



UNIVERSITY OF WISCONSIN – MARATHON COUNTY

# University of Wisconsin - Marathon County

WAUSAU, WISCONSIN

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## Residence Hall Consulting Study



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## Section 1: Introduction and Executive Summary

The Scion Group LLC (Scion) was engaged by the University of Wisconsin- Marathon County (UWMC) to conduct a Residence Hall Consulting Study for its existing student housing community, Marathon Hall, and to assess the potential for a new student housing community on or near the UWMC campus. Scion partnered with Eppstein Uhen, an architecture firm in Wisconsin that is expert in student housing design and shares a relationship with Scion from previous engagements.

The following findings are based on three campus visits during which Scion toured Marathon Hall, interviewed a number of stakeholders that included UWMC administrators including the Campus Dean, Director of Auxiliaries, and 4-H/Youth Development Agent Department Head; Northcentral Technical College (NTC) administrators including the Director of Student Relations/Development and Vice President for Finance; the local alderman; and a Marathon County Administrator. Focus group sessions were conducted with students living on campus, students living off-campus, UWMC and NTC faculty and staff, and Wausau area neighbors. Additionally, Scion analyzed enrollment and on-campus housing occupancy trends and reviewed the off-campus rental market.

Based on its analysis, the Scion team has identified several observations regarding demand and preferences for campus student housing. These observations are included in the following summary. Notably, student preferences and demand are based on current market conditions and perceptions by students. If new or renovated campus housing is achieved and students can actually experience it as a resident or guest, demand and preferences are likely to change and should be reassessed.

### Demand

It is our opinion that the data in the study points toward constructing a new semi-suite style residence hall on the site adjacent to the Center for Civic Engagement building, using high-quality construction standards (summarized in the first two construction options in this report), with a timeline that begins construction in spring of 2015 and has an occupancy date of August 2016. Our planning and analysis are intended to empower UWMC to seamlessly transition from planning to implementation stages. A potential schedule for key milestones is provided on page 44 of this study.

Throughout the process, UWMC requested that Scion evaluate demand using two assumptions: with and without NTC participation, and either a renovation or replacement project. The qualitative and quantitative data suggested the following current demand:

- A new residence hall serving only the UWMC student population is 198 beds.
- A renovated residence hall serving only the UWMC student population is 162 beds.
- A new residence hall serving both the UWMC and NTC student populations is 248 beds.
- A renovated residence hall serving both UWMC and NTC student populations is 212.

Like many residence halls built in the late 1960's, the existing Marathon Hall is in good physical condition, but functionally obsolete. A renovated or new student residence with community bathrooms, little or no study or community spaces on residential floors, poor Internet connectivity, no air-conditioning, and dated institutional finishes, does not provide a facility that supports the academic and social development goals for most campus housing operations. Additionally, the cost to reconfigure this existing hall to provide the desired modern functional spaces approaches the cost per bed of a new facility, would result in fewer beds overall, and would render some or all of beds temporarily offline for up to 14 months, creating an impact on enrollment goals and the student life experience.

The UWMC summarizes the 2013 Noel-Levitz Student Housing Analysis as a demand of 208, including 116 to 136 in traditional residence hall configuration with community bathrooms, and 72 to 92 beds in two or four bedroom units. Information provided to Scion suggests that the increased demand is coming broadly from all student groups, including UWMC and NTC students, as well as international students on both campuses through additional outreach marketing.

#### Unit Mix and Amenities

- A semi-suite configuration proved most favorable for first and second-year students. Suite or apartment-style units would be most appropriate for third and fourth year students.
- Amenity spaces should offer areas that promote student interaction, passive activity, and health and wellness. These may include a common area kitchen, interactive business center space, fitness center, and game room.

#### Rents

- Students currently pay approximately \$350 per month to live in Marathon Hall.

- A new residence hall with semi-private bathrooms, a competitive and achievable rate if appropriately marketed, is \$420 per month, especially for only a 9 – 10 month term.
- For a renovation of the existing residence hall, a competitive and achievable rate is \$380 per month.
- Off-campus rents range from \$306 to \$1,650 per month for a private bedroom.

#### Options to Build New and/or Renovate the Existing Facility

To enable informed decision-making, seven options are presented in detail in Sections D and F. Each option includes scope, configuration, amenities and estimated construction cost.

#### Implementation

It is our opinion that the data in the study supports construction of a new 198 to 248 bed semi-suite style residence hall on the CCE site, using construction Options 1 or 2, with a timeline that begins construction in spring of 2015 and has an occupancy date of August 2016. Our planning and analysis are intended to empower UWMC to seamlessly transition from planning to implementation stages. A potential schedule for key milestones has been provided.

**Section 2: Background and Current Conditions**

Current Housing

Based on information provided by the University, Marathon Hall was built in 1968 with Marathon County funds for the purpose of housing students who were attending the Marathon County “Center,” an extension of UW Madison at the time. In the 1970s, the Hall was offered to 60 Northcentral Technical College students as a student housing option for those students and to help build occupancy. Currently, students from both institutions still occupy the facility. The building consists of traditional residence hall accommodations (double occupancy rooms along double-loaded corridors, with community bathrooms) with a capacity of 162 students. It is located across the street from the UWMC main academic building. There is no on-campus living requirement for either institution.

The hall is typically occupied to capacity each fall semester with a waiting list of up to 30 students, and is 95% occupied during an average spring semester. During the summer months, the building is occupied by a mixture of students, camp and special program participants. During the academic year, up to 66 beds have been reserved for NTC students, but only 20 of those spaces have been occupied by that group in recent years. Currently, however, NTC utilized its entire allotment and it was reported that they could have used more.

Housing costs for NTC students are proportionately higher to reflect a slighter longer occupancy period. All residents of Marathon Hall are required to purchase a minimum meal plan of 10 meals per week. A deposit of \$150 is due at the time a housing contract is signed.

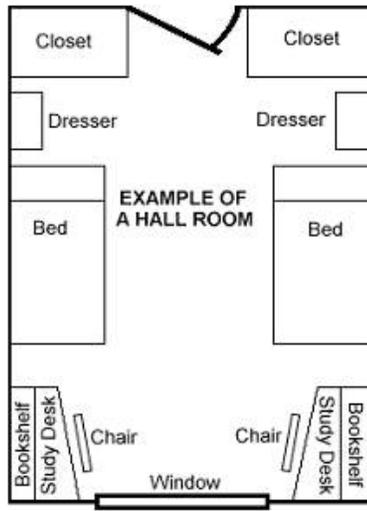
*Table 1: Marathon Hall Semester Room and Board Rates* shows room and board rates per semester for UWMC and NTC students based on their choice of meal plan.

Meal Plan	Housing Contract Rate	Room Portion	Meal Plan Portion
UWMC-10	4,636	2,949	1,687
UWMC-14	4,721	2,949	1,772
UWMC-19	4,783	2,949	1,834
NTC-10	4,726	3,068	1,658
NTC-14	4,808	3,068	1,740
NTC-19	4,869	3,068	1,801

**Table 1: Marathon Hall Semester Room and Board Rates**

There are about 54 students at Marathon Hall who reside on each floor and who also share two community bathrooms. Each bathroom provides three toilet stalls and three showers, allowing for a ratio of 9:1 (residents per fixture). Community amenities include a TV lounge, 24-hour quiet study lounge, game room with pool table, community kitchen, coin laundry, desktop computers

with Internet access connected to laser printers for academic use, and wireless Internet in the front lobby. Community assistants and the residence hall director live on site. Students with cars can purchase a parking permit for \$50 per year. In-unit amenities include standard room furnishings, combination lock access, Internet access and one cable television hookup.



Marathon Hall is operational year-round, providing accommodations to a variety of University and community programs during the summer. These programs include but are not limited to UWMC summer school students, 4-H students at the time of the Marathon County Fair, Upward Bound program high school students, summer interns from local businesses and high school and college students attending on-campus summer camps.

**Section 3: Market Analysis**

A. Review of Existing Data and Reports

The team requested the data and information listed below, most of which was provided. All information provided was reviewed by the Scion team to better understand the campus housing landscape.

Comments

- The 12A3g Building Standards helped guide some of the discussion about housing configurations, amenities, and costs. The information in the study was useful as options for housing become more defined.
- UWMC summarizes the 2013 Noel-Levitz Student Housing Analysis as a demand of 208, including a maximum of 116 in traditional residence hall configuration with community bathrooms, and 72 to 92 beds in two or four bedroom units.
- Demand for housing appears to be somewhat stronger than previously suggested, particularly recently. The increases were reported to be coming from most domestic groups of students at UWMC and NTC, as well as international students on both campuses. A current demand of +/- 225 beds was suggested by campus.

Data Reviewed and Analyzed

- Noel-Levitz Housing Study – fall 2013
- 12A3g New Residence Hall Facility Study Building Standards Development for the UWS Residence halls
- Current economic impact study for Wausau area; including near Westside Master Plan

Housing / Residence Life

- Existing current and historical survey data
- Current capacity and occupancy in residence halls
- Percent of occupants by class standing and school

Enrollment Management

- Current full-time and class standing
- Specific enrollment goals and strategies over the next few years
- Projected enrollment data for the next three years and/or the expected rate of enrollment growth for full-time students

### The Building

- The entire set of original construction drawings for Marathon Hall – all disciplines (i.e., site, architectural, structural, HVAC, electrical, plumbing, etc.)
- Documents describing capital improvements or major maintenance
- Building condition assessment or schedule of future repairs from the County

### Financial

- 2014-15 academic year housing budget
- Last two academic years (2012-13 and 2013-14) financial statements
- Debt schedule for any outstanding student housing debt

### B. Review of Market Conditions

Scion conducted an analysis of the rental housing options available to UW-Marathon (UWMC) students who do not live with family. The analysis focused on rental properties near the UWMC campus that would likely attract students, at an average distance of 3.7 miles from campus. Scion identified the housing options through online research<sup>1</sup> and telephone interviews with property managers. The University confirmed the lack of purpose built student housing properties in the Wausau area which offer individual leases, furnished units and most utilities.

