

**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: Undergraduate Admissions Interior Renovations

MEETING DATE: February 6-7, 2025

- 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: Brittany Kyles

Tim Leopard

Approved by: C9409452A0B346A

^{/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

December 19, 2024

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

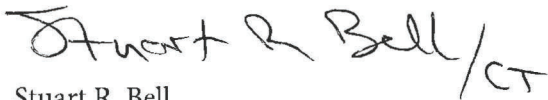
Dear Interim Chancellor Trant:

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 Undergraduate Admissions Interior Renovations 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 Chambless King Architects of Birmingham, Alabama, as the principal design firm for this project.

The item has been thoroughly reviewed and has my endorsement. With your concurrence, I ask that it be added to the agenda for The Board of Trustees of The University of Alabama at their regular meeting on February 6-7, 2025.

Sincerely,



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 Undergraduate Admissions Interior Renovations****RESOLUTION**

WHEREAS, in accordance with Board Rule 415, The University of Alabama (“University”) is requesting approval of a Stage I submittal for the Undergraduate Admissions Interior Renovations (“Project”) to be located at 751 Campus Dr, Tuscaloosa, AL 35401; and

WHEREAS, the Project will enhance approximately 12,829 gross square feet (“GSF”) of space on the second floor of Student Services to advance student recruitment and allow the department to be competitive in admissions; and

WHEREAS, the project is comprised of a single construction package for the 203 suite, which will modify existing spaces to upgrade finishes for Financial Affairs and Undergraduate Admissions and Scholarships; and

WHEREAS, Chambless King Architects of Birmingham, Alabama, (“Chambless King”) has successfully executed several renovations and designs on Campus and was previously engaged by the University as Architect of Record to perform renovations on Student Services in 2023; and

WHEREAS, Chambless King’s familiarity with the Student Services Building, design principles, and procedures will facilitate an efficient and cost-effective design and administrative process; and

WHEREAS, Chambless King is committed to an expedited design schedule, allowing the project to bid in early 2025 and construction to begin with the utmost expediency to finish by the desired date of April 2025 to minimize the impact on the student experience and college operations, the University is requesting approval to waive the Consultant Selection Process and to utilize the design services of Chambless King for the Project; and

WHEREAS, the University has negotiated a design fee of 7.5% of the cost of construction for the Project, with a 15% renovation factor for Chambless King Architects’ familiarity with the facility, representing a financial benefit to the University; and

WHEREAS, the Project location and program have been reviewed and are consistent with the University Campus Master Plan, University Design Standards, and the principles contained therein; and

WHEREAS, the Project will be funded from Enrollment Management Reserves in the amount of \$1,300,000 and will address campus deferred maintenance (capital renewal) liabilities in the amount of approximately \$900,000; and

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

BUDGET:		PRELIMINARY
Construction	\$	644,898
Owner Furnished Contractor Installed Equipment (OFCIE)	\$	60,102
Furniture, Fixtures, and Equipment	\$	400,000
Security/Access Control	\$	8,796
Telecommunication/Data	\$	12,000
Contingency ¹ (10%)	\$	70,500
UA Project Management Fee ² (4.5%)	\$	34,898
Architect/Engineer Fee ³ (8.6%)	\$	60,806
Other ⁴	\$	8,000
TOTAL PROJECT COST	\$	1,300,000

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

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

³Architect/Engineer Fee is based on 7.5% of the Construction and OFCIE plus a 1.15 renovation factor.

⁴Other expenses include Transportation Services Fees, 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.

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 resolutions granting signature authority for the University be, and hereby are authorized to act for and on behalf of The Board of Trustees of the University of Alabama to execute an owner designer agreement with Chambless King Architects, Birmingham, Alabama, for architectural design services in accordance with Board Rule 415 for this project.

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

MEETING DATE: February 6-7, 2025

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Undergraduate Admissions Interior Renovations

PROJECT NUMBER: 021-24-3656

PROJECT LOCATION: 751 Campus Dr., Tuscaloosa, AL 35401

ARCHITECT: Chambless King Architects - Pending Approval

THIS SUBMITTAL:	PREVIOUS APPROVALS:
<input checked="" type="checkbox"/> Stage I	
<input checked="" type="checkbox"/> Stage II (waiver)	
<input type="checkbox"/> Campus Master Plan Amendment	
<input type="checkbox"/> Stage III	
<input type="checkbox"/> Stage IV	

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input type="checkbox"/> Building Construction	Classroom Facilities		
<input type="checkbox"/> Building Addition	Laboratory Facilities		
<input checked="" type="checkbox"/> Building Renovation	Office Facilities	~82%	10,365
<input type="checkbox"/> Equipment	Study Facilities		
	Special Use Facilities		
	General Use Facilities		
	Central Service/ Support	~6%	886
	Circulation Area	~ 12%	1,578
	Building Service Area		
	Mechanical Area		
	TOTAL	100%	12,829

BUDGET	PRELIMINARY
Construction	\$ 644,898
Owner Furnished Contractor Installed Equipment (“OFCIE”)	\$ 60,102
Furniture, Fixtures, and Equipment	\$ 400,000
Security/Access Control	\$ 8,796
Telecommunication/Data	\$ 12,000
Contingency ¹ (10%)	\$ 70,500
UA Project Management Fee ² (4.5%)	\$ 34,898
Architect/Engineer Fee ³ (~8.6%)	\$ 60,806
Other ⁴	\$ 8,000
TOTAL PROJECT COST	\$ 1,300,000
Total Construction Cost per square foot \$60	

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

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

³Architect/Engineer Fee is based on 7.5% of the costs of Construction and OFCIE plus a 1.15 renovation factor.

