

Contact: Joan Racki

**REGISTER OF IOWA STATE UNIVERSITY**  
**CAPITAL IMPROVEMENT BUSINESS TRANSACTIONS**

**Action Requested:** Consider recommending approval of:

1. Permission to proceed with project planning and the selection of Story Construction as the Construction Manager – Agent for the **Larch Residence Hall - Perimeter Wall Modifications** project.
2. The following actions for the **Friley Residence Hall - Dining Renovation** and **Hach Hall Basement Research Laboratories** projects.
  - a. Acknowledge receipt of the University's final submission of information to address the Board's capital project evaluation criteria (Attachment A for Friley and Attachment B for Hach);
  - b. Accept the Board Office recommendation that the projects meet the necessary criteria for Board consideration;
  - c. Approve the schematic design, and project description and budget (\$6,200,000 for Friley and \$4,000,000 for Hach), with the understanding that approval will constitute final Board approval and authorization to proceed with construction; and
  - d. Approve A Resolution Declaring an Official Intent Under Treasury Regulation 1.150-2 to Issue Debt to Reimburse Iowa State University of Science and Technology for Certain Original Expenditures Paid in Connection with the Friley Residence Hall – Dining Renovation.
3. Revised project description and budget (\$27,100,000) for the **Marston Hall Renovation** project.

**Executive Summary:**

The University requests permission to proceed with project planning and the selection of Story Construction as the Construction Manager – Agent for the **Larch Residence Hall – Perimeter Wall Modifications** project, which would improve the quality of the perimeter exterior wall by installing an insulated drywall partition on the interior side of the perimeter wall in 272 student rooms. The modifications would improve temperature control and reduce condensation. The work to be accomplished is similar to the work undertaken in Willow Residence Hall during the summer of 2014. The estimated project cost of \$3.3 million would be funded by Dormitory System Improvement Funds. (See Attachment C for a map showing the location of Larch Residence Hall.)

The University requests approval of the schematic design and project description and budget (\$6,200,000) for the **Friley Residence Hall – Dining Renovation** project, which would convert inactive dining space in the residence hall and the corresponding kitchen area into a food court concept with supporting storage rooms, student dining space, private dining space with a new exterior entry. This facility would help address the greater demand for food service with the increased student enrollment. Food venues would be open at various times during both peak and off-peak hours. The renovated dining facility, within a residence hall, would easily serve

students on a meal plan; it would, however, also have the ability to draw in students who do not have a meal plan, and faculty and staff since the location would function like a food court. The project would be funded by Dormitory Revenue Bonds (\$4,500,000) and Residence System Improvement Funds (\$1,700,000).

The University requests approval of the schematic design and project description and budget (\$4,000,000) for the **Hach Hall – Basement Research Laboratories** project which would fit-out approximately 10,500 net square feet of basement shell space in Hach Hall to house research laboratory space for new faculty hires in the Department of Chemistry. The project would provide analytical and synthetic chemistry research laboratories, and associated support space including equipment and instrument rooms; and graduate student and faculty office space. The project would be funded by private funds. The schematic design booklet, which shows the location of Hach Hall, is included with the Board's agenda materials.

The University requests approval of a revised project description and budget (\$27,100,000) for the **Marston Hall Renovation** project, which would renovate approximately 60,000 gross square feet in the facility constructed to 1903. Marston Hall is the home of the College of Engineering and a landmark building on the University campus. However, the facility no longer provides an appropriate environment for teaching, student services, faculty, staff, and guests. The renovation would correct approximately \$2.4 million in deferred maintenance. The University opened bids for multiple bid packages on September 11, 2014. The total of the bids received exceeds the construction budget and the project cannot proceed as bid within the currently approved budget. After completing a detailed review of the bids received, the University believes that market conditions, lack of competition in some key areas, and estimating errors all contributed to the overage. The proposed budget increase of \$3 million, along with value engineering analysis and implementation of cost reduction measures in some bid packages would allow the University to proceed with the project. Rebidding of several bid packages will be necessary.

**Details of the Projects:**

**Larch Residence Hall – Perimeter Wall Modifications**

	<u>Project Summary</u>		
	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Permission to Proceed		Oct. 2014	Requested
Selection of Story Construction as Construction Manager - Agent		Oct. 2014	Requested

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An October 2013 study identified that the enclosure of Larch Residence Hall required thermal insulation at the exterior walls to reduce the potential for both summer and winter condensation.