The conventional market (leased by the unit) includes both professionally managed communities and those that are not, and is primarily comprised of apartment, single-family homes, and townhome complexes. The minimum monthly per person rental rates range from \$306 for a private bedroom in a three-bedroom apartment to \$543 for a furnished studio apartment with electricity included. The monthly rate for a single room at Marathon Hall is nearly 20% less expensive than the monthly rate for a studio apartment off campus, and about 3% less expensive than the monthly rate for a private bedroom in a two-bedroom unit off campus. However, off-campus apartments typically include in-unit kitchens and shared living areas, while similar apartments are not available at Marathon Hall. Even single rooms are unusual at Marathon Hall due to high demand for bed space, but are used in this comparison because off campus rentals typically seem to result in private bedrooms for each student renter.

The Wausau area rental market consists mainly of one- and two-bedroom apartments, with limited opportunities to rent a studio or three-bedroom unit. Scion did not identify any properties featuring four-bedroom units. The majority of communities do not offer rates that include utilities (i.e., electric, gas, cable television and internet access), and only four have furnished units

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<sup>1</sup> Using national rental sites such as trulia.com, apartments.com, padmapper.com, craigslist.org, forrent.com; a local rental site centralwisconsin.apartmentconnection.com; and phone book listings at yellowpages.com.

available. The most common lease term is 12 months, though a fair number offer flexible lease terms ranging from six to twelve months. In a few cases, rental rates are higher for lease terms shorter than 12 months. The most frequently noted security deposit is equivalent to one month’s rent. Pet deposits are also somewhat common, ranging from \$100 - \$300. Nearly every property includes wall unit air conditioning; an in-unit dishwasher; laundry on site or in-unit laundry; and assigned garage parking for no additional fee. On-site fitness facilities are unusual, and a few communities promoted options for storage options outside of the apartment.

Scion analyzed the rental rates and amenities at a total of 38 communities. The rental rates advertised by the properties were adjusted to include furniture, electric, cable television and Internet, as these typically were not included with rent but are included in on-campus housing. These costs tend to be students’ most significant additional expenses when renting an apartment or house.

Table 2: Adjusted Per Person Monthly Rental Rates below shows adjusted median, minimum and maximum per person monthly rental rates for surveyed properties in the market, in comparison to the rates for on-campus housing at Marathon Hall.

Unit Type	Median Monthly Rates	Min Monthly Rates	Max Monthly Rates	Marathon Hall Monthly Rates <sup>2</sup>
Studio	\$550	\$543	\$615	\$439
1 BR Apartment	\$770	\$360	\$1,650	N/A
2 BR Apartment	\$454	\$358	\$1,100	N/A
3 BR Apartment	\$340	\$306	\$420	N/A

Table 2: Adjusted Per Person Monthly Rental Rates

The following adjustments were made to calculate the monthly rates in Table 2.

Occupancy	Electric	Furniture	Internet	Cable TV
Studio / 1 BR Apartment	\$40	\$75	\$40	\$40
2 BR Apartment	\$75	\$95	\$40	\$40
3 BR Apartment	\$100	\$115	\$40	\$40

Table 3: Rental Rate Adjusted Per Unit Costs

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<sup>2</sup> Calculated by proration based on the median room portion of the yearly room and board rate for UWMC students renting a single room at Marathon Hall. NTC students pay slightly higher rates due to a longer rental term.



Competitive Properties

Scion identified several rental properties located closest to UWMC that may appeal to students based on pricing and amenities. The following table compares their distance from campus, unit types and monthly rates.

Development	Address	Distance from Campus (miles)	Unit Types	Monthly Rates
Bos Creek Estates <sup>3</sup>	1901 N 10th Ave	1.5	1br/1b	\$640
			2br/1b	\$720
			2br/1.5b	\$730
			2br/2b	\$760
			3br/1.5b	\$800
Mountview Apartments	500 E Thomas Street	1.6	2br/1b	\$580
Wausau Columns Apartments	1221 N 2nd Ave	1.7	1br/1b	\$460
			1br/1b	\$650 (furnished)
			2br/1b	\$560
			2br/2b	\$750 (furnished)
Riverview Apartments	920 Grand Ave	1.7	2br/2b	\$595
			3br/1.5b	\$623
Grandview Apartments	1016 Grand Ave	1.8	1br/1b	\$555
			2br/1b	\$625
Water's Edge Apartments	1010 Grand Ave	1.8	2br/1.5b	\$600

**Table 4: Competitive Properties Closest to UWMC**

<sup>3</sup> Average monthly rates for all floor plans of each unit type are shown.

### C. Assessment of the Efficiency and Appropriateness of the Existing Facility

Marathon Hall primarily caters to first-year and second-year students during the academic year. Most students at this point in their higher education experience seek opportunities for social interaction with others in the residence hall. This engagement with other students promotes learning outcomes and enhances the residential experience. Many students today arrive on campus having grown up in homes where they had their own bedroom and at college, may be experiencing a roommate for their first time.

The current configuration of Marathon Hall is becoming dated with its shared bedrooms and community bathrooms. Newer and remodeled residence halls across the country typically offer suite and semi-suite configurations for this student demographic. Amenity areas should provide a residential feel and promote social interaction, passive recreation, easy access to comfortable study areas and fitness. A lack of these types of unit mixes and amenities will often negatively impact demand and recruiting efforts.

The overall building appears to be well maintained and in good condition as far as a visual observation can determine. The building superstructure appears to be sound, plumb, true, and is not exhibiting noticeable signs of settlement or distress.

The building superstructure on the upper floors consists of precast concrete planks bearing on concrete block walls. Plank runs parallel to the long side of the building, and every other wall between the rooms is a bearing wall, which makes it challenging to re-purpose the building to another use since it would be costly to modify these bearing walls to create wider spaces. The floor to structure height of 8'-8" also creates a challenge and extra cost to install a ducted heating and cooling system that would be appropriate for uses other than residential.

Mechanical and electrical systems are original to the building and are well past their expected lifespan. These systems should be replaced as part of any major remodeling project. Electrical service at the residence hall was sized for power demand in the late 1960s. The service is inadequate for current demand.

The existing building does not have fire sprinklers, standpipes or fire hose cabinets. A fire suppression system would be required for any new construction or additions, but not necessarily in the remodeled portion of the residence hall. Adding a sprinkler system is strongly encouraged, however, even if the building is remodeled rather than replaced.

Marathon Hall residents participated in focus groups in which it was documented that there are common preferences and complaints about living in this facility.

When asked “what do you like most about living here,” comments included the following:

- Lobby to see everyone in the morning; talk to everyone
- More of like a family; mingle; have to leave room even to go to bathroom so have to socialize
- For UWMC students it’s so close
- NTC is not too far of a drive; less than ten minutes
- Equidistant from the mall and campus; I walk to each
- Take the trail to the park; we are welcomed there; so it feels like a bigger community
- The walk to the mall is only a ten minute walk
- Like the lounges downstairs – you can be as loud as you want
- Like the study lounge cause it’s quiet and you can get stuff done
- Like that there’s a kitchen; I can cook here and I have a lot of food allergies

When asked “what do you like least about living here,” comments included the following:

- A lot of everything...
- Least is bathrooms
- Parking – you have to sometimes park in the A parking lot – it’s far especially in the winter; summer and fall you can park on the streets
- Not a lot of windows especially downstairs
- Building in general is really old
- Rooms – paint is chipping; you can’t see through some windows; can see pipes
- Hot seasons – rather unbearable; need A/C. Summer was so “freaking hot.”
- Having more control of the temp, would be nice
- Somewhere to get food in the hall would be nice; stuff at the front desk has really limited options

Since Marathon Hall does not have any debt, it performs well financially. However, the infrastructure is in need of immediate replacement and a fire sprinkler system is recommended. Both of these capital improvement items are significant in expense. Current attractiveness of the building layout will have long-term negative implications on rent increases, recruitment efforts, and summer programs.

Eppstein Uhen examined the existing plans for Marathon Hall as well as conducted a property tour. Upon review, there are several load-bearing walls creating strong financial implications to renovating the facility to provide for the semi-suite configuration. To test this concept, a scheme has been developed that provides for renovation and an addition to Marathon Hall.

#### D. Recommendations for the Efficiency and Appropriateness of a New Facility, Unit Mix and Amenities

Facilities that support a student's academic as well as social success are desired. Studies have shown that student learning takes place as much outside the classroom as in the academic environment. Therefore, the building needs to be more than bedrooms and bathrooms. It needs to support the mission of UWMC and NTC through the use of unit space, amenity areas, and programmed student activities.

Based on the data gathered and analyzed as well as Scion's national expertise in student housing trends and preferences, it was determined that semi-suites are most appropriate for the first and second-year student population. Suite or apartment style housing would be more appropriate for returning students. The analysis indicated that the recommended unit mix is not altered if or if not NTC students reside in the residence hall.

Focus groups with UWMC and NTC students living both on and off-campus reacted very favorably to a semi-suite configuration. Since there is a meal plan, students did not express a need or desire for a kitchen.

In addition to a new room layout, students living in Marathon Hall expressed an interest in having:

- A/C
- Better heating system
- Pool hall
- Larger common area kitchen
- Fitness room; I could then work out whenever I want.

Industry trends indicate:

- Students desire social spaces blended with a sense of own physical space.
- Learning is collaborative providing a need for flexible furniture.
- Health and Wellness are becoming increasingly popular.
- Technology-related activities are increasing (gaming, fitness, communication).
- Décor in student housing is trending towards more luxury rental than student housing.

Scion recommends that amenity spaces offer areas that promote student interaction, passive activity, and health and wellness. These may include a common area kitchen, interactive business center space, fitness center, and game room.

Student housing facilities are typically financially self-sustaining. Our analysis accommodated this objective into our recommendations. The semi-suite configuration offers a lower construction cost than apartment-style units and provides for greater operational efficiency.

E. Recommendations for year-round use of the facility

Summer programs and conferencing are capable of providing significant revenue streams. With Marathon Hall, the maximization of financial return is challenged by lack of air-conditioning, unit configuration and gang bathrooms. If a new building is constructed, Marathon Hall could continue to serve some of its existing summer programs. A new, modern facility would be able to attract groups at higher rates that are now going elsewhere in the state. Once a new building is in operation, the availability of options and pricing structures would increase revenue generating opportunities.