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

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

(Utilities, Housekeeping, Maintenance, Insurance, Other)

\$ N/A*

Total Estimated Annual O&M Costs: \$ N/A

*Renovation of existing space only. No increase in O&M costs.

FUNDING SOURCE:

Enrollment Management Reserves \$ 1,300,000

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

*Renovation of existing space only. No increase in O&M costs.

NEW EQUIPMENT REQUIRED

Total Equipment Costs: N/A

PROJECT SCOPE:

The project consists of renovating approximately 12,829 GSF of space on the second floor of Student Services to give staff and prospective students proper areas for operations and admissions. The primary scope will include finish upgrades such as new flooring, paint, and lighting.

The renovation will include the auditorium area for prospective students, all offices, reception area, and break room to suit the department's needs better.

Currently, the Financial Affairs and Undergraduate Admissions and Scholarships are functionally aligned, but are housed within different facilities. The upgrades in the suite will allow them to operate more efficiently and effectively for their students' needs.

PROJECT STATUS		
SCHEMATIC DESIGN:	Date Initiated	March 2024
	% Complete	100%
	Date Completed	October 2024
PRELIMINARY DESIGN:	Date Initiated	November 2024
	% Complete	100%
	Date Completed	December 2024
CONSTRUCTION DOCUMENTS:	Date Initiated	December 2024
	% Complete	100%
	Date Completed	February 2025
SCHEDULED BID DATE:		February 2025

**N/A on Stage I Projects*

RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS

This Project will enhance existing programs and student affiliation by providing a space and opportunity for attracting and inspiring work for UA students, faculty, and staff. Suite 203 will engage and support staff in managing financial affairs with undergraduate students and offer an elevated environment. In this regard, it contributes to growing and maintaining the University's undergraduate population.

Recruitment and admissions serve as a foundational element for meeting the University's strategic goals because they directly impact the quality of our student body, shaping the academic environment and the university's overall reputation. By having this renovated space, which will house key leaders within admission in one central location, Undergraduate Admissions will be able to better facilitate conversations and strategic planning and provide adequate location space to a growing team.

THE UNIVERSITY OF ALABAMA | Division of Finance and Operations
Vice President

November 22, 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
Undergraduate Admissions Interior Renovations
UA Project No.: 021-24-3656

Dear Dr. Keith and Trustee Mauldin:

The University of Alabama (“University”) is requesting a Waiver of the Consultant Selection Process for the Undergraduate Admissions Interior Renovations project (“Project”) located at 751 Campus Dr., Tuscaloosa, AL 35401.

The University proposes to utilize Chambless King Architects, Birmingham, AL, (“Chambless King”) as the principal design firm for this Project. The services of Chambless King are proposed due to their familiarity with the Student Services Building and University design principles and procedures that will facilitate an efficient and cost-effective design and administrative process. Chambless King has also agreed to an expedited design schedule to complete construction in early Summer 2025. An agreement was previously reached with Chambless King for design services for the area with an initial estimate beneath the value requiring Board approval. However, as the design progressed and the area requested by the Department to be updated increased, the resulting cost estimate exceeded the Board threshold. Accordingly, the University is requesting approval to waive the Consultant Selection Process and to continue to utilize Chambless King for this Project.

The University has negotiated a design fee of 7.5% of the cost of construction, with a reduced renovation factor of 15% for Chambless King’s familiarity with the facility and recent services with the end users and no additional charge for expedited design, representing a savings to the University of \$5,288.

Cost of the Work		Percentage Fee for Building Group III		Major Renovation Factor		Credits		Fee
\$705,000	x	7.5%	+	25%	-	\$0	=	\$66,094
\$705,000	x	7.5%	+	15%	-	\$0	=	\$60,806


Fee savings are \$5,288 or approximately 8% of the value of the standard fee for the Project.

Approval is hereby requested for:

- 1. Waiver of the Consultant Selection process.
- 2. Chambless King Architects, Birmingham, AL, as the design service provider for the Project at a negotiated design fee based on 7.5% of the construction cost plus a 15% renovation factor.
- 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 contact me.

Sincerely,


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

DTL/mw

Attachment

Pc w/atchmnts: Michael Rodgers
Tim Leopard

Matt Skinner
Brittany Kyles

Jessica Morris


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

DocuSigned by:


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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:


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Trustee Evelyn VanSant Mauldin, Chair for Physical Properties Committee

Attachment K to Board Rule 415

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

FY: 2024 – 2025

Project Name: Undergraduate Admissions Interior Renovations
Project Address/Location: 751 Campus Dr., Tuscaloosa, AL 35401
Campus: The University of Alabama

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

- | | | |
|---|---------------------|-------------------|
| <input type="checkbox"/> increase space inventory | _____ % increase | _____ GSF |
| <input type="checkbox"/> replace space inventory | _____ % replacement | _____ GSF |
| <input checked="" type="checkbox"/> renovation of existing space only | | <u>12,829</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:

This Project will allow for the vacating of a portion of Houser Hall, which will then be available for other uses by the University. The Provost will reallocate the Houser Hall space.

