

Agenda Item: I.A.**DATE:** July 28, 2011**SUBJECT:** Lambuth Campus Feasibility Study**ACTION RECOMMENDED:** Approval

Included in the 2011 Appropriations bill was a provision for THEC to conduct a study “to determine the feasibility of the state obtaining the facilities, property and assets of Lambuth University” (Public Chapter 473). Lambuth, which ceased operations on June 30, 2011, has been negotiating the sale of the campus in order to settle approximately \$10.4 million in debt owed to various creditors with the intention of delivering it debt-free to the State of Tennessee so that a public institution could begin operating on the campus. On June 30, 2011, Lambuth University tentatively accepted a purchase offer of \$7.9 million from a local stakeholder group consisting of the city of Jackson, the Madison County Commission, the Jackson Energy Authority and West Tennessee Healthcare. That same day, the Lambuth Board of Trustees filed for Chapter 11 bankruptcy protection.

THEC staff recommend that the State of Tennessee acquire the assets of Lambuth University for use by the Tennessee Board of Regents (TBR) and the University of Memphis (UM) subject to the conditions and additional approvals as outlined in the 2011 Appropriations bill. Furthermore, as a condition of the acquisition, TBR is to develop and biannually submit to THEC plans to address the near term facilities issues with any necessary funding to be derived from external or non-state sources.

Also, THEC staff recommend a series of metrics related to enrollment projections, accreditation requirements and maintenance projects that will provide evidence in order to evaluate the success of the state’s efforts at the Lambuth campus. An annual evaluation of these metrics, coupled with the significant planning efforts that TBR and UM officials have already undertaken, provides confidence that the effort to bring public higher education to the Lambuth campus is feasible with a good likelihood of success. There are costs, however, for both operations and capital maintenance that require careful consideration by state policy makers, particularly considering the austere financial climate for public higher education and the significant existing capital maintenance needs across the University of Tennessee and TBR systems.

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Tennessee Higher Education Commission Lambuth Campus Feasibility Study

Executive Summary

The potential use of the Lambuth campus by the University of Memphis (UM) is consistent with the philosophical foundations and educational attainment goals of the Complete College Tennessee Act (CCTA) of 2010. Madison County, where the Lambuth campus is located, and the surrounding counties are currently well served by the various public, private and proprietary institutions located in the area, though the addition of a public university campus would increase the array of educational offerings for Tennesseans. The academic programs that the University of Memphis intends to offer on the Lambuth campus are well thought out and consistent with local workforce needs.

The Lambuth campus infrastructure has significant deferred maintenance issues throughout various buildings on the campus, ranging from minor improvements to make the campus more compliant with the Americans with Disabilities Act (ADA) to the renovations necessary at Hyde Science Hall. In the near-term, there are facilities issues primarily related to life/safety and ADA. Addressing some of these issues will require external or non-state funds while others can be addressed programmatically and operationally. The long-term deferred maintenance issues must be evaluated in light of the significant deferred maintenance and capital outlay needs across the existing public higher education system. For operating expenses, three main revenue sources exist: student tuition revenue, \$5 million in state appropriations in 2011-12 with diminishing amounts in the three years that follow, and a portion of recurring state appropriations that activities on the Lambuth campus would earn for UM through the outcomes funding formula. If revenues from these sources are insufficient, then the campus will require a subsidy from UM or increased investment from state government or other sources of funding.

The Tennessee Higher Education Commission (THEC) recommends that the State of Tennessee acquire the assets of Lambuth University for use by the Tennessee Board of Regents (TBR) and UM subject to the conditions and additional approvals as outlined in the Appropriations bill. As a condition of the acquisition TBR is to develop and biannually submit plans to address the near-term facilities issues with any necessary funding to be derived from external or non-state sources. THEC recommends a series of metrics related to enrollment projections, accreditation requirements and maintenance projects that will provide evidence in order to evaluate the success of the state's efforts at the Lambuth campus. An annual evaluation of these metrics, coupled with the thorough planning efforts that TBR and UM officials have already undergone, provides confidence that the effort to bring public higher education to the Lambuth campus is feasible with a good likelihood of success. There are costs, however, for both operations and capital maintenance that require careful consideration by state policy makers, particularly considering the austere financial climate for public higher education and the significant existing capital maintenance needs across the University of Tennessee (UT) and TBR systems.

Introduction

On April 14, 2011 the Lambuth University Board of Trustees approved a resolution that the Jackson, Tennessee institution would cease operations on June 30, 2011. The private Methodist college that was founded in 1843 had endured several years of declining enrollments and financial pressures that ultimately imperiled its viability. Its regional accrediting body, the Southern Association of Colleges and Schools, removed Lambuth's accreditation on February 23, 2011, though a Federal court enjoined the action pending appeal. Subsequently, the Tennessee General Assembly included language in the Appropriations bill calling for a study "to determine the feasibility of the state obtaining the facilities, property and assets of Lambuth University" (Public Chapter 473).¹ Throughout 2011, Lambuth officials were negotiating the sale of the campus in order to settle approximately \$10.4 million in debt owed to various creditors with the intention of delivering it debt-free to the State of Tennessee so that a public institution could begin operating on the campus. On June 30, 2011, Lambuth University tentatively accepted a purchase offer of \$7.9 million from a local stakeholder group consisting of the city of Jackson, the Madison County Commission, the Jackson Energy Authority and West Tennessee Healthcare. That same day, the Lambuth Board of Trustees filed for chapter 11 bankruptcy protection.

The Appropriations bill requires the state's coordinating body for higher education, the Tennessee Higher Education Commission, to review the potential acquisition of the campus, including an assessment of the Lambuth facilities. Though the legislation calls for a review of how the campus could be utilized by "one or more public institutions of higher education," it is clear that the legislation envisions the University of Memphis ultimately operating a higher education enterprise on the Lambuth campus should the state obtain the property and facilities. To that end, this study seeks to fulfill the requirements of the legislation through consideration of the various fiscal, academic and programmatic aspects of UM operating on the Lambuth campus, as well as associated infrastructure issues. Crucial to the analysis is an examination of the socioeconomic and educational context of Madison and surrounding counties from which students attending the UM at Lambuth are likely to be drawn.

Components of the study reflect substantial information generated through the comprehensive planning efforts that officials from TBR and UM have already performed, as well as the extensive Lambuth campus facility survey conducted in June 2009 by officials from TBR, UM, THEC, Lambuth University and Tennessee state government.

Background and Context**Financial Environment**

As with much of the nation, Tennessee continues to be affected by the economic crisis that began in 2008. As of April 2011, Tennessee's unemployment rate was 9.6 percent, nearly double the pre-recession rate of 4.9 percent. Comparatively, the Jackson Metropolitan Statistical Area's unemployment rate was 10.2 percent versus 5.2 percent in 2007. Despite

1 See Appendix A.

recent growth, state tax revenues still lag pre-recession levels, though Tennessee has experienced several consecutive months of sales tax revenue growth.²

The economic downturn has resulted in several years of reductions across numerous areas of state government including higher education. From 2007-08, which represented the peak of state funding for higher education measured in total appropriations, to 2010-11, state appropriations to higher education were reduced from \$1.346 billion to \$1.069 billion, a reduction of \$277 million or 20.6 percent. During the same period, full time equivalent enrollment (FTE)³ grew by 15 percent at Tennessee public higher education institutions. Funding for capital projects has fared no better as no capital outlay projects have been funded since 2007-08, with the notable exception of a special \$120 million appropriation in 2011-12 for community college and technology center projects that was linked to the Complete College Tennessee Act (CCTA), and \$11 million in 2011-12 for projects at Columbia State Community College and the UT Health Science Center. Funding for capital maintenance has been more stable with annual appropriations over the last 10 years averaging \$42 million. However, actual funding has fallen well short of the THEC recommended levels, contributing to a backlog of over \$400 million in out-year capital maintenance projects.

Table 1 – Higher Education State Appropriations History⁴

Year	Recurring	ARRA Related	Total
2007-08	\$1,346,276,300	\$0	\$1,346,276,300
2008-09	\$1,255,833,500	\$82,334,800	\$1,338,168,300
2009-10	\$1,118,661,000	\$228,383,200	\$1,347,044,200
2010-11	\$1,066,399,800	\$286,170,900	\$1,352,570,700
2011-12	\$1,068,664,400	\$0	\$1,068,664,400
Summary	\$277M or 20.6% Reduction	\$597M Over Three Years	\$277M or 20.6% Reduction

2 Tennessee Department of Revenue Comparative Statement of Collected Revenues (tn.gov/revenue).

3 FTE is defined as 15 student credit hours per semester for undergraduates and 12 for graduate students.

4 THEC finance data.

Table 2 – Higher Education Capital Project Funding History⁵

	Capital Outlay		Capital Maintenance	
	THEC Recommendation	Actual Funding	THEC Recommendation	Actual Funding
2011-12	\$341,830,000	\$11,000,000	\$143,160,000	\$54,700,000
2010-11	\$359,850,000	\$120,000,000	\$141,690,000	\$50,870,000
2009-10	\$378,651,000	\$0	\$121,880,000	\$11,380,000
2008-09	\$329,725,000	\$0	\$109,974,000	\$18,694,000
2007-08	\$321,110,000	\$240,330,000	\$86,660,000	\$54,350,000
2006-07	\$351,845,000	\$203,885,000	\$87,625,000	\$51,883,000
2005-06	\$273,610,000	\$155,240,000	\$399,680,000	\$44,240,000
2004-05	\$232,810,000	\$148,410,000	\$101,425,000	\$76,955,000
2003-04	\$446,175,000	\$0	\$200,000,000	\$20,810,000
2002-03	\$460,280,000	\$13,100,000	\$200,000,000	\$37,410,000

Due to the severity of state funding reductions across the nation, the federal government took the unprecedented step in 2009 of providing general operating funds for public institutions of higher education. The American Recovery and Reinvestment Act (ARRA) helped temporarily offset state funding reductions, providing nearly \$600 million in nonrecurring funding to Tennessee public higher education institutions from 2008-09 to 2010-11. With the expiration of ARRA funds at the conclusion of the 2010-11 fiscal year, the full effect of the state funding reductions since 2008-09 will be felt beginning with the 2011-12 fiscal year.

Complete College Tennessee Act

In January 2010, the Tennessee General Assembly passed the Complete College Tennessee Act, a comprehensive reform agenda that seeks to transform public higher education through changes in academic, fiscal and administrative policies at the state and institutional level. At the center of these reforms is the need for more Tennesseans to be better educated and trained, coupled with the reality of the state's diminished fiscal capacity to support higher education.

At the heart of the CCTA is a new master plan or Public Agenda⁶ for higher education which establishes the direct link between the state's economic development and its educational system. The overarching goal of the Public Agenda is to double the current number of annual college graduates from all sectors – public, private and proprietary – to have Tennessee meet the projected national average in educational attainment by 2025. The primary state policy levers for addressing the state's educational needs are a new public higher education funding formula, which incorporates outcomes in lieu of enrollment; a new Performance Funding program, which focuses on quality assurance; and the establishment of institutional mission statements or profiles, which distinguish each institution by degree level, program offerings and student characteristics.

⁵ THEC finance data.

⁶ See www.tn.gov/thec/complete_college_tn/ccta_summary.html.

THEC has implemented the policy mechanisms that are called for in the CCTA reform legislation: the 2010-15 Public Agenda, the outcomes-based funding formula and the Performance Funding program for quality assurance. These policy reforms are integrated and mutually reinforce achievement of the major goal of increasing educational attainment levels of Tennesseans. Implementation of the other major components of the reform agenda are nearing completion including more efficient student transfer, a more integrated community college system, reforms to the delivery of student remediation programs and an enhanced research focus for the University of Tennessee Knoxville and the University of Memphis, the state's two public Carnegie Research universities.

The opportunity to acquire and utilize the Lambuth campus to increase the supply of educational opportunities in Jackson and West Tennessee is consistent with the spirit and intent of the CCTA. While the area is currently well served by the various public and private institutions located nearby, the addition of a significant public university presence in Jackson will enhance the educational offerings in the area.

