

**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}**

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Gorgas Library Phase III

MEETING DATE: November 7 - 8, 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 ^{/2}
- ☒ 5. Executive Summary – Architect, Engineer, Selection Process (include Interview Outline). ^{/3, /4, /5}
- ☒ 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 ^{/6}
- ☐ 8. Preliminary Business Plan (if applicable) ^{/7}
- ☒ 9. Campus map(s) showing project site

Prepared by: Mary Kathryn Holt

Approved by:

Tim Leopold
CMR
D. Fayzell
10/22/24 email

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

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

^{/3} Reference Tab 3K – Board Rule 415 Instructional Guide

^{/4} Reference Tab 3L – Board Rule 415 Instructional Guide

^{/5} Reference Tab 3M – Board Rule 415 Instructional Guide

^{/6} Reference Tab 3N – Board Rule 415 Instructional Guide

^{/7} Reference Tab 3V – Board Rule 415 Instructional Guide

^{/8} 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



Office of the
President

October 8, 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 II submittal for the Gorgas Library Phase III 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 CMH Architects, Inc. 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 November 7 - 8, 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; granting authorization to execute an Owner/Architect Agreement for the Gorgas Library - Phase III

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 Gorgas Library Phase III project (“Project”) to be located at 711 Capstone Drive; and

WHEREAS, the Project is a continuation in the realignment of Library space as necessary to support the teaching, research, and learning environment in the 21st Century and has been developed in coordination with the Gorgas Library Master Plan; and

WHEREAS, the Gorgas Library Master Plan consists of four (4) phases of which Phase I and II are complete and it is expected to initiate Phase IV following the completion of this Phase as reflected in the Annual Consolidated Capital Projects and Facilities Report; and

WHEREAS, approximately 61,880 gross square feet (“GSF”) will be renovated in this Phase including complete renovations to floors five, six, and seven to provide Graduate and Faculty Commons areas, student study and collaboration locations, updated space for Library staff, and centralized Library Business Administration offices, as well as a partial renovation to the first floor for state of the art Digital Scholarship Zone, which is generously supported through the Wray and Joan Pearce Library Support Fund and Henry Dean Wray Digital Scholarship Zone; and

WHEREAS, to maintain an efficient and cost-effective delivery and to minimize the disruptions to students, faculty, and staff, the Project has been scheduled to be completed in two packages including Construction Package A – Selective Demolition which will include select interior demolition of the corresponding library spaces and Construction Package B – Interior Renovation, consisting of the main fit-out and enhancements; and

WHEREAS, CMH Architects, Birmingham, Alabama (“CMH Architects”), has previously been engaged by the University as architect of record for the Gorgas Library Core Support project (completed in spring of 2020) and the Gorgas Library Core Support, Phase II project (completed in summer of 2024) to perform due diligence and programming services for this Project and therefore has exclusive knowledge of the design and construction, as well as detailed information regarding as-installed infrastructure locations and configurations; and

WHEREAS, CMH Architect’s knowledge of preferred equipment, University Standards, design principles and procedures will greatly facilitate the design and administrative process and CMH Architects is committed to completing the design to allow the Project to proceed as scheduled to complete prior to the start of the Fall 2026 semester, the University is requesting approval to waive the Consultant Selection Process and to utilize CMH Architects for the Project; and

WHEREAS, the University has negotiated a final design fee of 7.1% for Construction Package A, plus a renovation factor of 12%, 5.3% for Construction Package B, plus a major renovation factor of 12%, and \$362,013 in additional services as further described below, plus reimbursable expenses in the amount of \$40,480, for a total design fee of \$2,001,797; and

WHEREAS, to minimize disruptions to Library operations and avoid rework of previously renovated space, additional services in the amount of \$67,666 for Gorgas Library Phase IV Programming and Logistics Planning, and \$288,627 for Gorgas Library Phase IV Advanced Schematic Design are included, as well as \$5,720 for Abatement Specifications; and

