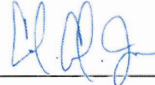



**University of Alabama System
Board Rule 415 (2/2005)
Board Submittal Checklist Criteria**

*** Board Submittal Checklist No. 4
Capital Project – Stage IV and Budget Reallocation /1
(Construction Contract Award and Budget Reallocation)**

Campus: The University of Alabama
Project Name: Delta Gamma Renovations and Addition
UA Project #: 831-19-2164
Meeting Date: September 16 – 17, 2021

- ☒ 1. Completed Board Submittal Checklist No. 4
- ☒ 2. Transmittal Letter to Chancellor from Campus President requesting the project be placed on the agendas for the forthcoming Physical Properties Committee and Board of Trustees (or Executive Committee) meetings
- ☒ 3. Resolution requesting approval of Construction Contract Award, Construction Budget, and Project budget
- ☒ 4. Campus correspondence/photographs providing supplemental project information
- ☒ 5. Executive Summary of Proposed Capital Project with final Contract Construction Budget and Project Budget (include all proposed project funding for movable equipment and furnishings) /2
- ☒ 6. Project Summary
- ☒ 7. Project Planning Report /2
- ☒ 8. Tabulation of competitive bids – certified by Project Architect/Construction manager
- ☒ 9. Recommendations for Contract Award by Architect/Construction Manager
- ☒ 10. Campus map(s) showing location of project site
- ☒ 11. Final Business Plans (if applicable) /3

Prepared by: 

Approved by: 

/1 Reference Tab 3H - Board Rule 415 Instructional Guide

/2 Reference Tab 3E - Board Rule 415 Instructional Guide

/3 Reference Tab 3V - Board Rule 415 Instructional Guide

* Basic documents required for this Board Submittal Package. Include other supporting materials, correspondence, etc., as may be required to fully describe or illustrate project being submitted for approval to Physical Properties Committee and Board of Trustees.



Office of the
President

August 9, 2021

Chancellor Finis E. St. John IV
The University of Alabama System
500 University Boulevard East
Tuscaloosa, Alabama 35401

Dear Chancellor St. John:

I am pleased to send to you for consideration by the Board of Trustees at its September 16-17, 2021 meeting the following resolution:

- Board Item – Action: Stage IV, and Budget Reallocation submittals: Delta Gamma Renovations and Addition, UA Project #831-19-2164

Please contact us if you have questions or need additional information.

Sincerely,

A handwritten signature in black ink, appearing to read "Stuart R. Bell". The signature is stylized with large, flowing letters.

Stuart R. Bell
President

Enclosure



RESOLUTION

DELTA GAMMA RENOVATIONS AND ADDITION

WHEREAS, on February 7, 2020, in accordance with Board Rule 415, The Board of Trustees of The University of Alabama (“Board”) approved the Stage I submittal for the Delta Gamma Renovations and Addition project (“Project”) for renovations of approximately 3,543 gross square feet (gsf) and an addition of approximately 978 gsf to their existing chapter house located at 625 Judy Bonner Drive; and

WHEREAS, this Project is comprised of two packages: Package I–Renovations and Package II–Addition; and

WHEREAS, Package I–Renovations included renovation of the 1,143 gsf serving line area and 2,000 gsf dining area; and

WHEREAS, Package II–Addition will consist of an addition totaling 978 gsf, encompassing 326 gsf each for first, second, and third floors, and a 400 gsf renovation of the kitchen; and

WHEREAS, on February 7, 2020, due to their involvement designing the existing house and their commitment to deliver the Project design by Summer 2020, the Board authorized The University of Alabama (“University”) to utilize the architectural services of Ellis Architects, Inc., of Tuscaloosa, Alabama, accepting a final negotiated a design fee of 7.7% of the cost of construction of Package I–Renovations and 7.4% of the cost of construction of Package II–Addition, plus a 1.18 renovation factor and a not-to-exceed amount of \$7,700 for reimbursable expenses, less a credit in the amount of \$1,500 for previous work performed; and