Lambuth University Overview

At its peak in 1995, Lambuth University enrolled 1,227 students⁷ but by fall 2010 headcount enrollment had fallen to 456.⁸ Approximately 80 percent of students were Tennessee residents, the majority of whom were from either Madison County (where Lambuth is located) or Shelby County. Average composite ACT scores range from 18 to 25, similar to most public Tennessee universities. The most popular programs at Lambuth were Health and Physical Education, Psychology and Accounting, which represented 34 percent of all bachelors degrees conferred.

Table 3 – Lambuth University Majors⁹

Popular Lambuth Majors (2007-2009 Total)		
Majors	Graduates	Percent of All Grads
Health and Physical Education	65	15%
Psychology	42	10%
Accounting	38	9%
English Language and Literature	28	6%
Sociology	25	6%
Adult and Continuing Ed Teaching	22	5%
Biology/Biological Sciences	22	5%
All Other Majors	197	45%
Grand Total	439	100%

7 Lambuth University DataBook 2008-2009.

8 IPEDS Federal higher education database (nces.ed.gov/ipeds).

9 IPEDS Data.

The Free Application for Federal Student Aid (FAFSA), which nearly all students submit as part of the college application, provides an opportunity to examine institutional choice preferences. Students indicate on the FAFSA their institutional preferences in priority order, information that might shed light on college choice preferences of students who were attracted to Lambuth. Among Lambuth students who named an alternate college choice, 17 percent listed Jackson State Community College as their second choice and 11 percent listed it as their third choice. About 23 percent of students considered attending Union University (as their second or third choice) had they not enrolled at Lambuth. The University of Memphis was named a second or third choice by 14 percent of Lambuth students. The University of Tennessee Martin, Lane College, and Middle Tennessee State University each were listed as alternate considerations by about 10 percent of students. In total, over 40 percent of Lambuth students indicated that their second college choice was an institution located in Madison County.

Table 4 – Other Institutional Preferences of Lambuth Students¹⁰

Lambuth Students Who Listed Preferences for Other Colleges Institution	Second Choice		Third Choice	
	Students	Percent	Students	Percent
Jackson State Community College	24	17%	8	11%
Union University	17	12%	8	11%
University of Memphis	15	11%	2	3%
Lane College	9	6%	4	6%
Middle Tennessee State University	8	6%	2	3%
University of Tennessee - Martin	8	6%	7	10%
Other Institutions	58	42%	40	56%

Further analysis indicates that Lambuth students preferred colleges in or near Jackson. Of Lambuth students who filed a FAFSA, half lived within 30 miles of Jackson and 90 percent were within a 2-hour drive. These data suggest that the type of student who had enrolled at Lambuth would likely consider enrolling at a public institution located on the Lambuth campus.

Educational and Demographic Profile of Madison and Other Counties

As of 2009, Madison County had over 97,000 residents, 64,000 of whom live within the city limits of Jackson. Madison County residents have higher levels of educational attainment compared to most other West Tennessee counties and to the state as a whole. Nearly 85 percent of residents aged 25 or over have a high school degree or GED. One third of Madison County adults have at least an associate's degree, and one quarter of adults have at least a bachelor's degree. These figures outpace those of the counties bordering Madison County by several percentage points and are slightly higher than Tennessee's overall educational attainment levels. Moreover, this gap is widening. Madison County's older workers (45-64 years of age) are only one percent more likely than Tennessee's older workers to have a bachelor's

¹⁰ THEC Analysis of FAFSA Data.

degree. Madison County's younger workers (25-34 years of age) are four percent more likely than their Tennessee counterparts to hold a bachelor's degree. As a region West Tennessee's educational attainment levels are comparable to Middle and East Tennessee. Of the adult population (age 25 and up), 22.1 percent of West Tennessee residents have a bachelor's degree, compared to 24.4 percent of Middle Tennessee residents and 20.6 percent of East Tennessee residents.¹¹

Table 5 – Educational Attainment¹²

Educational Attainment of Madison County					
Population 25 Years or Older with at Least...					
	High School	Associates	Bachelors	Age 25-34 Bachelors	Age 45-64 Bachelors
Tennessee	82%	29%	23%	26%	23%
Madison County	85%	32%	25%	30%	24%
*Carroll County	77%	19%	15%	17%	15%
*Chester County	84%	30%	24%	n/a	n/a
*Crockett County	79%	19%	15%	n/a	n/a
*Gibson County	79%	19%	14%	16%	14%
*Hardeman County	70%	15%	12%	12%	12%
*Haywood County	74%	16%	11%	n/a	n/a
*Henderson County	78%	17%	11%	10%	12%
Shelby County	85%	33%	28%	28%	29%

**County is contiguous to Madison County; some statistics for Chester, Crockett, and Haywood Counties were not available from the Census Bureau.*

Madison County's college going rate (high school graduates who immediately enroll in college) is 50 percent, which is lower than most nearby counties and the overall state rate.¹³ However, Madison County has the highest median family income and second-lowest unemployment rate among surrounding counties. Though significantly lower than the state's overall growth rate, Madison County is one of the faster-growing counties in West Tennessee. Madison County grew by nearly six percent since 2000, while Tennessee grew by over 10 percent. Over the same time period, Jackson grew by 6.4 percent.

11 US Census, American Community Survey 2005-2009 data.

12 US Census.

13 See THEC County Reports at

<http://www.tn.gov/thec/Legislative/Reports/2011/2011%20County%20Profiles%20-%20full%20report.pdf>.

Table 6 – County Demographic Comparison¹⁴

Demographic Characteristics of Tennessee, Madison & Other Counties				
	College Going Rate	Median Family Income	Unemployment Rate	Population Growth Rate
Tennessee	56%	\$ 52,638	9.4%	10.4%
Madison County	50%	\$ 51,444	9.4%	5.8%
*Carroll County	48%	\$ 43,937	13.7%	-3.3%
*Chester County	56%	\$ 50,880	9.3%	4.8%
*Crockett County	43%	\$ 45,087	11.5%	-0.4%
*Gibson County	56%	\$ 45,799	12.4%	2.7%
*Hardeman County	52%	\$ 41,250	11.9%	-1.8%
*Haywood County	55%	\$ 41,163	13.4%	-4.7%
*Henderson County	56%	\$ 43,009	14.0%	5.7%
Shelby County	56%	\$ 55,675	9.8%	2.4%

*County is contiguous to Madison County

Madison County is home to several higher education institutions. Jackson State Community College and Union University are the county's largest by enrollment and together comprise two-thirds of all students who attend college within Madison County. There are also four private institutions in Madison County and in the immediate area: Bethel University in Carroll County, Lane College and Union University in Madison County and Freed-Hardeman University in Chester County.

Table 7 – Characteristics of Selected Jackson Area Private Institutions¹⁵

Characteristic	Bethel	Freed-Hardeman	Lane	Union
Full-Time Students	2,094	1,504	2,210	2,431
Part-Time Students	1,301	488	12	1,660
Total Headcount	3,395	1,992	2,222	4,091
Bachelor Degrees	456	245	258	564
Masters Degrees	187	119	0	436
Doctoral Degrees	0	0	0	13
Tuition and Fees	\$12,878	\$15,922	\$8,000	\$22,390

Among public institutions, Jackson State Community College (JSCC) enrolls the most Madison County residents, 1,715 in fall 2010, while the next-largest public institution, the Tennessee Technology Center at Jackson, enrolled 895 Madison County residents. Large numbers of Madison County residents also attended the University of Tennessee Martin (392), the University of Memphis (374), and Middle Tennessee State University (303). Lambuth enrolled 251 students in fall 2010 from Madison County.

14 US Census.

15 TN Independent Colleges and Universities Association (TICUA) Characteristics Fall 2010.

Table 8 – Public Institution Enrollment of Madison County Residents (2010)¹⁶

Institution	Headcount	Percent
Jackson State CC	1,715	37.5%
Jackson TTC	895	19.6%
UTM	392	8.6%
UM	374	8.2%
MTSU	303	6.6%
All Other Public	889	19.5%
Total	4,568	100.0%

Employment and Labor Force Trends

Similar to other areas of the country, economic changes are altering the makeup of the Jackson area workforce. According to the US Bureau of Labor Statistics, the Jackson metropolitan statistical area has a workforce of approximately 58,000 people. The largest major employment sector is government followed next by trade, transportation and utilities and then by the manufacturing sector. However, over the last ten years, the manufacturing sector workforce has declined from 14,300 to 9,000 while education and health services employment has grown from 6,600 to 8,700.¹⁷

According to the Jackson Area Chamber of Commerce, the largest employer in Madison County is West Tennessee Healthcare whose Jackson-Madison County General Hospital is located less than two miles from the Lambuth campus. Several large companies have manufacturing plants in the Jackson area employing significant numbers of workers including Procter and Gamble and Delta Faucet.

Table 9 – Largest Employers in Jackson, Madison County¹⁸

Employer	Employees
West Tennessee Healthcare	4,362
Jackson-Madison County School System	1,582
Procter & Gamble	824
City of Jackson	786
Stanley Black & Decker - South	650
Union University	637
Madison County	632
Delta Faucet	600
Pinnacle Foods	592
Regional Hospital of Jackson	574

16 Fall 2010 data obtained from the THEC Student Information System.

17 Bureau of Labor Statistics data retrieved via the website of the Center for Business & Economic Research at the University of Tennessee Knoxville, cber.bus.utk.edu.

18 Jackson Area Chamber of Commerce.

As the Madison County area economy shifts from manufacturing towards other sectors such as health care, area higher education institutions must adapt and shift programmatic focus to reflect employment needs and trends. In recognition of the critical link between the region's economic health and educational attainment, local officials recently announced the Madison CAN (College Access Network) initiative, which provides up to \$2,000 in "last dollar" scholarships to local high school graduates who attend Jackson State Community College or the Tennessee Technology Center in Jackson. Efforts such as this, coupled with programs geared in part towards local workforce needs, link the educational attainment of the population with the region's economic strength and viability.

Programmatic Aspects of UM at Lambuth

The University of Memphis has done significant programmatic planning for the Lambuth campus, building on the current array of programs offered at UM's off campus location in Jackson (located on the Jackson State Community College campus). UM's commitment to serving the Jackson and Madison County area is longstanding, having had a presence in Jackson since 1955 and operating the JSCC center since the early 1970s. In 2010, UM enrolled 385 students at their Jackson location though a substantial portion of the enrollment was through TBR's Regents Online Degree Program (RODP) in which students identify with an institution even though they may not take classes at any physical location. Students at UM's Jackson location are primarily in business, education and nursing, mostly in upper division courses.

The University of Memphis plans to enroll students at the Lambuth location for fall 2011 with the intention of shifting all activities away from their current Jackson location. Lower division courses will be added to the current degree programs available at the JSCC location so complete undergraduate degrees can be offered in the following programs:

- Bachelor of Business Administration (Management)
- Bachelor of Science in Education (K-8 Teaching All Learners)
- Bachelor of Liberal Studies
- Bachelor of Professional Studies
- Bachelor of Science in Nursing (Currently mostly online, but UM will move to mostly campus based)

The University of Memphis plans to utilize non-traditional delivery methods, especially for programs geared towards adult learners, by employing 7-week terms, accelerated programs, and weekend courses, as well as traditional semester courses.

The Bachelor of Science in Nursing is of particular interest due to the proximity of the Lambuth campus to Jackson-Madison County General Hospital, located 1.2 miles from campus and Regional Hospital of Jackson, located five miles from campus. This program would compete with the BSN program at Union University. The University of Memphis plans to continue and initiate programs that coincide with the present interests of students at Lambuth and programs that meet evolving student demand. UM plans to eventually offer a Bachelor of Liberal Studies in Entertainment/Music Industry Studies, which was one of the most popular majors at

Lambuth University. Other degree programs will be added as needed in fine arts, humanities, social science and the sciences as the demand grows. UM plans to relocate its graduate program offerings currently at the JSCC location in the following areas:

- Master of Arts in Teaching in Secondary Education
- Master of Arts in Teaching in Special Education
- Master of Science in Education
- Doctor of Education in Higher Education
- Master of Arts in Liberal Studies

The University of Memphis has articulation agreements with JSCC in nursing, engineering technology, business, and education as well as a Dual Admission Program with JSCC enabling students to be simultaneously admitted to both JSCC and UM. Dually admitted students complete the Associate degree and then seamlessly transfer to UM. Over the next five years, UM projects total enrollment at Lambuth to increase from 250 FTE in 2011-12 to 1,000 FTE in 2015-16. Approximately 80 percent of the enrollment projections are undergraduate students.

