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

<u>* Board Submittal Checklist No. 2</u> <u>Capital Project – Stage I and Stage II Submittals/1</u> (General Information Package and Architect Ranking)/8

Campus: _	The University of Alabama
Project Name: _	Bryant Conference Center and Moody Music District Energy Plant
UA Project #: _	337-20-2307
Meeting Date: _	November 12 – 13, 2020

- 1. Completed Board Submittal Checklist No. 2
 - 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. Proposed Board Resolution requesting approval of Stage II Submittal (Architect Ranking, Project Scope and Project Budget; authority to proceed with Owner/Architect contract negotiations)
 - 4. Campus correspondence/photos providing supporting project information
 - 5. Completed Executive Summary Proposed Capital Project. /2
 - Executive Summary Architect, Engineer, Selection process (include Interview Outline). /3,
 ^{/4, /5}
 - Campus letter requesting approval of the ranking of firms and authority to submit to the Physical Properties Committee for approval – signed by the Chair of the Physical Properties Committee and signed by the UA System Vice Chancellor for Finance and Administration. /6
- 8. Project Planning Report /2

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- 9. Preliminary Business Plan (if applicable) /7
- 10. Campus map(s) showing Project site

*Request for Waiver of the Consultant Selection process.

Additional information required for Stage I submittal:

- 11. Proposed Board Resolution requesting approval of Stage I Submittal by UA Board of Trustees.
- 12. Completed Supplemental Project Information Worksheet Attachment "K", Board Rule 415

Prepared by: <u>Carla Coleman Jones</u> Approved by: <u>Tim lespand</u>

- /1 Reference Tab 3H Board Rule 415 Instructional Guide
- /2 Reference Tab 3E Board Rule 415 Instructional Guide
- /3 Reference Tab 3K Board Rule 415 Instructional Guide
- /4 Reference Tab 3L Board Rule 415 Instructional Guide /5 Reference Tab 3M - Board Rule 415 Instructional Guide
- /6 Reference Tab 3N Board Rule 415 Instructional Guide
- /7 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.

^{/8} After completion of negotiations on Owner/Architect Agreement, provide notification to Chair of the Physical Properties Committee and UA System Vice Chancellor for Finance and Administration. Reference Tab 3-O-Board Rule 415, Instructional Guide



Office of the **President**

October 14, 2020

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 November 13, 2020 meeting the following resolution:

• Board Item – Action: Stage I and Stage II, Waiver submittals: Bryant Conference Center and Moody Music District Energy Plant, UA Project #337-20-2307

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

Sincerely,

Stuart R. Bell/met Stuart R. Bell

President

Enclosure



203 Rose Administration Building | Box 870100 | Tuscaloosa, AL 35487-0100 | 205-348-5100 | Fax 205-348-7238 president@ua.edu | http://www.ua.edu

RESOLUTION

BRYANT CONFERENCE CENTER AND MOODY MUSIC DISTRICT ENERGY PLANT

WHEREAS, in accordance with Board Rule 415, The University of Alabama ("University") is requesting approval for a Stage I submittal for the Bryant Conference Center and Moody Music District Energy Plant project ("Project"); and

WHEREAS, the Project will improve the teaching, learning, and working environments of campus constituents by providing reliable and efficient energy to the Bryant Conference Center, Alumni Hall, Frank Moody Music building and Bryant Museum by replacing systems that have reached the end of their functional service life and by centralizing equipment in a district energy plant; and

WHEREAS, the Project is coordinated with the master plan for the area including development plans for Bryant Conference Center, Frank Moody Music building and the future pedestrian bridge from the Capstone Parking Deck; and

WHEREAS, this work was originally planned to be coordinated with the Bryant Conference Center Renovation and Addition project, but is being advanced distinctly from that project as the equipment has reached a critical replacement point and this approach will yield the most efficient long term cost approach for the University; and

