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Timeline
FY 22/23 Capital Budget Submittal *

Getting Started
February
- TBR issues annual guide with instructions and required forms
- Campuses prepare Capital Outlay, Capital Maintenance, and Disclosure submittals, including prioritized summary list (DB 71)
- TBR helps campus staff for preparing budget submittal

May 28, 2021
- Deadline for additional FY 22/23 Maintenance Budget Submittal to TBR

July 2, 2021
- Deadline for FY 22/23 Outlay Budget Submittal to TBR

Analysis
April - August
- TBR reviews projects
- Research with questions and answers
- Scoring and ranking projects

Submittals and Approvals
June 17, 2021
- Presentation to the Tennessee Board of Regents

July - September
- Submit Capital Budget Request to THEC and F&A
- Answer questions and perform additional research as necessary

February 2022
- Gubernatorial recommendation

May/June
- Appropriations Bill is signed

July
- Projects are taken to the State Building Commission for project and funding approval
Submittal Requirements

Submittal Deadline: March 20, 2021 (Maintenance) July 2, 2021 (Outlay)

Each campus must submit both a paper (clipped, not bound) and electronic copy (Excel or Word) of their Outlay submittals and only an electronic copy of each Maintenance and Disclosure project to:

Diane Uhler diane.uhler@tbr.edu
Tennessee Board of Regents
Office of Facilities Development
1 Bridgestone Park, Third Floor
Nashville, Tennessee 37214
(615) 366-3982

Electronic and Paper Copies: (all on 8½” x 11” paper (one-sided) and as an email attachment)

- One (1) DB-71 form for the prioritization of all projects (List DB71)
- One (1) Project Workbook, DB70, for each project
- Other required documents for Outlay project described under Appendix – Page 15 and 16.
- Relevant illustration and photographic images may be included if printed on 8½”x11” paper and captioned to clearly explain the specific content and relevance. These should be added as Appendixes to the end of the workbook. Pictures can be saved as JPEGs and then included.

Include in the subject line of your e-mail message, the words “capital budget request from” followed by your institution name. (example: Capital Budget Request from DSCC)

Budget Guides and Workbooks can be found at: https://www.tbr.edu/facilities/capital-budget – on the “Guide Documents” sub-page.

The THEC Space Guide Model can be found at: https://www.tbr.edu/facilities/physical-facilities-inventory-and-survey – on the “Physical Facilities Inventory & Survey” sub-page.

Capital Outlay: Institutions are asked to submit only one (1) project for consideration. Although only renovation projects will be considered by THEC this year, you need to send in all Outlay projects for consideration in out years. THEC will review and score on 5 criteria – State Goals and Drive to 55 (25 pts.), Strategic Plan and Campus Master Plan (20 pts), DB70 (30 pts.), Space Needs (25 pts), and External Funding (Pass/Fail). Full list of assignable points listed on Page 24 of this document.

Capital Maintenance:
Request projects totaling in cost within the institution’s Annual Renewal Target (Page 22) with a list of the projects in order of the institution’s priority (on DB71) and full documentation of each project. Institution’s projects should be up to, but not more than the Annual Renewal Target for the institution.

Disclosure: Disclose any number of projects with full documentation of each project. Projects of a significant nature and/or funded by TSSBA funds can only be disclosed during the annual budget process, not in the quarterly submittal.
## Project Forms and Documents

<table>
<thead>
<tr>
<th>Project Workbook forms</th>
<th>Capital Maintenance Project</th>
<th>Capital Outlay Project</th>
<th>Disclosed Project</th>
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<tr>
<td>Project Summary list (DB71)</td>
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<td>Fixed-format one-page summary of project name, brief description, total cost, funding objective, and requested amount.</td>
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<tr>
<td>Fixed-format two-page summary of project scope, justification, facility history, cost basis, program impact, schedule, and existing conditions.</td>
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### Outlay Documents

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<tr>
<td><strong>Introduction, 0</strong></td>
<td>Summary sheet for project</td>
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<tr>
<td><strong>State Goals, 1.1, 1.2, 1.3</strong></td>
<td>Fixed format three-page summary of Complete College Tennessee Act and the Drive to 55 initiatives</td>
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<td><strong>Enrollment Data, 1.4</strong></td>
<td>Fixed format two-page summary providing historical and projected counts of student and faculty supported by the project</td>
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<tr>
<td><strong>Master Plan and Project Development, 2.1, 2.2</strong></td>
<td>Fixed format two-page summary linking project with the institution’s master plan and space needs</td>
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<tr>
<td><strong>Schedule of Movable Equipment, 3.4</strong></td>
<td>Fixed-format list of items to be purchased within the project.</td>
</tr>
<tr>
<td><strong>Business Plan, 3.5</strong></td>
<td>Fixed-format defining costs to maintain building</td>
</tr>
<tr>
<td><strong>First Year Operating Costs, 3.5b</strong></td>
<td>Required only for E&amp;G space which will affect the state operating appropriation calculation, estimating first-year increase in state costs.</td>
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<tr>
<td><strong>Bond Questionnaire, 3.6</strong></td>
<td>Required for projects with private uses or auxiliary enterprises</td>
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<tr>
<td><strong>Space Needs, 4.1</strong></td>
<td>Fixed-format summary of THEC Space Guidelines, Facility Assessment, and Migration Plan</td>
</tr>
<tr>
<td><strong>Tabulation of Affected Space, 4.2</strong></td>
<td>Fixed-format for space needs analysis of the square footages of the various classifications of space to be renovated or constructed</td>
</tr>
<tr>
<td><strong>Architectural Program, 4.3</strong></td>
<td>Architectural Program Outline</td>
</tr>
<tr>
<td><strong>External Funding, 5.1</strong></td>
<td>Required for any project utilizing funds other than appropriated Capital funds or for Match Fund Plan for Capital Outlay projects</td>
</tr>
<tr>
<td><strong>Appendix A</strong></td>
<td>3 required documents attached to end of Excel workbook</td>
</tr>
<tr>
<td><strong>Appendix B</strong></td>
<td>optional supplemental and support documents</td>
</tr>
<tr>
<td><strong>Multi-Phase Project Grouper, X.1</strong></td>
<td>For any project with a mix of new construction and renovations</td>
</tr>
</tbody>
</table>
General Instructions

The three (3) THEC Excel workbooks (Outlay, Maintenance, or Disclosure) for Project Documentation (DB70) and the Capital Budget List (DB71) can be downloaded from our website: https://www.tbr.edu/facilities/capital-budget.