The Willow Residence Hall - Perimeter Wall Modifications project was completed utilizing a Construction Manager Agency process, with Story Construction Co. as the selected firm. The scope of work for the Larch Residence Hall is nearly identical.

Due to the aggressive project schedule (work to be completed during the unoccupied period in the summer of 2015), the University requests permission to use a Construction Manager - Agent (CM) delivery system for this project. The use of CM delivery would provide flexibility in packaging, bidding, and sequencing the work to ensure that the project can be completed in accordance with the schedule. The CM will serve as the University's agent in coordinating and managing multiple prime contractors; all packages will be bid competitively.

In consideration of the knowledge Story Construction Co. has of the program, existing building, related infrastructure and the firm's experience with the Willow Residence Hall project, the University requests approval of the use of Story Construction Co. as the CM - Agent for the Larch Residence Hall project.

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**Friley Residence Hall – Dining Renovation**

<u>Project Summary</u>			
	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Permission to Proceed		Feb. 2014	Approved
Initial Review and Consideration of Capital Project Evaluation Criteria		Feb. 2014	Received Report
Design Professional Agreement (Rohrbach Associates, PC; Iowa City)	\$ 663,000	Aug 2014	Not Required*
Program Statement		Sept. 2014	Not Required*
Schematic Design		Oct. 2014	Requested
Project Description and Budget	6,200,000	Oct. 2014	Requested
Final Review and Consideration of Capital Project Evaluation Criteria		Oct. 2014	Receive Report

\*Approved by the Executive Director, consistent with Board policy

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A more identifiable main entry will be provided at the east façade of the existing dining area. The architecture of the entry will relate to the existing features of Friley Residence Hall. The material palette will consist of red face brick and limestone veneer to match existing materials. The existing windows within the dining area will be replaced with new aluminum framed windows, with the limestone surround of the windows remaining. The existing roof will be replaced.

The renovated dining facility would operate with multiple venues, with each location having its own menu and cashier area. The core components of the menus would come from a central kitchen, with some of the food finishing and preparation done within each venue.

The seating area, with a capacity of approximately 300 occupants, would be open all day, making the facility a place where students can come, dine, and socialize at any time during operating hours, much like they do in the current Memorial Union Food Court seating area.

The following page includes a summary of the square footages included in the program statement and schematic design:

	<b>Net Assignable Square Feet</b>
<b><u>Food Court &amp; Support</u></b>	
Receiving & Storage	1,650
Kitchen	715
Employee Spaces	540
Venues	<u>4,800</u>
Sub Total	<b>7,705</b>
<b>Dining</b>	
Dining Area	<u>5,350</u>
Sub Total	<b>5,350</b>
<b>Total Net Assignable Space</b>	<b><u>13,055</u></b>

The kitchen and support areas will be located in the west portion of the existing kitchen/serving space, and the dining room will be located along the existing east windows. New restrooms will be provided at the north portion of the space and an accessible ramp will be located at the south end of the area.

Project Budget

	<u>Budget</u>
Construction	\$5,090,260
Planning, Design & Management	899,970
Furniture & Equipment	150,000
Contingency	<u>59,770</u>
<b>TOTAL</b>	<b><u>\$6,200,000</u></b>
Source of Funds:	
Dormitory System Revenue Bonds	\$4,500,000
Residence System Improvement Funds	<u>1,700,000</u>
<b>TOTAL</b>	<b><u>\$6,200,000</u></b>

It is anticipated that the project will be bid in March 2015, with construction substantially complete by April 2016.

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**Hach Hall – Basement Research Laboratories**

<u>Project Summary</u>			
	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
Permission to Proceed		April 2014	Approved
Initial Review and Consideration of Capital Project Evaluation Criteria		April 2014	Received Report
Design Professional Agreement (OPN Architects, Inc; Cedar Rapids)	\$ 444,500	Sept. 2014	Not Required*
Program Statement		Aug. 2014	Not Required*
Schematic Design		Oct. 2014	Requested
Project Description and Budget	4,000,000	Oct. 2014	Requested
Final Review and Consideration of Capital Project Evaluation Criteria		Oct. 2014	Receive Report

\*Approved by the Executive Director, consistent with Board policy

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Hach Hall, a 136,000 gross square foot building that was designed to address critical teaching and research space needs for the Department of Chemistry, was completed and occupied in 2010. At that time, shell space constructed in the basement was intended to accommodate future strategic faculty hires. The build-out of the basement would provide state-of-the-art research space to support the Department's research initiatives and to attract new, excellent faculty.