## Section 4: Facility Analysis

### A. Existing Facility Assessment

The following is a summary of the physical conditions observed at the existing UW Marathon County Marathon Hall student residence building. The building was constructed in 1968 as a residence hall for UW Marathon County and to provide housing for 4H participants during the County Fair. It has many similarities to residence halls constructed at the four-year UW Institutions during the same timeframe. Alterations to provide accessibility were made in 1998, including installation of an elevator and remodeling the existing bathrooms. Windows were replaced, tuck-pointing was completed, and additional insulation at precast wall panels above and below windows was installed in 2001. Under slab sanitary waste piping was replaced in 2003. Mechanical and electrical systems are original to the building. The building heating system is served by the campus hot water utility system.

### Physical Conditions Overview

This overview is a summary of the observer's opinions and information provided by occupants and maintainers of the building during a tour of the building on September 15, 2014.

The overall building appears to be well maintained and in good condition as far as a visual observation can determine. The building superstructure appears to be sound, plumb, true, and is not exhibiting noticeable signs of settlement or distress.

The building superstructure on the upper floors consists of precast concrete planks bearing on concrete block walls. Plank runs parallel to the long side of the building, and every other wall between the rooms is a bearing wall, which makes it challenging to re-purpose the building to another use since it would be extremely costly to modify these bearing walls to create wider spaces. The floor to structure height of 8'-8" also makes it very challenging to install a ducted heating and cooling system that would be appropriate for uses other than residential.

Mechanical and electrical systems are original to the building and are well past their expected lifespan. These systems should be replaced as part of any major remodeling project. Electrical service at the residence hall was sized for power demand in the late 1960's. This is a very small service that is inadequate for current demand.

The existing building does not have fire sprinklers, standpipes or fire hose cabinets. A sprinkler system would be required for any new construction or additions, but not the remodeled residence hall, although it is strongly encouraged.

Campus has a central utility plant that distributes heating hot water to campus buildings. The system is original from the 1960's. Domestic hot water heating for residence hall use during non-

heating months is back-fed from the Science Center smaller boilers. The central system was not used to service the new Center for Civic Engagement – it was too far away to pump, and main pipe sizes are too small. It should not be assumed that this central plant will have capacity to serve a new building. There is no plan to build a central chilled water plant as it is not economically feasible. Buildings have standalone chillers.

It was reported that there is asbestos containing material encapsulated on pipe elbows, in some tile, and in some mastic. No current WALMS report on the building was available.

#### Physical Condition Systems Descriptions and Observation Comments

##### **A10 FOUNDATIONS**

A1020 - Building foundations consist of conventional concrete strip and spread footings and concrete walls. The slab on grade is a conventional concrete slab with reinforcing mesh, bearing on a gravel sub-bed. Drawings do not indicate a moisture barrier below the slab, nor is a drain tile system indicated. It was reported that the basement does not have any seepage or leakage problems.

##### **B10 SUPERSTRUCTURE**

B1010 - The first floor building superstructure consists of precast plank bearing on precast beams and columns, and has a 10'-0" floor to bottom of structure clearance. The upper floor building superstructure consists of precast concrete planks bearing on concrete block walls. Plank is parallel to the long side of the building, and every other residence room wall is a bearing wall. Drawings indicate 2" concrete topping with wire mesh reinforcing on the precast plank.

B1020 - The roof structure of the 2 story entrance area consists of precast concrete double tee's spanning from exterior wall to exterior wall. The roof structure of the residence hall portion of the building consists of precast concrete planks bearing on concrete block walls in a layout similar to the lower floors. Original building drawings indicate insulating concrete pitched to drains on top of the planks and tees.

#### Potential Expansion

Adding a new fourth floor has been shown as a potential option as part of this Study. Enclosure and superstructure for fourth floor additions would need to be lightweight materials like metal stud framing and EIFS exterior cladding. Before this option is selected, a more detailed study is necessary to determine the capacity of the existing building structure and soils. Adding a fourth floor increases the dead load by 20 psf and the live load by 10 to 70 psf. Potential options to upgrade the existing superstructure to accommodate these loads include the following.

Reinforce the existing precast plank: Add a new composite topping to increase the load carrying

capacity. To analyze this option, the engineer would need to know the plank reinforcing, which entails finding existing shop drawings with the strand information or contacting local precasters to see if they did this project and still have design information for the plank. Another option is providing additional tension reinforcing on the bottom of the plank by installing carbon fiber reinforcing.

Shorten the span of the plank: By providing new bearing points at mid-span of each section, the span can be reduced. This could be accomplished by adding steel beams that span all the way across the building (approx. 40') to the exterior walls. If smaller pieces of steel are needed columns could be added at the corridor walls. These new columns would need to go down to the foundation.

Build a new floor: A new floor could cover the top of the existing roof to provide the needed capacity. This would likely be steel beam framing supported by columns that align with the existing columns in the basement.

Analysis of the foundations is also required: The existing drawings do not indicate a soil bearing pressure. Working backwards and doing a column load takedown, the soil is currently loaded to about 3500 psf bearing pressure. It is likely that this is close to capacity and a vertical expansion would require reinforcing the footings. If this option is pursued, the existing soil bearing capacity will need to be tested.

## **B20 EXTERIOR VERTICAL ENCLOSURE**

B2010 - Exterior enclosure walls consist of face brick, un-insulated air space and concrete block; face brick, mortar joint, and concrete block; stone, mortar joint, and concrete block; and EIFS over existing precast concrete panels. The only insulated areas are at the new EIFS above and below windows and at cornice. Face brick, stone, mortar joints, and sealant joints are in good condition. Adding insulation to the interior of walls is not advisable because the existing walls are not designed to accommodate this amount of change in thermal movement.

B2020 - Windows in resident rooms were replaced in 2001, and are reported to have operating hardware that is constantly breaking, air leakage and failing Low E coatings that obscure transparency. These windows should be replaced if a major remodeling is undertaken. The existing aluminum framed ½" double pane insulating glass windows at the lower level, entrances, and 2 story entry area are intact, but should be replaced with more efficient units if a major remodeling is undertaken.

## **C10 INTERIOR CONSTRUCTION**

The interior build-out is in good condition, but some of the aesthetics are dated.

C3010 - Existing painted concrete block partitions are durable, but convey a very institutional feeling.

C3020 - Carpeting was replaced in 2012.

C3030 - Existing ceilings are mostly painted precast concrete, with some 2' x 4' tile in suspended metal grid in common areas. Existing ceilings convey a very institutional feeling.

### **B30 ROOFING**

B3010 - A new ballasted single ply rubber roof was installed in 2002. Repairs were made in 2010, and minor leaks continue to occur and get repaired. If a major remodeling is undertaken the roof should be replaced.

### **D10 CONVEYING**

D1010 - A hydraulic elevator and associated shaft and machine room were installed in 1998. The elevator is currently operating properly, but it is reaching an age where an upgrade to its controls and systems should be considered as part of a major remodeling.

### **D20 PLUMBING**

Plumbing fixtures at the residence hall bathrooms were replaced as part of the 1998 alterations. Under slab sanitary waste piping was replaced in 2003.

The plumbing systems elsewhere appear to be original building equipment, installed in approximately 1968. These systems are in working order, but have exceeded their expected lifespan and should be considered for replacement as part of any major remodeling.

Domestic hot water is provided via a heat exchanger tied to the campus hot water utility system.

### **D30 HVAC**

The HVAC systems serving the existing building are original building equipment, installed in 1968. Systems are operational, but less efficient than modern units.

The building does not have air-conditioning.

Building heating system is served by the campus hot water utility.

Heating of the resident rooms is via fin pipe in cabinets. There is no individual control per room. Heating in the ground floor lounge area is via a forced air system through under slab ducts.

**D40 FIRE PROTECTION**

The building does not have a fire sprinkler system, standpipes, or hose cabinets. Fire protection systems will be required for any additions or new construction. It is recommended that fire sprinklers and standpipes be added as part of any major renovations.

**D50 ELECTRICAL**

The electrical service, capacity and distribution throughout the existing building appears to be, for the most part, original building equipment installed in approximately 1968.

The building electrical equipment appears to have exceeded its useful life and is not recommended for reuse. A new larger service to the building will be required to meet modern demand for power.

The fire alarm system was replaced in 2013. Alarms and detectors are provided in circulation areas and common areas. Rough-ins were extended to bedrooms, but detectors and alarms were not provided in bedrooms.

Light fixtures were replaced in 2002, and ballasts were replaced in 2011.

**G20 SITE IMPROVEMENTS**

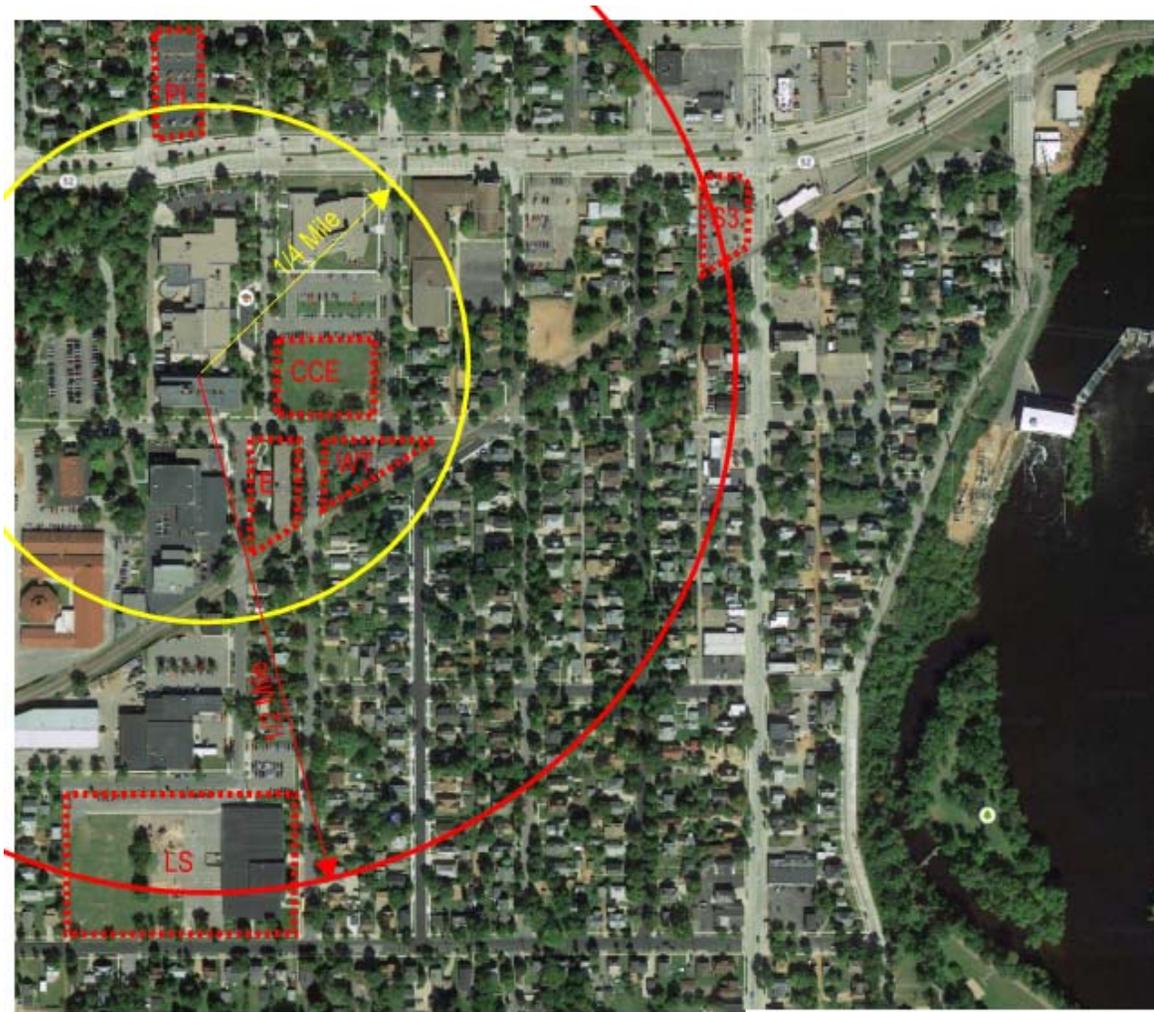
As part of the 1998 renovations the exterior access to the entry level of the building was upgraded to be accessible. It was reported that there are no site drainage problems at the building.