WHEREAS, the simultaneous programming and schematic design of Gorgas Library Phase III and Phase IV are necessary to ensure full coordination of building architecture, infrastructure, ADA, and Life Safety modernizations; 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 Education Trust Fund Advancement and Technology Funds allocated in HB 147, ACT #2024-429, as allocated by the Board of Trustees of The University of Alabama, in the amount \$20,353,715, University Central Reserves in the amount of \$18,146,285, and from University Library Gifts in the amount of \$1,000,000 dedicated to the Digital Scholarship Zone, for a total project budget of \$39,500,000, and will eliminate deferred maintenance liabilities in the approximate amount of \$14,000,000; and

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

| BUDGET: | | PRELIMINARY |
|---|-----------|--------------------------|
| Construction Package A – Selective Demolition | \$ | 1,450,000 |
| Construction Package B – Interior Renovation | \$ | 25,000,000 |
| Furniture, Fixtures and Equipment | \$ | 3,325,000 |
| Security/Access Control | \$ | 250,000 |
| Telecommunication/Data | \$ | 600,000 |
| Contingency ¹ (10%) | \$ | 2,645,000 |
| UA Project Management Fee ² (4.5%) | \$ | 1,309,275 |
| Architect/Engineer Fee ³ (~7.6%) | \$ | 2,001,797 |
| Other ⁴ | \$ | 683,079 |
| Escalation ⁵ | \$ | 2,235,849 |
| TOTAL PROJECT COST | \$ | <u>39,500,000</u> |

¹Contingency is based on 10% of Construction Packages A and B.

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

³Architect/Engineer Fee is based on 7.1% for Construction Package A, plus a renovation factor of 12%, 5.3% for Construction Package B, plus a major renovation factor of 12%, and \$362,013 in additional services, plus reimbursable expenses in the amount of \$40,480.

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

⁵Escalation is currently based on an anticipated 0.5% inflation per month. Therefore, escalation is calculated on a 6% basis for this project based on the September 2024 cost estimate date and the anticipated bid date of September 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.

ALSO, BE IT FURTHER RESOLVED THAT, Stuart R. Bell, President; Daniel T. Layzell, 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 herby are, authorized for and on behalf of the Board to execute an owner designer agreement with CMH Architects, of Birmingham, Alabama, for architectural and design services in accordance with Board Rule 415 for the Project.

EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT
BOARD OF TRUSTEES SUBMITTAL

MEETING DATE: November 7 - 8, 2024

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Gorgas Library Phase III

PROJECT NUMBER: 013-24-3561

PROJECT LOCATION: 711 Capstone Drive

ARCHITECT: CMH Architects, Birmingham, AL – pending approval

THIS SUBMITTAL:

- ☒ Stage I
- ☒ Stage II (Waiver)
- ☐ Campus Master Plan Amendment
- ☐ Stage III
- ☐ Stage IV

PREVIOUS APPROVALS:

| PROJECT TYPE | SPACE CATEGORIES | PERCENTAGE | GSF |
|---|-------------------------|-------------------|---------------|
| <input type="checkbox"/> Building Construction | Classroom Facilities | ~6% | 3,500 |
| <input type="checkbox"/> Building Addition | Office Facilities | ~38% | 23,470 |
| <input checked="" type="checkbox"/> Building Renovation | Study Facilities | ~ 28% | 17,550 |
| <input type="checkbox"/> Equipment | Special Use Facilities | ~ 8% | 4,800 |
| | General Use Facilities | ~5% | 2,860 |
| | Circulation Area | ~8% | 5,000 |
| | Building Service Area | ~ 1% | 600 |
| | Mechanical Area | ~6% | 4,100 |
| TOTAL | | 100% | 61,880 |

| BUDGET | PRELIMINARY |
|---|----------------------|
| Construction Package A – Selective Demolition | \$ 1,450,000 |
| Construction Package B – Interior Renovation | \$ 25,000,000 |
| Furniture, Fixtures and Equipment | \$ 3,325,000 |
| Security/Access Control | \$ 250,000 |
| Telecommunication/Data | \$ 600,000 |
| Contingency ¹ (10%) | \$ 2,645,000 |
| UA Project Management Fee ² (4.5%) | \$ 1,309,275 |
| Architect/Engineer Fee ³ (~7.6%) | \$ 2,001,797 |
| Other ⁴ | \$ 683,079 |
| Escalation ⁵ | \$ 2,235,849 |
| TOTAL PROJECT COST | \$ 39,500,000 |
| Total Construction Cost per square foot: \$470 | |

¹Contingency is based on 10% of Construction Packages A and B.