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 a 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	23	48	7,103	1
315 Office Service	7	-	1,390	2
350 Conference Room	5	13	1,805	1
355 Conference Room Service	1	-	67	1
400 Study Facilities				
500 Special Use Facilities				

Proposed New Space/Facilities				
Classification	Number (Spaces/Rooms)	Capacity (Persons)	Area (GSF)	Existing Space Utilization Data (See Notations)
600 General Use Facilities				
700 Support Facilities				
710 Central Computer or Telecommunications	2	-	352	1
720 Shop				
725 Shop Service				
730 Central Storage	2	-	534	1

Proposed New Space/Facilities				
Classification	Number (Spaces/Rooms)	Capacity (Persons)	Area (GSF)	Existing Space Utilization Data (See Notations)
800 Health Care Facilities				
900 Residential Facilities				
000 Unclassified Facilities				
WWW Circulation Area				
W05 Lobby	1	6	790	1
W06 Public Corridor	1	-	788	1
XXX Building Service Area				
YYY Mechanical Area				

Data reported on the latest fiscal year data available.
 Utilization factor based on Scheduled Operating Hours at each Campus – outlined below in notations.

Comments/Notations:

1. Existing space program to remain.
2. A need for additional communal workroom and storage space resulted in a request to convert an existing conference room and closet into one storage/packing room.

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

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

Comments:

The departments proposed to be on the second floor of the Student Services Center are functionally aligned, but are currently housed in separate locations. This project will allow for their co-location to enhance operations and efficiency. Due to the adjacency, the new location will provide consolidated and easier access for campus customers and prospective students and improve group collaboration.

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 the user group:

- Dr. Matthew McLendon – Associate Vice President and Executive Director of Enrollment Management
- Jim Landers – Executive Director of Undergraduate Admissions
- Katy Metcalfe – Director of Enrollment Management Financial Affairs
- Brittany Kyles, Project Manager, University of Alabama Construction Administration
- Courtney Oglesby – Senior Interior Designer, University of Alabama Furnishings and Design
- Addie Harchelroad – Chambliss King Architects

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

Source(s)	New Funds (FY _____)	Reserves	Status ¹⁷
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Education Sales/Services			
• External			
• Internal			
Direct Grants			
Gifts			
Bonds			
Enrollment Management Reserves		\$1,300,000	Pending
Other			
Totals		\$1,300,000	Pending

¹⁷ Approved, allocated, pending

Comments:

This project will be funded from existing Enrollment Management Reserves.

8. Estimate of operations and maintenance (O&M) costs for the initial occupancy year and projections for the 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			
Other –			
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:

Student Services is an existing general facility; accordingly, O&M costs have already been funded. There has been no incremental increase in O&M because of 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
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

/9 Initial Full Yr of Occupancy
 /10 Next Five (5) Yrs Occupancy
 /11 Funds Reallocated from other sources
 /7 Approved, allocated, pending

Comments:

Student Services is an existing general facility; accordingly, O&M costs have already been funded. There has been no incremental increase in O&M due to this project.

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

\$ 900,000 70 % of Total Development Costs

Comments:

Address aged finishes, fixtures and materials within the suite.

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:

Houser Hall must be vacated so the University can repurpose that space. The renovation of the second floor in the Student Services Center will allow key members of the Admissions team and their managers to be together on one floor, increasing collaboration and allowing for more feedback directly from the Executive Director of Admissions and the Associate Vice President.

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:

Consolidating to a single location will free up valuable space in Houser Hall, which can then be repurposed to meet the needs of other departments or support additional university priorities.

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

Comments:

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

Recruitment and admissions serve as a foundational element for meeting this goal because they directly impact the quality of our student body, shaping the academic environment and the university's overall reputation. By having this renovated space, which will house key leaders within admissions in one central location, we will be able to better facilitate conversations and strategic planning and provide adequate location space to a growing team.

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

Comments:

Core Principle #2: Make higher education accessible, prepare all our students for success, and meet the workforce needs of the State.

The renovation directly supports the university's core principle of making higher education accessible, particularly our in-state students. By consolidating the number of our department locations across campus, we can enhance our recruitment efforts by having our staff centrally located so key staff can receive direction from department leadership in a face-to-face environment, and this renovation will allow for more collaboration in a centralized space. Additionally, the freed-up space in Houser Hall can be repurposed to benefit other departments, further advancing the university's mission of creating an accessible, dynamic environment that meets the needs of all students.

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

Comments:

Enrollment Management would continue to be operated from numerous disparate locations across campus and remain less efficient and effective, and Houser Hall would not be made available for other departments.

Undergraduate Admissions Interior Renovations

LOCATION MAP