WHEREAS, on March 26, 2020, pursuant to Title 39, State Bid Law of Alabama Code, competitive bids were received for Package I–Renovations of the Project and Snow-Blakeney Construction, Inc., of Tuscaloosa, Alabama (Snow-Blakeney) was declared the lowest responsive and responsible bidder with a base bid in the amount of \$440,000; and

WHEREAS, on June 5, 2020, the Board approved a Budget Reallocation to reflect the construction contract for Package I–Renovations, adjustments to Construction Package II–Addition and the associated changes to soft costs; and

WHEREAS, on June 5, 2020, the Board approved the renderings for Project; and

WHEREAS, on June 5, 2020, the Board ratified the award of the construction contract for Package I – Renovation to Snow-Blakeney; and

WHEREAS, on August 5, 2021, pursuant to Title 39, State Bid Law of Alabama Code, competitive bids were received for Construction Package II–Addition of the Project and J.T. Harrison Construction Company, of Tuscaloosa, Alabama (“Harrison Construction”) was declared the lowest responsive and responsible bidder with an adjusted base bid in the amount of \$929,800; and

WHEREAS, the University desires to accept Alternate #1 and Alternate #2 totaling \$173,300; and

WHEREAS, the University is requesting approval to award the construction contract for Package II–Addition of this Project to Harrison Construction for a total contract amount of \$1,103,100 inclusive of the adjusted base bid and Alternates 1 and 2; and

WHEREAS, the University is requesting approval for a Budget Reallocation to reflect the final cost of Construction Package I – Renovations in the amount of \$454,320, the construction contract for the Construction Package II – Addition in the amount of \$1,103,100, and related adjustments to soft costs as reflected in the Revised Budget below; and

WHEREAS, the Project location and program have been reviewed and are consistent with the Campus Master Plan, University Design Standards, and the principles contained therein; and

WHEREAS, this Project will be funded from Chapter Reserves in the amount of \$2,000,000; and

WHEREAS, ΔΓ is current and has an outstanding note balance of \$6,657,318 as of June 30, 2021, with a monthly payment of \$39,190, maintains a strong chapter membership, and has shown through its National Housing Operations Balance Sheet that the chapter has funds available; and

WHEREAS, the Revised Budget for the Project is as stipulated below:

BUDGET:	REVISED
<i>Construction Package I – Renovations</i>	\$ 454,320
Construction Package II – Addition	\$ 1,103,100
Security/Access Control	\$ 20,000
Telecomm/Data	\$ 25,000
Contingency* (Lump Sum)	\$ 77,871
UA Project Management Fee** (3%)	\$ 49,059
Architect/Engineer Fee*** (~9.96%)	\$ 155,181
Expenses (Surveys, Testing, Inspections)	\$ 60,00
Other Fees and Services (Advertising, Printing, Postage)	\$ 55,469
TOTAL PROJECT COST	\$ 2,000,000

*Contingency is based on Lump Sum.

**UA Project Management fee is based on 3% of the total cost of construction for Packages I and II, and contingency.

***Architect/Engineer fee is based on 7.1% of the cost of Construction, plus a 1.18 renovation factor, \$18,500 for additional services, and a not-to-exceed amount of \$7,700 for reimbursable expenses, less a credit in the amount of \$1,500 for previous work performed.

Completed. Actual contract cost.

Current Package for Approval.

NOW, THEREFORE, BE IT RESOLVED by The Board of Trustees of The University of Alabama that The University of Alabama that:

1. The Revised Budget for the Project is approved as stipulated above.
2. Stuart R. Bell, President; Matthew M. Fajack, Vice President for Finance and Operations and Treasurer; or those officers named in the most recent Board Resolutions granting signature authority for The University of Alabama be, and each hereby is, authorized to act for and on behalf of The Board of Trustees of The University of Alabama in executing the aforementioned contract with J.T. Harrison Construction Company, Tuscaloosa, Alabama, for the Construction Package II – Addition of the Project in accordance with Board Rule 415.