**B. Assessment of Available Sites**

The following pages provide an analysis of the following sites close to the UWMC and NTC campuses. The first page provides a large scale plan for context, followed by summaries for each individual site that was considered. The site analysis report is arranged in order of our opinion on the suitability of each site based on proximity to campus, ease of access, highest and best use of site, site fit, complexity of procurement, and estimated site cost.

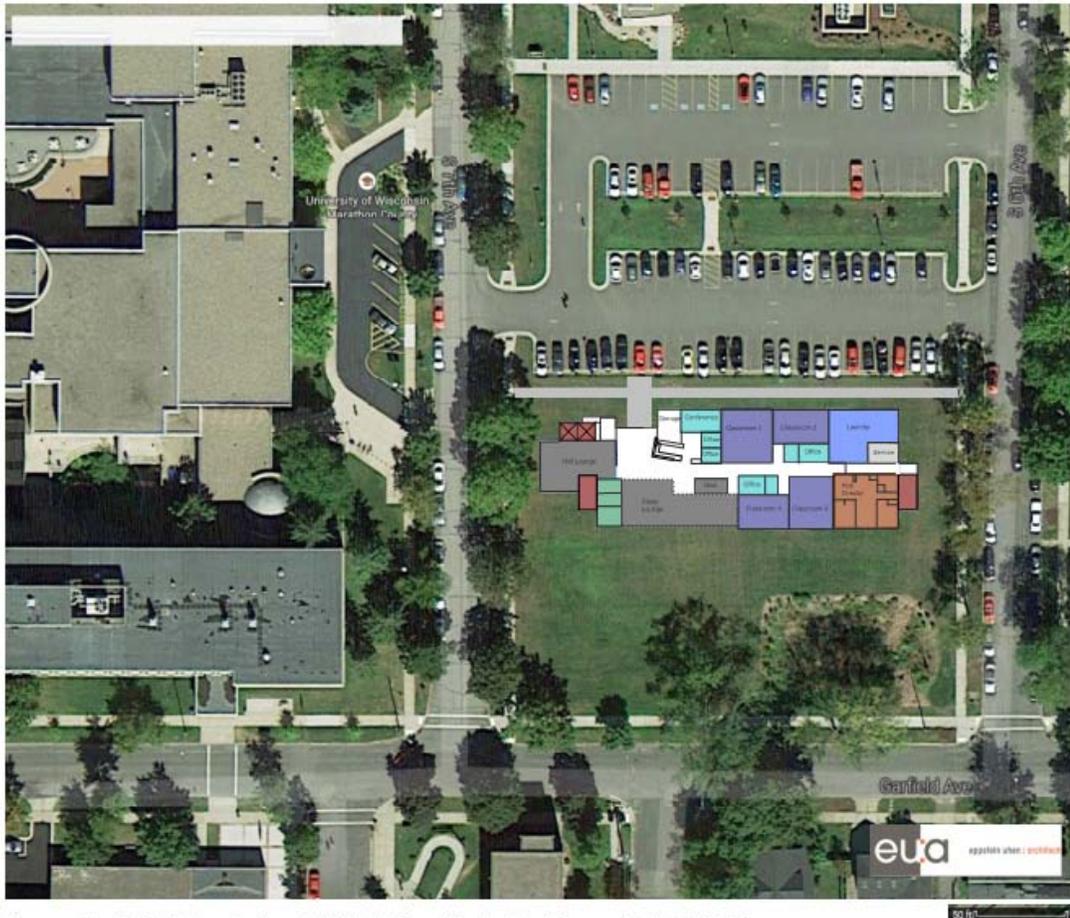
1. CCE site
2. Parking lot site
3. Werle Triangle site
4. Lincoln School site
5. Stewart and 3<sup>rd</sup> Street site
6. Existing Marathon Hall site

Site Analysis



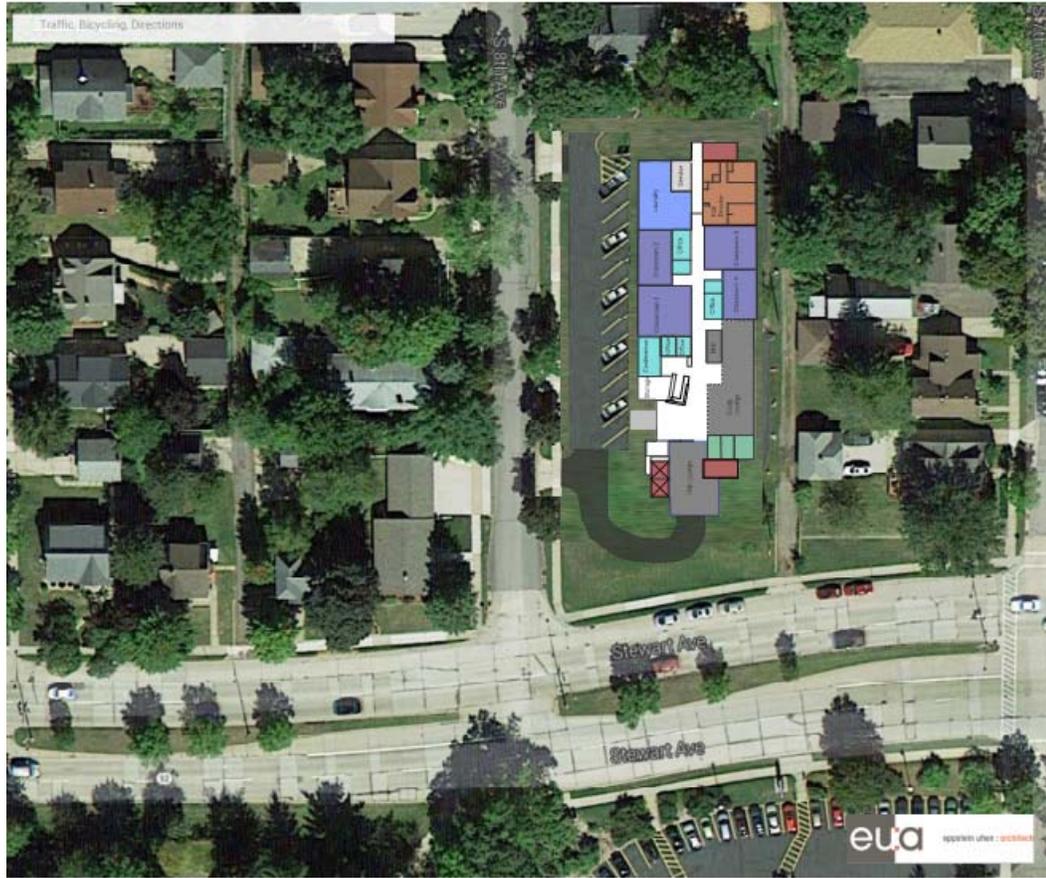
Large Context Site Plan

- CCE:** Site South of CCE
- PL:** Parking Lot Site
- WT:** Werle Triangle Site
- LS:** Lincoln School Site
- S3:** Stewart & 3rd Ave Site
- E:** Existing Residence Hall Site



Conceptual Site Plan, 5 story 208 Bed Semi-Suite Residence Hall, CCE Site

Name of Site	South of CCE
Ranking	1
Proximity to Campus	On Campus
Correct Size to Accommodate Use?	Accommodates 5 Story Building, leaves room for double loaded parking or another building
Topography	Relatively Flat
Utilities	City Utilities
Easements	
Zoning	UDD Unified Development District
Setbacks	Defined by UDD Agreement
Ownership Status	Owned by County
2013 Assessed Land Value	n/a
Parking	Room for Double Loaded Parking
Demolition/Remediation	No Demolition Needed
Suitability for Other Uses	Prime Site for other future Campus Buildings
Other Challenges	The Campus Master Plan targets this site for future Academic Buildings. This site has an existing storm water management basin that needs to be accounted for in any site development