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

³Architect/Engineer Fee is based on 7.1% for Construction Package A, plus a renovation factor of 12%, 5.3% for Construction Package B, plus a major renovation factor of 12%, and \$362,013 in additional services, plus reimbursable expenses in the amount of \$40,480, for a total design fee of \$2,001,797.

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

⁵Escalation is currently based on an anticipated 0.5% inflation per month. Therefore, escalation is calculated on a 6% basis for this project based on the September 2024 cost estimate date and the anticipated bid date of September 2025 as included in the Project Status.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:

(Utilities, Housekeeping, Maintenance, Insurance, Other)

\$ NA

Total Estimated Annual O&M Costs:

\$ NA*

*Renovation of existing space; no incremental increase in O&M costs

FUNDING SOURCE:

Advancement & Technology Funds Supplemental Appropriation \$ 20,353,715

Act #2024-429/HB 147

University Central Reserves \$ 18,146,285

University Library Gifts* \$ 1,000,000

O&M Costs: University Annual Operating Funds \$ NA

*Wray and Joan Pearce Library Support Fund and Henry Dean Wray Digital Scholarship Zone

NEW EQUIPMENT REQUIRED**Total Equipment Costs:**

N/A

PROJECT SCOPE:

In 2017, The University of Alabama Libraries embarked on a comprehensive review and evaluation of Gorgas Library as “appropriate to position the University of Alabama as a hub for innovation and research by creating a flexible learning environment that encourages the support of a wide variety of research styles and to support the student experience.” In short, what was necessary was to address deferred maintenance issues and to bring the Library up to 21st century standards to support the mission and the expectations of students and faculty.

The approved Gorgas Library Master Plan identified that it would be most appropriate to break the work into four (4) phases that would be closely coordinated:

- 1.) Phase I—Gorgas Library Core Support primarily consisted of redoing the existing elevators, establishing a utility vertical shaft through the building to support future floor work, and reworking the stacked restrooms and related plumbing. This work was completed in 2020.
- 2.) Phase II – Gorgas Library Core Support Phase II primarily consisted of the construction of the new service/loading dock area at the northeast corner of the building, replacement of the core building air handlers, installation of the core of the fire sprinkler system, new electrical service and connection to the campus central thermal system and elimination of the local boiler and chillers. This work was completed in 2024.

These first two phases were essential for addressing deferred maintenance needs and coordinating utility and infrastructure support in the subsequent phases.

- 3.) Phase III – Gorgas Library Phase III – see detailed description below for the scope of this submittal.
- 4.) Phase IV – Gorgas Library Phase IV will provide a four-story addition to the north elevation to better integrate that facade with campus, enhance the north public entrance and integrate it into future master plan changes to Capstone Drive, renovate and expand the study commons areas, create a grand stair between levels 1 and 2, renovate the areas at the tie into the addition, relocate the food service/dining component and establish a rooftop outdoor terrace on Level 7. This project is listed in Tab 2 of the FY 24/25 Annual Consolidated Capital Projects and Facilities Report.

The Gorgas Library Phase III project (“Project”), located at 711 Capstone Drive and being considered with this submittal, will consist of partial renovations to floor one, and complete renovations to floors five, six and seven, totaling approximately 61,880 gross square feet.

The Project involves renovations to the first floor for a new Digital Scholarship Zone, generously funded through the Wray and Joan Pearce Library Support Fund and Henry Dean Wray Digital Scholarship Zone gift, and a Graduate and Faculty Commons on the sixth floor. The entire fifth floor will receive upgrades to accommodate Library staff. Approximately 12,000 LF of Collections will be relocated to offsite storage, providing valuable space in the library to modernize teaching and study locations for undergraduate and graduate students.