Table 10 – UM Lambuth Location Enrollment Projections¹⁹

Enrollment Projections	2011-12	2012-13	2013-14	2014-15	2015-16
Total Projected FTE	250	460	685	775	1,000
Projected graduate FTE	50	90	135	155	200
Projected undergraduate FTE	200	370	550	620	800

For its current Jackson location, UM utilizes four full-time education professors and two business professors as well as adjuncts and full-time professors from the Memphis campus teaching in Jackson. Initially, UM projects a need for 29 faculty FTE, rising to 62 within the next five years, needs based in large part on enrollment projections and program accreditation requirements of student-to-faculty ratios. Adjunct professors as well as current UM faculty will also be utilized to teach courses on the Lambuth campus.

Table 11 – UM Lambuth Faculty Projections²⁰

Faculty Projections	2011-12	2012-13	2013-14	2014-15	2015-16
Projected Faculty FTE	29	41	52	54	62

¹⁹ Estimates provided by the University of Memphis.

²⁰ Estimates provided by the University of Memphis.

The University of Memphis has notified its regional accrediting body, the Southern Association of Colleges and Schools (SACS), about the possibility of establishing a location on the Lambuth campus. The University of Memphis is proceeding with the appropriate actions to satisfy SACS requirements and has entered into a teach-out agreement that will allow former Lambuth students to complete their studies as UM students. UM is considering the necessity of developing appropriate tenure and promotion guidelines for faculty whose duties will consist primarily in undergraduate teaching and service. On the main campus all faculty are also expected to contribute substantially to the research and graduate educational mission of those departments.

University of Memphis officials have engaged in significant planning efforts to transition programs at their existing Jackson location to the Lambuth campus. Over time, UM will complement those programs with an array of new programs designed to meet student and workforce demand. Enrollment projections contemplate a student body composed of an undergraduate population of traditional age students alongside an adult student population in both graduate and undergraduate programs, all served by a mixture of full-time and adjunct faculty. Because the traditional undergraduate student typically takes classes during the day and adult students during the evening, this model meets the local economic and workforce needs while also maximizing the utilization of the campus facilities.

Lambuth Campus Infrastructure

Covering approximately 50 acres, the Lambuth University campus is situated in an older residential area of south Jackson. There are 19 structures on campus, of which eight are dormitories, ranging from 11 to 88 years old in a classical Georgian architectural style. The infrastructure includes approximately 260,000 gross square feet of E&G space²¹, comparable in size to the smallest public institution in Tennessee, Dyersburg State Community College. The Lambuth University property was valued at \$38.3 million in a December 2009 appraisal.²² A summary of the Lambuth facilities is presented below.²³

21 Education and General; excludes auxiliaries, such as dormitories.

22 Appraisal performed by James P. Murdaugh, TN State Certified General Real Estate Appraiser.

23 Derived from the Lambuth University Technical Memorandum No. 1 Inventory & Analysis prepared by Hawkins Partners, Inc., Binkley Garcia in association with Barge Cauthen & Associates, EMC Structural Engineers and I.C. Thomasson Associates; May 29, 2008.

Table 12 – Lambuth Facilities Summary²⁴

Facilities	Year Built	Gross Sq Ft
<i>Education and General Space</i>		
Athletics Center	1969	59,000
Student Union	1959/69	45,300
Chapel	1957	10,700
Arts Building	1950s	14,500
Library	1961	24,600
Administration/Classroom Building	1923	42,100
Science Hall	1967	44,000
Performing Arts Center	1948	11,800
Christian Life Center	Unknown	900
Maintenance Building	Unknown	7,300
Epworth Hall	1929	Closed
<i>E&G Space Subtotal</i>		260,200
<i>Dormitories (Auxiliary Space)</i>		
Carney-Johnston Hall	1967	37,800
Harris Hall	1959	24,700
Spangler Hall	1957	20,600
Sprague Hall	1952	28,000
Oxley Commons	2000	16,000
<i>Auxiliary Space Subtotal</i>		127,100
Grant Total		387,300

In summer 2009 an extensive assessment of the facilities was performed by staff from TBR, THEC, UM and a group of consultants with expertise in areas such as engineering, fire safety and building codes. The assessment included a comprehensive examination of the various building systems (heating, ventilation and cooling systems or HVAC, electrical, etc.), the shell and substructure (foundation, basement), interior construction and general building components such as furnishings, safety standards and site conditions. At that time, TBR staff determined that the condition of facilities, including the level and quality of maintenance of the campus, was comparable to that of other TBR institutions. While the TBR staff has not assessed the campus since the initial 2009 visit, the UM facilities staff has visited the campus on multiple occasions during 2011. Based on their observations and discussion with maintenance staff at Lambuth, they conclude that the current condition of the Lambuth facilities is consistent with the conditions found during the initial 2009 visit.

The information obtained from the 2009 survey produced a Building Condition Rating²⁵ for most structures on the Lambuth campus. Buildings with condition ratings of around 90 generally require only minor repair work, while ratings of 80 require more extensive maintenance. Ratings of 70 indicate that upgrades are required and that some systems need

²⁴ Of the educational and residential buildings on campus, five were encumbered as collateral for outstanding loans as of June 2011: Varnell-Jones Administration building, the Performing Arts Center, the library, Epworth Hall and Oxley Commons.

²⁵ See Appendix D.

components to be replaced. If a building has a general condition rating of 60, then major upgrades or replacement of certain components are required in various systems throughout the building. While the campus presents well and is aesthetically in excellent shape, many of the buildings are in such condition where capital maintenance improvements and repairs are necessary.

Table 13 – Lambuth Buildings Condition Rating²⁶

Facilities	Condition Rating
Performing Arts Center	83.9
Library	79.4
Administration/Classroom Building	74.1
Athletics Center	70.5
Student Union	65.5
Science Hall	64.2

A particular area of concern for the Lambuth facilities is that Jackson is an area with significant seismic risk, sitting less than 100 miles from the New Madrid fault. The campus buildings, which were generally built prior to 1969, are considered to have poor seismic performance. Future seismic upgrades to campus buildings would be of an unknown cost and complexity.²⁷

Deferred Maintenance Issues

The comprehensive facilities assessment was also used to generate a projection of deferred maintenance projects that range from HVAC upgrades to asbestos removal to ADA upgrades. Of the \$20 million in total deferred maintenance projects that were identified throughout the Lambuth campus, \$5.8 million is required to address issues at what is generally considered to be the facility in most need of maintenance, Hyde Hall, which houses science classrooms and lab space.

The top priorities for deferred maintenance identified by the comprehensive facilities assessment totaled \$11.98 million for over 50 identifiable projects, of which 12 have an estimated project cost of over \$100,000. Of this total, however, over \$4 million is identified for auxiliary projects which are not funded from state sources. The \$5.8 million required for Hyde Hall, mentioned above, is included in the estimates, representing the bulk of the E&G cost estimate. For this analysis, the labels “year one” through “year five” essentially represent potential sequencing of projects rather than a chronology of when issues should be addressed. The data in Table 14, though derived from the 2009 comprehensive facilities assessment, is not rigid and it does not represent a recommended schedule of maintenance projects. Some

²⁶ Not all buildings were rated during the facilities assessment.

²⁷ According to the Lambuth University Technical Memorandum No. 1 Inventory & Analysis prepared by Hawkins Partners, Inc., Binkley Garcia in association with Barge Cauthen & Associates, EMC Structural Engineers and I.C. Thomasson Associates; May 29, 2008.

projects, such as the maintenance issues at Hyde Hall science building, can be delayed as UM does not intend to utilize Hyde Hall initially. While the projects are clearly identifiable, the timeline for addressing the deferred maintenance issues is flexible.

Table 14 – Identified Deferred Maintenance Projects²⁸

Timeframe	E&G	Auxiliary	Total
Year 1	\$7,967,000	\$4,016,000	\$11,983,000
Year 2	\$1,635,000	\$65,000	\$1,700,000
Year 3	\$4,718,000	\$413,000	\$5,131,000
Year 4	\$302,000	\$180,000	\$482,000
Year 5	\$420,000	\$560,000	\$980,000
Totals	\$15,042,000	\$5,234,000	\$20,276,000

Table 15 – Year One Deferred Maintenance Projects by Building²⁹

Facilities	Maintenance
<i>Education and General Space</i>	
Athletics Center	\$348,000
Student Union	\$745,000
Chapel	\$12,000
Arts Building	\$25,000
Library	\$336,000
Administration/Classroom Building	\$213,000
Science Hall	\$5,810,000
Performing Arts Center	\$78,000
Campus Wide	\$400,000
E&G Space Subtotal	\$7,967,000
<i>Auxiliary Space</i>	
Carney-Johnston Hall	\$997,000
Harris Hall	\$1,011,000
Spangler Hall	\$1,019,000
Sprague Hall	\$969,000
Oxley Commons	\$20,000
Auxiliary Space Subtotal	\$4,016,000
Grand Total	\$11,983,000

Life/Safety and ADA (Americans with Disabilities Act) Issues

In addition to the identified deferred maintenance needs, an assessment was made of improvements necessary for the Lambuth facilities to meet current code requirements for occupant safety. This assessment, included as part of the comprehensive facilities assessment in 2009, was performed by Bill Wamsley, a Fire Protection Consultant. In his written report, Mr.

28 Data generated from the comprehensive facilities assessment performed in summer 2009.

29 Data generated from the comprehensive facilities assessment performed in summer 2009.

Wamsley presents a list of issues that in his judgment must be addressed and resolved prior to occupancy. Acknowledging that the ultimate determination of compliance rests with the State Fire Marshal's office, the list of recommendations includes specific improvements to the administrative and educational buildings on campus. A similar list of recommendations for the residential facilities was provided in summer 2011.³⁰ Among the improvements recommended are new fire rated doors at certain building exits, emergency lighting and exit upgrades and proper storage of combustible materials.

In June 2011, Barry Bonifay, an ADA consultant, conducted a walk-through of Lambuth University to assess campus ADA issues.³¹ His assessment identified ADA issues throughout the campus including parking, restrooms and building access. Based on his correspondence with the US Department of Justice, Mr. Bonifay concluded that a change in ownership of the Lambuth campus would not trigger additional minimum requirements for compliance with Title II (program accessibility) and Title III (public accommodation). It is important to note that some of the identified issues can be addressed by programming, planning or operational procedures and that some of the identified issues require minimal or no financial resources to resolve.

Issues related to life/safety and ADA compliance are the primary near-term maintenance issues on the Lambuth campus. Along with any necessary environmental studies, the Fire Marshall will ultimately determine whether a building is able to be occupied and utilized. Undoubtedly, some of the life/safety and ADA issues identified by the preliminary assessments will require funding from some external or non-state source. Other potential issues could be addressed over a reasonable timeframe as enrollment expands and UM begins to utilize more of the space on the Lambuth campus. UM will also likely resolve some issues with routine maintenance work that does not rise to the level of a capital maintenance project.

TBR and UM, with assistance from consultants, developed preliminary cost estimates that provide a general sense of the potential magnitude of the tasks involved to resolve the life/safety and ADA issues identified by the consultants.³² The resolution of these near-term items identified by the consultants in non-auxiliary buildings would require approximately \$3.5 million, with an additional \$2.3 million to address issues in the residence halls. These preliminary estimates are not the result of a detailed cost estimation process and are subject to change due to several factors.

- The cost estimates assume that every identified issue would need to be addressed through some modification to a facility. They do not take into consideration the consultant's opinion that a number of the identified ADA issues can be resolved if spaces are planned or programmed in ways that meet accessibility requirements. To the degree that ADA issues can be resolved programmatically, the cost estimates within this assessment overstate the potential requirement.

30 See Appendix E.

31 See Appendix F.

32 See Appendix H.

- ADA issues are interrelated in that once sufficient ADA compliant classrooms have been provided in one building, then UM can schedule classes that require accessibility as necessary without the need to address classroom accessibility issues in other buildings. It should be noted that TBR institutions widely engage in the practice of scheduling classes and events to meet ADA accessibility requirements.
- The State Fire Marshall will make the final determination on what constitutes a life/safety/code item and how those items shall be addressed. Therefore, the consultant's report may over or under estimate the list of potential requirements, thus impacting the preliminary cost estimates.
- These estimates are based on TBR and UM staff knowledge of the costs for facilities renovations within the processes employed by TBR and the State Building Commission. Assuming that whatever facilities issues need to be addressed are managed through processes engaged in by the local stakeholder group or others, these estimates may overstate or understate the actual costs.