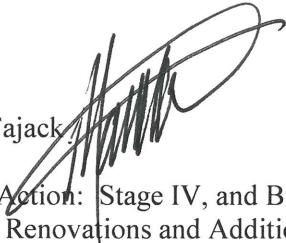


Division of
Finance and Operations

MEMO

August 9, 2021

To: Stuart R. Bell

From: Matthew M. Fajack 

Subject: Board Item – Action: Stage IV, and Budget Reallocation submittals:
Delta Gamma Renovations and Addition
UA Project #831-19-2164

On August 5, 2021, at 1:00 p.m., pursuant to Title 39 State Bid Law of Alabama Code, The University of Alabama (“University”) received competitive bids for the Construction Package II – Addition for the Delta Gamma (ΔΓ) Renovations and Addition project (“Project”) and J.T. Harrison Construction Company, Tuscaloosa, Alabama (“Harrison Construction”), was declared the lowest responsive and responsible bidder with an adjusted base bid in the amount of \$929,800, which is within funds available for the Project. The University also desires to accept Alternate #1 and Alternate #2 totaling \$173,300. Therefore, the University is requesting approval from The Board of Trustees of The University of Alabama (“Board”) to accept Harrison’s Construction’s adjusted base bid in the amount of \$929,800, plus the cost in the amount of \$173,300 for Alternate #1 and Alternate #2 for a total contract amount of \$1,103,100.

Accordingly, the University is requesting approval from the Board for a Budget Reallocation to reflect the actual cost of Package I – Renovations, in the amount of \$454,320, that is less than the threshold amount requiring approval by the Board, and the construction contract for Package II – Addition in the amount of \$1,103,100, and related adjustments to soft costs.

The Project will be funded from Chapter Reserves in the amount of \$2,000,000. ΔΓ is current and has an outstanding note balance of \$6,657,318 as of June 30, 2021, with a monthly payment of \$39,190, maintains a strong chapter membership, and has shown through its National Housing Operations Balance Sheet that the chapter has funds available.

The Project location and program have been reviewed and are consistent with the Campus Master Plan, University Design Standards, and the principles contained therein. I have attached a Bid Tabulation, Resolution, Executive Summary, Project Summary, Project Planning Report, and Location map for your review. Subject to your approval, I recommend this item be forwarded to the Chancellor for inclusion as an Action Item on the agenda of the Physical Properties Committee at the Board of Trustees meeting scheduled for September 16 – 17, 2021.

MMF/ccj

pc w/atchmts: Michael Rodgers
Michael Lanier
Tim Leopard
Suzanne Webster

**EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT
BOARD OF TRUSTEES SUBMITTAL**

Meeting Date: September 16 – 17, 2021

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Delta Gamma Renovations and Addition

PROJECT LOCATION: 625 Judy Bonner Drive

ARCHITECT: Ellis Architects, Inc., Tuscaloosa, Alabama

THIS SUBMITTAL:	PREVIOUS APPROVALS:
<input type="checkbox"/> Stage I	<u>February 7, 2020</u>
<input type="checkbox"/> Stage II, Waiver	<u>February 7, 2020</u>
<input type="checkbox"/> Stage III	<u>June 5, 2020</u>
<input type="checkbox"/> Budget Reallocation	<u>June 5, 2020</u>
<input checked="" type="checkbox"/> Stage IV	
<input checked="" type="checkbox"/> Budget Reallocation	

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input checked="" type="checkbox"/> Building Addition	Sorority-Addition	~22%	978
<input checked="" type="checkbox"/> Renovation	Sorority-Renovation	~78%	3,543
	TOTAL	100%	4,521

BUDGET	Preliminary	Revised
<i>Construction Package I – Renovations</i>	\$ 440,000	\$ 454,320
Construction Package II – Addition	\$ 1,057,000	\$ 1,103,100
Security/Access Control	\$ 20,000	\$ 20,000
Telecomm/Data	\$ 25,000	\$ 25,000
Contingency* (Lump Sum)	\$ 149,700	\$ 77,871
UA Project Management Fee** (3%)	\$ 49,401	\$ 49,059
Architect/Engineer Fee*** (~9.25%/~9.96%)	\$ 138,476	\$ 155,181
Expenses (Surveys, Testing, Inspections)	\$ 60,000	\$ 60,000
Other Fees and Services (Advertising, Printing, Postage)	\$ 60,423	\$ 55,469
TOTAL PROJECT COST	\$ 2,000,000	\$ 2,000,000

*Contingency is based Lump Sum.