The relocation of SLIS from the Gorgas 7th floor to McLure Library will allow the 7th floor of Gorgas to be renovated for the new Library Business Administration offices and Graduate Student Commons.

The sprinkler system will be extended and installed throughout the renovated portions of this phase to meets current code requirements.

The work will be broken into two phases, Construction Package A – Selective Demolition and Construction Package B – Interior Renovation. Package A – Selective Demolition will be executed over the summer months so as to minimize the disturbance to Gorgas Library operations.

It is also proposed as part of the Project to execute design for Phase IV through Preliminary Design (30%) to ensure coordination, necessary logistical planning and scope and transition areas between Phase III and IV.

PROJECT STATUS

| | | |
|-------------------------|----------------|----------------|
| SCHEMATIC DESIGN: | Date Initiated | November 2024 |
| | % Complete | 0% |
| | Date Completed | December 2024 |
| PRELIMINARY DESIGN: | Date Initiated | January 2025 |
| | % Complete | 0% |
| | Date Completed | March 2025 |
| CONSTRUCTION DOCUMENTS: | Date Initiated | April 2025 |
| | % Complete | 0% |
| | Date Completed | August 2025 |
| SCHEDULED BID DATE: | | September 2025 |

**N/A on Stage I Projects*

RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS

The proposed Gorgas Library Phase III project (“Project”) is a critical step in the realignment of library space in order to meet the strategic plan of The University of Alabama (“University”) and to transform University libraries as necessary to support the academic mission and the teaching, research and learning environment in the 21st Century.

Increased emphasis on research will increase the demand for areas where graduate students and faculty can create and share knowledge in an age of digital technology and collaboration.

Providing adequate and appropriate space for students to study and collaborate directly impacts retention and recruitment.

Attachment K to Board Rule 415

Supplemental Project Information Worksheet Annual Capital Development Plan

FY: 2024 – 2025

Project Name: Gorgas Library Phase III
Project Address/Location: 711 Capstone Drive
Campus: The University of Alabama, Tuscaloosa, AL

- 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 | | <u>61,880</u> 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.

- 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:

This project is a continuation of the Gorgas Library Master Plan originally envisioned in 2017. Phases I & II are complete.

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 | 2 | Varies | 3,500 | |
| 200 Laboratory Facilities | | | | |
| 300 Office Facilities | | | | |
| 310 Office | 50+ | Varies | 21,070 | |
| 350 Conference Room | 2 | Varies | 2,400 | |
| 400 Study Facilities | | | | |
| 410 Study Room | 18 | Varies | 2,650 | |
| 430 Open-Stack Study Room | 3 | Varies | 14,350 | |
| 440 Processing Room | 1 | 10 | 550 | |
| 500 Special Use Facilities | | | | |
| 590 Other (All Purpose) | 1 | Varies | 4,800 | |
| 600 General Use Facilities | | | | |
| 650 Lounge | 5 | 5-10 | 1,860 | |
| 680 Meeting Room | 1 | 12 | 1,000 | |
| 700 Support Facilities | | | | |
| 800 Health Care Facilities | | | | |
| 900 Residential Facilities | | | | |
| 000 Unclassified Facilities | | | | |
| WWW Circulation Area | | | | |
| W05 Lobby | 1 | Varies | 1,300 | |
| W06 Public Corridor | Multiple | Varies | 3,100 | |
| W07 Stairway | 1 | Varies | 600 | |
| XXX Building Service Area | | | | |
| X03 Public Rest Room | 1 | 4 | 600 | |
| YYY Mechanical Area | | | | |
| Y04 Utility/Mechanical Space | 1 | NA | 4,100 | |

Data reported on latest fiscal year data available.

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

Comments/Notations:

The Gorgas Library Phase III project (“Project”), located at 711 Capstone Drive, will consist of partial renovations to floor one, and complete renovations to floors five, six and seven, totaling approximately 61,880 gross square feet.