Finally, though there will possibly be some limited need for recreational facilities, TBR and UM will need to determine what to do with the athletics facilities and the fraternity and sorority houses that Lambuth owns.

Due to the condition of the buildings and the deferred maintenance needs, the campus infrastructure offers perhaps the most significant challenge to the establishment of a public presence at the Lambuth location. State investment in long-term capital maintenance projects for the UM Lambuth campus must be assessed with an acknowledgment of significant deferred maintenance and capital outlay needs throughout the Tennessee public higher education system. Also, there are issues related to life/safety and ADA that require resolution in the near-term, possible even before occupancy of certain buildings, throughout the campus.

Financial Considerations

Expenditures

Based on their enrollment projections, the University of Memphis estimated the operational costs of the Lambuth campus for the five year period 2011-12 through 2015-16. The total projected expenditures increase from \$7.3 million in 2011-12 to \$11.3 million in 2015-16. In projecting the operational costs, UM intends to leverage the capabilities and functions of the main campus, capitalizing on economies of scale, avoiding unnecessary duplication of services, and minimizing administrative overhead and operational costs. This principle will extend to all functions and services: business, facilities, academic, and student services. Currently, UM has a small administrative staff to operate the Jackson site. Once activities are shifted to the Lambuth campus, the staff will be supplemented over time as enrollment grows. Principally, administrative functions for the Lambuth campus will be performed from the Memphis campus, though there will be a need for facilities and operational staff at Lambuth. UM does not intend to implement a chargeback to the Lambuth campus.

Table 16 – University of Memphis, Lambuth Campus
Operational Cost Estimates³³

	2011-12	2012-13	2013-14	2014-15	2015-16
Total Projected FTE Enrollment	250	460	685	775	1000
Undergraduate	200	370	550	620	800
Graduate	50	90	135	155	200
Total Projected FTE Faculty	29	41	52	54	62
Instruction	\$ 3,199,800	\$ 3,635,600	\$ 4,548,100	\$ 5,006,200	\$ 6,464,100
Research	-	-	-	-	-
Public Service	22,900	28,000	30,000	34,000	38,000
Academic Support	464,100	483,000	525,000	588,000	625,000
Student Services	545,000	598,000	665,000	695,000	874,000
Institutional Support	332,000	355,000	378,000	390,000	432,000
Operations & Maintenance	2,450,000	2,200,000	2,266,000	2,300,000	2,404,000
Scholarship and Fellowships	303,000	340,000	350,000	357,000	427,000
Total Projected Expenditures	\$ 7,316,800	\$ 7,639,600	\$ 8,762,100	\$ 9,370,200	\$ 11,264,100

Revenues

The General Assembly appropriated \$5 million in non-recurring funding for 2011-12 for UM to support operations at the Lambuth campus subject to the following conditions:

The allotment of funds appropriated by this item shall be subject to approval of the Commissioner of Finance and Administration after the requirements of paragraph (a) of this item are fulfilled and upon certification by the Chancellor that: (a) an operating budget for activities on the Lambuth Campus has been developed by the University of Memphis and approved by the Board of Regents; (b) funds authorized by the State hereunder will not be used for capital purposes; (c) the facilities to be used are made available to the University of Memphis in good serviceable order, without the need for capital maintenance at the time made available, and free and clear from all liens and encumbrances; and, (d) all outstanding debt of Lambuth University has been paid off from non-state sources.

Over the subsequent three years, the legislation envisioned diminishing amounts of support: \$3 million in 2012-13; \$2 million in 2013-14 and \$1 million in 2014-15. Of course, these amounts are subject to appropriations decisions during future sessions of the General Assembly. The legislative intent of these funds is as follows:

The funds appropriated in this item shall be used to subsidize operational costs of the Lambuth campus, it being the legislative intent that these state funds be used as an initial sum to begin transitioning such campus from a separate funding unit of higher

³³ Estimates provided by the University of Memphis.

education under the leadership of the University of Memphis into a regular operating unit of the University of Memphis over a period of five (5) years.

In addition to the \$5 million in non-recurring state appropriations for 2011-12 that will supplement the operations of the campus, it is possible to analyze the level of state appropriations that is generated for UM by the outcomes and activities at the Lambuth campus. Because of the sophistication of the THEC Student Information System, a database of student enrollment and degree information generated by data supplied by TBR and UT, institutional outcome data can be analyzed by location. Therefore, THEC can isolate the outcomes produced at the current UM location in Jackson and potentially at Lambuth. These outcomes can then be analyzed through the outcome-based funding formula to determine what portion of the UM state allocation in any given year is attributable to activities at the Lambuth location. This has the practical application of allowing THEC, TBR and UM to understand the level of state appropriations received by UM that would be based on activities at Lambuth. This information, which THEC will report annually to TBR and UM, will allow UM to make budgetary and programmatic decisions regarding the Lambuth location, in fulfillment of the language cited above.

Based on the UM Lambuth enrollment projections, outcome estimates were generated for the Lambuth campus.³⁴ Along with infrastructure data (educational and general square feet), state operating appropriations were projected through the outcomes based funding formula. The 2012-13 funding formula will utilize outcomes generated in 2010-11, thus not including any outcome data for the Lambuth campus though it will include outcomes produced at UM's current Jackson location.³⁵ The UM Lambuth enrollment projections as well as the campus infrastructure data would generate outcomes that produce an estimated \$4.2 million in 2017-18 when UM projects the campus to reach 1,000 student FTE. To be clear, these estimates represent the portion of the UM state appropriation that is attributable to the Lambuth campus. These estimates, like all projections of future state appropriations, are contingent on productivity changes at other institutions as well as the overall level of state higher education appropriations.

The enrollment projections established by UM also provide a direct way to estimate tuition and fee revenues generated by enrollment at the Lambuth location. Student fee revenue estimates are based on actual 2010-11 tuition revenue at UM with a projected five percent tuition increase for subsequent years.

34 See Appendix G. These estimates were based on UM outcomes per FTE and applied to projected Lambuth enrollment to generate outcomes for student progression, student transfers, bachelors degrees and masters degrees, including student subpopulations.

35 Outcome data from 2010-11 would include information for summer and fall 2010 and spring 2011, obviously before UM's involvement at the Lambuth location.

Table 17 – University of Memphis, Lambuth Campus
Revenue Estimates³⁶

Revenues	2011-12*	2012-13**	2013-14***	2014-15	2015-16
Formula Impact	\$603,000	\$1,345,000	\$1,635,000	\$2,307,000	\$3,085,000
Student Fee Revenue	\$1,713,800	\$3,294,600	\$5,127,100	\$6,063,200	\$8,179,100
Non-Recurring State Appropriations	\$5,000,000	\$3,000,000	\$2,000,000	\$1,000,000	\$0
Total	\$7,316,800	\$7,639,600	\$8,762,100	\$9,370,200	\$11,264,100

NOTE: THEC estimates the formula impact to be \$3.4 million in 2016-17 and \$4.2 million in 2017-18

*2011-12 Formula Impact number is due to the current UM Jackson location outcome data.

**2012-13 Formula Impact begins to include Lambuth facility data and UM Jackson location outcome data.

***2013-14 Formula Impact begins to account for outcomes generated from UM Lambuth enrollment projections.

Observations and Recommendations

The chance to utilize the former Lambuth property provides the state with a unique opportunity to quickly ramp up a campus in an area of Tennessee without a public university presence. However, utilization of the Lambuth campus offers several financial and programmatic challenges.

- The University of Memphis and TBR have engaged in thorough planning and have done their due diligence in anticipating the various challenges that this opportunity presents. While there are no acute gaps in educational opportunities, given the presence of JSCC and the TTC-Jackson along with the private and for-profit institutions in that area of West Tennessee, the addition of the University of Memphis at Lambuth would certainly contribute to the range of higher education offerings in Madison County. The presence of a public university would add an affordable option to the array of educational offerings that has been lacking heretofore. Undoubtedly, this is consistent with the CCTA and its goal of increasing educational attainment of Tennesseans.
- For the Lambuth location, the University of Memphis contemplates the relocation of programs at its current Jackson location as well as an array of additional programs that fit the needs of the area, particularly considering the role that the health care industry plays in the local economy and the proximity of Lambuth to Jackson's largest hospital.
- The state's decision to utilize the Lambuth campus should consider the current backlog of capital outlay and maintenance needs across higher education. Specifically, there are both long-term deferred maintenance issues that must be addressed on the Lambuth campus, as well as near-term issues such as ADA and life/safety that require immediate attention (some possibly even before occupancy). Determining the priority that the long-term deferred maintenance projects warrant compared to the significant deferred capital needs across the UT and TBR systems represents a significant challenge.

36 Student fee revenue estimates were provided by the University of Memphis; formula impact estimates were performed by THEC.

- State appropriations through the outcomes formula are difficult to project and will be a function of overall state higher education appropriations as well as the productivity levels of the Lambuth campus and productivity changes across other universities and community colleges. Because that source of funding is competitive and therefore unknown, there may be additional pressure on tuition revenue as a source of funding or for the state to increase or prolong its non-recurring operating support. These considerations increase the cost either to the state, to the University of Memphis or to students.

Considering these factors, THEC recommends that the State of Tennessee acquire the assets of Lambuth University for use by TBR and UM subject to additional approvals as outlined in the Appropriations bill:

Should the report recommend that the assets of Lambuth University be obtained by the state, the appropriate governing board shall take action pursuant to its by-laws to adopt the report and commit to fulfilling any conditions outlined in the commission's recommendation. The transaction will not become final unless and until the conditions have been met by the appropriate governing board and/or institution, the state building commission approves the acquisition of any real property, and the speakers of both the Senate and House of Representatives approve a budget expansion acknowledging the funding sufficient to pay for the transaction.

Assessments of the Lambuth campus have generally identified two categories of facility issues, as discussed in this report. The state will have to consider the long-term deferred maintenance issues in the coming years in light of a backlog of deferred maintenance projects throughout the TBR and UT systems. The near-term facilities issues, primarily related to life/safety and ADA, are the principal factor in ensuring that the campus is in good serviceable order, as required by the legislation.

As a condition of the acquisition, TBR is to develop plans to address the near-term facilities issues, primarily related to life/safety and ADA, on the Lambuth campus. This plan, which is to be submitted biannually to THEC as part of the operating budget cycle, is to be based on final results and determinations of the Fire Marshall, environmental surveys and both current and any further assessments of the Lambuth facilities. The plan shall identify how and in what timeframe TBR and UM will address the facility issues, whether by programmatic or operational remedies, or the funding amounts required to resolve the facility issues. The funding source for these issues shall be identified and are to be derived from external or non-state sources, whether gifts, UM funds, contributions from local sources or others.

As an additional condition, THEC recommends several metrics to be reported on and analyzed annually by UM and TBR that will provide a measure of the success of the Lambuth campus.

- *Have all institutional and program accreditation requirements been met?*
- *Have enrollment and faculty projections been met?*

- Have all ADA, life/safety and necessary deferred maintenance projects been completed or are they scheduled to be completed?

Acknowledgements

The many members of the THEC staff who contributed to this report gratefully acknowledge those individuals who provided information, feedback and perspective necessary to its completion. In particular, various staff members at the Tennessee Board of Regents and the University of Memphis were very helpful and responsive, providing essential data and information. Any endeavor of this magnitude and on this timeframe requires many hands to bring it to fruition. We are thankful to all who provided assistance.