**UA Project Management fee is based on 3% of the total cost of Construction for Packages I and II, and Contingency.

***Architect/Engineer fee is based on 7.1% of the cost of Construction, plus a 1.18 renovation factor, \$18,500 for additional services, and a not-to-exceed amount of \$7,700 for reimbursable expenses, less a credit in the amount of \$1,500 for previous work performed.

Completed. Actual construction cost.

Current Package for Approval.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:

(Utilities, Housekeeping, Maintenance, Insurance, Other)

\$ N/A*

TOTAL ESTIMATED ANNUAL O&M COSTS:

\$ N/A*

FUNDING SOURCE:

Capital Outlay:

Chapter Reserves \$ 2,000,000

O&M Costs:

*O&M Costs

\$ N/A

*O&M costs will be funded by the chapter from rental income and other charges to sorority members.

NEW EQUIPMENT REQUIRED:**RELATIONSHIP & ENHANCEMENT OF CAMPUS PROGRAMS:**

An increase in the size of the Delta Gamma sorority house will allow the chapter to comfortably accommodate the projected chapter size and the growing Greek community.

This Project will allow the chapter to better compete and to enhance the living experience for existing student members as well as future members.

The facility will provide space more appropriate to current trends in Greek life and will enhance both functional and programmatic use.

ATTACHMENT NO. 1

Project: Delta Gamma Renovations and Addition
BOT Submittals: Stage IV and Budget Reallocation
Meeting Date: September 16 – 17, 2021

Project Summary**DELTA GAMMA RENOVATIONS AND ADDITION**

The Delta Gamma ($\Delta\Gamma$) Renovations and Addition project (“Project”) is located at 625 Judy Bonner Drive. The current $\Delta\Gamma$ house opened in 2011 as part of Phase I of the Sorority Expansion Master Plan. The house is 36,157 gross square feet (gsf) with a bed capacity of 66. There are four (4) levels comprised of a basement and three (3) floors. In 2015, a porch addition was constructed to the south elevation of the house.

The Project includes two packages: Package I – Renovations and Package II – Addition.

Package I – Renovations included the renovation of the 1,143 square foot (sf) serving line area and 2,000 sf dining area as necessary to improve functionality for the growing chapter. This work was completed over the Summer of 2020.

Package II – Addition will consist of an addition totaling 978 gsf, encompassing 326 gsf for each first, second, and third floors, and a 400 gsf renovation of the kitchen. The renovation on the first floor will enhance the serving efficiency to the growing number of members and provide additional work areas for staff.

The second and third floors will include a combination of study rooms and break rooms. The exterior and interior finishes will match the existing materials.

The addition will not extend to the basement and will not extend beyond the approved variance of 8’ to The University of Alabama setbacks.

PROJECT PLANNING REPORT

DATE: SEPTEMBER 16 - 17, 2021

INITIAL REPORT

INTERIM REPORT

X FINAL REPORT3 REPORT NO.

TO: OFFICE OF THE CHANCELLOR
BOARD OF TRUSTEES OF THE UNIVERSITY OF ALABAMA

FROM: OFFICE OF THE PRESIDENT
THE UNIVERSITY OF ALABAMA

1. PROJECT: Delta Gamma Renovations and Addition

2. LOCATION: 625 Judy Bonner Drive

3. ARCHITECT/ENGINEER: Ellis Architects, Inc., Tuscaloosa, Alabama

4. PROJECT STATUS:

A. SCHEMATIC DESIGN	DATE INITIATED	September-19
	% COMPLETE	100%
	* DATE COMPLETED	December-19
B. PRELIMINARY DESIGN:	DATE INITIATED	December-19
	% COMPLETE	100%
	* DATE COMPLETED	May-20
C. CONSTRUCTION DOCUMENTS:	DATE INITIATED	May-20
	% COMPLETE	100%
	* DATE COMPLETED	June-20
D. SCHEDULED BID DATE:		July-21