The Project involves renovating the first floor for a new Digitization Lab and a Graduate and Faculty Commons on the sixth floor. The entire fifth floor will receive upgrades to accommodate Library staff.

Approximately 12,000 LF of Collections will be relocated to offsite storage, providing valuable space in the library to modernize teaching and study locations for undergraduate and graduate students.

The relocation of SLIS from the Gorgas 7th floor to McLure Library, will allow the 7th floor of Gorgas to be renovated for the new Library Business Administration offices and Graduate Student Commons.

The University proposes to extend the sprinkler system throughout the renovated portions of the building to meet current code requirements.

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

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

Comments:

This project will support enrollments by supporting research, retention and recruiting efforts by providing a safe, modern building and a wealth of resources in the core of campus for student centric purposes.

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:

Dr. Don Gilstrap – Dean of University Libraries

Kara Gibson – Director of Administrative Services

Michael Arthur – Senior Associate Dean and Professor, Associate Dean for Research

Emy Decker – Associate Dean for Research Services & Information Technology

Tyler Capell – Projects Coordinator, University Libraries

Jason Bigelow – University Architect

Mary Kathryn Holt – Senior Project Manager

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

| Source(s) | New Funds (FY2024) | Reserves | Status /7 |
|---|-------------------------------|-----------------|------------------|
| ETF Advancement & Technology Funds (Act #2024-429/HB 147) | \$20,353,715 | | Approved |
| University Central Reserves | \$18,146,285 | | Pending |
| University Library Gifts* | \$1,000,000 | | Approved |
| Other | | | |
| Totals | \$39,500,000 | | Pending |

/7 Approved, allocated, pending

Comments:

This Project will be funded in the amount of \$20,353,715 from Education Trust Fund Advancement and Technology Funds, \$18,146,285 from University Central Reserves and \$1,000,000 in Library Gifts.

*Wray and Joan Pearce Library Support Fund and Henry Dean Wray Digital Scholarship Zone

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 | 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 | | | |
| Totals | N/A | N/A | N/A |

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

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

Comments:

The Gorgas Library is an existing Education and General facility and accordingly is already funded. There is no incremental change in space or function resulting from this Project.

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

| Source(s) | Occupancy Yr /9 (FY _____) | Future Years /10 | Status /7 |
|-----------------|-------------------------------|---------------------|-----------|
| Other | | | |
| Total/YR | | | NA |

/9 Initial Full Yr of Occupancy

/10 Next Five (5) Yrs Occupancy

/11 Funds Reallocated from other sources

/7 Approved, allocated, pending

Comments:

Gorgas Library is an existing Education and General facility and accordingly is already funded. Ongoing O&M costs are funded from the annual operating budget.

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

\$ 14,000,000 35 % of Total Development Costs

Comments:

This Project will address Deferred Maintenance liabilities in the amount of approximately \$14,000,000. The spaces being renovated were originally constructed in 1967 and have remained primarily unchanged since that time. The project will allow for a comprehensive renovation to fully address all remaining deferred maintenance issues including mechanical, electrical, accessibility, life safety, systems, technology, and new windows.

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:

Gorgas Library is centrally located on campus. In order for students to easily access the library, renovation of the current space was a better option than new construction in a decentralized location.

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:

Mission: The University of Alabama will advance the intellectual and social condition of the people of the state, the nation and the world through the creation, translation, and dissemination of knowledge with an emphasis on quality programs in teaching, research, and service.