Appendix A

Public Chapter No. 473

SECTION 72

Item 11. To the Board of Regents for the purpose of allocating such sum to the University of Memphis to operate a higher education enterprise in Jackson, Tennessee, using the Lambuth campus, the sum of \$5,000,000 (non-recurring) from the Revenue Fluctuation Reserve (Rainy Day Fund) and intended as year one (1) of four (4) appropriations of declining amounts, to be available under the following conditions:

(a) It is the legislative intent that the staff of the Tennessee Higher Education Commission shall, in coordination with the Board of Regents, the University of Memphis, and other relevant entities, and in accordance with § 49-7-202(c)(10), conduct a study to determine the feasibility of the state obtaining the facilities, property and assets of Lambuth University. The review shall include, but not be limited to, the condition and value of physical structures and real property, value of other assets and the debt obligations of Lambuth University. The review shall also include an evaluation of the extent that the campus could be utilized to provide postsecondary instruction by one (1) or more public institutions of higher education. No later than August 1, 2011, the Tennessee Higher Education Commission shall report its findings to the Governor, Commissioner of Finance and Administration, and the Chairs of the Senate and House Education and Finance, Ways and Means committees. Such findings shall include a recommendation as to the feasibility of obtaining the assets of Lambuth University, any preconditions that should be met prior to the state obtaining the campus, and specific recommendations on academic HA0613 programs or coursework that one or more public institutions of higher education would provide at the campus. Should the report recommend that the assets of Lambuth University be obtained by the state, the appropriate governing board shall take action pursuant to its by-laws to adopt the report and commit to fulfilling any conditions outlined in the commission's recommendation. The transaction will not become final unless and until the conditions have been met by the appropriate governing board and/or institution, the state building commission approves the acquisition of any real property, and the speakers of both the Senate and House of Representatives approve a budget expansion acknowledging the funding sufficient to pay for the transaction.

(b) The funds appropriated in this item shall be used to subsidize operational costs of the Lambuth campus, it being the legislative intent that these state funds be used as an

initial sum to begin transitioning such campus from a separate funding unit of higher education under the leadership of the University of Memphis into a regular operating unit of the University of Memphis over a period of five (5) years. Funds appropriated within this item shall be used for operating rather than capital purposes. The allotment of funds appropriated by this item shall be subject to approval of the Commissioner of Finance and Administration after the requirements of paragraph (a) of this item are fulfilled and upon certification by the Chancellor that: (a) an operating budget for activities on the Lambuth Campus has been developed by the University of Memphis and approved by the Board of Regents; (b) funds authorized by the State hereunder will not be used for capital purposes; (c) the facilities to be used are made available to the University of Memphis in good serviceable order, without the need for capital maintenance at the time made available, and free and clear from all liens and encumbrances; and, (d) all outstanding debt of Lambuth University has been paid off from non-state sources. No later than January 15, 2012, the Chancellor and President of the University of Memphis shall submit a report to the Governor, Commissioner of Finance and Administration, and Chairs of the Senate and House Education and Finance, Ways, and Means committees summarizing activities, progress, and plans related to accomplishing the legislative intent of this item and accounting for the use of the funds appropriated hereunder and any remaining balance of such funds.

Appendix B

Five-Year Deferred Capital Maintenance and Outlay Projects

Capital Maintenance Proposed Projects

	UT Projects	TBR Projects	Higher Education Projects
2011-12	12	86	98
2012-13	14	25	39
2013-14	14	25	39
2014-15	12	25	37
2015-16	18	14	32

	UT Total	TBR Total	Higher Education Total
2011-12	\$34,320,000	\$86,610,000	\$120,930,000
2012-13	\$40,220,000	\$27,560,000	\$67,780,000
2013-14	\$29,980,000	\$58,710,000	\$88,690,000
2014-15	\$34,850,000	\$62,080,000	\$96,930,000
2015-16	\$36,310,000	\$14,700,000	\$51,010,000

Capital Outlay Proposed Projects

	UT Projects	TBR Projects	Higher Education Projects
2011-12	4	17	21
2012-13	4	10	14
2013-14	5	3	8
2014-15	3	n/a	3
2015-16	3	n/a	3

	UT Total	TBR Total	Higher Education Total
2011-12	\$159,600,000	\$236,650,000	\$396,250,000
2012-13	\$170,400,000	\$199,310,000	\$369,710,000
2013-14	\$105,900,000	\$153,210,000	\$259,110,000
2014-15	\$153,200,000	n/a	\$153,200,000
2015-16	\$76,000,000	n/a	\$76,000,000

Appendix C

2011-12 Capital Maintenance and Outlay Projects

2011-12 Capital Maintenance

UT	THEC Recommendation	Governor's Recommendation	Legislative Action
Projects	21	6	6
Total Amount	\$57,450,000	\$23,920,000	\$23,920,000

TBR	THEC Recommendation	Governor's Recommendation	Legislative Action
Projects	85	26	26
Total Amount	\$85,710,000	\$30,780,000	\$30,780,000

Total Higher Education	THEC Recommendation	Governor's Recommendation	Legislative Action
Projects	106	32	32
Total Amount	\$143,160,000	\$54,700,000	\$54,700,000

2011-12 Capital Outlay

UT	THEC Recommendation	Governor's Recommendation	Legislative Action
Projects	4	0	1
Total Amount	\$159,600,000	\$0	\$4,500,000

TBR	THEC Recommendation	Governor's Recommendation	Legislative Action
Projects	3	0	1
Total Amount	\$182,230,000	\$0	\$6,500,000

Total Higher Education	THEC Recommendation	Governor's Recommendation	Legislative Action
Projects	7	0	2
Total Amount	\$341,830,000	\$0	\$11,000,000

Appendix D

Tennessee Board of Regents Physical Facilities Survey Definitions

Tennessee Board of Regents
Physical Facilities Survey
<http://pfs.tbr.edu/>

The objective of the Physical Facilities Survey is to investigate and document the current condition of all TBR buildings in a uniform format and with a consistent rating system. The survey is based on the CSI UniFormat.

Each campus needs to maintain its PFS information, with appropriate updates when any significant work has been done on a building, there has been a change in the building condition or it during the annual Capital Budget request.

Summary of Scores:

- 100% The "basis rating" if no deficiencies are identified - no funds required.
- 90% Minor repair work is required – probably campus maintenance.
- 80% Repair work required - possibly requiring engineering.
- 70% Upgrade required - replacement of some components.
- 60% System salvageable - major upgrade or significant replacement of components required.
- 50% Partially functions, but ineffective/inappropriate - needs midterm (5 to 10 years) replacement.
- 40% Limited function/reliability - replacement required.
- 30% Low function - serious problems (code/safety) - replacement required.
- 20% Barely functioning - causing other damage - replacement required in near term
- 10% Failed system that needs immediate replacement.
- 0% Does not exist-but is required - totally failed causing serious damage.

Appendix E

Tennessee Board of Regents Fire Protection Consultant Capital Report

BILL WAMSLEY, FIRE PROTECTION CONSULTANT

June 07, 2011

Mr. Carl Manka
Tennessee Board of Regents
Office of Facilities Development
1415 Murfreesboro Rd.
Suite 664
Nashville, TN 37217-2833

Re: Lambuth University
Jackson, Madison Co., TN

Dear Mr. Manka:

As a result of trying to narrow the specific code requirements for the buildings surveyed at Lambuth University in June of 2009, I present to you a list of code issues that in my opinion, must be addressed and resolved prior to occupancy of specific buildings. This list of code issues does not include any of the residential or dormitory buildings, only the administrative, academic and support buildings.

As a result of the narrowing of issues, the following are those that in my opinion as a minimum need to be addressed. However, the State Fire Marshal's Office will make the final determination as to which issues are mandatory for compliance. The data on which my opinions are based are the results of the tour and inspection conducted in June of 2009. Some of the conditions observed during that tour may have changed, been altered or deteriorated further since the report was written. Therefore, the following comments are limited to my findings at that time:

I. Varnell-Jones Building

- A. The ceiling tiles identified as being combustible ceiling tiles located in the stairwells and on the ceiling of the second floor should be completely removed and replaced with new ceiling tiles that are not as combustible in nature as those that are currently in place.
- B. New fire rated doors should replace the current doors used to enclose the exit stairwells in the building. The current doors are not fire rated and contain more glass than is allowed for an exit stair. The new doors should also include new hardware such as self-closing devices and latching hardware.
- C. The building's fire alarm system is currently not extended into the basement level. The fire alarm system should be expanded to include the entire basement.

II. Hyde Hall Science Building

- A. The ceiling tiles located on the walls of the Planetarium also appear to be combustible tiles and should be replaced with tiles that are not as combustible as those already in place.
- B. An additional remote egress door needs to be installed in the lecture hall to provide the required second egress door from the room since the number of seats in the room are currently at 91. Anything over 50 requires at least 2 ways out of that room.
- C. If the existing chemistry labs are going to continue in use, the rooms or spaces to be used as labs need to be separated completely from all other portions of the building by one hour construction. This includes the walls, ceilings and floors.
- D. All flammable and combustible liquids need to be stored in approved flammable liquids storage cabinets.
- E. Emergency lighting needs to be upgraded and or installed throughout the egress and exit systems.
- F. Any exhaust hoods located in any of the laboratory units that use flammable and combustible liquids should have the exhaust hoods replaced.

- G. The enclosure of the exit stairwells is causing the doors opening onto the stairwell to encroach upon the distance to the stair treads and risers. In some instances, the distance between the door when opened to be within 1 ½ to 3 inches.

III. Theater Building

- A. Emergency lighting needs to be upgraded and new fixtures need to be installed throughout the auditorium and egress and exit systems.
- B. The workroom where stage scenery is made and painted and where the scenery and flammable liquids are stored needs to be completely enclosed with materials providing a one hour fire rating as well as being provided with a sprinkler system.

IV. Art Building

- A. Provide properly enclosed storage cabinets or rooms for all flammable and combustible liquids and materials.

V. Wilder Student Union Building

- A. The kitchen hood and duct system should be replaced prior to any cooking.
- B. The exit stair from the second floor needs to be reconfigured so that the exit routes are clearly marked and provide a fire rated enclosure to the outside of the building.
- C. The fire alarm system needs to be upgraded or replaced so that it is in proper working condition.
- D. All dead bolt locks need to be removed from all exit and egress doors throughout the building.
- E. All penetrations through the walls and ceiling of the boiler room need to be sealed completely so there are no opening around the penetrations.

- F. Emergency lighting needs to be upgraded in the egress corridor and exit stairwell systems and in the cafeteria.
- G. The enclosure of the exit stairwells needs to be altered so that the doors into the stairwell, when fully opened does not encroach upon the first riser of the stair (when door is opened, it is too close to the edge of the stair).

VI. Gobbel Library

- A. The exit stair at the rear of the building needs to be reconfigured so that the stair enclosure is continuous to grade on all levels of the building.
- B. The penetrations through the boiler room walls need to be sealed tightly to maintain the fire rated separation.
- C. Stairwell doors need to be replaced with fire rated doors and hardware.

VII. Athletic Center Building

- A. The dead end corridor that leads back to the Dance Studio needs to be eliminated.
- B. Doors to the exit stairwells need to be installed or replaced so that the fire rated enclosures are maintained. Where new doors are being installed, they need to meet the proper minimum widths. Existing doors to stairwells are only 30 inches in width.
- C. The corridor systems serving the second floor need to be separated from the vertical opening created by the gymnasium.
- D. Handrails need to be provided on the exterior stairs of the building.
- E. The doors that are in the stairwells and where the door encroaches too closely to the stair treads and risers need to be altered so that the door does not open too close to the steps.
- F. A remote fire alarm control panel needs to be installed in the building so that it is visible to the occupants of the building.

VIII. Chapel Building

- A. No work necessary at this time.

IX. Campus Wide Infrastructure

- A. Since the building will be changing from a privately owned university to a State owned university, ADA and accessible accommodations will be required to be made throughout the campus. This includes parking, accessible routes to buildings, restrooms within the buildings, etc.
- B. Ensure that all existing fire protection and life safety systems are working properly and in operating condition. These include any sprinkler systems, fire alarm systems, emergency lighting systems and smoke detection systems.

This concludes my opinions and recommendations of the work that should be addressed prior to occupancy of the above buildings. If you should have any questions or comments, please do not hesitate to ask.

BILL WAMSLEY, FIRE PROTECTION CONSULTANT

July 05, 2011

Mr. Carl Manka
Tennessee Board of Regents
Office of Facilities Development
1415 Murfreesboro Rd.
Suite 664
Nashville, TN 37217-2833

Re: Dormitory Issues
Lambuth University
Jackson, Madison Co., TN

Dear Mr. Manka:

On June 07, 2011 I sent you information regarding code conditions for the administrative, academic and other support buildings but with the exception of the residential buildings on the campus of Lambuth University. The code conditions were narrowed from the original conditions found during the June 2009 inspection and survey of the campus to include only the most important and severe conditions as it relates to fire and life safety issues.

