



State of Utah

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# ADDENDUM #1

Date: March 30, 2007  
To: Consultants  
From: Matthias Mueller, Project Manager, DFCM  
Reference: Southern Utah University  
Master Planning and Programming Services for Campus Housing  
DFCM Project No. 07032730

Subject: **Addendum No. 1**

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	<u>Southern Utah University Campus Housing Handout</u>	<u>7</u>	<u>pages</u>
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**Note: This Addendum shall be included as part of the Contract Documents. Items in this Addendum apply to all drawings and specification sections whether referenced or not involving the portion of the work added, deleted, modified, or otherwise addressed in the Addendum. Acknowledge receipt of this Addendum in the space provided on the Bid Form. Failure to do so may subject the Bidder to disqualification.**

**SCHEDULE CHANGES – There are no project schedule changes per this Addendum.**

**1.1 Solicitation for Consultant Services**

Notice To Consultants – Change the word “design-bid” to “design-build”.

Project Description: Introduction - Change the word “design-bid” to “design-build”.

**1.2 Questions**

Question #1 – Have DFCM and SUU determined the type of construction procurement (design-bid-build, design-build, or CMGC) for Phase 2 and if not, when?

*Answer – The decision regarding the type of construction procurement has not been made, but most likely will be sometime during the master-planning/programming effort.*

Question #2 – Will a subconsultant to the master-planning/programming prime consultant be permitted to compete in the future design selection for the housing facilities if design-build is the construction procurement method eventually selected?

*Answer – Yes.*

Question #3 – How important is it for a prime consultant to team with and propose “critical subconsultants” in their statements of qualification, management plan, and interview?

*Answer – As noted in the Solicitation For Consultants’ (SFC) section titled “Selection Criteria for VBS Professional Services”, points will be awarded by the VBS selection committee to proposing teams based upon the strength of the team, including the strength brought to the team by critical subconsultants. In evaluating the strength a critical subconsultant brings to the team, the VBS selection committee considers things such as if the proposed team worked together successfully in the past; have they worked on similar projects; how familiar is the critical sub-consultant with – in this case- SUU’s campus and its needs; past performance of the critical subconsultant; etc.*

### **1.3 Mandatory Pre-submittal Meeting**

Handout – a handout dated and titled “March 22, 2007, Southern Utah University Campus Housing Handout” was distributed to attendees at the March 22, 2007 mandatory pre-submittal meeting. A copy of the handout is attached to this addendum.

**End of Addendum #1**

March 22, 2007

# Southern Utah University Campus Housing Handout

## BACKGROUND INFORMATION

Southern Utah University is a regional public University emphasizing teaching, and is one of nine members of the Utah System of Higher Education (USHE). It is located in Cedar City, a rural southwestern Utah town of about 25,000. Since its founding in 1897, Southern Utah University, who currently employ more than 660 faculty and staff, has evolved from a teacher training institution to its current role as a comprehensive, regional, public university offering graduate, baccalaureate, associate and technical programs. SUU places students first by featuring personalized and participative classes with competent, qualified and supportive faculty, staff and administration.

The more than 7,000 currently enrolled students represent all 29 Utah counties, more than 40 states, and several foreign countries. Nearly one third of the students are from the service region in the southwest corner of the state and another one third come from the metro Wasatch Front area of the state between Provo on the south and Ogden to the north. The non-resident population of SUU's student body is about 10%.

The Princeton Review recognized SUU in 2005 as one of its Best in the West Colleges and Universities. The University also recently received commendations from the top accrediting agencies in the nation for its education, business, engineering and athletic training programs.

Students choose from more than 80 undergraduate and graduate programs provided across the beautiful and safe campus. SUU students enjoy remarkably high acceptance rates into graduate and professional schools, thanks in part to the hands-on opportunities afforded them by the interactive teaching environment. The end result is—96% of SUU graduates are employed shortly after they receive their degrees.

The Athletic Department competes at the Division I level and is a member of the Mid-Continent Conference, Great West Football Conference and the Western Gymnastics Conference. The department sponsors 15 Varsity sports, Men's/Women's Cross Country, Football, Women's Soccer, Men's/Women's Indoor Track, Baseball, Softball, Women's Tennis, Men's/Women's Golf, Gymnastics and Men's/Women's Outdoor Track. The 290 student Athletes practice and compete in State-of-the-Art Facilities and yearly contend for Conference titles. The Athletic Programs compete at the Regional and National level and receive media exposure throughout the area.

## ON-CAMPUS HOUSING

Four on-campus facilities are available for single student housing: Juniper Hall, Manzanita Court, the new Eccles Living Learning Center, and the recently acquired Ponderosa Terrace. In addition, there are three Greek houses on-campus. Accommodations in all facilities are reserved on a first-come, first-served basis with preference given to returning residents.