- Improved space in University Libraries will be realized with upgrades and renovations that will replace outdated facilities and move the building toward code compliance. As the phases evolve, the plan will allow the creation of spaces that will support teaching and research conducted by faculty and will provide students with spaces to create and share knowledge in the age of digital technology and collaboration.
- There are frequent requests from students for additional group study spaces, graduate student and faculty spaces, and more areas for quiet, individual study spaces. Students spend much time in the libraries working, studying, and interacting with peers. This phase of construction will provide more adequate student space.
- The libraries have seating and study areas for 7.7% of the number of students currently enrolled. Many research universities have a goal of providing seating and study areas for 20% of the number of students enrolled.
- Increased emphasis on research will increase the demand for areas where graduate students and faculty can create and share knowledge in an age of digital technology and collaboration.
- The renovation of Gorgas Library will provide:
 - Functional, safe, and productive space for undergraduate/graduate education.
 - Space for collaboration between graduate students and faculty will increase the University's productivity in innovation, research, and scholarship.
 - Space for programs, events, collaboration, and exhibits will enhance the campus environment and improve recruitment.

A safe and accessible, asbestos-free, and code-compliant building with spaces designed for research will enhance the experience for students, faculty, and staff. The improved environmental conditions, work, study, collaborative spaces, modern furnishings and finishes, and easier access to library resources will foster work-life balance and recruitment and retention of outstanding faculty and staff.

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

Comments:

This project is part of a multi-phase project which will support the strategic goals of the University of Alabama by providing a space for collaborative and individual study spaces, graduate student and faculty spaces, experimental teaching and learning areas, as well as improved conditions to house Special Collections and other library materials. Through a phased series of improvements, the building will be transformed into a modern space that will meet the standards that our students, faculty, and staff have come to expect at the University of Alabama. This improved space will support the University's Strategic Goals

Goal #1: Provide a premier education that enhances the lives of our students, graduates, and the communities they serve.

- Participate more actively with departments on campus in the promotion of experiential teaching and learning opportunities.
- Evaluate spaces to align services, collections, and changes in resources and technology with evolving needs of users.
- Create space for graduate student and faculty study and consultation.
- Add team workrooms.
- Create new innovation and collaboration spaces to enhance the undergraduate, graduate and faculty experiences.
- Actively promote the use of Special Collections and Archives across the disciplines by having more accessible spaces for them.
- Evaluate the existing coffee shop operation to determine how it can be enlarged to provide improved services.

Goal #2: Increase the University's productivity and innovation in research, scholarship and creative activities that impact economic and societal development.

- By increasing the number of technology focused collaboration and innovation areas within Gorgas Library, students can fully engage in quality environments that lead to direct increases in research and innovation output.
- Increase access to and promote primary sources in Special Collections.
- Evaluate preservation and conservation needs in Special Collections.
- Combine service desks in Gorgas Library to one single service point.
- Investigate ways to create more collaborative and individual study spaces in Gorgas Library.
- Create additional areas in the library where graduates and undergraduates can work independently in a quiet environment.

Goal #3: Enrich our learning and work environment by attracting, welcoming, and supporting all faculty, staff, and students.

- Curate exhibits and explore opportunities for public programs and events that are of interest to a broader community.

Goal #4: Foster an environment that will aid in the recruitment, retention, growth, and support of outstanding faculty and staff.

- Assess space and implement changes that address staffing, skills, and emerging needs to promote a successful learning and research environment.
- Create a showcase facility that highlights the University's commitment to quality teaching, research, and learning and which subsequently can be used for recruitment and retention of outstanding faculty and staff.

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

Comments:

Core Principle No. 2 – Make higher education accessible, prepare our students for success, and meet the workforce needs of the State.

Core Principle No. 4 – Work to lead a unified approach to improving education at every level in Alabama.

Core Principle No 6 – 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 the 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:

Students will continue to experience a lack of adequate study and collaboration space.

Gorgas Library is a beautiful, iconic building that holds an essential place in the University's landscape and the history of the University. The building constructed in 1939 exemplifies the importance of the building from the exterior, but the positive aesthetic appeal of the exterior of the old building disappears once you step inside. It is impossible to visualize how modern methods, techniques, and technologies used in research and study could be applied in the current conditions that exist in the interior of the building.

If the renovations do not occur, the infrastructure of the building will continue to decline which could cause it to become an unsuitable and perhaps unsafe space for study and collaboration space. Each year approximately 1,000,000 faculty, staff, students, and visitors use the space in Gorgas Library.