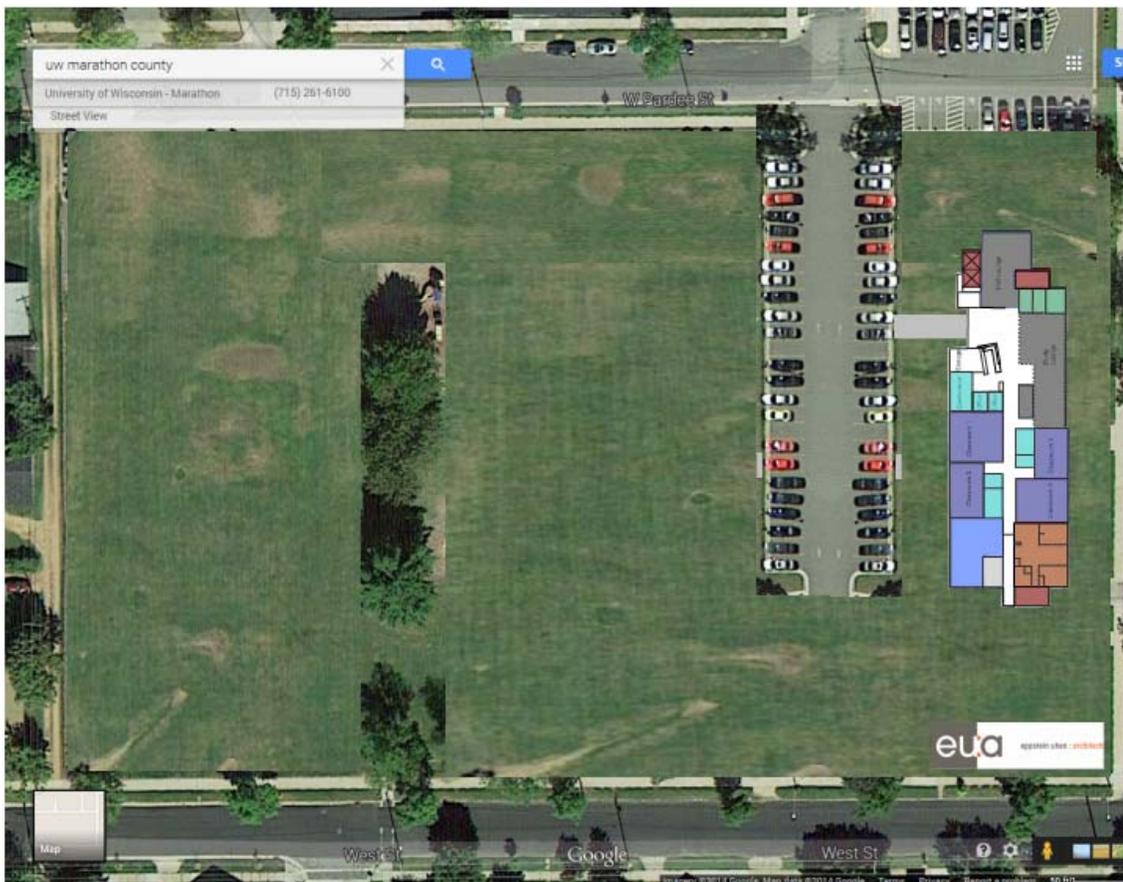
Conceptual Site Plan, 5 story 208 Bed Semi-Suite Residence Hall, Parking Lot Site

Name of Site	Parking Lot
Ranking	2
Proximity to Campus	Adjacent to Campus, North of Stewart Ave
Correct Size to Accommodate Use?	Accommodates 5 Story Building and single loaded parking lot
Topography	Steep slope North to South, could accommodate walk out basement or basement parking access
Utilities	City Utilities
Easements	
Zoning	R3, 2 Family Residential
Setbacks	Front, 20'; Rear, 30'; Side 8'
Ownership Status	Owned by County
2013 Assessed Land Value	n/a
Parking	Room for Single Loaded Parking
Demolition/Remediation	Parking Lot Demolition Required
Suitability for Other Uses	Secondary site for other future Campus Buildings
Other Challenges	Stewart Avenue is dangerous for pedestrians to cross due to very heavy traffic. The City, County, and State are resistant to adding a Traffic Light



Conceptual Site Plan, 5 story 208 Bed Semi-Suite Residence Hall, Werle Triangle Site

Name of Site	Werle Triangle
Ranking	3
Proximity to Campus	Adjacent to Campus, South of Garfield Ave
Correct Size to Accommodate Use?	Accommodates 5 Story Building with no Setbacks, no Parking
Topography	Relatively Flat
Utilities	City Utilities
Easements	High voltage power lines along south lot line
Zoning	R3, 2 Family Residential; R2, Single Family Residential
Setbacks	Front, 20'; Rear, 30'; Side 8'
Ownership Status	Three Separate Private Owners
2013 Assessed Land Value	\$309,500
Parking	No Room for Parking
Demolition/Remediation	Demolition of houses, basements, likely some remediation
Suitability for Other Uses	Secondary site for other future Campus Buildings
Other Challenges	The size and shape of this site coupled with the high voltage power line easement to the south make the buildable area of the site very small



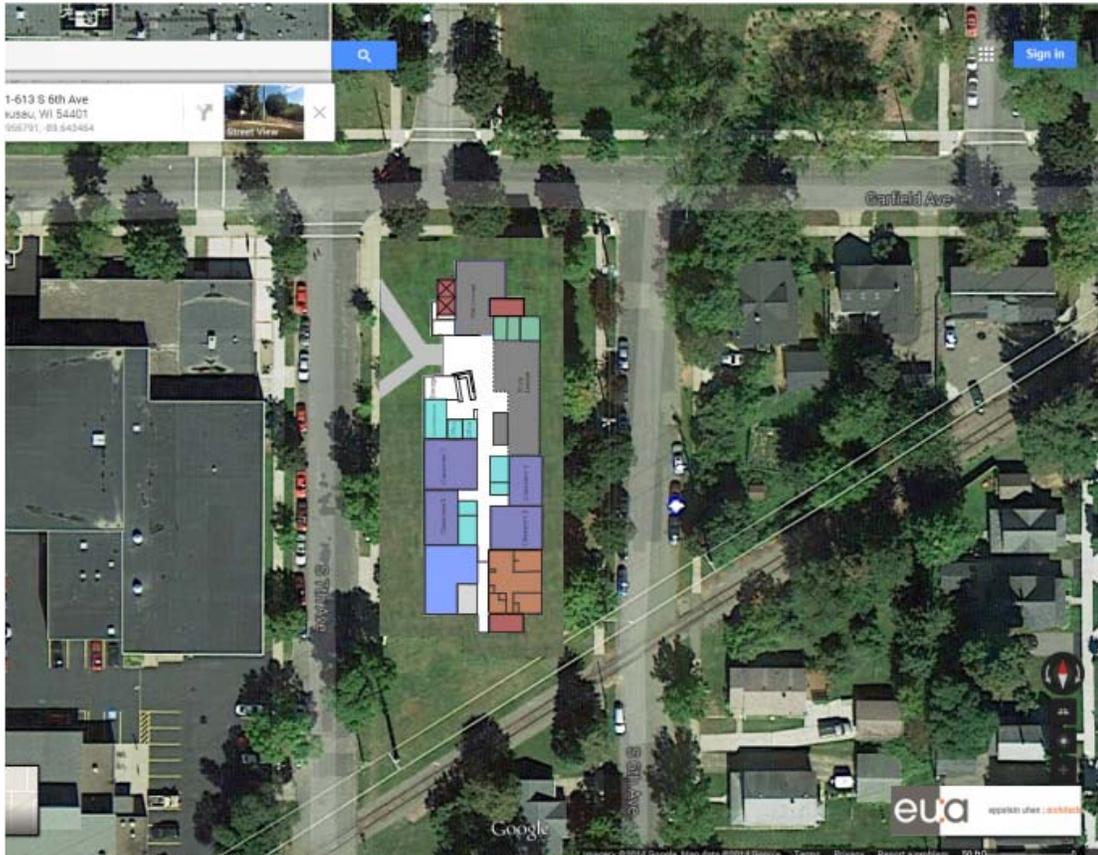
Conceptual Site Plan, 5 story 208 Bed Semi-Suite Residence Hall, Lincoln School Site

Name of Site	Lincoln School
Ranking	4
Proximity to Campus	1/3 Mile South of Campus
Correct Size to Accommodate Use?	Accommodates 5 Story Building, double loaded parking, and leaves 3/4's of the site for other uses
Topography	Relatively Flat
Utilities	City Utilities
Easements	
Zoning	R3, 2 Family Residential
Setbacks	Front, 20'; Rear, 30'; Side 8'
Ownership Status	Owned by City
2013 Assessed Land Value	not available
Parking	Room for Double Loaded Parking
Demolition/Remediation	Demolition of School, likely some remediation
Suitability for Other Uses	Large site, not adjacent to Campus, poor suitability for other Campus uses due to distance from Campus
Other Challenges	There is no campus need identified in the Master Plan for the site area leftover after accommodating the residence hall and parking



Conceptual Site Plan. 5 story 208 Bed Semi-Suite Residence Hall. Stewart Ave and 3rd Street Site

Name of Site	Stewart & 3rd Ave
Ranking	5
Proximity to Campus	1/2 Mile East of Campus
Correct Size to Accommodate Use?	Accommodates 5 Story Building with small Setbacks, no Parking
Topography	Relatively Flat
Utilities	City Utilities
Easements	
Zoning	B2, Community Service
Setbacks	Front, 15'; Rear, 30'; Side 5'
Ownership Status	Two Separate Private Owners
2013 Assessed Land Value	\$376,700
Parking	No Room for Parking
Demolition/Remediation	Demolition of Building and Parking, likely some remediation
Suitability for Other Uses	Small site, not adjacent to Campus, poor Suitability for other Campus uses due to distance from Campus. Good candidate for revitalizing private mixed use development
Other Challenges	Students are very concerned about personal safety at this site



Conceptual Site Plan, 5 story 208 Bed Semi-Suite Residence Hall, Existing Marathon Hall Site

Name of Site	Existing Marathon Hall
Ranking	6
Proximity to Campus	On Campus
Correct Size to Accommodate Use?	Accommodates 5 Story Building, no Parking
Topography	Relatively Flat
Utilities	City Utilities, Campus Steam
Easements	High voltage power lines along south lot line
Zoning	R2, Single Family Residential
Setbacks	Front, 20'; Rear, 30'; Side 8'
Ownership Status	Owned by County
2013 Assessed Land Value	n/a
Parking	No Room for Parking
Demolition/Remediation	Demolition of Building, some remediation
Suitability for Other Uses	The existing Residence Hall superstructure and floor to floor heights do not efficiently accommodate uses other than Housing
Other Challenges	Building on this site would require taking the existing student housing off-line for two summers and one academic year, which would have a very detrimental effect on the housing program

C. Comments on possible 7th Ave mall and one-way 6th Ave

Creating a Mall on 7<sup>th</sup> avenue, and converting 6th Avenue to one way will have a calming effect on traffic, and will help make the campus feel more unified. These improvements will also benefit a new residence hall on the CCE site by reinforcing the feeling of campus, make street crossing safer, and will enhance convenience for residents.