All residents enjoy free utilities including water, heat, electricity, sewer, trash, basic cable TV service, high-speed internet connections, and local phone service. Computer labs (open 24/7 and connected to the university server) are available to all on-campus residents. All buildings also have laundry facilities and free parking.

Special amenities are located in each complex and are shared by the residents. An oversized hot tub, volleyball court, plush lobby/lounges, big screen TV rooms, music practice rooms, group study spaces, multipurpose activity rooms, BBQ/Picnic areas, mailboxes, and tutorial labs are just some of the amenities that enhance on-campus living.

Live-in RAs (Resident Assistants) and Hall Directors assist in the smooth and friendly operation of each complex and keep residents informed and connected to events, activities, and other happenings at the housing facilities as well as on campus.

Residence Halls, Apartments:

Facility	Year Built	Family Units	Men's Unit's	Women's Unit's	Total
Eccles Living/Learning	2004	0	72	228	300
Juniper Hall	1962	0	110	110	220
Manzanita Court	1962	0	50	130	180
Ponderosa Terrace	1970	0	20	10	30
Totals		0	252	478	730

**INTENT**

The mission statement of Southern Utah University (SUU) Housing and Residence Life department states, in part, that it is our goal to provide the highest quality housing facilities and to provide the very best in on-campus experience. In keeping with this mission, the selected consultant will assist the University in developing a Master Plan for replacing older housing units on campus with more modern, state-of-the-art, single student housing. The Consultant will provide options to various styles, Suite, Apartment or combination of both, and will be encouraged to propose options that will allow SUU to meet the needs of students.

The information provided herein is intended to assist proposers in the preparation of proposals necessary to properly respond to the SFC. Please note that the SFC is not intended to limit a proposal's content.

**BASIC MASTER PLANNING WORK FOR PHASES 2 AND 3**

**PLEASE NOTE THE SCOPE OF WORK OUTLINED BELOW INCLUDES, BUT IS NOT LIMITED TO, THE FOLLOWING:**

**PHASE I: Preliminary Assessment**

**1. Analysis of Existing Conditions**

A. Draft a summary of the Project's "Strategic Asset Value," outlining the University's expectations and aspirations for the project, identifying the University's key stakeholders and the Residence Program's clients, and framing the initial project concepts which would respond to that vision.

B. **Review Existing Documentation & Drawings**, including all available site plans, concept plans, projected budgets, previous five year operating statements, occupancy levels, marketing studies, university

master planning documents, floor plans and as-built drawings, square footage assignments, fire safety reports, ADA compliance reports, facilities audits, energy audits, and security reviews.

C. **Tour Existing Residence Halls**, to assess qualitatively the current conditions, and to acquire an understanding of current space allocations, functionality and physical condition. Also, tour food service venues to develop an understanding of dining options on campus.

D. Give a preliminary **Assessment of the Residence Halls**, including existing conditions, existing layout, architectural style, and outline current housing policy issues that will be examined in more detail in subsequent phases.

E. **Analyze University's Financial Condition**, by giving a quick assessment of the University's existing financial condition including current capacity to fund additional projects or major renovations. Evaluate current occupancy levels, debt coverage, and financing viability.

## 2. Preliminary Market Analysis & Concept Development

A. **Interview with Officials from the University's Finance Office and President's Office**, to identify the University's long-range goals and current status with regard to debt capacity, preferences for financing structures and procedures, and current fiscal expectations.

B. **Interview the University's Student Life Officers**, to identify the Department's mission and the role of on-campus housing in fulfilling its underlying objectives.

C. **Interview the University's Residence Department Officers**, to evaluate existing issues, budgetary restraints, facility concerns, and existing problems within the overall housing department.

D. **Interview the University's Campus Planners/Physical Plant Staff**, to identify the University's master plan developments in relation to potential student housing sites.

E. **Review Housing Policies and Procedures** within the Residence Department, and determine issues to be addressed in Phase II of the analysis.

## 3. Preliminary Financial Review

A. **Review Existing Financial Performance of University Housing**, by analyzing existing operating statements and budgets, and examining current occupancy and debt coverage levels.

B. Conduct a **Preliminary Financial Analysis**, by using professional judgment and rules of thumb to develop a preliminary estimate of the likely financial performance of the system and the preliminary project concepts and to provide a basis for detailed market and financial analyses.

## 4. Decision Support & Documentation

A. **Initial Meeting/Report with Steering Committee and Working Group**, to report the findings of the Preliminary Assessment and have the respective groups provide guidance to the firm as to the direction the Study should take.

## Phase II – Comprehensive Housing Master Plan

### 1. Detailed Market Analysis

#### A. Off-Campus Market Analysis

1. **Analyze Local Housing Market Statistics**, to gauge an understanding of the off-campus marketplace, by examining regional economic and housing trends.
2. **Conduct Interviews with Rental Agents and Brokers**, that are active in the metropolitan area to obtain their perspective on the viability of market rate housing proximate to campus, relative demand for housing options, housing projects in the pipeline, vacancy rates and rental rates.
3. **Tour Relevant Neighborhoods and Developments**, to compile documentation identifying and assessing interior and exterior amenities offered, price structure, access to campus, and other pertinent features. This inventory will allow us to evaluate the range of changes that the University might consider in order to provide affordable, new, and exceptional housing for students.

