

FACILITIES MASTER PLAN / CAPITAL PROJECT REQUEST
CAPITAL REQUIREMENTS SUMMARY AND NEEDS ASSESSMENT FORM
(Form 1A)

Institution: University of Montevallo
Name of Respondent: DeAnna Smith

Telephone Number: 205-665-6010
E-Mail Address: dsmith23@montevallo.edu

A. IMMEDIATE CAPITAL REQUIREMENTS - YEAR 1 (FY 2014-2015)

	Institutional Priority	Funding Sources			Estimated Total Cost	Specify Source(s) Other State	Specify Source(s) Other Funds	Building Number (If existing Facility or Facilities)	Space Utilization Description (If more than 1 Code used include % for each Code. Click here to view Codes)	Projected Gross Square Feet. (Should be used only for Subsection 1 or 2 Projects)	Projected Net Assignable Square Feet. (Should be used only for Subsection 1 or 2 Projects)	Space Category (If more than 1 Code used include % for each Code. Click here to view Codes)	Change in Purpose (Yes or No Depending on Project)	Projected Start/ Acquisition Date (Date reported cannot be before the start of the fiscal year to be reported on the form. Fiscal Years run from Oct. 1 - Sept. 30)	Projected Completion Date	Basis of Requirement (Use no more than 2 Codes. Click here to view Codes) USE LETTER OF CODE ONLY
		Education Trust Fund	Other State Funding	Other Funds												
1. New Construction/Acquisition Projects																
1.																
2.																
3.																
4.																
Subtotal																
2. Renovation/Remodeling Projects																
1. Mass Communications (expansion)	4			\$750,000	\$750,000	Fundraising	98	1	13,171	9,539	E&G	No	10/1/2014	8/15/2015	B	
2. 3D Art Building	5			\$1,000,000	\$1,000,000	Fundraising	12	1	13,360	11,994	E&G	No	5/1/2015	8/15/2015	E	
3.																
4.																
Subtotal				\$1,750,000	\$1,750,000											
3. Major Capital Equipment Projects																
1.																
2.																
3.																
4.																
Subtotal																
4. Deferred Maintenance/Facilities Renewal (See Instructions)																
1. Irrigation Campus	3			\$50,000	\$50,000	University bond proceeds	N/A	17 (utilities)	N/A	N/A	N/A	No	10/1/2014	9/30/2015	G	
2. lighting	2			\$35,000	\$35,000	University bond proceeds	N/A	17 (utilities)	N/A	N/A	N/A	No	10/1/2014	9/30/2015	F	
3. Roofing	1		\$100,000		\$100,000	University budget (unrestricted revenues)	Various	Various	N/A	N/A	N/A	No	10/1/2014	9/30/2015	E	
4.																
Subtotal			\$100,000	\$85,000	\$185,000											
Total Immediate Year 1 Capital Requirements			\$100,000	\$1,835,000	\$1,935,000											

A brief description and justification must be attached for each project listed above.

Provide a succinct but thorough justification of the need for the capital project. This information may be included in a separate Word Processing document. See instructions for further information.

FACILITIES MASTER PLAN / CAPITAL PROJECT REQUEST
CAPITAL REQUIREMENTS SUMMARY AND NEEDS ASSESSMENT FORM
(Form 1B)