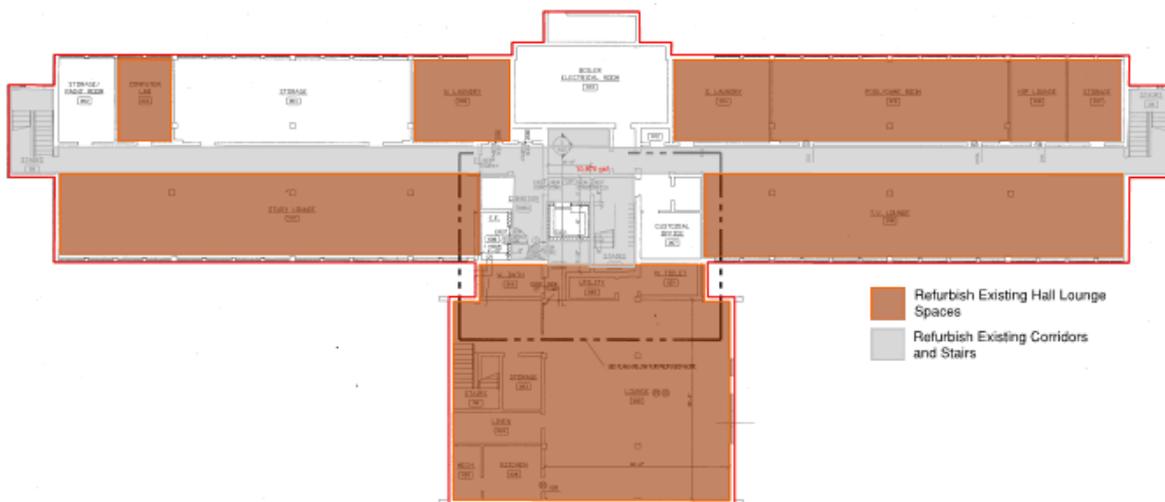


**D. Renovation assessment, costs, and proposed timeline**

The following pages illustrate options for refurbishing Marathon Hall. The only option that provides a functional layout that provides program spaces and arrangement similar to the recommended configuration is the conversion of Marathon Hall to semi-suites, but this conversion results in a reduction in beds below demand, and the cost per bed of this option approaches the cost of new construction, and therefore our team does not recommend a renovation to address current demand.

**1. Refurbish Marathon Hall**

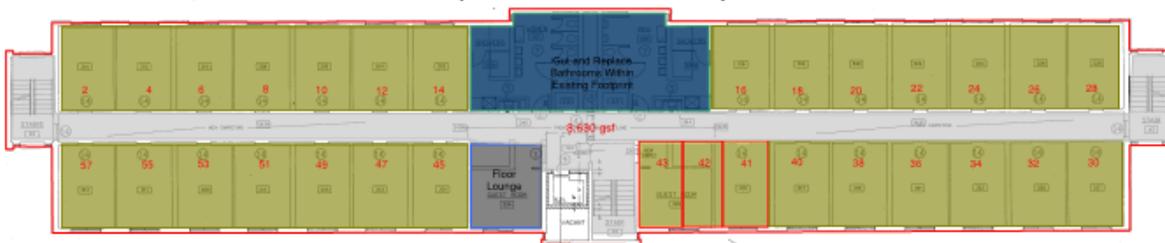
<b>scope of work</b>	Replace roofing. Tuckpoint and re-caulk exterior. Replace remaining original windows and doors. Replace all interior finishes. Skim coat plaster all concrete block walls in corridors and public areas. Gut and replace existing bathrooms in their current locations and current number of fixtures. Reconfigure lower level lounge area and kitchen to function better. Replace all existing MEP systems, add A/C.
<b>representative photo of construction type</b>	
<b>configuration</b>	existing double occupant rooms and central bathroom configuration to remain
<b>number of beds</b>	162
<b>bed/shower ratio</b>	9 to 1
<b>bed/toilet ratio</b>	6.75 to 1
<b>bed/sink ratio</b>	9 to 1
<b>hall director apartment</b>	existing 2 bed one bath unit to be remodeled
<b>front desk/hall office</b>	existing to be remodeled
<b>hall lounges</b>	one, existing to be remodeled
<b>floor lounges</b>	none
<b>study spaces</b>	three, existing to be remodeled
<b>computer lab</b>	one, existing to be remodeled
<b>classroom</b>	none
<b>laundry</b>	one, existing to be remodeled
<b>kitchen</b>	one, existing to be remodeled
<b>vending</b>	one
<b>storage</b>	one, 680 sf
<b>gross square footage new</b>	0
<b>gross square footage remodeled</b>	39,931
<b>total gross square footage</b>	39,931
<b>gross square footage per bed</b>	246
<b>number of stories</b>	exposed lower level, 1st, 2nd, 3rd
<b>est. construction cost per bed 2015</b>	\$45,000
<b>Bidding</b>	
<b>est. construction cost per sf 2015 Bidding</b>	\$183
<b>est. construction cost 2015 Bidding</b>	\$7,290,000
<b>construction phasing options</b>	1: close hall, complete in 9 months. 2: over three summers remodel the north wing, then the south wing, then the entry/hall lounge wing



Ground Floor Plan, Refurbish



First Floor Plan, Refurbish



Second and Third Floor Plans, Refurbish



**2. Refurbish Marathon Hall, Add 4<sup>th</sup> Floor**

<b>scope of work</b>	Add a Fourth Floor*. Replace elevator with a unit that can travel to a 4th floor. Tuckpoint and re-caulk exterior. Replace remaining original windows and doors. Replace all interior finishes. Skim coat plaster all concrete block walls in corridors and public areas. Gut and replace existing bathrooms in their current locations and current number of fixtures. Reconfigure lower level lounge area and kitchen to function better. Replace all existing MEP systems, add A/C. *Adding a new Fourth Floor has been shown as a potential Option as part of this Study. Before this Option is selected more detailed study needs to be done on the capacity of the existing building structure and soils.
<b>representative photo of construction type</b>	
<b>configuration</b>	existing double occupant rooms and central bathroom configuration to remain. Three singles are provided as part of 57 bed 4th floor addition
<b>number of beds</b>	219
<b>bed/shower ratio</b>	9.13 to 1
<b>bed/toilet ratio</b>	6.84 to 1
<b>bed/sink ratio</b>	9.13 to 1
<b>hall director apartment</b>	existing 2 bed one bath unit to be remodeled
<b>front desk/hall office</b>	existing to be remodeled
<b>hall lounges</b>	one, existing to be remodeled
<b>floor lounges</b>	none
<b>study spaces</b>	three, existing to be remodeled
<b>computer lab</b>	one, existing to be remodeled
<b>classroom</b>	none
<b>laundry</b>	one, existing to be remodeled
<b>kitchen</b>	one, existing to be remodeled
<b>vending</b>	one
<b>storage</b>	one, 680 sf
<b>gross square footage new</b>	8600
<b>gross square footage remodeled</b>	39,931
<b>total gross square footage</b>	48,531
<b>gross square footage per bed</b>	222
<b>number of stories</b>	exposed lower level, 1st, 2nd, 3rd, 4th
<b>est. construction cost per bed 2015 Bidding</b>	\$44,283
<b>est. construction cost per sf 2015 Bidding</b>	\$200
<b>est. construction cost 2015 Bidding</b>	\$9,698,000
<b>construction phasing options</b>	1: close hall, complete in 12 months. 2: over three summers add the 4th floor enclosure and remodel the north wing, then the south wing, then the entry/hall lounge wing



### 3. Convert Marathon Hall to Semi-Suites

scope of work	Convert all existing rooms to semi-suites. Gut existing bathrooms, convert to semi-suites. Replace roofing. Tuckpoint and re-caulk exterior. Replace remaining original windows and doors. Replace all interior finishes. Skim coat plaster all concrete block walls in corridors and public areas. Reconfigure lower level lounge area and kitchen to function better. Replace all existing MEP systems, add A/C.
representative photo of construction type	
configuration	Convert to semi-suite arrangement with 2 double occupant rooms sharing an in-suite bathroom
number of beds	136
bed/shower ratio	4.12 to 1
bed/toilet ratio	4.12 to 1
bed/sink ratio	4.12 to 1
hall director apartment	existing 2 bed one bath unit to be remodeled
front desk/hall office	existing to be remodeled
hall lounges	one, existing to be remodeled
floor lounges	none
study spaces	three, existing to be remodeled
computer lab	one, existing to be remodeled
classroom	none
laundry	one, existing to be remodeled
kitchen	one, existing to be remodeled
vending	one
storage	one, 680 sf
gross square footage new	0
gross square footage remodeled	39,931
total gross square footage	39,931
gross square footage per bed	294
number of stories	exposed lower level, 1st, 2nd, 3rd
est. construction cost per bed 2015 Bidding	\$66,062
est. construction cost per sf 2015 Bidding	\$225
est. construction cost 2015 Bidding	\$8,984,475
construction phasing options	1: close hall, complete in 14 months



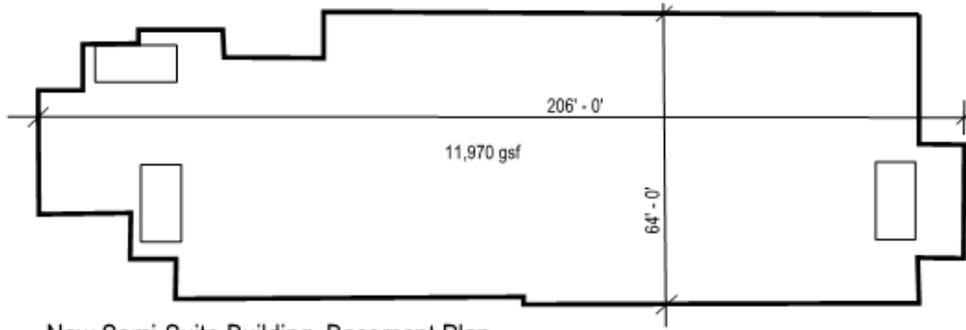
## Options for New Semi-Suite Buildings

The following pages illustrate a representative semi-suite building that addresses the program goals set forth in this study. Three options are provided to show cost and quality for institutional-grade construction, ranging from the heaviest duty/most flexible to lightest but still institutional-grade options. Low quality short life span options like wood frame were not considered due to poor long term value.