The following is a summary of the spaces included in the program and schematic design:

<u>Function</u>	<u>Net Assignable Square Feet</u>
<b>Research Laboratories</b>	
Synthetic Labs	2,253
Analytical Labs	5,795
Graduate Student Offices	<u>1,320</u>
Sub Total	<b>9,368</b>
<b>Office and Administration</b>	
Faculty Office	<u>148</u>
Sub Total	<b>148</b>
<b>Building and Support</b>	
Lab Support	472
Team Room	<u>164</u>
Sub Total	<b>636</b>
<b>Total Assignable Net Square Feet</b>	<b>10,422</b>

Project Budget

	<u>Budget</u>
Construction	\$3,118,000
Planning, Design & Management	759,180
Furniture & Equipment	50,000
Contingency	<u>72,820</u>
TOTAL	<u><u>\$4,000,000</u></u>
Source of Funds:	
Private Funds	<u>\$4,000,000</u>
TOTAL	<u><u>\$4,000,000</u></u>

**Marston Hall Renovation**

Project Summary

	<u>Amount</u>	<u>Date</u>	<u>Board Action</u>
<u>Permission to Proceed with Project Planning</u>		<u>June 2013</u>	<u>Approved</u>
<u>Selection of Design Professional</u> <u>(Substance Architecture Interiors Design;</u> <u>Des Moines)</u>		<u>June 2013</u>	<u>Approved</u>
<u>Consideration of Use of Construction Manager</u> <u>- Agent</u>		<u>June 2013</u>	<u>Approved</u>
<u>Initial Review and Consideration of Capital</u> <u>Project Evaluation Criteria</u>		<u>June 2013</u>	<u>Received</u> <u>Report</u>
<u>Design Professional Agreement</u> <u>(Substance Architecture Interiors Design;</u> <u>Des Moines)</u>	<u>\$ 1,550,390</u>	<u>Sept. 2013</u>	<u>Not Required*</u>
<u>Program Statement</u>		<u>Jan. 2014</u>	<u>Not Required*</u>
<u>Schematic Design</u>		<u>Feb. 2014</u>	<u>Requested</u>
<u>Project Description and Budget</u>	<u>24,100,000</u>	<u>Feb. 2014</u>	<u>Requested</u>
<u>Final Review and Consideration of Capital</u> <u>Project Evaluation Criteria</u>			<u>Receive</u> <u>Report</u>
<u>Revised Project Description and Budget</u>	<u>27,100,000</u>	<u>Oct. 2014</u>	<u>Requested</u>

\*Approved by Executive Director, consistent with Board policies

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	<u>Initial</u> <u>Budget</u> <u>(Feb. 2014)</u>	<u>Revised</u> <u>Budget</u> <u>(Oct. 2014)</u>
<u>Construction</u>	<u>\$18,937,230</u>	<u>\$22,426,017</u>
<u>Planning, Design &amp; Management</u>	<u>3,376,250</u>	<u>3,230,070</u>
<u>Movable Equipment</u>	<u>976,350</u>	<u>1,015,000</u>
<u>Relocation</u>		<u>35,000</u>
<u>Contingency</u>	<u>810,170</u>	<u>393,913</u>
<u>TOTAL</u>	<u>\$24,100,000</u>	<u>\$27,100,000</u>
<u>Source of Funds:</u>		
<u>University Funds and Private Giving</u>		
<u>TOTAL</u>	<u>\$24,100,000</u>	<u>\$27,100,000</u>

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Friley Residence Hall – Dining Renovation  
Evaluation Criteria

Since the project meets the Board's definition of a major capital project, the University has provided the following information in response to the Board's evaluation criteria.

Institutional Mission / Strategic Plan: This project will continue to allow students to, as stated on the University's website, "immerse [themselves] in a university where top-notch academics and a vibrant student life form the ultimate college adventure"— and enjoy the adventure. By creating a location where students can informally interact with one another, the proposed dining facility would enhance the sense of community among members of the student population.