Institution: University of Montevallo
Name of Respondent: DeAnna Smith

Telephone Number: 205-665-6010
E-Mail Address: dsmith23@montevallo.edu

B. INTERMEDIATE CAPITAL REQUIREMENTS - YEAR 2 (FY 2015-2016)

	Institutional Priority	Funding Sources			Estimated Total Cost	Specify Source(s) Other State	Specify Source(s) Other Funds	Building Number (If existing Facility or Facilities)	Space Utilization Description (If more than 1 Code used include % for each Code. Click here to view Codes)	Projected Gross Square Feet. (Should be used only for Subsection 1 or 2 Projects)	Projected Net Assignable Square Feet. (Should be used only for Subsection 1 or 2 Projects)	Space Category (If more than 1 Code used include % for each Code. Click here to view Codes)	Change in Purpose (Yes or No Depending on Project)	Projected Start/ Acquisition Date (Date reported cannot be before the start of the fiscal year to be reported on the form. Fiscal Years run from Oct. 1 -Sept. 30)	Projected Completion Date	Basis of Requirement (Use no more than 2 Codes. Click here to view Codes) USE LETTER OF CODE ONLY
		Education Trust Fund	Other State Funding	Other Funds												
1. New Construction/Acquisition Projects																
1.																
2.																
3.																
4.																
Subtotal																
2. Renovation/Remodeling Projects																
1. Student Activity Center (expansion)	2			\$1,500,000	\$1,500,000		Fundraising	61	1	80,866	76,352	E&G	No	5/1/2016	8/15/2016	B
2. Davis Hall	3			\$1,000,000	\$1,000,000		Fundraising	29	1	31,053	17,505	E&G	No	5/1/2016	8/15/2016	E
3. Wallace Hall (expansion)	4			\$1,000,000	\$1,000,000		Fundraising	31	1	26,789	16,076	E&G	No	5/1/2016	8/15/2016	B
4.																
Subtotal				\$3,500,000	\$3,500,000											
3. Major Capital Equipment Projects																
1.																
2.																
3.																
4.																
Subtotal																
4. Deferred Maintenance/Facilities Renewal (See Instructions)																
1. Roofing	1		\$100,000		\$100,000		University budget (unrestricted revenues)	Various	Various			Various	No	10/1/2015	9/30/2016	E
2.																
3.																
4.																
Subtotal			\$100,000		\$100,000											
Total Intermediate Year 2 Capital Requirements			\$100,000	\$3,500,000	\$3,600,000											

A brief description and justification must be attached for each project listed above.

Provide a succinct but thorough justification of the need for the capital project. This information may be included in a separate Word Processing document. See instructions for further information.

FACILITIES MASTER PLAN / CAPITAL PROJECT REQUEST
 CAPITAL REQUIREMENTS SUMMARY
 (Form 1C)

Institution: University of Montevallo
 Name of Respondent: DeAnna Smith
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C. LONG TERM CAPITAL REQUIREMENTS - YEARS 3-5
 (FY 2016-2017 through FY 2018-2019)

	Estimated Total Cost
1. New Construction/Acquisition Projects	
1. New Residence Hall	<u>\$9,000,000</u>
2. Performing Arts Center	<u>\$8,000,000</u>
3.	<u> </u>
4.	<u> </u>
Subtotal	<u>\$17,000,000</u>
2. Renovation/Remodeling Projects	
1. Morgan Hall	<u>\$500,000</u>
2. Science Labs	<u>\$500,000</u>
3.	<u> </u>
4.	<u> </u>
Subtotal	<u>\$1,000,000</u>
3. Major Capital Equipment Projects	
1. VOIP	<u>\$750,000</u>
2.	<u> </u>
3.	<u> </u>
4.	<u> </u>
Subtotal	<u>\$750,000</u>
4. Deferred Maintenance/Facilities Renewal (See Instructions)	
1. Underground High Voltage	<u>\$4,000,000</u>
2. Water/Sewer improvements	<u>\$1,500,000</u>
3. Roofing	<u>\$300,000</u>
4.	<u> </u>
Subtotal	<u>\$5,800,000</u>
 Total Long Term Capital Requirements	 <u>\$24,550,000</u>
 Funding Source for All Long Term Projects:	
Education Trust Fund	\$ <u> </u>
Other State Funding	\$ <u>\$300,000</u>
Other Funds (fundraising, university unrestricted revenues, reserves)	\$ <u>\$24,250,000</u>

D. TOTAL ALL CAPITAL PROJECTS **\$ \$30,085,000**
 (The total of Form1A, 1B and 1C
 should be reported in Part D)

**University of Montevallo
Facilities Master Plan
Justifications**

Form 1A

Mass Communication Expansion

\$750,000

Due to growth in the Mass Communication project, the University needs to not only improve the condition of the existing building, but also expand. The expansion would include additional classrooms and faculty offices. Expansion estimated at 5,046 square feet. Fundraising proposals outstanding.

3D Art Building

\$1,000,000

The 3D Art Building was scheduled for renovation in fiscal year 2014; however, the building next to this structure was deemed structurally unsafe; therefore, UM will demolish the Scene Shop and build a new Art Building in 2014 with bond proceeds. However, the existing 3D Art Building will continue to be utilized primarily for faculty offices, studios and instruction. Therefore, this building still needs renovation. The current facility does not have air conditioning in the summer. As a result, a significant renovation is needed due to the condition of this existing facility.