WHEREAS, LIVE Design Group, Inc., of Birmingham, Alabama ("LIVE Design"), was previously selected by the Board of Trustees of the University of Alabama to design the renovation and addition for the Bryant Conference Center and has developed the energy master plan for the Bryant Conference Center, Alumni Hall, and the connection to the Frank Moody Music Building; and

WHEREAS, based on the firm's previous programming experience and preliminary design work on the Project, their commitment to completing the design to allow the Project to proceed as scheduled prior to the start of the 2021 academic year with Project completion spring 2022, and to best coordinate with the seasonal loads of the system, the University is requesting approval for a Waiver of the Consultant Selection process and to proceed with design utilizing the architectural services of LIVE Design; and

WHEREAS, the University further requests approval to accept a final negotiated fee based on 6.2% of the cost of construction and landscaping plus \$4,620 for additional services, less \$5,000 for previous work performed; and

WHEREAS, the Project location and program have been reviewed and are consistent with the master plan, University Design Standards, and the principles contained therein; and WHEREAS, the Project will be funded from the Office of Academic Affairs Reserves in the amount of \$750,000, University Plant Reserves in the amount of \$750,000, and the College of Continuing Studies Reserves in the amount of \$7,625,000 ; and

WHEREAS, the project will address \$2,639,405 in campus deferred maintenance liability and provide more energy efficient operations; and

WHEREAS, the preliminary budget for the Project is as stipulated below:

BUDGET:	PRELIMINARY
Construction	\$ 6,500,000
Equipment	\$ 750,000
Landscaping	\$ 200,000
Security/Access Control	\$ 30,000
Telecommunication/Data	\$ 30,000
Contingency (10%)	\$ 745,000
UA Project Management Fee ** (3%)	\$ 245,850
Architect/Engineer Fee *** (~6.2%)	\$ 461,520
Commissioning Fee	\$ 60,000
Expenses (Geotech, Constrution Materials Testing)	\$ 60,000
Other Fees and Services (Testing, Advertising, Inspections and Printing)	\$ 42,630

TOTAL PROJECT COST

9,125,000

\$

*Contingency is based on 10% of the cost of construction, equipment, and landscaping. **UA Project Management Fee is based on 3% of the cost of construction, equipment, landscaping, and contingency.

***Architect/Engineer Fee is based on 6.2% of the cost of construction, equipment, and landscaping, plus \$4,620 for additional services, less \$5,000 for previous work performed.

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

1. The Stage I submittal package for the Project is hereby approved.

2. The preliminary budget for the Project as stipulated above is hereby approved.

BE IT FURTHER RESOLVED that 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 be, and each hereby is, authorized to act for and on behalf of the Board to execute an architectural agreement with LIVE Design Group of Birmingham, Alabama, for architectural services in accordance with Board Rule 415 for this Project.

THE UNIVERSITY OF ALABAM

Division of **Finance and Operations**

October 23, 2020

To: Stuart R. Bell

Marthu M. Jajoch Matthew M. Fajack From:

Subject: Board Item – Action: Stage I and Stage II, Waiver submittals: Bryant Conference Center and Moody Music District Energy Plant UA Project #337-20-2307

Pursuant to Board Rule 415, The University of Alabama ("University") is requesting approval from The Board of Trustees of The University of Alabama ("Board") for a Stage I submittal for the Bryant Conference Center and Moody Music District Energy Plant project ("Project") to be located immediately north of Bryant Conference Center (BCC) and south of Frank Moody Music Building (Moody Music), at a projected total Project budget of \$9,125,000.

The proposed Project will encompass the construction of a single-story building of approximately 3,477 square feet (sf) to provide space for the District Energy Plant (DEP) chillers and support equipment. In addition to the DEP building, the Project will include utility relocations and a new roundabout in 9th Street to facilitate large truck access to BCC. The new DEP will replace mechanical systems that are beyond their useful life and provide adequate cooling capacity to service BCC, Alumni Hall, Moody Music, and Bryant Museum, in close coordination with the master plan for the area.