To begin a project: When you first open a project workbook, name it with a specific, identifying name. You will need to complete a separate workbook for each project you submit.

Sheet and cell protection:
Cells in which you are expected to enter information are not shaded yellow. Each sheet is also password protected, locking cells that should not be edited. If you need to take off the protection, the password is Pandora.

Summary List: Required for all submittals
The List (DB71) sheet is designed to serve as a consolidated list for all classifications. You will list all your projects, in priority order according to the type of project, Outlay, Maintenance, or Disclosure. You will not need to prioritize Disclosures, only list them.
1. Put the name of the institution in the space provided
2. Enter type of project, Outlay, Maintenance, or Disclosure
3. Enter priority
4. Enter project name, and
5. Enter project cost,

Project Workbook - Developed by THEC and required for all projects

0. Page –Introduction
This is a one-page summary of your Capital Outlay project, listing pertinent information at a glance.

1. State Goals and Drive to 55 - required for all Outlay projects
The Complete College Tennessee Act of 2010 and the Drive to 55 Initiative have provided the policy foundation for Tennessee higher education. They address the state’s economic development, workforce development, and research needs.

Page 1.1 – State Goals
As a complement to the Plan, the THEC Master Plan update 2020 presents action-oriented strategies for progress toward the Drive to 55:

- **Student Success**
  - Academic Readiness
  - Access to Higher Education
  - Completion
- **Family Prosperity**
  - Affordability
  - Transparency
- **The Future Workforce**
  - Outreach to Adults
  - Future of Work
  - CTE and Work-Based Learning
  - Academic Program Approval
A. Demonstrate how the project supports the goal of “increasing the education attainment levels of Tennesseans.” Reference how this will be achieved through “Student Success” measures and “Family Prosperity” measures in the THEC Master Plan Update 2020.

B. Demonstrate how the project advances the state’s economic and workforce development goals. Reference how this will be achieved through “The Future of Workforce” measures in the THEC Master Plan Update 2020
   - How is the capital project linked to the local/regional/state workforce needs?
   - How does the capital project support development in the community?
   - Describe considerations of the project as it relates to the impact of COVID and workforce development.

All project types have tangible impacts on state goals; therefore, institutions should provide information that links the requested project to state goals regardless of project type.

**Page 1.2 – Institution Mission and Goals** (not a requirement for TCATs)
   - C. Demonstrate the alignment between the institutional mission and the proposed project.
   - D. Community Colleges need to describe how the project advances the institution’s strategic plan.

**Page 1.3 – Academic Program and Credential Production**
   - E. Identify the specific academic programs directly served by the proposed project. Provide details about the programs and why they are a priority for the campus. How will the program(s) continue during the renovation? Describe temporary accommodations.
   - F. Describe how the project will affect academic programs on campus, including potential shifts in academic program delivery methods with online and hybrid courses. What unique strengths will be enhanced by the project? Will credential production be expanded, more efficient, or of higher quality as a result of this project? If an institution is seeking to increase credential production, institutions should detail how additional students will be recruited into the academic programs.

**Page 1.4 – Enrollment Data**
   - A. Worksheet providing historical and projected counts of students and faculty for the academic credentials supported by the proposed project. Provide the number of majors directly served by the academic programs affected by the proposed project for the past 3 academic years and projected figures for future years. This worksheet focuses on students majoring in the academic programs served by the proposed project. Not included in this worksheet are students that are that are taking classes in the academic program but have a different major on campus. Those students may be described in 1.4B.
Example:

<table>
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<tr>
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<td>BBA</td>
</tr>
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<td>10</td>
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</tr>
<tr>
<td>Fall FTE Enrollment - On Ground</td>
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<td>50</td>
<td>56</td>
<td>64</td>
<td>68</td>
<td>72</td>
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<td>Fall FTE Enrollment - Online</td>
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<td>19</td>
<td>21</td>
<td>24</td>
<td>26</td>
<td>27</td>
<td>28</td>
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<tr>
<td>Graduates</td>
<td>59</td>
<td>63</td>
<td>70</td>
<td>80</td>
<td>85</td>
<td>89</td>
<td>95</td>
</tr>
</tbody>
</table>

Cells in gray are projections by the institution.

B. Discuss anticipated impact of COVID on FTE or affected programs. Describe number of students or program participants who will directly or indirectly be served by the project. Describe FTE supported by the project, number of majors in programs associated with the project, number of people impacted by the projected research, and/or number of program participants affected by non-formula projects.

Data sources that may help address the above descriptions included, but are not limited to:


- **Summary for Tennessee Postsecondary Education 2015-2025** [https://www.tn.gov/content/dam/tn/thec/bureau/research/other-research/master-plan/MasterPlanSummary.pdf](https://www.tn.gov/content/dam/tn/thec/bureau/research/other-research/master-plan/MasterPlanSummary.pdf)


- **Data provided by the Tennessee Department of Economic and Community Development’s Center for Economic Research in Tennessee (CERT)** ([https://www.tn.gov/ecd/](https://www.tn.gov/ecd/))

2. **Campus Master Plan and Project Development** - required for all Outlay projects

Accounting for project as related to the campus master plan, space needs, and the development of the project.

**Page 2.1 – Campus Master Plan**

A. Identify the Project. Describe how the project is consistent with the strategic plan and master plan. Note specific references, with links and page number of the plans. List the MP goals related to the project and provide page and/or link to the location in the MP. If multiple institutions are partnered in the project, provide reference for each.
B. Explain the past progression of outlay projects as they relate to the priorities defined in the master plan and how this project will affect opportunities and challenges for future capital plans.

C. List how facility inventory and future space needs affects project’s architectural program
   - **Space Needs:** How are institution’s master plan existing facility inventory and future space needs related to the project? Provide specific reference in the MP, and/or cite specific space analysis reference.
   - **Physical Facility Survey (PFIS):** Describe existing building conditions that affected the development of the project.