Irrigation

\$50,000

The University has a well on campus that is no longer appropriate for drinking water; however, this water can be a source of irrigation for the campus landscaping. As a result, the University allocated a portion of bond proceeds to add utility pipes for irrigation.

Campus Lighting

\$35,000

Campus lighting was improve a few years ago utilizing PSCA projects; however, the funding did not cover all the desired lighting. As a result, UM has the plans for an additional expansion of campus lighting. Bond proceeds of \$35,000 were set aside for the purpose of completing the planned lighting.

Roofing

\$100,000

The University owns 72 structures; therefore, annually, we will strive to complete some roofing replacements. As a result, \$100,000 can be devoted to the replenishment annually from the University budget.

Form 1B**Student Activity Center Expansion****\$1,500,000**

With student enrollment growth, we are currently experiencing high volume use of the Student Activity Center. Currently, we operate exercise classes in the concourse and we are at maximum capacity of the fitness center. As a result, UM would like to expand the center. A rough estimate might be 10,000 square feet in a number of uses (locker rooms, weight rooms, exercise studios).

Davis Hall**\$1,000,000**

The University Music Department offers excellence in music instruction; however, the academic space they occupy has not been upgraded in recent years. As a result, the University desires to improve Davis Hall (classroom, practices suites, and performance areas). This project could be one featured in the upcoming comprehensive campaign.

Wallace Hall**\$1,000,000**

Wallace Hall is home to the University's Department of Communication Sciences & Disorders. We offer both Graduate and Undergraduate study in this department. While the University has a wait list of qualified applicants annually to the graduate program, we do not have physical capacity to admit additional students. Therefore, an expansion of classrooms, faculty offices and clinic space would allow further expansion of this program to serve the State of Alabama.

Roofing**\$100,000**

The University owns 72 structures; therefore, annually, we will strive to complete some roofing replacements. As a result, \$100,000 can be devoted to the replenishment annually from the University budget.

Form 1C**New Residence Hall****\$9,000,000**

With male occupancy of 104% and women in excess of 90%, the University will be considering additional residence hall space. The last structure built in 2008 was a 154 suite style facility. At that time, the University pursued plans for a 3 facility village. This project would be phase II of the Village. Likely, the

University would review and assess financial health in order to determine whether to issue financing and proceed.

Performing Arts Center

\$8,000,000

The University's theatre facilities are in poor condition and do not adequately represent the quality of the academics offered. Additionally, the University does not have a facility that adequately seats 300-500 for performing arts shows. There is currently no performing arts venue in Shelby County. As a result, the University desires to construct a new performing arts center in Montevallo. This will be a consideration of the University's comprehensive campaign currently underway.

Morgan Hall

\$500,000

Morgan Hall is home to the Michael E. Stephens College of Business. The facility is not a historic structure and therefore, does not resemble other architectural features of the campus. As a result, we desire to update the exterior of the building, including cutting in additional windows in the style of others on Montevallo's campus. Fundraising from COB alumni will be a focus of the campaign.

Science Labs

\$500,000

The University Science Labs have not been updated in many years. Currently, the Chemistry lab includes only 4 hoods to serve classes of 24 students. In order to ensure students receive up to date laboratory experiences, the University must consider a renovation for state of the art facilities. Recent grants have updated a few small labs; therefore, grants and fundraising will be pursued.

VOIP

\$750,000

The University operates numerous phone systems that do not professionally serve the needs of the campus community. We are currently assessing the status of fiber and network in order to pursue VOIP telephone technology in the future.

Underground High Voltage

\$4,000,000

The University owns the underground high voltage system that serves campus. The system is in need of major upgrades and updating. If this system fails, University operations will be severely impacted.

Water/Sewer Improvements**\$1,500,000**

With additional student growth and new/expanded facilities, the University must consider the strain on existing infrastructure. As a result, the water and sewer systems will need to be upgraded in the future.

Roofing**\$300,000**

The University owns 72 structures; therefore, annually, we will strive to complete some roofing replacements. As a result, \$100,000 can be devoted to the replenishment annually from the University budget for these three years (\$300,000).