This work was originally planned to be coordinated with the Bryant Conference Center Renovation and Addition project, but is being advanced distinctly from that project as the equipment has reached a critical replacement point and this approach will yield the most efficient long term cost approach for the University.

LIVE Design Group, Inc., of Birmingham, Alabama ("LIVE Design") was previously selected to provide design services for the renovation and addition for BCC and Live Design developed the master plan for BCC. As a result, LIVE Design has exclusive knowledge of the design and construction of the area and the Project, and familiarity of the University's standards, therefore resulting in an efficient design process and ensuring coordination with the existing infrastructure, systems, and materials and the proposed renovations to BCC. LIVE Design is

WHERE LEGENDS ARE MADE Bryant Conference Center and Moody Music District Energy Plant October 23, 2020 Page 2

committed to completing the design to allow the Project to proceed as scheduled in 2021 with Project completion by winter 2022 so as to best coordinate with the seasonal loads of the system and to least impact operations during the change-over.

Accordingly, the University is requesting a Waiver of the Consultant Selection Process for the proposed Project to utilize LIVE Design as the principal design firm for this Project.

Additionally, the University has negotiated a design fee of 6.2% of the cost of construction and landscaping plus \$4,620 for additional services and less \$5,000 for previous work performed. This fee is consistent with the Alabama Building Commission fee schedule and represents a negotiated discount of approximately 1.2%. The University is requesting acceptance of this negotiated fee.

The Project will be funded from the Office of Academic Affairs Reserves in the amount of \$750,000; University Plant Reserves in the amount of \$750,000; and, the College of Continuing Studies Reserves in the amount of \$7,625,000 for a total Project cost of \$9,125,000. This Project will eliminate approximately \$2,639,405 in deferred maintenance liabilities and provide more energy efficient operations.

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 Letter of Approval from the Vice Chancellor for Finance and Administration and Chair of the Physical Properties Committee, Resolution, Executive Summary, Attachment K, Project Planning Report, Project Summary, 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 November 12 – 13, 2020.

MMF/ccj

pc w/atchmts: Michael Rodgers Michael Lanier Tim Leopard Paul Davis Greg McKelvey

EXECUTIVE SUMMARY PROPOSED CAPITAL PROJECT

BOARD OF TRUSTEES SUBMITTAL

	Meeting Date:	Novemb	er 12 – 13,	2020		
CAMPUS:	The University of	The University of Alabama, Tuscaloosa, Alabama				
PROIFCT NAME:	Bryant Conferen	nce Center and N	Aoody Mu	sic District Energy Pla	ant	
	Immediately nor	rth of Bryant Co	nference (Center and south of M	oody	Music
PROJECT LOCATION:	Building	,			,	
ARCHITECT:	Requesting in th	is submittal				
THIS SUBMITTAL:			PREVIO	US APPROVALS:		
🔀 Stage I		-				
🔀 Stage II, Waive	er	-				
Stage III						
Stage IV		_				
DROJECT TYPE	c.		ODIEC	DEDOENTACE		
	2	SPACE CATEG	ORIES	PERCENIAGE		GSF
Campus Infrastructu	re I	Building Service		100%	_	3,477
]	ΓΟΤΑL		100%		3,477
BUDGET					P	reliminary
Construction					\$	6,500,000
Equipment					\$	750,000
Landscaping					\$	200,000
Security/Access Control					\$	30,000
Telecommunication/Data	ı				\$	30,000
Contingency* (10%)					\$	745,000
UA Project Management	Fee** (3%)				\$	245,850
Architect/Engineer Fee***	* (~6.2%)				\$	461,520
Commissioning Fee					\$	60,000
Expenses (Geotech, Cons	truction Materials	Testing)			\$	60,000
Other Fees and Services (Testing, Advertisin	ng, Inspections a	nd Printin	ng)	\$	42,630
TOTAL PROJECT COST	[\$	9,125,000

*Contingency is based on 10% of the cost of construction, equipment, and landscaping.