**Page 2.2– Project Development**

D. Describe the planning influences, conditions, refined academic goals, or facility program goals that support the development of the proposed project. Describe the long-range planning considerations that produced the current proposed project.

E. What is the status of the architectural programming for the project? Is a detailed program complete? Was it completed in-house, or by consultant, or by master planner? An architectural program includes detailed requirements for each space in the project. An outline or summary program includes only a list of programmed spaces with space name, capacity, primary use, and net area, and a total of net/gross for the project.

Provide an architectural program, delivered via hardcopy and electronic delivery. Note on the spreadsheet in 2.2E that it is complete and delivered (Y/N).

F. Provide an assessment of alternatives to the project that were considered during the planning process to meet the academic and space needs of the institution. Why is the proposed project the preferred solution? Describe how the project supports flexible classrooms or labs, office spaces, and other flexible program configurations.

3. **Project Description and Impact on Campus**

Workbook pages 3.1 – X.1 provides an overview of the project, serves as confirmation of the campus’s understanding of the project, and confirms the level of pre-planning conducted in advance of the submittal. Blue tabs are pages required by F&A in Access.

**Page 3.1 – DB70**

Part 1 – Project Identification

Fill in the institution name where indicated.

Project Name: The individual building name should be part of the Project Name in the style of naming the building first then what you intend to do to it, such as “Fulton Building Air Conditioning Upgrade.”

Part 2 – Fiscal year

Fiscal Year should already be filled as “2022 / 2023”.
Part 3 – Classification, Designer Requirement, and Square Footage

There are three (3) Classifications with a box for each, plus a fourth box for “Designer Required”. Put an “X” in the box for the type of project and for a Designer selection.

Fill in values for square footage and cost/s.f. under New construction and Renovation. Cost estimates should be based on discussions with OFD Project Management staff or a licensed design professional. The cost per square foot is based on gross square footage of the building construction only, excluding site & utilities and special built-in equipment. The values put here feed a calculation in cell I29, in the upper right of Part 5. These figures should match throughout the project workbook.

Part 4 – Project Description

This is for overview of the scope of the project. Concisely describe the Work to be performed. Do not repeat the project name, nor dwell on justification, historical data, or the benefits derived. Save the details for the Project Support Document or the Program Statement.

Part 5 – Project Costs

The two columns – “Total Project” and “Allocation” – for most project requests are the same, and the Allocation column has been set up to automatically copy the Total Project column unless you override that feature by filling in other values. Fill in only the amount being requested for this fiscal year.

Building Construction should be reasonably close to the Estimated Construction Cost calculated in cell I28 from the square foot and cost values entered in Part 3, and typically only covers the cost of normal building construction including style and basic functions but omitting special system requirements.

Site & Utilities should include demolition, parking lots and roads, and other site amenities.

Built-in Equipment should include special air-handling units like fume hoods, special plumbing such as gas and water for laboratories, casework, kitchen equipment, and other special system requirements.

Bid Target: Is locked with embedded math to sum of the preceding three lines.

Contingency: Is locked with embedded math.

M.A.C.C. should be rounded to 5 or 10 thousand and allow a contingency of approximately 5% for new construction and 10% of the Target for renovations. Once the M.A.C.C. is entered, contingency values will calculate and display in their respective cells.

Fee for the designer has been set up to calculate automatically, but is dependent upon several factors:

- **Renovation**: cell I36 contains the word “Renovation”, and the fee will calculate at 1.25 times the base formula of 35/LogP. In this context, any repairs and replacements are “Renovation”.
- **New Construction**: put “New” in cell I36. The base formula will be calculated un-multiplied.
- **Fixed**: put “Fixed” in cell I36, and overtype Fee value cell(s) with the fixed amount.
- **Multi-Part**: Contacting TBR if using.

Movable Equipment should be supported by a list in the “Equip” sheet.

1st-Other and 2nd-Other are available for special costs, such as land acquisition, commissioning, scheduling, moving expenses, special consultants. In the column (F) with the other line-item
captions, provide an appropriate, concise, descriptive caption. Surveys, geotech, and other basic design investigations are normally included in Miscellaneous but can be separated into these “other” lines. Commissioning is needed for all new buildings, major renovations, and HVAC projects. Use $1.50/SF as a rule of thumb when calculating Commissioning fees.

**Admin. & Misc.** Is locked with embedded math to equal the Total Cost below, minus the sum of the lines above. A guide would be approximately 50% of the designer’s fee, with a minimum of $10,000.

**Total Cost** should be rounded to 10 thousand, allowing a suitable level of miscellaneous costs. The total cost should not be a negative number.

---

### Part 6 – Funding Request

- **State funds:** total project cost will automatically populate from “Total Cost” in Section 5, unless costs are entered in the next 2 lines of this section (see below).
- **Federal Funds:** enter any federal funds that will be put into the project.
- **Local and Institutional Funds:** entry any other funds included in the project besides state funds or federal funds. This is used for Disclosures and for the Match required for Outlay projects. Describe funding source in cell 47H.

---

### Part 7 – Previous SBC Approved Funding

Normally, enter nothing here. This Part is used only if This Request is for additional funding to continue an existing SBC project. Do not insert additional rows, as these may foul math functions and pagination. Funding information on existing projects is available through the Project Information Tracking System at [http://pits.tbr.edu](http://pits.tbr.edu). (can use “pitsguest” to sign in)

---

### Part 8 – SBC Action

If requesting or disclosing funding for an existing SBC project, provide the SBC project number.

---

### Part 9 – Designer

It is not necessary to fill in anything; however, if the request continues an existing SBC project, the name of the designer already assigned to the project by the SBC should be filled in.

---

### Page 3.2 – Project Support Documentation, Sheet 1

The **Project Support Document** is required for all projects and provides a brief narrative of the project. Extended narratives may be included as appropriate. The following information is required:

A. **Architectural Program Scope:** Provide a description of the work to be included in the project. For roof replacements, indicate the area of the roof if only a portion of a total building’s roof. Avoid repeating the title or justifying the project.

B. **Evidence of Physical Facility Need** Describe the deficiency being remedied by the project, whether it is lack of adequate space, inadequate conditions, growing demand, systems in need of repair, etc. The focus is on space needs, space condition, or other physical factors that create the need for the project. How does the project address quality of space as it relates to the impact of COVID.