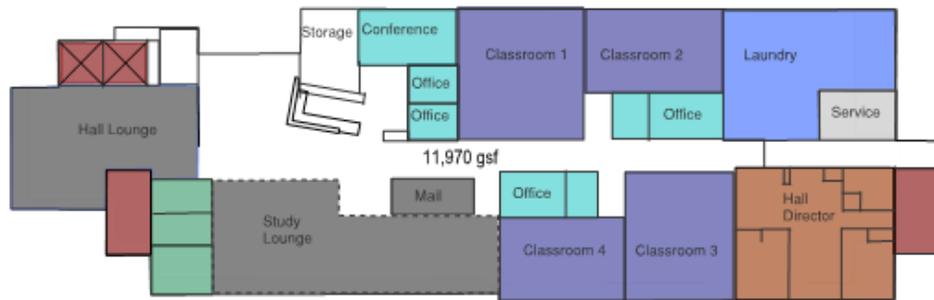
<b>New Semi-Suite Hall scope of work Option 1</b>	Construct a new 210 bed semi-suite style residence hall. <b>Construction systems shall be institutional quality, with a 50 year lifespan.</b> Superstructure to be <b>concrete frame with 30' x 30' bay spacing and 13'-8" floor to floor heights to allow for future flexibility/conversion to other uses.</b> Exterior to be brick and stone cavity wall with CMU backup. MEP systems to be institutional quality. Building to have A/C
representative photo of construction type	
configuration	Semi-suite arrangement with 2 double occupant rooms sharing an in-suite bathroom
number of beds	210
bed/shower ratio	4.12 to 1
bed/toilet ratio	4.12 to 1
bed/sink ratio	4.12 to 1
hall director apartment	one 2 bed 1 bath unit
front desk/hall office	conf rm, 2 offices, storage, front desk
hall lounges	one social, with kitchen on 1st floor
floor lounges	per floor: one social with kitchen, one study
study spaces	one study on 1st floor
computer lab	One
classroom	4
laundry	1
kitchen	one adjacent to hall social lounge
vending	one
storage	basement, 5000 sf
gross square footage new	75000
gross square footage remodeled	0
total gross square footage	75,000
gross square footage per bed	357
number of stories	Basement, 1st, 2nd, 3rd, 4th, 5 <sup>th</sup>
est. construction cost per bed 2015 Bidding	\$103,571
est. construction cost per sf 2015 Bidding	\$290
est. construction cost 2015 Bidding	\$21,750,000
construction phasing options	1: complete in 12 months while existing hall remains open

<b>New Semi-Suite Hall scope of work Option 2</b>	Construct a new 210 bed semi-suite style residence hall. <b>Construction systems shall be institutional quality, with a 50 year lifespan.</b> Superstructure to be <b>precast concrete plank supported by concrete block bearing walls.</b> Floor to floor heights to be 12'-8" at basement and 1st floor, and 10'-8" at residential floors 2, 3, 4, and 5. Exterior to be brick and stone cavity wall with CMU backup. MEP systems to be institutional quality. Building to have A/C
representative photo of construction type	
<b>configuration</b>	Semi-suite arrangement with 2 double occupant rooms sharing an in-suite bathroom
<b>number of beds</b>	210
<b>bed/shower ratio</b>	4.12 to 1
<b>bed/toilet ratio</b>	4.12 to 1
<b>bed/sink ratio</b>	4.12 to 1
<b>hall director apartment</b>	one 2 bed 1 bath unit
<b>front desk/hall office</b>	conf rm, 2 offices, storage, front desk
<b>hall lounges</b>	one social, with kitchen on 1st floor
<b>floor lounges</b>	per floor: one social with kitchen, one study
<b>study spaces</b>	one study on 1st floor
<b>computer lab</b>	One
<b>classroom</b>	4
<b>laundry</b>	1
<b>kitchen</b>	one adjacent to hall social lounge
<b>vending</b>	one
<b>storage</b>	basement, 5000 sf
<b>gross square footage new</b>	75000
<b>gross square footage remodeled</b>	0
<b>total gross square footage</b>	75,000
<b>gross square footage per bed</b>	357
<b>number of stories</b>	Basement, 1st, 2nd, 3rd, 4th, 5 <sup>th</sup>
<b>est. construction cost per bed 2015 Bidding</b>	\$89,286
<b>est. construction cost per sf 2015 Bidding</b>	\$250
<b>est. construction cost 2015 Bidding</b>	\$18,750,000
<b>construction phasing options</b>	1: complete in 12 months while existing hall remains open

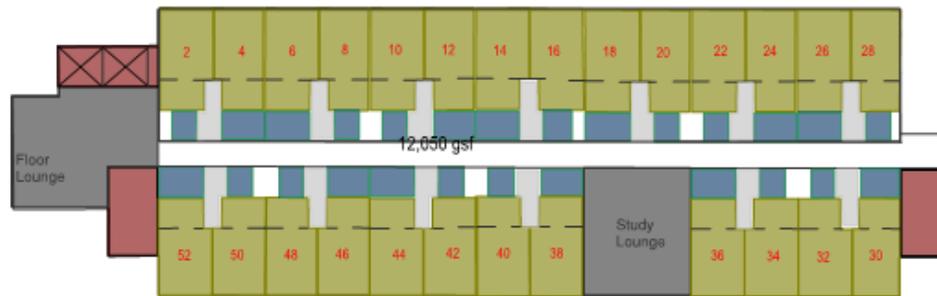
<b>New Semi-Suite Hall scope of work Option 3</b>	Construct a new 210 bed semi-suite style residence hall. <b>Construction systems shall be heavy commercial, with a 30 year lifespan.</b> Superstructure to be <b>steel frame with 30' x 30' bay spacing, steel joists, and concrete floors.</b> Floor to floor heights to be 12'-8" at basement, 13'-8" at 1st floor, and 10'-8" at residential floors 2, 3, 4, and 5. Exterior to be brick and stone cavity wall with metal stud backup. MEP systems to be commercial quality. Building to have A/C
representative photo of construction type	
<b>configuration</b>	Semi-suite arrangement with 2 double occupant rooms sharing an in-suite bathroom
<b>number of beds</b>	210
<b>bed/shower ratio</b>	4.12 to 1
<b>bed/toilet ratio</b>	4.12 to 1
<b>bed/sink ratio</b>	4.12 to 1
<b>hall director apartment</b>	one 2 bed 1 bath unit
<b>front desk/hall office</b>	conf rm, 2 offices, storage, front desk
<b>hall lounges</b>	one social, with kitchen on 1st floor
<b>floor lounges</b>	per floor: one social with kitchen, one study
<b>study spaces</b>	one study on 1st floor
<b>computer lab</b>	One
<b>classroom</b>	4
<b>laundry</b>	1
<b>kitchen</b>	one adjacent to hall social lounge
<b>vending</b>	one
<b>storage</b>	basement, 5000 sf
<b>gross square footage new</b>	75000
<b>gross square footage remodeled</b>	0
<b>total gross square footage</b>	75,000
<b>gross square footage per bed</b>	357
<b>number of stories</b>	Basement, 1st, 2nd, 3rd, 4th, 5 <sup>th</sup>
<b>est. construction cost per bed 2015 Bidding</b>	\$71,429
<b>est. construction cost per sf 2015 Bidding</b>	\$200
<b>est. construction cost 2015 Bidding</b>	\$15,000,000
<b>construction phasing options</b>	1: complete in 12 months while existing hall remains open