**UA Project Management fee is based on 3% of the cost of construction, equipment, landscaping, and contingency.

*** Architect/Engineer fee is based on 6.2% of the cost of construction, equipment, and landscaping, plus \$4,620 for additional services, less \$5,000 for previous work performed.

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

(Utilities, Housekeeping, Maintenance, Insurance, Other)

\$ (\$94,800)*

TOTAL ESTIMATED ANNUAL O&M COSTS:

\$ (\$94,800)*

FUNDING SOURCE:

Office of Academic Affairs Reserves	\$	750,000
University Plant Reserves	\$	750,000
College of Continuing Studies Reserves	\$	7,625,000
*O&M Costs	\$	N/A
	Office of Academic Affairs Reserves University Plant Reserves College of Continuing Studies Reserves *O&M Costs	Office of Academic Affairs Reserves\$University Plant Reserves\$College of Continuing Studies Reserves\$*O&M Costs\$

*Project replaces existing local utility infrastructure with more efficient centralized equipment. Central utility O&M costs are neither assigned at a facility level nor by GSF.

NEW EQUIPMENT REQUIRED:

Two (2) 600-ton chillers

Two (2) cooling towers

All associated pumps and accessories

RELATIONSHIP & ENHANCEMENT OF CAMPUS PROGRAMS:

The proposed Bryant Conference Center and Moody Music District Energy Plant project ("Project") will improve the teaching, learning, and working environments of campus constituents by providing reliable and efficient energy to facilities by replacing systems that have reached the end of their functional service life. By centralizing equipment in an energy plant, the Project will free campus exterior space currently occupied by existing equipment for other uses including, but not limited to, parking, landscaping, and hardscape improvements. Furthermore, reducing the cost to provide heating and cooling to buildings will support The University of Alabama ("Alabama") in maintaining a competitive cost of attendance.

The Project has also been coordinated with the master plan for the area including development plans for Bryant Conference Center, Frank Moody Music building and the pedestrian bridge to efficiently support future development.

ATTACHMENT NO. 1 Project: Bryant Conference Center and Moody Music District Energy Plant BOT Submittals – Stage I and Stage II, Waiver Meeting Date: November 12 – 13, 2020

Project Summary

BRYANT CONFERENCE CENTER AND MOODY MUSIC DISTRICT ENERGY PLANT

The Bryant Conference Center and Moody Music District Energy Plant ("DEP") project ("Project") will be located immediately north of Bryant Conference Center (BCC) adjacent to the existing mechanical yard that supports BCC, Alumni Hall and the Bryant Museum and just west of the BCC loading dock area.

The building will be single-story and approximately 3,477 gross square feet (gsf) and is sized for future expansion (one additional 600T chiller) of the system to accommodate the BCC and Moody master plans and the future pedestrian bridge. The building will be constructed so as to screen the cooling towers from public view. In addition to the DEP building, the Project will also include utility relocations and a new roundabout in 9th Street to facilitate large truck access to the BCC loading dock. Proposed to be constructed in phases, the new DEP will replace mechanical systems that are beyond their useful life and provide adequate cooling capacity to service BCC, Alumni Hall, Frank Moody Music Building, and Bryant Museum.

The Project includes the installation of two (2) 600-ton chillers, two (2) cooling towers, all associated pumps and accessories along with space for future chiller with all piping headers including valve taps for all required future connections in the DEP. Underground chilled water lines would be extended from the new district energy plant to connect to and replace the chilled water mechanical equipment at BCC that currently serves Bryant Museum, Bryant Conference Center, Alumni Hall, and the equipment that serves the Frank Moody Music Building.

As noted above, this Project will also eliminate the existing air-cooled chillers and their enclosure at Moody Music. The adjacency of this equipment to Moody Music has caused acoustical challenges and the removal will allow the courtyard area to be enhanced. The location of the existing chillers in BCC will be repurposed as part of the future BCC renovations.