C. **Historical Profile:** Provide history of the facility and program. On existing structures, provide dates of original construction, additions, and renovations, etc.

D. **Summary Results and Date of Physical Facilities Survey:** Include a current facilities assessment (e.g., a Facility Survey Score) and the general condition of any existing building that will be
impacted by this project, including any buildings that will be vacated after project completion, renovated or demolished. Identify condition of the major systems of relevant buildings (i.e. HVAC, roof, envelope, and others) and identify which ones will be addressed by the project. Also, specify the date that the survey was completed. The summary survey data sheets should be attached in Appendix A.3.

Page 3.3 – Project Support Documentation, Sheet 2

E. Cost Basis for Construction Estimate and Other Costs: Describe method for determining estimated construction costs with source data and similar project(s) information. Include basis for determining soft costs, AV, IT, commissioning, specialty consultant, programming, and administrative costs.

F. Project Schedule: Provide a preliminary schedule for the project, with realistic key milestone dates and phases as appropriate.

G. Campus or Architectural Program Impact: Describe any other costs or program related impact of the project otherwise not described in this section.

Page 3.4 – Schedule of Movable Equipment

A. Itemize and estimate the cost for equipment planned in the project. The total should equal the total on the DB70 sheet for movable equipment.

B. Provide a narrative explaining the basis for estimating the equipment costs. Do not use per s.f. estimates.

Page 3.5 – Business Plan

- Define on-going costs to maintain the building and its academic programs/research.
- Provide the existing and future total salaries, and existing and future position counts in the upper fields.

A. Operations Overview

- Provide an overview of the financial plan associated with the operations of the programs and facility described in the project. Costs may be defined by previously approved or existing expenses and revenue, and new expenses and revenue needed as a result of the project.
- Summarize the annual net additional costs for programs, staffing, operations, utilities, and maintenance costs. Costs should be consistent with planned student enrollment increases, staffing increases, and additional net area created from the project.
- Describe financial efficiencies or planned reductions as a response to COVID impact achieved with the project. How will they be realized (demolitions, shared spaces, funding sources, etc.)? Quantify the financial benefits, or describe other opportunities created with the project.

B. Revenue Sources, Fundraising, and Partnerships

- Will there be a fundraising campaign or other community/industry partners that will be specifically associated with this project, and what are the specific funding goals?
• What are the revenue sources expected to defray additional on-going costs, such as estimated additional tuition, grants, or other sources? Anticipated funding and tuition income should be supported by the academic strategic plan for credential production and enrollment increases.

3.5b – First Year Operating Costs

This form is available to complete for all projects that will have new increases in annual operating costs as a result of the project. Previous or existing salary or other existing operating costs do not need to be included in these costs.

A detailed format for the final estimate is built into the project workbook sheet with the tab name of BondQuest (3.6).

The information required includes:

- Number of positions to be added
- Salary costs added by new positions
- Reimbursable program expenses
- Telephone and equipment installation
- Utilities
- Maintenance.
- Offsetting revenues to be received from non-state sources

Utility Funding

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Maintenance and Operating

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<td>6.87</td>
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<tr>
<td>3.44</td>
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4. Space Needs – THEC Space Guideline, Facility Assessment, and Migration Plan

Appendix A2 – Attach completed THEC Space Guidelines workbook.

Page 4.1 – Space Needs – THEC Space Guideline, Facility Assessment, and Migration Plan

Capital project proposals include a space-needs analysis in the spreadsheet page 4.1, Space Needs. In the upper right, provide the name of the person or firm that completed the THEC Space Guideline, and the date for the Existing E&G s.f. Project evaluations of the Space Needs section may consider changes or reductions in campus space due to an increase in fully online or hybrid coursework, need for more flexible active learning environment, reduction or change in offices, and overall reduction of space inventory.

A. Complete the full THEC Space Guide and attach as Appendix A2, based on the entire campus data for the campus where the project is located (not project data), and then transfer the summary totals to the 4.1 Space Needs sheet.

“Modeled” and “Exist E&G SF.” Complete 4.2 tab “Tabulation of Affected Space and determine the “Net Change” column on sheet 4.2. The “Net Change NASF” column on 4.1 Space Needs sheet will automatically populate from the data in column “H” on 4.2.

The Space Needs will be scored based on the following:

- **Space Needs** - Preservation of existing space with renovations and space improvements to address program delivery needs.

- Demonstrated need for academic space improvements for the programs identified in the project program.

- **Rebalance** of campus space needs.

- **Demolitions** of space not suitable for renovations, demolition included in scope and space calculation.

- Program seeks flexibility with shared uses and classroom, lab efficiencies.

B. Complete the narrative box “B” in the 4.1 Space Needs sheet. The narrative may address space needs for formula space, or space revisions for non-formula space. Include relevant space needs documented by the Master Plan. The proposal may include any other space utilization studies if appropriate. If the Space Guidelines do not apply to the project or only partially applies, proposals should provide the details of the identified need outside the guidelines that drives this project.

C. Provide a migration plan for buildings and programs impacted by the project. It should include the future planned use of related spaces as a result of the project. In the case of renovations, describe any temporary provisions for dislocated occupants. Clarify how much of the migration plan and associated construction are included in the scope of the current project.
Page 4.2 – Tabulation of Affected Space

Fill in the total net areas of the project according to room use category, and construction type (demolition, renovation, or new construction). Then fill in the gross areas associated with each type. The efficiency of the project (net/gross) will calculate automatically. The totals in the column “Net increase” are linked to the corresponding space categories on sheet 4.1 Space Needs, under the column “This Project – Net Change NASF.” The total net and gross areas, for new construction and renovation, with calculated multiplier percentage grossing factor, should match the net/gross on the DB70 sheet.

Under the “Demolition” column, add the net area formula space, the other non-formula space, and gross areas that is to be demolished as part of the project.

Provide an explanation of the data provided, if needed, in the lower text box “Explanation of Data.” Please list the buildings to be demolished as part of the project and provide the names of buildings included in the renovation spaces.

Page 4.3 – Outline Architectural Program

Provide an outline architectural program in the Excel workbook on 4.3. This information provides more details about the project and is an indicator of the institution’s advance planning efforts and understanding of the program.