October 7, 2024

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

Trustee Evelyn VanSant Mauldin
Chair, Physical Properties Committee
Sid McDonald Hall
500 University Boulevard, East
Tuscaloosa, AL 35401

RE: Request for Waiver of Consultant Selection Process
Gorgas Library Phase III
UA Project # 013-24-3561

Dear Dr. Keith and Trustee Mauldin:

CMH Architects, Birmingham, Alabama (CMH Architects), were previously engaged by The University of Alabama ("University") as architect and designer of record for the Gorgas Library Core Support project (Phase I completed in spring of 2020) and the Gorgas Library Core Support, Phase II project (completed in spring of 2024). The Gorgas Library Phase III project ("Project") is the next critical step in the Gorgas Library Master plan to support the realignment of Library space necessary to support the teaching, research, and learning environment in the 21st Century. All work will be carefully coordinated with the Gorgas Library Master Plan to support future phases in the library.

As a continuation of the comprehensive Project, CMH Architects has exclusive knowledge of the design and construction proposed for the Project as well as detailed information regarding as-installed utility infrastructure locations and configurations. Further, CMH's knowledge of the Library's unique needs and environment, the preferred equipment, and the University's standards, design principles, and procedures, will greatly facilitate the design and administrative process and ensure the Project schedule. CMH Architects is committed to completing the design to allow demolition to proceed in May of 2025 and the main Project to proceed as scheduled to be completed prior to the start of the Fall 2027 semester.

Accordingly, the University has negotiated a design fee for the Project based on a reduction in the renovation factor to 12% resulting in a discount of \$185,634 or approximately 10.4% of the standard fee for the Project.

In addition to the Phase III design fee, the proposal includes \$288,627 in additional services for Gorgas Library Phase IV Advanced Schematic Design. To minimize disruptions to Library operations and avoid rework of previously renovated space, it is critical that Phase III and Phase IV schematic designs be completed simultaneously. This is necessary to ensure full coordination of building architecture, infrastructure, ADA, and life safety modernizations. The proposal also includes additional services in the amount of \$67,666 for Phase III and IV Logistics Planning and \$5,720 for Abatement Specifications.

| Package | Cost of the Work | | Percentage Fee for Building Group III | | Major Renovation Factor | | Fee |
|-----------------------|------------------|---|---------------------------------------|---|-------------------------|---|-------------|
| A | \$1,450,000 | x | 7.1% | + | 25% | = | \$128,688 |
| B | \$25,000,000 | x | 5.3% | + | 25% | = | \$1,656,250 |
| | Total | | | | | | \$1,784,938 |
| Negotiated Fee | | | | | | | |
| A | \$1,450,000 | x | 7.1% | + | 12% | = | \$115,304 |
| B | \$25,000,000 | x | 5.3% | + | 12% | = | \$1,484,000 |
| | Total | | | | | | \$1,599,304 |

The proposed fees represent a financial benefit to the campus and a discount of \$185,634 or approximately 10.4% of the standard fee for the Project.

Approval is hereby requested for:

1. Waiver of Consultant Selection process for the Project.
2. CMH Architects, Birmingham, Alabama, as the design service provider for the Project at a negotiated design fee based on 7.1% of the cost of Construction Package A, plus a major renovation factor of 12%; 5.3% of the cost of Construction Package B, plus a major renovation factor of 12%; and \$362,013 in additional services as described above, plus reimbursable expenses in the amount of \$40,480 for a total design fee of \$2,001,797.
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,



Daniel T. Layzell
 Vice President for Finance and Operations
 and Treasurer

DTL/sc

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October 7, 2024
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Attachment

pc w/atchmts: Michael Rodgers
Tim Leopard
Mary Kathryn Holt
Jessica Morris

- ☒ 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

- ☒ Recommended for Approval.
☐ Not Recommended for Approval. Submit to Physical Properties Committee.

Signed by:
Evelyn VanSant Mauldin

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Trustee Evelyn VanSant Mauldin, Chair for Physical Properties Committee

GORGAS LIBRARY PHASE III

LOCATION MAP