5. CURRENT PROJECT BUDGET:

	PRELIMINARY	REVISED
A. CONSTRUCTION PACKAGE I - RENOVATIONS	\$ 440,000	\$ 454,320
B. CONSTRUCTION PACKAGE II - ADDITION	\$ 1,057,000	\$ 1,103,100
C. SECURITY/ACCESS CONTROL	\$ 20,000	\$ 20,000
D. TELECOMM/DATA	\$ 25,000	\$ 25,000
E. CONTINGENCY* (Lump Sum)	\$ 149,700	\$ 77,871
F. UA PROJECT MANAGEMENT FEE** (3%)	\$ 49,401	\$ 49,059
G. ARCHITECT/ENGINEER FEE*** (~9.25%/~9.96%)	\$ 138,476	\$ 155,181
H. EXPENSES (SURVEYS, TESTING, INSPECTIONS)	\$ 60,000	\$ 60,000
I. OTHER FEES AND SERVICES (ADVERTISING, PRINTING,	\$ 60,423	\$ 55,469
J. TOTAL PROJECT COST	\$ 2,000,000	\$ 2,000,000

*Contingency is based on Lump Sum.

**UA Project Management fee is based on 3% of the total cost of Packages I and II, and contingency.

***Architect/Engineer fee is based on 7.1% of the cost of construction, plus a 1.18 renovation factor, \$18,500 for additional services, and a not-to-exceed amount of \$7,700 for reimbursable expenses, less a credit in the amount of \$1,500 for previous work performed.

Completed. Actual construction cost.

Current Package for Approval.

6. FUNDING/RESOURCES: Chapter Reserves - \$2,000,000

7. REMARKS Construction Package II-Addition budget amount includes Base Bid and Alternates 1 & 2

* FINAL AGENCY APPROVAL

SUBMITTED BY:

Tim Leopand

TABULATION OF BIDS

THE UNIVERSITY OF
ALABAMA

Project Name
Delta Gamma Addition

Bid Due
August 5, 2021 1:00 p.m. local time

Architect/Engineer
Ellis Architects
1490 Northbank Parkway, Suite 212
Tuscaloosa, AL 35406
phone: (205) 752-4420

UA Project No.
831-19-2164

Bid Location
405 Cahaba Circle
Tuscaloosa, Alabama 35404

FUNDS AVAILABLE:

One million, seventy-five thousand dollars and 00/100 (\$1,075,000.00)

BIDS SHALL BE VALID FOR:

Sixty (60) Days

CONSTRUCTION DURATION:

Project Completion: September 16, 2022; Alternate 3 Early Completion: July 16, 2022

CONTRACTOR	J. T. Harrison Construction Co., Inc.	RCI Contractors & Engineers, Inc.
	P. O. Box 21300 Tuscaloosa, AL 35402 (205) 333-1120 GC Lic. #20245	2315 14th Street Tuscaloosa, AL 35401 (205) 752-0333 GC Lic. #18041
Addenda EIGHT - TEN	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
LICENSE # ON ENVELOPE	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
BONDING COMPANY OR BID DEPOSIT	Travelers Casualty & Surety Co. of America	Ohio Casualty Ins. Co.
UNIT PRICE #1 <i>Description on back of page</i>	\$ 10.00	\$ 12.50
UNIT PRICE #2 <i>Description on back of page</i>	\$ 15.00	\$ 18.75
UNIT PRICE #3 <i>Description on back of page</i>	\$ 250.00	\$ 312.50
UNIT PRICE #4 <i>Description on back of page</i>	\$ 110.00	\$ 126.50
BASE BID ON PROPOSAL	\$ 949,000.00	\$ 1,000,000.00
ENVELOPE ADJUSTMENT	(19,200.00)	10,000.00
ADJUSTED BASE BID	929,800.00	1,010,000.00
ALTERNATE #1 <i>Description on back of page</i>	137,500.00	156,000.00
ENVELOPE ADJUSTMENT	13,800.00	20,000.00
Subtotal	1,081,100.00	1,186,000.00
ALTERNATE #2 <i>Description on back of page</i>	22,000.00	30,000.00
ENVELOPE ADJUSTMENT	-	-
Subtotal	1,103,100.00	1,216,000.00
ALTERNATE #3 <i>Description on back of page</i>	50,000.00	45,000.00
ENVELOPE ADJUSTMENT	-	10,000.00
TOTAL BID W/ALTERNATES	\$ 1,153,100.00	\$ 1,271,000.00