The template provided in the workbook should be used to show the program areas for both renovation and new space. The workbook can be duplicated for separate programs for new space and renovation space. The total net areas should match the net areas provided on the DB70 and other space data such as 4.2 Tabulation of Affected Space.

The outline should include:
- Each space name,
- Space room use code,
- Brief activity description of the room,
- Net area per space,
- Occupancy count of room,
- Number of spaces,
- Total occupancy count, and
- Total net area of each specific space type

East formula space type should have a total for each formula space type. (Example: 1 classroom is 2,000 net s.f., 6 total classrooms of this space type, 12,000 net s.f. total for that space type. Then there is also a subtotal for all classroom spaces.)

Provide an architectural program as a hardcopy. Note that program is complete on sheet 2.2E. Do not place the program in the Appendix.

5. External Funding

Required for all Outlay and Disclosure projects.

Page 5.1 – External Funding

Enter amounts of match funds by fund type committed for the project on sheet 5.1. The total project will populate from cell C41 of the DB70. For your institution type, fill in the percentage of the total cost for New Construction. In the case of 100% renovation area and costs, then 0% should be entered.
in New Construction. If the project is a mix of new construction and renovation, the basis for the match required is the total project cost for each portion of the project.

**Sheet X.1, Grouper** is required for all projects with a mix of new construction and renovation. Enter the total project cost for each type of construction (minor new or renovation) to calculate the percentage mix of the project. Enter the percentage mix of minor qualifying new construction for your institution type on Sheet 5.1 to calculate the required match.

Major new construction (major new programmed spaces such as classrooms and offices) is required to be funded 100% with external funding. Enter the amount funded at the top of 5.1, but do not include it in the match calculation.

If there are elements of the project with various institution types, such as TCAT and University, then please provide a grouper defining the costs for each type to determine the percentage of total cost to be assigned accordingly.

All institutions including TCATs must fill out the top section of sheet 5.1 if funding sources other than outlay is pledged for the project.

**Appendix**

Specify additional appendix documents on the “0, Introduction” sheet. Please keep all appendix documents in one location, and do not split them between the workbook and PDF document. Please cross reference where Appendix Documents support specific sections in the submittal.

To add appendix documents, add tabs after “X Grouper.” JPEG files may be inserted in the spreadsheet. You can convert PDF’s or other format files to JPEG for easy inclusion. Be sure to size the image approximately or check the “fit sheet on the one page” to print correctly. The THEC space Guideline may be inserted either as a spreadsheet tab, or as an object or JPEG. Please format the printing.

**Appendix A – Required Documents**

All the following documents are required for all outlay project submittals in the workbook, except A1 is not required for TCATS.

**A1 Institutional Mission Profile** (not required for TCATs): Institutional Mission Profiles are approved by the THEC Commission each year after being approved by the TBR board. The FOCU Act emphasized the importance of institutional mission profiles and further directed the annual submission of profiles by each university and community college. Mission Profiles are utilized to minimize redundancy in degree offerings, instructional locations, and competitive research. The profiles are also used in the outcomes-based funding formula. Through outcomes-based formula weighting factors derived from the mission differences, institutions are funded based on their mission-defined production of graduates, their breadth of undergraduate and graduate programs, and their research capacity.

**A2 THEC Space Allocation Guidelines**: Provide the completed “THEC Space Guidelines” workbook in the outlay workbook for your institution type. The totals at the end of the workbook should correspond to the totals entered on sheet 4.1, Space Needs, under the “Modeled” column.

**A3 Facilities Survey Summary Sheets (PFIS)**: Attach summary sheets of directly affected buildings in the project, and/or related existing buildings not in the project.
Appendix B Supplemental Support Documents

B1 Supplemental Drawings, such as master plan drawings, site plan, floor plans, and massing models. They will serve to support the narratives on Sheet 2.2 D, E, and F.

B2 Other optional support documents (not graded).

Capital Outlay Evaluation Criteria and Objectives

1. Capital projects will be linked to State goals and the Drive to 55, including.
   a. Increasing degree production, particularly at the undergraduate level
   b. Enhancing research and/or workforce development
   c. Identifying and addressing education and workforce needs of local and regional economies
   d. If applicable, emphasizing focus populations as identified in the outcomes-based funding formula. Focus populations are defined as:
      - Low income,
      - Adults age 25 and over, and
      - for Community Colleges only, academically underprepared.

2. Capital projects should enhance campus mission and distinction and should be envisioned in the institution’s current Master Plan. If the renovation and/or a major addition to the project is not currently shown in the MP, then an amendment to the plan should be submitted to THEC no later than July 1, 2022 to be considered for the FY 22/23 cycle.

3. Boards should develop project proposals that include academic planning and architectural programs, which may include early ideas regarding the uses and layout of buildings impacted by each project.

4. Institutional facility needs and condition, as analyzed by the THEC Space Planning Guidelines, are a factor in determining institutional priorities. You are strongly encouraged to develop projects that address overall space needs and advance long-range planning goals

5. External funding requirement is a pass/fail component. The capital match component identifies a minimum percentage of project costs to be borne by the institution, ideally from private fundraising.
**Capital Outlay Scoring Matrix** The points assigned to each evaluation criteria are detailed below. A detailed breakdown of the points assigned to each section is attached at the end of this document.

<table>
<thead>
<tr>
<th>Prioritization Criteria</th>
<th>All Universities, CC, TCAT's, and Specialized Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. State Goals &amp; the Drive to 55</td>
<td>25</td>
</tr>
<tr>
<td>2. Strategic Plan and Campus Master Plan</td>
<td>20</td>
</tr>
<tr>
<td>3. Project Description and Impact on Campus</td>
<td>30</td>
</tr>
<tr>
<td>4. Space Needs</td>
<td>25</td>
</tr>
<tr>
<td>5. External Funding – Pass/Fail</td>
<td>0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100</td>
</tr>
</tbody>
</table>

**External Funding (Match) Thresholds for Capital Outlay Projects**

Projects submitted by all Community Colleges must meet a minimum match requirement to be evaluated. The minimum match requirement differs by institution and project type, as detailed below. There are no match requirements for TCATs. The primary intent of the State’s match requirement is to encourage the development of gifts to an institution’s capital outlay project. Institutions are encouraged to maximize the gift component in excess of the minimum amount required.