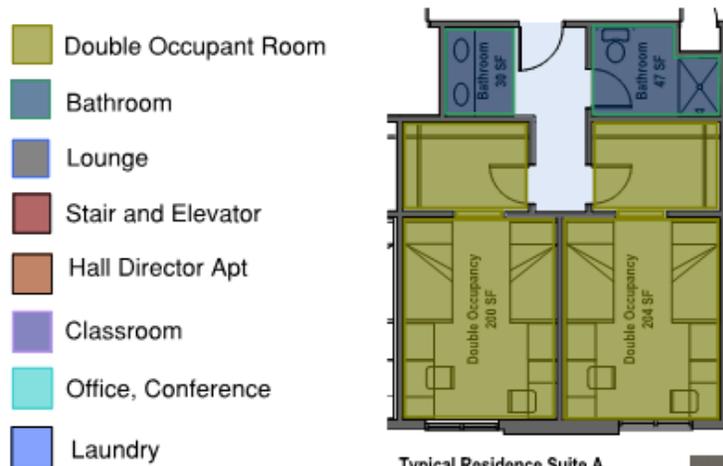
New Semi-Suite Building, Basement Plan



New Semi-Suite Building, First Floor Plan



New Semi-Suite Building, Second, Third, Fourth and Fifth Floor Plans, 208 Beds



Typical Residence Suite A

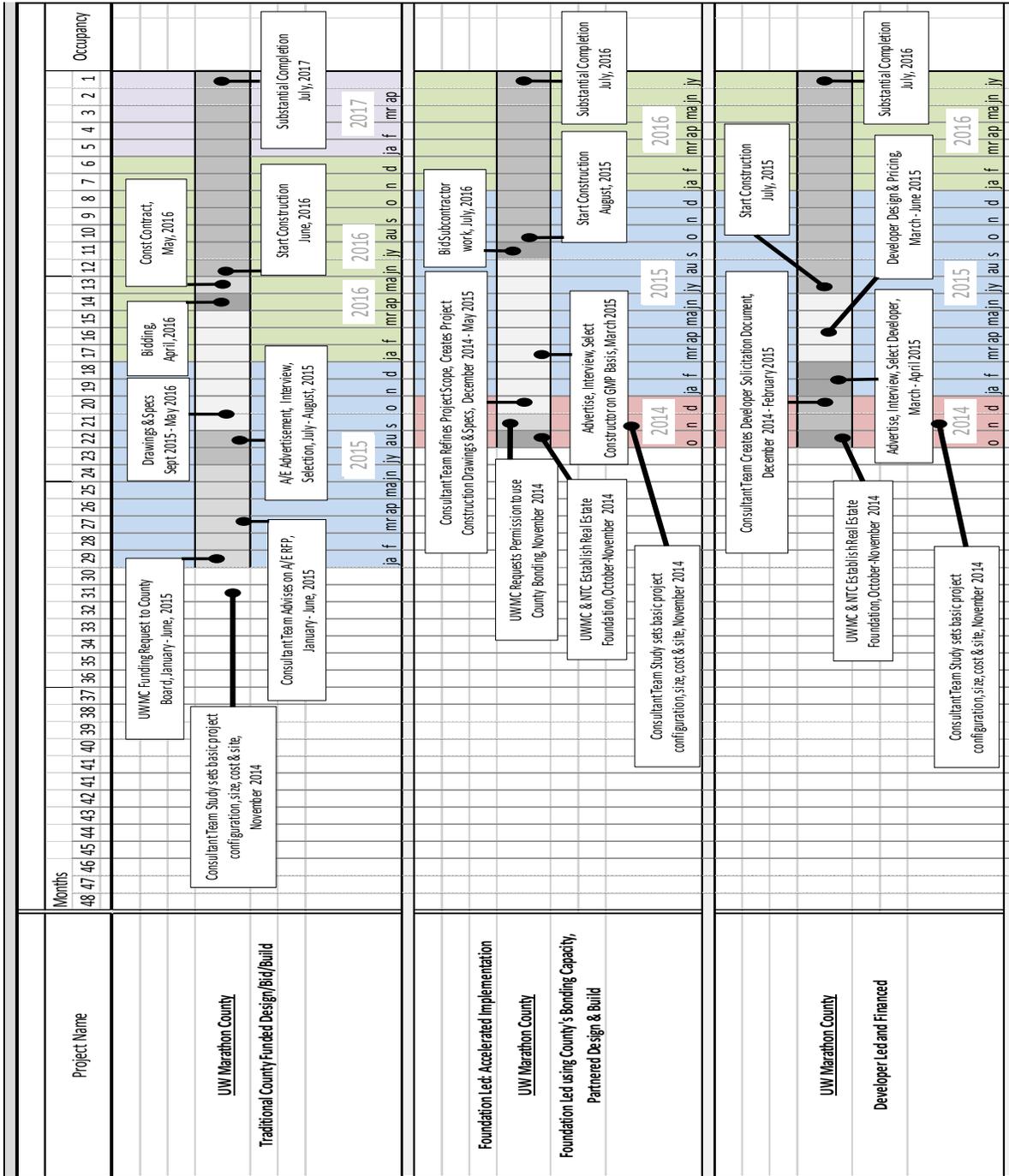


E. Comments on portions of the 12A3g New Residence Hall Facility Study Building Standards Development for the UWS Residence halls relevant to the UW Marathon County housing goals

Configuration benchmarks, cost benchmarks, and implementation timeline benchmarks in the 12A3g New Residence Hall Facility Study were leveraged to help validate the recommendations provided in this report.

F. Proposed timeline for building new facility

The timelines shown below offer 3 options for delivering a UW Marathon County Residence Hall.



**Section 5: Financial Analysis**A. Costs to Obtain Potential Building Site

Section 4D Site Analysis, includes information regarding estimated procurement costs of the privately owned Werle Triangle, Stewart and 3<sup>rd</sup> Street sites based on assessed value. No information was available about the assessed value or procurement cost of the Lincoln School Site. The CCE site, Parking Lot site and Existing Marathon Hall sites are all currently owned by Marathon County.

B. Cost Options to Renovate Existing Facility and/or Build New Facility

See Sections 4D and 4F for cost options to renovate the existing facility or build a new facility

C. Financing Options / Models

Refer to Scion's Memorandum: Residence Hall Consulting Study Financial Analysis.

## Section 6: Operations Analysis and Plan

### A. Estimated Operating Costs

Refer to Scion's Memorandum: Residence Hall Consulting Study Financial Analysis.

### B. Staffing Recommendations

Once the building is open and stabilized, operations requires both on- and off-site personnel, similar to the current staffing structure at Marathon Hall. On-site personnel will consist of part-time staff, including community assistants in a ratio of about one per 30 residents. One of these community assistants should have an expanded role that includes more coordination of programs and scheduling (community coordinator).

Additionally, a cadre of desk and service staff workers, all part-time student positions, will be needed to provide services to residents from the front desk and to help maintain building access control, especially during peak periods. One or two of these positions should have an expanded role that includes some additional coordination responsibilities.

All of these positions should be directly supervised by a live-in community manager, who will also typically be a full-time, second-year graduate student. In addition to working with the resident staff to oversee the programs and services to residents, the manager should also serve as the liaison for all of the other off-site offices and organizations providing support to building operations.

It is also recommended that a part-time professional position be established as director of housing, to support and oversee the resident staff and to provide leadership for financial, facility and occupancy management. This position could also have a collateral assignment (such as an instructor, counselor or coach) to comprise a full-time position. In the capacity of housing director, the position should report to the director of auxiliary services.

Many of the off-site management functions necessary for efficient management of the residential facility are listed below. Most of these are performed by other campus offices/departments, or third-party organizations/vendors, rather than retained dedicated personnel to the residence hall. It is important that someone (director of housing) ensure that the functions are completed to the standards expected by the University and coordinated, resulting in an exceptional residential experience for occupants.

#### Facility Management –

- Building custodial services (community bathrooms cleaned 7-days/week; semi-private bathrooms cleaned monthly during the academic year)

- Building maintenance services (routine repairs completed within two business days; emergencies responded to promptly at all times)
- Pest control
- Grounds maintenance (landscaping and snow removal)
- Future capital projects (reserves and planning)

#### Occupancy Management -

- Marketing (academic year; summer operations)
- Collaboration with admissions offices (both schools) regarding tours, model room and collateral material
- Ensuring all contracts, policies and procedures strengthen occupancy efforts (start/end dates, pricing, specials, dining program), appeal to the student market (factoring student preferences and other off-campus options), and compliance with all regulations (Fair Housing Act, American with Disabilities Act, etc.)
- Creating (and enforcing) eligibility standards for occupancy, including enrollment status, behavior norms, priority factors (international, athletes, etc.) and negotiations with outside groups (for summer occupancy)

#### Financial Management -

- Developing a proposed annual budget, including revenue and expense
- Monitoring the budget and reporting variations on a monthly basis
- Recommending a competitive rate structure to maximize revenue and achieves budgeted occupancy levels

#### C. Student Life Programming Recommendations

Significant opportunities for residents to meet and socialize with other students, while still having a sense of privacy when desired, all in a safe environment, will perhaps be some of the most important defining characteristics of a student community with high levels of resident satisfaction. Given the lack of any requirement for students to reside on campus, campus housing must offer a compelling option. A renovated or new facility will certainly go a long way in that regard, but so must the community that is created within.

Guidelines in a “statement of community living” should reflect principals of tolerance, communication and respect for different opinions and life styles, without creating overly imposing rules. Building regulations should specify only what’s necessary, with an emphasis on life safety protocols.

Programming efforts should generally focus on the following four areas:

- Social – Student-to-student and student-to-faculty engagement (outside of the classroom) in relaxed atmosphere
- Recreational – Emphasis on physical activities (fitness, intramurals, tournaments, hiking, skiing, etc.)
- Cultural – Increasing understanding/appreciation of different cultures, opinions and life-styles
- Educational – Support for academic interests and success, including further opportunities to engage with faculty; transfer, travel and internship opportunities; academic mentors/study groups; career counseling

#### D. High-level Marketing Recommendations

The investment in a new or renovated facility is significant, and warrants special consideration regarding marketing strategies during lease-up that may not otherwise be necessary. While demand exists, planning and executing the marketing should begin shortly following project approval. It is recommended that a marketing plan be developed (possibly included in project costs) that encompasses aggressive strategies, at least through the initial lease-up period. Some strategies for review and possible inclusion are as follows:

- Mock-up of a model room and management/leasing office 6 – 12 months prior to opening
- Collateral material for distribution by student affairs and admission offices
- Strategic communication to current residents of Marathon Hall
- Re-development of the housing website, including video
- Review and possible re-development of application process (new and returning residents)
- Advertising; giveaways
- Incentives for early renewals and new contracts; perks for campus residents
- Promotion of dining program and options
- Social media outreach

These functions can be accomplished either in-house or with a third party, but will require student housing marketing expertise and the time necessary for this planning and implementation to occur in support of the project.

#### E. Estimated Bed Rentals to Support Facility

Refer to Scion's Memorandum: Residence Hall Consulting Study Financial Analysis

## Section 7: Implementation Schedule

This report is intended to provide the direction to the successful implementation of any new and/or renovated residence hall on-campus at UWMC. The below dates are provided as a guide to next steps. They are based on a new residence hall, as recommended, with an opening in August, 2016.

### University of Wisconsin Marathon County Key Milestone Dates and Durations (preliminary)

12.11.14	Market analysis, preliminary program, cost-benefit analysis, and initial project budget finalized and reviewed
12.18.14	Determine approach (renovate, build new, renovation and addition) and finalize site selection
12.18.14	Determine construction delivery (Construction Manager, Design-Bid, CM@Risk); Scion to develop request for qualifications (“RFQ”); Set up steering committee
12.18.14	Determine optimal approach to financing; begin to set up Foundation, if applicable
12.19.14	Finalize architecture agreement; potential kick off for design with an on-site charrette
12.22.14	Distribute construction company RFQ; initiate contact with investment bankers for interviews
1.12.14	Construction company RFQ due; distributes responses and evaluation score sheets
1.12.14	Interview investment bankers via phone or in person
1.19.15	Determine construction company short list and notify finalists
2.2.15	Conduct construction company interviews (3)
2.2.15	Determine construction company; begin contract negotiations
2.16.15	Finalize construction company agreement
5.15.15	Architecture/Engineering drawings completed
5.31.15	Guarantee Maximum Price (“GMP”) - may be able to expedite by one month
5.31.15	Funding approved (this date can fluctuate and should be earlier)
6.8.15	Groundbreaking - may be able to expedite by four to six weeks
6.1.16	Substantial completion
7.1.16	Furniture installation
8.1.16	Punch list creation
8.15.16	Ribbon cutting
8.18.16	Move-in date
10.1.16	Punch list complete and project close-out