This report is intended to address only fire and life safety conditions found in the residential buildings on campus. Since there was no report required for the residential buildings after the 2009 surveys were performed, this report is intended to identify those conditions. As presented in the June 2011 report, the conditions identified in this report are based upon the requirements for existing buildings as outlined in the Life Safety Code. The State Fire Marshal's Office may have a differing opinion than those I am listing in my report. However, it is my opinion that the conditions addressed in this report should be the most critical of the conditions present in each building. There are other conditions present that do not present the concern that those listed in this report present, but for the purposes of this report they are not included. Therefore, the following conditions are those that I consider to be the most critical to address when attempting to determine which conditions should be addressed initially:

I. Oxly Square Apartments

- A. The sprinkler system serving these apartments did not appear to have been maintained as well as it should have been. The sprinkler riser serving the building was located in a closet in one of the individual apartments. The sprinkler system should be completely re-evaluated by a licensed sprinkler contractor. If exceptions are being provided for other code requirements in the building, it is important to know that the system is performing as it was originally designed to do.

2. Spangler Dormitory

- A. The building is not sprinklered. Due to the number and type of code violations discovered in this dormitory building, it is my opinion that this building should be fully sprinklered.
- B. The doors to the individual sleeping rooms from the corridor have no self-closing devices. Since the corridor walls are required to be fire rated for 30 minutes and smoke tight, all doors opening onto the corridor need to have self-closing devices installed on each door. The doors in the corridor walls need to be closed at all times when not in use.
- C. The door to the laundry room in the basement was missing at the time of the survey.
- D. There are also several piping and conduit penetrations located in the corridor walls. The annular spaces (space around the actual penetration) are not sealed tightly. The lack of being sealed will allow smoke, toxic fumes and other products of combustion to enter into the corridor systems in the event of a fire in one of the adjacent rooms. This will contaminate the corridor systems and could prevent their use when attempting to evacuate the building.
- E. At the time of the survey in 2009, the fire alarm control panel for the building was in the trouble mode. This means that some event caused the panel to show a problem in its circuitry. The fire alarm system should be completely inspected and evaluated by a licensed fire alarm contractor before re-occupying the building.

- F. The only fire alarm pull stations found in this building were located in the basement. Pull stations are required immediately adjacent to each exit stairwell door on each floor.
 - G. The exit stairs serving all four stories of this building do not discharge to the outside of the building as required.
 - H. The corridor systems in this building appear to be used as a return air plenum which is not permitted in a dormitory building that is not sprinklered.
3. Harris Hall Dormitory
- A. This building is not sprinklered and is 4 stories in height.
 - B. The laundry room on the lowest level opens into one of the required exit stairwells. A laundry room is not permitted to open into an exit stairwell.
 - C. The walls forming the corridors in this building do not extend tight to the floors above. Since the corridors are required to be smoke tight, the wall arrangement does not provide the required smoke tight separation between the corridor systems and the adjacent rooms and spaces.
 - D. The corridor systems in this building appear to be used as a return air plenum which is not permitted in a dormitory building that is not sprinklered.
 - E. Even though it is my opinion that this building should be sprinklered, the code issues in this building could be resolved without having to be sprinklered.
4. Sprague Hall Dormitory
- A. This building is not sprinklered and is 4 stories in height. As with Harris Hall, it is my opinion that this building should be sprinklered but the code conditions could be resolved without having to install a sprinkler system.

- B. The corridor systems in this building are not fire rated and the walls do not extend up to the floor systems above. There are also penetrations through the walls in the corridors that are not sealed.
 - C. The corridor systems in this building are being used as a return air plenum. Doors to sleeping rooms are equipped with ventilating louvers which does not provide for a smoke tight separation.
 - D. The exit stairs from this building do discharge to the outside of the building.
5. Carney Johnston Dormitory

This building was unavailable to inspect at the time of the survey due to the building being occupied by a beauty pageant.

Please be aware that due to the time restraints encountered during the survey in June of 2009 neither Carney Johnston dormitory nor Sprague Hall could be revisited due to time restraints. However, in Sprague Hall most of the code conditions were identified and addressed. There were some areas I needed to revisit on the following day of the survey but could not due to the time restraints. Even though I have stated for some of the buildings that the identified code conditions could be resolved without the use of a sprinkler system, which is not mandated by the Life Safety Code for existing dormitory buildings, it is my opinion that each of the dormitory building should be sprinklered, at some point in the near future and at least in the long term plan. Residential buildings are the most critical to have sprinklered since the occupants are sleeping. In addition, most fire occur in residential buildings and are the source of greatest number of fire related deaths.

This concludes my comments on the dormitory buildings and the apartment building at Lambuth University. If you should have any questions or comments regarding the content of this report, please let me know.

Sincerely,

Bill Wamsley
Fire Protection Consultant

Appendix F

Tennessee Board of Regents ADA Consultant Accessibility Review



Lambuth University
ADA Assessment

Barry Bonifay, ADA consultant at the request of the Tennessee Board of Regents – visited the Lambuth University Jackson, Tennessee campus on Wednesday, June 29, 2011.

Barry met with Gary Williams with physical plant at Lambuth who showed him around campus and through buildings there. The following observations were made regarding compliance with the Americans with Disability Act of 1994.

Initial contact with the Department of Justice regarding program accessibility revealed that change in ownership of the campus and change from private to public would not trigger any additional minimum requirements for compliance with Title II for program accessibility and Title III for public accommodation issues. The general rule of requiring one of each type of program or program element will apply to this campus - if purchased by TBR. This report will address what will need to be changed, altered, or added to meet minimum requirements in the building and site to offer programs on this campus.

The compliance is tied to programs and not necessarily buildings. For example, basement and 2nd floor at Student Center Building (3) are not accessible. Classrooms are located on these floors, but there is no elevator in this building. Under Title II, a state school can hold classes in their classrooms, as is. When an HC student (wheelchair) registers for a class held on these floors, the school is allowed to move the class to a classroom in an accessible building. This is the current strategy at most state colleges owned by TBR.

Site:

The campus generally scores well on accessible paths from the street and then to all campus buildings. Two long sidewalks that run east-west along north and south side of the campus commons are in fair condition with only one section at the Student Center, Building 3 needing repair. This walk generally maintains a 1:20 running slope to connect campus building along this path together. The criss-cross paths across the commons exceed allowable slopes. There is also no accessible connector to connect the main campus to the tennis courts, Burkett Softball Field(17), Hamilton Performing Arts Center (12), or Oxley Commons Housing, or Art Building 6. These buildings are served by site arrival points (parking lots) that are potentially compliant by installation of compliant HC parking at these existing parking lots.

Parking:

Lambuth University has 655 parking spaces on campus. There are currently 5 HC spaces with none marked 'van accessible'. The required number, if this was a publicly owned

university, would be thirteen HC with two van spaces. The existing parking lots are relatively flat which would make it easy to locate, stripe, and sign the required spaces, dispersed on the perimeter of the existing campus. Available accessible paths will need to be considered when locating these HC parking spaces.

Buildings:*A. General*

1. Most buildings lack compliant door hardware. Only one floor of main Admin/Classroom Building (9) has had door hardware update.
2. Almost all drinking fountains on campus are very old and at non-compliant heights.
3. In many buildings, there are double-leaf doors where neither dial will meet minimum door widths. The most practical solution is to replace double leafs with compliant single leaf and smaller fixed leaf or side light. This is only required on room where accessible programs will be held. This would include common areas and conference rooms or meeting rooms.
4. Most toilet rooms that I report as needing minimal corrections involve lowering mirrors, relocating dispensers, or lowering sink or urinal.

*B. Academic Buildings***Varnier-Jones Hall (9)**

1. Elevator will only need minor upgrades – meets size requirements
2. Registrar desk will need HC section
3. HC toilet rooms on third floor only and one compliant unisex HC toilet on lower floor. Minor adjustments will be needed in the HC toilet rooms and directional signage located at non-HC toilets.
4. Only classrooms on third floor have accessible door hardware. Since this building is in pretty good shape, I recommend all classroom, office, and common room doors be refitted with HC door hardware.
5. First floor toilets are too small to make accessible.
6. Second floor toilet rooms have the space to be made accessible. Doors to rooms will need to be reversed (swing) to provide door maneuver space.
7. Recommend toilet rooms on third floor and unisex in basement be cleaned up to provide minimum one HC toilet of each sex for building and signs be posted, directing HC to these toilets via elevator. Also, sign in lobby on first floor stating CH toilet rooms on third floor.
8. Campus connector from this building to common area buildings is through two egress doors on basement level, via elevator. Both doors are accessed by small ramps with slopes that slightly exceed minimum requirement.
9. Stair handrails do not meet existing code, but ADAAG will not require those be brought into compliance.

Hyde Science Building (10)

1. Entry ramp – slope okay – will need compliant handrails. The lower level has two entrances that are either accessible or could be made accessible with minimum upgrades.
2. Elevator is too small for compliance and will need to be replaced to use all floors of this building.
3. Doors throughout building are under-sized – either single doors with less than 32” clear width or double-leaf doors where neither leaf has minimum width.
4. Toilet rooms can be made accessible with two on lower level being best cost choice to fix. All toilet rooms have under-sized doors. To use this building, wider doors will be needed at men and women toilets on lower level and a single HC stall installed where two toilets are now. Non-HC toilets and lobby will need directional signage directing HC to toilets on lower level.
5. One lab of each type offered will need to have doors addressed as well as lecture hall on second floor with fixed seating. The demo station counters are not at accessible heights and most labs do not have accessible student work stations. In some labs with lower tables, knee access can be easily obtained by a slight alteration to furniture.
Lambuth currently uses adjustable height rolling workstations as desks or lab tables. This may reasonable accommodation in most cases under Title II except where gas lines or water lines that are present in many lab tables must be used 5% or minimum one lab work station should be made accessible in each lab (minimum one lab of each type)
6. Greenhouse off of biology lab has door threshold-height issue which could be easily fixed if this room is to be used as HC program. A sink no more than 34” would be required in greenhouse.
7. Main issue to use Hyde Hall
 - a. Elevator needed
 - b. Toilet room doors too small
 - c. Double-leaf doors, too many classrooms or conference rooms will need single HC leaf installed.
 - d. HC workstations minimum 1 or 5%.

Note – The university could invest in one portable demonstration counter for HC instructors that could be moved to needed room, when HC instructor is hired.

Wilder College Union (3)

1. Three floors –the basement and second floor are not accessible (no elevator)
2. Ramp to building – slope okay, HC handrails need to be installed.

3. Coffee-vending area lacks HC section
4. One HC unisex toilet allows this floor to be accessible
5. Other existing toilets on this floor have under-sized doors and lack HC stalls. The rooms are large enough to be made accessible in the future.
6. Single and double-leaf doors to many rooms on first floor are not compliant width.
7. To use building, add HC door hardware, first floor to all common areas, toilet rooms, or rooms where programs held. Classes on lower and second levels can be relocated to HC accessible building on an as-needed basis. Add signage to non-HC toilets on first floor only directing to unisex HC toilets

Lambuth Theater – Hamilton Performing Arts Center (12)

1. Building was updated approximately 5 years ago.
2. Toilet rooms generally in good shape with minor corrections needed at some point.
3. Accessible entrance and path from parking lot south of building. No HC parking for this building, which is also under public accommodation rules.
4. Ticket info desk, no HC section. A folding shelf can easily be added to make compliant.
5. Theater style fixed seating – interior ramp to upper seating level to provide multiple views of stage. This ramp has a few design errors that may be correctable. Only one handrail, lower portion of ramp. Ramp run is a little over 30' before the intermediate landing. Less than 36" between handrails. I think we could make a case for leaving this ramp as-is after installing second handrail on lower run.
6. No HC access to stage for users or audience. Portable lift for this school may solve issue in more than one location.
7. HC wheelchair locations and companion seating provided – lower and upper levels. May have very minor issues, but generally will pass muster for existing buildings.