The match funding requirement is pass/fail and will not generate points in the scoring rubric.

Outlay funding shall include an institutional matching component that is no less than the amount pledged by the institution in the capital outlay budget proposal. The match should be secured when the project funding is approved and ready for SBC approval. Matching funds may include gifts, grants, plant funds, student fees, and other non-state sources.

No more than 1/3 of the total pledged match shall consist of Tennessee State School Bond Authority (TSSBA) financing, the term of which shall not exceed five (5) years. Obligations resulting from such financing shall be reduced as the matching funds from other non-state sources are raised and recognized.

The match requirement will be the same as the previous year for renovation and new construction with the following exception. Minor areas of new construction additions to the renovated structure may be included in the scope for the purpose of improving codes issues, circulation, and/or connections to other structures, and will follow the match requirements below.
New construction for major new programmed spaces should be supported by 100% external funding; gift minimum requirement does not apply.

Projects that are a mix of new construction and renovations must have the required match for each construction type, based on the total project cost of each type. See instructions for 5.1 External Funding, and “External Funding” tab in the DB70 spreadsheet. See the chart below for the required match component for renovation and new construction by institution. The match component for new construction (minor new areas for codes issues, circulation, or connections, not renovations) shall consist of gifts to the institution in the following percentage of the total pledged match:

- 0% for all Community Colleges and Specialized Units

<table>
<thead>
<tr>
<th>Capital Outlay Match Requirement FY 2022-23</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Type</td>
</tr>
<tr>
<td>Major Renovation – Pass/Fail, no gift minimum</td>
</tr>
<tr>
<td>New Construction Match – Pass/Fail</td>
</tr>
<tr>
<td>Gift Minimum – New Construction Only</td>
</tr>
</tbody>
</table>
Project Classification

All projects submitted for consideration for the annual capital budget request and disclosures must be submitted in one of the following three classifications:

**Capital Outlay**

**Definition:** New buildings or structures, utility and/or service systems, land acquisition, site improvements, appurtenances, or permanent betterments which materially extends the useful life and improves or changes the functional use of a facility, normally meeting one or more of the following criteria:

- **Renovation**, restoration, and/or replacements, which result in a change in use, with the end product qualifying as E&G space for the PFI.
- **New Facility or Addition** to Existing Facility, which creates new E&G square footage.

Former project requests, if still a priority need to be resubmitted.

Be prepared to show proof of match fund availability.

**Capital Maintenance**

**Definition:** Major non-routine repairs and replacements for E&G space unrelated to new construction, for

- **Repair** to restore a facility or infrastructure to its former, better state without a change in use.
- **Replacement** of exhausted or damaged utility systems, roofs, exterior fencing and lighting, infrastructure, and paving.
- **Removal** of hazards such as asbestos encapsulation or abatement.
- **Alteration** of safety or accessibility features, to rectify code deficiencies.
- **Modernization or Update** of obsolete building systems, for continuation of educational program.
- ** Corrections** to bring buildings or systems into compliance with newer codes or standards.

Out-year portions of partially funded projects will not be requested by TBR unless the institution submits a request. Because maintenance needs can change much in a year, a completely new list is produced each year.

**Disclosure**

Projects proposed from School Bonds and other sources

**Definition:** Any project which adds or deletes square footage and will receive funds from a source other than Capital Appropriations, such as:

- **Tennessee State School Bond Authority** financing (bonds or commercial paper)
- **Plant funds (auxiliary)**: from bookstore, food service, parking, health care, athletics, etc.
- **Plant funds (non-auxiliary)**: balances from appropriations and tuition allotted for improvement projects
- **Land sale proceeds**: applicable only to work normally eligible for capital outlay funding
- **access fees**: (e.g., parking, technology)
- **student fees**
- **gifts**: donations, bequests, foundations
- **local funds**: (city or county participation)
- **federal funds**: grants and matches
## Prioritization

### Capital Outlay

The Prioritization Formula applied to candidate projects gives points for:

- **State Goals & Drive to 55**  
  25 points  
  Each project shall include a narrative on how the project supports the principles of the Complete College Tennessee Act and the Drive to 55 initiative.

- **Master Plan and Strategic Plan narrative**  
  20 points  
  Each project shall include a narrative linking project with strategic plan and campus master plan.

- **Project Description**  
  30 points  
  Each project will provide an overview of the project.

- **Space Needs**  
  25 points  
  Each project will include a space-needs analysis.

- **External Funding**  
  Pass/Fail

### Capital Maintenance

Frequently, preliminary analysis results in high-cost projects being divided up and low-cost projects being combined.

- **Maintenance Target value** is formulated from replacement value and age of facilities.

- **The total of project submitted should not be more than the annual renewal target.** They need to be submitted in priority order.

  Additional prioritization is accorded to type of work in this order:

  - Building Codes & Safety
  - Roofs
  - Mechanical & Infrastructure
  - Building Envelope, Parking, and Paving
  - Interiors & Finishes

- **The Annual Renewal request will be near the TBR’s annual target.**

- **A nearly equal value of projects is further listed as Unmet Maintenance Needs.**

- Please do not mix different types of work in the same project. For example; a roof project should not also be a landscaping or interior renovation project.

  - **Types of work:**
    - Roofing
    - Mechanical/Bldg. Systems
    - Interior Updates
    - Exterior Updates
    - Infrastructure Updates
    - Parking and Paving

### Disclosure

No priority order is required for these projects.

- All construction of new buildings or structures more than $100,00 must be disclosed. All major maintenance projects more than $500,000 must be disclosed.

- The disclosed projects are acknowledged when the budget is approved. If the campus wants to proceed with a disclosed project, the campus needs to request that the project be brought to the State Building Commission (SBC) for approval.

- Funding must be in place when the project is taken to the SBC.

- A disclosed project remains disclosed for 2 years.

**Opportunities:**

- **Budget Submittal and Quarterly Disclosures during the year, as well as the Annual Disclosure Amendment in March.**

- Project of significance and projects using TSSBA funding will need to be submitted with the budget or budget amendment, not with the quarterly submission.

