the amount of \$58,000.
- 3. Submittal to the Physical Properties Committee for review and approval.

please feel free to contact me.	s been attached. If you have any que	estions or concerns,
Cheryl Mowdy Interim Vice President for Finance and Opera and Treasurer	ations	
CM/lrc		
Attachment		
Pc w/atchmts: Michael Rodgers Tim Leopard	Matt Skinner Brittany Kyles	Jessica Morris
**************************************	********	*******
Not Recommended for Approval. Submit Docusigned by: Dunu 5 Keith 9C2EFD005B6C48D	to Physical Properties Committee	
Dr. Dana S. Keith, Senior Vice Chancellor fo	r Finance and Administration	
**************************************	**********	********
☐ Not Recommended for Approval. Submit	to Physical Properties Committee	
Docusigned by: Marietta Urqulart 73592E8B4A08472		

Trustee Marietta M. Urquhart, Chair for Physical Properties Committee

H.M. Comer Hall 1st & 2nd Floor Interior Renovations

LOCATION MAP