Athletic Center (1)

1. Elevator in this building in under-sized.
2. No compliant HC ramp at east entrance to building.
3. Doors throughout, including toilet rooms, undersized.
4. Public toilet rooms on second level are easy to make accessible once compliant doors are installed and rise in elevator at entry doors is handled.
5. Swimming Pool – not accessible, will need to provide ramp on left to be accessible per current law.
6. Bleach seating – no HC bleacher seating area in gym.
7. Did not look at locker room areas.
8. All interior walls concrete block.
9. This building will be very costly to make accessible.
10. Building generally not on accessible path and has no HC parking available.

Gobbel Library (8)

1. Library has three floors.
2. Ramp slope okay, intermediate land size 60"x60" can be corrected when new handrails are installed (space is there for a compliant landing)
3. Public toilet rooms on lower and upper floor, second level toilet rooms can be made accessible with wider doors and minor corrections.
4. For library to be accessible, an elevator will need to be installed.

R.E. Womack Chapel (4)

1. Ramp installed over five years ago. Slope okay. Run exceeds 30' with no intermediate landing. Does not deny access to wheelchair person.
2. No access to rear portion of building or second floor. Rear portion includes stage level and toilet rooms. Toilet rooms lack compliant door width.
3. To make building accessible interior ramp and doors to toilet rooms, plus minor toilet room adjustments will be needed.
4. I think exterior ramp could be left as-is.

Dormitories – built 50s through 60s

1. Of the 4 dormitories located on the Lambuth commons, none are accessible. Only Carney-Johnston Hall (2) has an HC ramp to get into the lobby.
2. All rooms and toilet rooms, all floors, have under-sized doors. Concrete block with metal door frames are common throughout.
3. Public toilet rooms in lobbies are too small to be made accessible.
4. To use any one of these dorms, the following would need to be provided:
 - a. HC Entrance
 - b. HC toilets in lobby area
 - c. Accessible common area – some dorms have sunken common rooms
 - d. For 100 room dorms, minimum 5 HC rooms
 - e. For 50 room dorms, minimum 2 HC rooms
 - f. All elements offered- rec room, laundry, common area, and HC rooms must be on ground level if not elevator is installed in building.

Note: As a state-owned school, if you made one dorm accessible, then the others could be left as-is except for having an HC accessible lobby, which would mean ramps and HC toilets accessible to lobby. This of course would only apply to dorm actually opened for use.

Oxley Apartments (14)

1. In addition to four dorms, Lambuth also owns some townhouse units used as dormitory rooms with no kitchens. They also own five fraternity/sorority houses. I did not look at the frat/sorority houses.

Oxley has four units with HC rooms and HC bath/toilet rooms. The toilet rooms need only minor corrections. The sidewalk leading to units constitute non-accessible ramps. This also can be easily corrected with a common sidewalk running along parallel to front of unit and hooked up to accessible path to HC parking which will need to be provided.

Conclusion:

TBR could operate Oxley with minimum investment of funds and not open other dormitories until funding was available to bring minimum one into compliance.

Overall Conclusion:

You could open up for programs at Lambuth using buildings 9, 10 and 3. Building 10 would need new elevators and door widened, Building 3 would need doors widened on first floor only. All 3 buildings would need new ramp handrails.

Building 12 can be used as large lecture hall if needed with no additional work.

Building 4 could also be used if interior ramp and toilet room doors are widened.

Hope this helps.

End of Review



Building and Outdoor Facility Legend (FIGURE 1.7)

Buildings

- 1 - Athletic Center
- 2 - Carney-Johnston Hall
- 3 - Wilder Student Union
- 4 - R.E.Womack Memorial Chapel
- 5 - Mary Girven Harris Hall
- 6 - Art Building
- 7 - E.W. Sprague Hall
- 8 - Gobbel Library
- 9 - Varnell-Jones Hall
- 10 - Joseph Reeves Hyde Hall

- 11 - George Ellis Spangler Hall
- 12 - Hamilton Performing Arts Center
- 13 - Epworth Hall
- 14 - Oxley Commons
- 16 - Christian Life Center

Outdoor Athletic Facilities

- 15 - Soccer Field
- 17 - Burkett Softball Field
- 18 - LL Fonville Football Stadium
- 19 - Football Practice
- 20 - Baseball Stadium
- 21 - Arlington Softball Field



PLAN NORTH

0ft 200ft 400ft
SCALE: 1" = 400'-0"

Appendix G

Lambuth Campus Funding Formula Impact Methodology

THEC staff estimated the state appropriations projected to be attributable to a UM campus at Lambuth by adding projected outcomes and actual E&G square footage associated with Lambuth to the UM outcomes formula. This allows THEC to determine what portion of the UM state allocation in any given year is attributable to activities at the Lambuth location.

Assumptions

- Annual outcome data, rather than a three-year average, was utilized for Lambuth projections; the three-year average methodology will be utilized at a later time.
- All other University and Community College outcomes do not change.

Estimation of Outcomes

- Lambuth outcomes were estimated using FTE projections provided by TBR.
- The projections through 2012-13 include the outcomes produced through 2009-10 at the UM-Jackson location. Beginning with the 2013-14 formula, which utilizes 2011-12 data, UM Lambuth outcome data will be used.
- Outcome production was assumed to be equivalent to:

Outcome	Assumes Production is Equivalent To:
Student Progression	UM Production per Undergraduate FTE
Bachelors and Associates Degrees	UM Production per Upperclassman FTE
Masters Degrees	UM Production per Graduate FTE
Transfers	UM Production per Undergraduate FTE
Doctoral Degrees and Research	Projected to be Zero
Degrees/FTE and Grad Rate	Current UM Rates

Estimation of Fixed Costs

- M&O and Utilities were calculated using the same E&G square foot rate as UM.
- Equipment Replacement assumed the same equipment per FTE amount as UM.

Final Funding Projections				
FY	Data Year	Total UM Estimated Appropriations with Lambuth/Jackson	Overall UM Change	Funding Due to Lambuth/Jackson
2011-12	2009-10	\$82,760,000	\$0	\$603,000
2012-13	2010-11	83,502,000	742,000	1,345,000
2013-14	2011-12	83,792,000	1,032,000	1,635,000
2014-15	2012-13	84,464,000	1,704,000	2,307,000
2015-16	2013-14	85,243,000	2,483,000	3,086,000
2016-17	2014-15	85,552,000	2,792,000	3,395,000
2017-18	2015-16	86,328,000	3,568,000	4,171,000

Appendix H

Tennessee Board of Regents Lambuth Facilities Review

Lambuth University – Building Summary

In 2009, staff of THEC, TBR, and UoM as well as professional consultants completed a facilities assessment of the Lambuth campus. At that time, the staff's determined that the condition of facilities, including the level and quality of maintenance of the campus, was comparable to that of other TBR institutions. While the TBR staff has not assessed the campus since the initial 2009 visit, the UoM facilities staff has visited the campus on multiple occasions during 2011. Based on their observations and discussion with maintenance staff at Lambuth, they conclude that the maintenance and operation of the Lambuth facilities has been consistent since the initial 2009 visit.

This building condition assessment summary focuses on Life/Safety/Code and ADA issues and was developed from the following sources:

- Life/Safety/Code information was developed by Bill Wamsley, the TBR Code Consultant, based on his campus visit with the evaluation team in 2009. Mr. Wamsley has pointed out that he has identified items that would likely be of interest to the State Fire Marshal. The final determinations for life safety items lie with the State Fire Marshal's office. Mr. Wamsley's full report is attached;
- ADA information is based on a report from Mr. Barry Bonifay, the TBR Accessibility Consultant, who was contracted to perform a 2011 site assessment to identify possible barriers that would affect accessibility. Mr. Bonifay noted that providing accessible programs which include access to labs, classrooms, meeting rooms, offices, and other spaces may be accomplished by planning and programming of existing identified accessible spaces without requiring additional improvements to facilities. Mr. Bonifay's full report is attached;
- UoM facilities staff assessment of the need for various minor repairs.

At THEC's request, TBR and UoM staffs, with assistance from the consultants, have developed a cost estimate for each building based on the items outlined in the summary. These cost estimates should only be used to develop a general sense of the potential magnitude of the tasks involved and are subject to significant change. Specifically note that these estimates are not the result of a detailed cost estimation process. These estimates are qualified as follows:

- These costs do not take into consideration Mr. Bonifay's opinion that a number of ADA issues identified can be resolved if spaces are planned or programmed in a way that meet accessibility requirements, meaning these estimates assume that every issue identified would need to be addressed through some modification to a facility. To the

degree that ADA issues can be met programmatically, the cost estimates within this assessment overstate the potential requirement;

- Many items noted are interrelated, particularly pertaining to ADA issues. For example, resolving an ADA issue in one building may address ADA issues in other buildings (if sufficient ADA compliant classrooms are made available in building A, then non-compliance in other buildings may be met programmatically by scheduling classes requiring accessibility to be held in building A). To the extent this is possible, the cost estimates within this assessment overstate the potential requirement. It should be noted that TBR institutions widely engage in the practice of scheduling classes and events to meet ADA accessibility requirements;
- Mr. Wamsley's report states that the final determination on what constitutes a Life/Safety/Code item and how those items are addressed rests with the State Fire Marshal. To the extent Mr. Wamsley's report includes items not considered essential by the State Fire Marshal, these estimates overstate the potential requirement; however, to the degree the State Fire Marshal identifies conditions requiring attention that were not identified by Mr. Wamsley, then these estimates may understate the potential requirement.
- These estimates are based on staff knowledge of the costs for facilities renovations within the processes employed by the TBR and State Building Commission. Assuming whatever facilities conditions need to be addressed are managed through processes engaged in by the Stakeholders or others, these estimates may overstate or understate the actual costs.

It is also noted that reports by Mr. Wamsley and Mr. Bonifay include an assessment of dormitories at Lambuth and that this summary includes cost estimates for those facilities. However, within both of Tennessee's public higher education systems, dormitories are considered auxiliaries enterprises. As such, the cost of construction, renovation, operation, maintenance must be fully recovered through fees and charges assessed by residents using the dormitories.

Site: Projected value of all improvements if required

\$75,000

The criss-cross paths across the commons exceed allowable slopes. There is also no accessible connector to connect the main campus to the tennis courts, Burkett Softball Field (17), Hamilton Performing Arts Center (12), or Oxley Commons Housing, or Art Building (6).

Parking: Projected value of all improvements if required

\$500

Lambuth University has 655 parking spaces on campus. There are currently 5 HC spaces with none marked 'van accessible'. The required number, if this was a publicly owned university, would be thirteen HC with two van spaces. Available accessible paths will need to be considered when locating these HC parking spaces.

Buildings:	Projected value of all improvements if required
\$237,000	

C. General

5. Most buildings lack ADA compliant door hardware. Only one floor of main Admin/Classroom Building (9) has had door hardware update. (refer to buildings)
6. Almost all drinking fountains on campus are very old and at non-compliant heights. (refer to buildings)
7. In many buildings, there are double-leaf doors where neither door will meet minimum door widths. (refer to buildings)
8. Most toilet rooms that are reported as needing minimal corrections involve lowering mirrors, relocating dispensers, or lowering sink or urinal. (refer to buildings)
9. Ensure that all existing fire protection and life safety systems are working properly and in operating condition. These include any sprinkler systems, fire alarm systems, emergency lighting systems and smoke detection systems. (protection of assets and people occupied or unoccupied)
10. Campus wide: correct low Freon issues on chillers / compressors. (refer to buildings)
11. Eliminate sidewalk tripping hazards from unlevel joints or seriously deteriorated portions. (multiple locations)
12. Various Buildings on quad: Repair front façades, peeling paint. (refer to buildings)
13. Demolition of Epworth Hall needs to be accomplished, 3 story 17,225 square feet. (Abatement and demolition included at \$125,000 is dependent on risk assessment for safety/ security or need for additional parking)
14. Removal of hazardous waste, chemicals, e-waste, universal waste as well as numerous small radioactive sources. (Removal included at \$100,000 dependent on EPA report and necessary compliance action)
15. Resolve outstanding EPA violations and potential fine. (see above)

D. Academic Buildings (E&G)

<u>Varner-Jones Hall (9)</u>	Projected value of all improvements if required
\$146,600	

10. Elevator will only need minor upgrades – meets size requirements.
11. Registrar desk will need HC section.
12. HC toilet rooms on third floor only and one compliant unisex HC toilet on lower floor. Minor adjustments will be needed in the HC toilet rooms and directional signage located at non-HC toilets.