**Exception:**

- **Maintenance Emergencies** may be initiated immediately but must be disclosed in the subsequent quarterly submission.
Maintenance Request Requirements

A capital maintenance project is a rehabilitation project that keeps a facility or asset in efficient operating condition or is needed to restore a facility to an acceptable condition but does not include programmatic renovation, demolition, or new construction. These projects are of a non-recurring nature, beyond the scope of ordinary repairs, and do not appreciably prolong the previously estimated service life or increase the estimated value of the building.

In general, ordinary repair and maintenance projects, and other projects below $100,000, will be funded through operating appropriations rather than capital maintenance.

Disclosed Project Requirements

Submit any number of Disclosures that you think may be funded within the next two years. Disclosed projects are funded from sources other than state appropriations, such as institutional funds, auxiliary funds, TSSBA funds, or gift funds.

All capital improvement projects in excess of $100,000 must be disclosed to THEC. All capital maintenance projects in excess of $500,000 must be disclosed to THEC.

Capital Improvement and Capital Maintenance are defined by the State Building Commission (Policy Item 2.01).

Quarterly Submission

Should unforeseen opportunities or needs arise that require disclosure during a fiscal year, governing boards may disclose such projects each quarter. TBR will request quarterly submissions for disclosed projects in June, September, December, and March for projects intended to be initiated in the three months that follow. **THEC may request TBR to hold a disclosed project of significance – one that requires master plan guidance – to the following fiscal year submission.**

Projects funded by TSSBA funds can only be disclosed during the annual budget process.

Emergency Projects

If an event occurs which requires a campus to immediately engage in a capital project exceeding the thresholds to avoid immediate danger to persons or property or when essential and indispensable to campus operations, institutions may initiate the project immediately but must disclose it in the subsequent quarterly submission. Emergency performance of capital improvement or renovations are subject to appropriate State Building Commission, Department of Finance & Administration, and other state policies and procedures, including review and approval.
Capital Maintenance Target Funding by Institution

OFD endeavors to craft a Capital Maintenance recommendation up to the systemwide Annual Target.

<table>
<thead>
<tr>
<th>Institution</th>
<th>2017 Target</th>
<th>2018 Target</th>
<th>2019 Target</th>
<th>2020 Target</th>
<th>2021 Target</th>
</tr>
</thead>
<tbody>
<tr>
<td>ChSCC</td>
<td>4,206,607</td>
<td>4,295,830</td>
<td>4,333,184</td>
<td>4,301,723</td>
<td>4,955,736</td>
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<tr>
<td>CISCC</td>
<td>1,898,720</td>
<td>1,914,741</td>
<td>1,930,763</td>
<td>1,943,479</td>
<td>2,231,626</td>
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<tr>
<td>CoSCC</td>
<td>1,738,030</td>
<td>1,772,107</td>
<td>1,802,406</td>
<td>1,832,705</td>
<td>2,131,116</td>
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<tr>
<td>DSCC</td>
<td>1,223,983</td>
<td>1,257,984</td>
<td>1,281,407</td>
<td>1,304,831</td>
<td>1,513,499</td>
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<tr>
<td>JSCC</td>
<td>1,855,519</td>
<td>1,891,363</td>
<td>1,921,981</td>
<td>1,952,599</td>
<td>2,267,672</td>
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<tr>
<td>MSCC</td>
<td>1,498,480</td>
<td>1,548,225</td>
<td>1,579,335</td>
<td>1,610,445</td>
<td>1,917,450</td>
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<tr>
<td>NaSCC</td>
<td>2,255,231</td>
<td>2,403,594</td>
<td>2,488,232</td>
<td>2,559,345</td>
<td>2,947,990</td>
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<td>NeSCC</td>
<td>1,202,498</td>
<td>1,246,526</td>
<td>1,334,276</td>
<td>1,413,509</td>
<td>1,561,736</td>
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<td>PSCC</td>
<td>3,304,635</td>
<td>3,398,954</td>
<td>3,493,273</td>
<td>3,599,514</td>
<td>4,143,995</td>
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<tr>
<td>RSCC</td>
<td>2,269,367</td>
<td>2,354,253</td>
<td>2,451,952</td>
<td>2,537,516</td>
<td>2,965,199</td>
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<td>STCC</td>
<td>4,415,210</td>
<td>4,561,906</td>
<td>4,708,601</td>
<td>4,855,296</td>
<td>5,646,583</td>
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<tr>
<td>VSCC</td>
<td>2,375,133</td>
<td>2,464,148</td>
<td>2,553,162</td>
<td>2,736,866</td>
<td>3,213,451</td>
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<td>WSCC</td>
<td>3,464,794</td>
<td>3,570,989</td>
<td>3,689,795</td>
<td>3,795,990</td>
<td>5,076,799</td>
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<tr>
<td>colleges</td>
<td>31,708,207</td>
<td>32,680,618</td>
<td>33,568,367</td>
<td>34,443,818</td>
<td>40,572,852</td>
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<tr>
<td>TCATs</td>
<td>9,385,148</td>
<td>9,617,105</td>
<td>9,774,867</td>
<td>10,022,271</td>
<td>11,681,993</td>
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<tr>
<td>TOTAL</td>
<td>41,093,355</td>
<td>42,297,723</td>
<td>43,343,234</td>
<td>44,466,089</td>
<td>52,254,846</td>
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</table>

2021 System Statistics

<table>
<thead>
<tr>
<th>Education &amp; General gross square footage</th>
<th>Average Age</th>
<th>Median Age</th>
<th>Building Replacement Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>E&amp;G GSF square feet</td>
<td>years</td>
<td>years</td>
<td>dollars</td>
</tr>
<tr>
<td>Colleges</td>
<td>8,430,099</td>
<td>36.02</td>
<td>37.0</td>
</tr>
<tr>
<td>TCATs</td>
<td>2,325,244</td>
<td>38.55</td>
<td>41.0</td>
</tr>
<tr>
<td>TOTAL</td>
<td>10,755,343</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Formula for Annual Target Funding

Source: FM Data Monthly, August 1997

\[
\frac{2}{3} \left( \text{Building Replacement Cost} \right) \times \left( \frac{\text{Building Age}}{1275} \right)
\]

2022-2023 Target Funding for Capital Maintenance $52,254,846
## History of Appropriations