Alternatives Explored and Rationale for Proposed Project: Several alternatives have been considered that included both location and service style. After discussion and research, a food court style venue offering meals to go as well as additional seating for those who want to dine in, will increase opportunities to serve ISU Dining's core customer base of meal plan holders. The proposed facility, with its central location, has the ability to serve the greater campus community. By utilizing existing building stock versus constructing new, the renovation of existing space increases value in centrally-located property already in place. Having the facility centrally located and easily accessible to a large community of students was the primary rationale for the proposed project.

Project Size and Impact on Other Facilities: The existing space is a former dining center and kitchen area that was vacated when the current Union Drive Community Center was constructed. The existing building floor plate will remain in place with internal modifications as necessary to accommodate the new dining facility, with exterior modifications limited to a new east entrance.

Financial Resources for Construction: Funding will be provided by Residence System Revenue Bonds and Dormitory System Reserves.

Operations and Maintenance Funding: Actual operating expenses will depend on the quantity and type of venues, and will be funded with Dining facility revenue.

External Forces Justifying Approval: The recruitment and retention of students with learning centers and excellent facilities is an important item in the university's strategic plan. Dining facilities are an important key to recruitment and retention. The success of Residence halls and dining are interrelated.

Hach Hall – Basement Research Laboratories  
Evaluation Criteria

Since the project meets the Board's definition of a major capital project, the University has provided the following information in response to the Board's evaluation criteria.

Institutional Mission / Strategic Plan: The expansion of the chemistry faculty is consistent with the Signature Themes of the College of Liberal Arts and Sciences and is additionally driven by a recent increase in service teaching load due to increased enrollment. The originally built spaces in Hach Hall from the basement to the 3rd floor will be fully occupied by the fall of 2015. The department is housed in Hach Hall, Gilman Hall, Spedding and Wilhelm Halls (Ames Lab space), and Carver Co-Lab. Spedding Hall is nearly full and restricted to research supported by Ames Laboratory.

The expansion of modern, high-quality research space for additional chemistry faculty into the basement of Hach Hall is by far the most functional location for new chemists. Providing space for new faculty in Hach Hall will facilitate departmental interactions, collaboration and collegiality. Additionally, basement space is uniquely appropriate for certain types of experimental chemistry. The building infrastructure systems were designed to accommodate current research equipment needs, processes, and capabilities.

To accomplish this vision, and support the Strategic Plan, the Chemistry Department must recruit the best young faculty in the field, make key hires in senior-level positions, retain established faculty, and provide exceptional training for students. The other issue that needs to be considered is providing space for new research initiatives and collaborative efforts. The research mission of the department is directly relevant to four of the five Signature Themes of the LAS College (Biological Structures and Systems, Complex Materials, Data-Rich Environments, and Economic, Environmental, and Societal Sustainability) which are areas for targeted growth in the next several years. These areas represent directions for growth and development of the Chemistry Department that build on current strengths.

Alternative Explored and Rationale for Proposed Project: Approximately 10,500 square feet of space in the basement of Hach Hall was strategically left unfinished at the time of the original construction of the building. This space was reserved and planned for development to accommodate future key faculty hires in the Department of Chemistry.

Project Size and Impact on Other Facilities: This project will finish 10,500 square feet of space to provide additional research laboratory space for the Department of Chemistry.

Financial Resources for Construction Project: Private funding of \$4,000,000 will be provided by Private Giving.

Financial Resources for Operations and Maintenance: The estimated operations and maintenance costs of the additional space are:

Operations and Maintenance - \$26,696

Utilities - \$68,110

Other (Grounds/Mail/EHS/DPS) - \$11,941

Methods used to determine the costs: Estimates of the Operating Budget Impact are based on actual costs and metered utilities for existing space and correlation with similar building types.

Proposed source of funds: College of Liberal Arts and Sciences

External Forces Justifying Approval: The vision of the Chemistry Department is to:

- Be among the top 5 departments nationally at public universities (the short-term goal is to be in the top 10).
- Raise the stature of Iowa State University through interdisciplinary efforts.
- Achieve the rank of #1 in analytical chemistry for graduate schools in the United States.

To achieve these goals the department will need to retain and recruit the very best faculty and graduate students. The interdisciplinary association that the department has with other university and federal programs is a critical part of the university's goals and aspirations to "Become the Best".

Map Showing Location of Larch Hall