13. Only classrooms on third floor have accessible door hardware. All classroom, office, and common room doors will need to be refitted with HC door hardware. (See item 12)
14. First floor toilets are too small to make accessible.
15. Second floor toilet rooms have the space to be made accessible.
16. The ceiling tiles identified as being combustible ceiling tiles located in the stairwells and on the ceiling of the second floor should be completely removed and replaced with new ceiling tiles that are not as combustible.
17. New fire rated doors should replace the current doors used to enclose the exit stairwells in the building. The current doors are not fire rated and contain more glass than is allowed for an exit stair. The new doors should also include new hardware such as self-closing devices and latching hardware.
18. The fire alarm system should be expanded to include the entire basement.
19. Replace deteriorated and missing exterior cornice, south portion has been removed.
20. HVAC system has no fresh air component and uses corridors for return air.
21. Update to ADA compliant door hardware and drinking fountains

Hyde Science Building (10)
\$754,700

Projected value of all improvements if required

8. Entry ramp will need compliant handrails.
9. Elevator is too small for compliance and will need to be replaced to use all floors of this building.
10. Doors throughout building are under-sized – either single doors with less than 32” clear width or double-leaf doors where neither leaf has minimum width.
11. To use this building, wider doors will be needed at men and women toilets on lower level and a single HC stall installed where two toilets are now.
12. One lab of each type offered will need to have doors addressed as well as lecture hall on second floor with fixed seating. The demo station counters are not at accessible heights and most labs do not have accessible student work stations.
13. Greenhouse off of biology lab has door threshold-height issue. A sink no more than 34” would be required in greenhouse.
14. The ceiling tiles located on the walls of the Planetarium also appear to be combustible tiles and should be replaced with tiles that are not as combustible.
15. An additional remote egress door needs to be installed in the lecture hall to provide the required second egress door from the room since the number of seats in the room are currently at 91.
16. If the existing chemistry labs are going to continue in use, the rooms or spaces to be used as labs need to be separated completely from all other portions of the building by one hour construction. This includes the walls, ceilings and floors.

17. All flammable and combustible liquids need to be removed from the site or stored in approved flammable liquids storage cabinets.
18. Emergency lighting needs to be upgraded and or installed throughout the egress and exit systems.
19. Any exhaust hoods located in any of the laboratory units that use flammable and combustible liquids should have the exhaust hoods replaced.
22. The enclosure of the exit stairwells is causing the doors opening onto the stairwell to encroach upon the distance to the stair treads and risers. In some instances, the distance between the door when opened to be within 1 ½ to 3 inches.
23. Update to ADA compliant door hardware and drinking fountains
24. Correct low refrigerant issues on cooling equipment.
25. Repair front façades, peeling paint.

Wilder College Union (3)
\$801,000

Projected value of all improvements if required

8. Three floors –the basement and second floor are not accessible (no elevator)
9. Coffee-vending area lacks HC section
10. Single and double-leaf doors to many rooms on first floor are not compliant width.
11. To use building, add HC door hardware, first floor to all common areas, toilet rooms, or rooms where programs held
12. The kitchen hood and duct system should be replaced prior to any cooking.
13. The exit stair from the second floor needs to be reconfigured so that the exit routes are clearly marked and provide a fire rated enclosure to the outside of the building.
14. The fire alarm system needs to be upgraded or replaced so that it is in proper working condition.
15. All dead bolt locks need to be removed from all exit and egress doors throughout the building.
16. All penetrations through the walls and ceiling of the boiler room need to be sealed completely so there are no openings around the penetrations.
17. Emergency lighting needs to be upgraded in the egress corridor and exit stairwell systems and in the cafeteria.
18. The enclosure of the exit stairwells needs to be altered so that the doors into the stairwell, when fully opened does not encroach upon the first riser of the stair
19. Update to ADA compliant door hardware and drinking fountains.
20. Correct low refrigerant issues on cooling equipment.

Lambuth Theater – Hamilton Performing Arts Center (12)**Projected value of all improvements if required****\$37,250**

8. Toilet rooms need minor corrections.
9. No HC parking for this building, which is also under public accommodation rules.
10. Ticket info desk, no HC section.
11. No HC access to stage for users or audience.
12. Emergency lighting needs to be upgraded and new fixtures need to be installed throughout the auditorium and egress and exit systems.
13. The workroom where stage scenery is made and painted and where the scenery and flammable liquids are stored needs to be completely enclosed with materials providing a one hour fire rating as well as being provided with a sprinkler system.
14. Provide properly enclosed storage cabinets or rooms for all flammable and combustible liquids and materials.
15. Replace 2 5-ton compressors.
16. Update to ADA compliant door hardware and drinking fountains

Athletic Center (1)**Projected value of all improvements if required****\$570,600**

11. Elevator in this building in under-sized.
12. No compliant HC ramp at east entrance to building.
13. Doors throughout, including toilet rooms, undersized.
14. Swimming Pool – not accessible, will need to provide ramp on left to be accessible per current law.
15. There are no HC bleacher seating area in gym.
16. Building generally not on accessible path and has no HC parking available.
17. The dead end corridor that leads back to the Dance Studio needs to be eliminated.
18. Doors to the exit stairwells need to be installed or replaced so that the fire rated enclosures are maintained. Where new doors are being installed, they need to meet the proper minimum widths. Existing doors to stairwells are only 30 inches in width.
19. The corridor systems serving the second floor need to be separated from the vertical opening created by the gymnasium.
20. Handrails need to be provided on the exterior stairs of the building.
21. The doors that are in the stairwells and where the door encroaches too closely to the stair treads and risers need to be altered so that the door does not open too close to the steps.

22. A remote fire alarm control panel needs to be installed in the building so that it is visible to the occupants of the building.
23. Pool drain safety kit, pool filters, pumps to be made operational.
24. Update to ADA compliant door hardware and drinking fountains.
25. Repair front façades, peeling paint.

Gobbel Library (8)**Projected value of all improvements if required****\$611,500**

5. Public toilet rooms on lower and upper floor, second level toilet rooms can be made accessible with wider doors and minor corrections.
6. For library to be accessible, an elevator will need to be installed.
7. The exit stair at the rear of the building needs to be reconfigured so that the stair enclosure is continuous to grade on all levels of the building.
8. The penetrations through the boiler room walls need to be sealed tightly to maintain the fire rated separation.
9. Stairwell doors need to be replaced with fire rated doors and hardware.
10. Repair wood trim on front fascia.
11. Repair flat roof area.
12. Update to ADA compliant door hardware and drinking fountains.

R.E. Womack Chapel (4)**Projected value of all improvements if required****\$224,500**

5. No access to rear portion of building or second floor. Rear portion includes stage level and toilet rooms. Toilet rooms lack compliant door width.
6. To make building accessible interior ramp and doors to toilet rooms, plus minor toilet room adjustments will be needed.
7. Repair ridge vent.
8. HVAC system has no fresh air component.
9. Update to ADA compliant door hardware and drinking fountains.

E. Residential Buildings (Auxiliary)**Dormitories – built 50s through 60s**

**Projected value of all improvements if required
\$500,000**

5. Of the 4 dormitories located on the Lambuth commons, none are accessible. Only Carney-Johnston Hall (2) has an HC ramp to get into the lobby.
6. All rooms and toilet rooms, all floors, have under-sized doors. Concrete block with metal door frames are common throughout.
7. Public toilet rooms in lobbies are too small to be made accessible.
8. To use any one of these dorms, the following would need to be provided:
 - a. HC Entrance
 - b. HC toilets in lobby area
 - c. Accessible common area – some dorms have sunken common rooms
 - d. For 100 room dorms, minimum 5 HC rooms
 - e. For 50 room dorms, minimum 2 HC rooms
 - f. All elements offered- rec room, laundry, common area, and HC rooms must be on ground level if not elevator is installed in building.

Spangler Dormitory
\$497,500

Projected value of all improvements if required

1. The building does not have a sprinkler system. Due to the number and type of code violations discovered in this dormitory building, this building should have a sprinkler system.
2. The doors to the individual sleeping rooms from the corridor have no self-closing devices. Since the corridor walls are required to be fire rated for 30 minutes and smoke tight, all doors opening onto the corridor need to have self-closing devices installed on each door. The doors in the corridor walls need to be closed at all times when not in use.
3. The door to the laundry room in the basement was missing at the time of the survey.
4. There are also several piping and conduit penetrations located in the corridor walls. The annular spaces (space around the actual penetration) are not sealed tightly. At the time of the survey in 2009, the fire alarm control panel for the building was in the trouble mode. The fire alarm system should be completely inspected and evaluated by a licensed fire alarm contractor before re-occupying the building.
5. The only fire alarm pull stations found in this building were located in the basement. Pull stations are required immediately adjacent to each exit stairwell door on each floor.

6. The exit stairs serving all four stories of this building do not discharge to the outside of the building as required.
7. The corridor systems in this building appear to be used as a return air plenum which is not permitted in a dormitory building that does not have a sprinkler system.
8. Update to ADA compliant door hardware and drinking fountains.
9. Repair front façades, peeling paint.

Harris Hall Dormitory**Projected value of all improvements if required****\$342,000**

1. This building does not have a sprinkler system and is 4 stories in height.
2. The laundry room on the lowest level opens into one of the required exit stairwells. A laundry room is not permitted to open into an exit stairwell.
3. The walls forming the corridors in this building do not extend tight to the floors above. Since the corridors are required to be smoke tight, the wall arrangement does not provide the required smoke tight separation between the corridor systems and the adjacent rooms and spaces.
4. The corridor systems in this building appear to be used as a return air plenum which is not permitted in a dormitory building does not have a sprinkler system.
5. Update to ADA compliant door hardware and drinking fountains.

Sprague Hall Dormitory**Projected value of all improvements if required****\$444,000**

1. This building does not have a sprinkler system and is 4 stories in height. As with Harris Hall, this building should have a sprinkler system.
2. The corridor systems in this building are not fire rated and the walls do not extend up to the floor systems above. There are also penetrations through the walls in the corridors that are not sealed.
3. The corridor systems in this building are being used as a return air plenum. Doors to sleeping rooms are equipped with ventilating louvers which does not provide for a smoke tight separation.
4. The exit stairs from this building do discharge to the outside of the building.
5. Update to ADA compliant door hardware and drinking fountains.
6. Repair front façades, peeling paint.

Carney Johnston Dormitory**Projected value of all improvements if required****\$500,000**

This building was unavailable to inspect at the time of the survey due to the building being occupied.

Oxley Apartments (14)**Projected value of all improvements if required****\$5,500**

2. The sprinkler system serving these apartments did not appear to have been maintained as well as it should have been. The sprinkler system should be completely re-evaluated by a licensed sprinkler contractor. If exceptions are being provided for other code requirements in the building, it is important to know that the system is performing as it was originally designed to do.

Fraternity Houses and Private Residences

These building were not reviewed.

The State will require an environmental survey and a property survey prior to acceptance of the property. This is usually completed with the assistance of the Real Property Administration department of Finance and Administration.

Summary of Estimates by Building**Overall**

Site	\$ 75,000	
Parking	\$ 500	
General	<u>\$ 237,000</u>	
	Subtotal	\$ 312,500

E&G Space

Varner Jones Hall	\$ 146,600	
Hyde Science	\$ 754,700	
Wilder College Union	\$ 801,000	
Hamilton Performing Arts Ctr.	\$ 37,250	
Athletic Center	\$ 570,600	
Gobbel Library	\$ 611,500	
R.E. Womack Chapel	<u>\$ 224,500</u>	
	Subtotal	<u>\$ 3,146,150</u>

Subtotal - Non Auxiliaries \$3,458,650

Auxiliaries (residence halls)

General	\$ 500,000	
Spangler Dormitory	\$ 497,500	
Harris Hall Dormitory	\$ 342,000	
Sprague Hall Dormitory	\$ 444,000	
Carney Johnston Dormitory	\$ 500,000	
Oxley Apartments	<u>\$ 5,500</u>	
	Subtotal	<u>\$ 2,289,000</u>

Grand Total \$5,747,650