Total amounts appropriated by the State of Tennessee to TBR capital projects  
(FY20/21 gubernatorial recommendation not yet appropriated)

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Outlay</th>
<th>Maintenance</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020-2021</td>
<td>21,700,000</td>
<td>12,660,000</td>
<td>34,360,000</td>
</tr>
<tr>
<td>2019-2020</td>
<td>17,750,800</td>
<td>14,615,000</td>
<td>32,365,100</td>
</tr>
<tr>
<td>2018-2019</td>
<td>41,240,000</td>
<td>23,790,000</td>
<td>65,030,000</td>
</tr>
<tr>
<td>2017-2018</td>
<td>153,337,000</td>
<td>26,120,000</td>
<td>179,457,000</td>
</tr>
<tr>
<td>2016-2017</td>
<td>29,062,000</td>
<td>15,790,000</td>
<td>44,852000</td>
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<tr>
<td>2015-2016</td>
<td>44,570,000</td>
<td>9,450,000</td>
<td>54,020,000</td>
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<tr>
<td>2014-2015</td>
<td>61,830,000</td>
<td>11,150,000</td>
<td>72,980,000</td>
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<tr>
<td>2013-2014</td>
<td>85,520,000</td>
<td>10,300,000</td>
<td>95,820,000</td>
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<tr>
<td>2012-2013</td>
<td>1,000,000</td>
<td>15,516,000</td>
<td>16,516,000</td>
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<tr>
<td>2011-2012</td>
<td>0</td>
<td>7,640,000</td>
<td>7,640,000</td>
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<tr>
<td><strong>10-year total:</strong></td>
<td>456,009,800</td>
<td>147,031,000</td>
<td>603,040,100</td>
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<tr>
<td><strong>10-year average:</strong></td>
<td>45,600,910</td>
<td>14,703,100</td>
<td>60,304,010</td>
</tr>
</tbody>
</table>

### Notable Facts:

- 20/21 Outlay for 1 ranked project
- 19/20 Outlay is for one 1 ranked project
- 18/19 Outlays is for 1 ranked project and partially for another ranked project.
- 17/18 Outlays is for 8 ranked projects and four projects not ranked.
- 16/17 Outlays is for 4 unranked projects and 8 Drive to 55 Capacity grant projects.
- 15/16 Outlays is for 2 ranked projects.
- 14/15 Outlays is for 2 ranked projects.
- 13/14 Outlays is for 2 ranked projects and 1 one project not ranked, Nissan Education Facility.
- 12/13 Outlay is for RSCC Oak Ridge Campus.
- 11/12 Outlay is zero.
## 2022-23 Capital Outlay Scoring Criteria

<table>
<thead>
<tr>
<th>Project:</th>
<th>Max Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. State Goals &amp; the Drive to 55</td>
<td>25.0</td>
</tr>
<tr>
<td>1.1 State Goals</td>
<td></td>
</tr>
<tr>
<td>A. Increasing the Education Attainment Levels:</td>
<td>4.0</td>
</tr>
<tr>
<td>B. Economic and Workforce Development:</td>
<td>4.0</td>
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<tr>
<td>1.2 Institutional Mission</td>
<td></td>
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<tr>
<td>C. Alignment of Mission and Project:</td>
<td>3.0</td>
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<tr>
<td>D. Advancement of the Strategic Plan:</td>
<td>3.0</td>
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<tr>
<td>1.3 Academic Program</td>
<td></td>
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<tr>
<td>E. Academic Programs Served by the Project:</td>
<td>3.0</td>
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<tr>
<td>F. Academic Programs and Credential Production:</td>
<td>3.0</td>
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<tr>
<td>1.4 Enrollment Data</td>
<td></td>
</tr>
<tr>
<td>A &amp; B Academic Programs - Support Documentation:</td>
<td>5.0</td>
</tr>
<tr>
<td>2. Strategic Plan and Campus Master Plan</td>
<td>20.0</td>
</tr>
<tr>
<td>2.1 Campus Master Plan</td>
<td></td>
</tr>
<tr>
<td>A. Project Description, Consistency with Campus Master Plan:</td>
<td>4.0</td>
</tr>
<tr>
<td>B. Progression of Projects:</td>
<td>3.0</td>
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<tr>
<td>C. Space Needs and Facility Condition:</td>
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<td>2.2 Project Development</td>
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<td>D. Project Development:</td>
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<td>E. Programming and Planning - Status, Progress:</td>
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<td>F. Alternatives Considered to Meet Objectives:</td>
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<td>3. DB70</td>
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<td>3.2 Project Support Documentation - 1</td>
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<td>A. Program Scope:</td>
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<td>B. Evidence of Physical Facility Need:</td>
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<td>C. Historical Profile:</td>
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<td>D. Summary Results and Date of Physical Facilities Survey:</td>
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<td>3.3 Project Support Documentation - 2</td>
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<td>E. Cost Information - Basis for SF Cost and Other Costs:</td>
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<td>F. Project Schedule:</td>
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<td>G. Campus or Program Impact:</td>
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<td>3.4 Schedule of Movable Equipment</td>
<td>A &amp; B</td>
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<td>3.5a Business Plan</td>
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<td>A. Operational Overview and Efficiencies gained</td>
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<td>B. Revenue Sources, Fundraising and Partnerships:</td>
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<td>3.5b First-Year Operating Costs</td>
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<td>3.6 Bond Questionnaire</td>
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<td>4. Space Needs</td>
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<tr>
<td>Preservation of existing space with renovations and space improvements to address program delivery needs.</td>
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<tr>
<td>Demonstrated need for academic space improvements for the programs identified in the project program.</td>
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<td>Relevance of campus space needs.</td>
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<td>Demolitions of space not suitable for renovations included in scope and space calculations.</td>
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<tr>
<td>Program seeks flexibility with shared uses, and classroom/lab efficiencies.</td>
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<tr>
<td>B. Notes or Comments on Above Data, or Describe Need for Non-Formula Space:</td>
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<td>C. Migration Plan:</td>
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<td>4.2 Tabulation of Affected Space</td>
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<td>A. Tabulation Table</td>
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<td>B. Explanation of Data, if Needed</td>
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### 5. External Funding - Pass/Fail

| Total Score | 100.0 |