I CERTIFY THAT THE ABOVE BIDS WERE RECEIVED SEALED AND WERE PUBLICLY OPENED AND READ ALOUD AT THE TIME AND PLACE INDICATED AND THAT THIS IS A TRUE AND CORRECT TABULATION OF ALL BIDS RECEIVED FOR THIS PROJECT. I RECOMMEND AWARD OF THE CONTRACT FOR CONSTRUCTION TO THE LOWEST RESPONSIBLE AND RESPONSIVE BIDDER AS SHOWN ABOVE, AS DETERMINED BY THE AVAILABLE FUNDS AND SUBJECT TO THE INSTRUCTIONS TO BIDDERS AND ANY APPLICABLE LAW.

Brian E. Brooker, AIA, LEED AP
Ellis Architects

Sworn to and subscribed before me this 5th day of August, 2021.

Laigh Ann Huguley
Notary Public

04/02/2023
My Commission Expires



Unit Price Descriptions:

- Unit Price #1: Excavation / Removal of Soil Materials. Price per CYIP.
- Unit Price #2: Placement of Engineered Fill Material. Price per CYIP.
- Unit Price #3: Additional Structural Steel. Price per 100 pounds in place.
- Unit Price #4: Additional 3"x3"x1/4" Steel Angle in Place. Price per 10 lineal feet in place.

Alternate Descriptions:

- Alternate #1: Interior Fit-Outs of 2nd and 3rd Level Study Rooms, 222A and 321A
- Alternate #2: Raising West Roof Lines
- Alternate #3: Early Project Completion

DELTA GAMMA RENOVATIONS AND ADDITION

Approved June 5, 2020



DELTA GAMMA RENOVATIONS AND ADDITION

LOCATION MAP



Delta Gamma FHC
Balance Sheet

		Actual 8/5/2021
079 - Beta Psi House Corporation		
Assets		
079-00-000-1515	Deferred Expense - Beta Psi	\$50,172.74
079-00-000-1710	Land Improvements - Beta Psi	\$15,830.00
079-00-000-1715	Buildings - Beta Psi	\$375,702.93
079-00-000-1720	Leaseholder Improvements - Beta Psi	\$8,411,060.83
079-00-000-1725	Interior Improvements/Furniture - Beta Psi	\$1,147,832.62
079-00-000-1730	Computer Equipment - Beta Psi	\$3,389.10
079-00-000-1735	Electronics & Minor Appliances - Beta Psi	\$83,347.63
079-00-000-1750	Land Improvements 2 - 5K - Beta Psi	\$1,950.00
079-00-000-1755	Building Improvements 2 - 5K - Beta Psi	\$167,852.98
079-00-000-1810	Accumulated Depreciation - Beta Psi	(\$4,504,246.18)
079-00-001-1985	Required Cash Reserve - Beta Psi	\$367,575.50
079-00-001-1990	Available Cash Balance - Beta Psi	\$2,245,999.35
079-40-000-1010	Set-Aside Funds -Beta Psi	\$27,259.27
Total Assets		\$8,393,726.77
Liabilities and Fund Balance		
Liabilities		
079-00-000-2410	University of Alabama -Note 1- Beta Psi	\$1,993,615.10
079-00-000-2420	University of Alabama -Note 2- Beta Psi	\$1,676,287.54
079-00-000-2430	University of Alabama -Note 3- Beta Psi	\$2,987,415.85
Total Liabilities		\$6,657,318.49
Fund Balance		
079-00-000-3700	Fund Balance 6/30 - Beta Psi	\$1,736,408.28
Total Fund Balance		\$1,736,408.28
Total Liabilities and Fund Balance		\$8,393,726.77