#### B. On-Campus Market Analysis, Conduct a Detailed Demographic Analysis, and

1. **Review Enrollment Projections**, by identifying fluctuations and trends in specific campus including: the mix of local, in-state, and out-of-state students; the ratio of part-time versus full-time students, and shifts from traditional to non-traditional aged students. By examining housing preferences in these current populations, we can project how changes in the University's demographic make-up will affect the demands placed on campus housing facilities and develop strategies to address this demand fluctuation.
2. Conduct up **Focus Group Interviews** with students, faculty and staff at University from the following groups:
  - a. **Resident Undergraduate Students**,
  - b. **Non-resident Undergraduate Students**
  - c. **Graduate Students**
  - d. **Faculty/Staff**
  - e. **Transfer Students and Alumni**
  - f. **Prospective Students/Parents**
  - g. **Student Resident Assistants**
  - h. **Married Students**

The firm will utilize the focus group findings to evaluate the campus community's views of the project with respect to proposed elements, operating philosophies, fee levels, and other critical issues. With the firm's guidance, the University will take responsibility for scheduling the focus groups and inviting participants.

3. Conduct a detailed **Survey of Residents and Non-residents**, to test the demand for living on-campus and gauge the sensitivity to specific room fee levels among the primary target population

groups and determine features of housing accommodations that would draw non-residents into campus housing. The firm will develop a survey instrument for reproduction, distribution, and collection by the University, and will enter survey response data into a statistical analysis software system.

C. **Conduct a Competitive Context Analysis**, by identifying **Peer Institutions** as well as other **National Model Programs**, and performing a telephone survey of their housing departments. The analysis will clarify the University's current market position relative to its closest competitors with regards to the quality and quantity of student housing and campus life, illustrate successful features of model housing programs nationwide, and demonstrate what measures the University might take in order to strengthen its competitive standing.

## 2. Programming

A. **Develop a Housing Demand Model** to project demand requirements for each type of housing space based on demand as demonstrated by survey results.

B. **Perform Demand-Supply Reconciliation**, and

C. **Concept Development & Refinement**, by utilizing the survey information and demand based programming modeling to predict demand for varied housing types and to project the most cost effective and strategically advantageous space programs for on campus facilities.

D. **Develop Overall Housing Strategy Recommendations**, by suggesting housing phasing strategies by level of schooling, to help retain upperclassmen and graduate students in the housing system. This phasing strategy may include possible construction and renovation projects whose viability will be supported by our financial analysis and financial structuring recommendations.

## 3. Financial Analysis

A. **Develop Long-Term Capital Costs Projections** including soft and hard costs for total project development.

B. **Develop Long-Term Revenue Projections**, by utilizing past operating statements, and the demand based programming as previously discussed, to project occupancy rates, future rent levels, additional income and other sources that may be identified during the analysis.

C. **Identify Long-Term Operating Costs Projections**, by using the University's records, preliminary staffing plans, anticipated usage/activity levels, interviews with University staff, and proposed building configurations to project building-specific operating costs.

D. **Identification of Model Ownership/Financial Structures**, by examining potential off-balance sheet financing methods, such as sale-leasebacks, management outsourcing, and other national trends.

E. **Construct a Detailed Financial Model**, with a fifteen-year operating pro forma allowing for fluctuations in enrollment, different financial structure, renovation and new construction costs, minor repair and renovations costs, expected rental income, and supplemental income.

F. **Recommend Ownership/Financial Structure**, to analyze ownership alternatives, including privatized development, off-balance sheet development, or development by an affiliated foundation or "friend" of the institution to determine the best option in keeping with the finances and mission of the University.

G. **Develop a Project Phasing Strategy**, which is supported by detailed analysis of the financial implications of proceeding with the recommendations of the strategic plan.

4. **Decision Support & Documentation**

A. **Working Group Meetings and**

B. **Steering Committee Meetings** Conduct Working Group and Steering Committee presentations, including the preparation of agendas, presentation of status reports, provision of analyses, and facilitation of decisions on key issues requiring consensus.

C. **Draft Final Report**

D. **Final Report & Presentation**, The final report should contain strategic recommendations for housing improvements designed to:

1. Position Housing (& Dining) to remain competitive with off-campus options.
2. Address programmatic changes which would provide a stronger bond between the residential and academic programs of the University.
3. Recommendations should be consistent with the University and Housing mission including maintaining a financially self-supporting housing operation that will meet current and future demands for student housing.

**Legend**

-  Existing Housing to be Razed
-  New Student Housing
-  Eccles Living Learning Center (Phase 1)
-  Phase 2
-  Phase 3

**SUU Student Housing**