Thermal Energy service capacity for BCC and the other buildings in the area was originally considered in the Capstone Parking Deck, but the space designated for that purpose was allocated to the Event Management Center. This configuration will yield overall savings due to minimizing

pipe lengths. The Project is being advanced prior to the planned BCC Renovation as the existing chillers and cooling towers, at both BCC and Moody, have reached their expected service lives and operational and service challenges are manifesting. The Project is being closely coordinated with the planned BCC Renovation and Moody Music Renovations to eliminate any potential conflicts and to ensure efficient connectivity.

Attachment K to Board Rule 415

Supplemental Project Information Worksheet Annual Capital Development Plan

FY: 2020 – 2021

Project Name/Category :	Bryant Conference Center and Moody Music District Energy Plant
	Immediately north of Bryant Conference Center and south of the
	Frank Moody Music Building

Campus: The University of Alabama

1. Will this Project increase the current space inventory on campus or replace existing space?

increase space inventory	~.015	% increase	3,477	GSF
replace space inventory		% replacement		GSF
renovation of existing space only				GSF

2. If this Project will replace existing space inventory, how will vacated space be utilized or assigned after this Project is completed?

Comments:

The space occupied by the current chillers within Bryant Conference Center (BCC) will be repurposed for other building support space as part of the future BCC renovations.

3. Is the proposed Project location consistent with the Campus Master Plan and University Design Standards and the principles contained therein?

Yes No, A Campus Master Plan Amendment Is Required

If Campus Master Plan amendment required, explain:

4. Provide information on classification of new space provided by this Project and latest utilization data on similar type space on campus.

	Proposed New Space/Facilities				
	Classification	Number (Spaces/Rooms)	Capacity (Persons)	Area (GSF)	Existing Space Utilization Data (See Notations)
100	Classroom Facilities				
200	Laboratory Facilities				
300	Office Facilities				
400	Study Facilities				
500	Special Use Facilities				
600	General Use Facilities				
700	Support Facilities			3,477	
800	Health Care Facilities				
900	Residential Facilities				
000	Unclassified Facilities				

Comments:

The Bryant Conference Center and Moody Music District Energy Plant project ("Project") will replace mechanical systems that are beyond their useful life and provide adequate cooling capacity to service Bryant Conference Center, Alumni Hall, Frank Moody Music Building, and Bryant Museum.

5. How will this Project enhance existing/new programs and undergraduate/graduate enrollments?

Estimated New Funds from Tuition/Programs

\$ <u>N/A</u> Yr.

Comments:

The proposed Project will improve the teaching, learning, and working environments of campus constituents by providing reliable and efficient energy to facilities by replacing systems that have reached the end of their functional service life. By centralizing equipment in an energy plant, the Project will free campus exterior space currently occupied by existing equipment for other uses including, but not limited to, parking, landscaping, and hardscape improvements. Furthermore, reducing the cost to provide heating and cooling to buildings will support The University of Alabama ("University") in providing a competitive cost of attendance.

6. Has a facility user group been established to provide input for planning, programming, and design purposes?

Greg McKelvey – Executive Director, Maintenance Operations and Energy Management Tim Leopard – Senior Associate Vice President for Campus Development Shanwei Chen – Staff Engineer Paul Davis – Project Manager Bonner Lee – University Landscape Architect Jason Bigelow – University Architect

Source(s)	New Funds (FY2020-2021)	Reserves	Status /7
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
Education Sales/Services			
• External			
• Internal			
Direct Grants			
Gifts			
Bonds			
Existing Net Assets			
Other Office of Academic Affairs 		\$750,000	Allocated
Reserves			
• University Plant Reserves		\$750,000	Allocated
College of Continuing Studies Reserves		\$7,625,000	Allocated
Totals		\$9,125,000	Allocated

7. Source(s) of funding for Total Project Development Costs.

/7 Approved, allocated, pending

Comments:

This Project will be funded from Office of Academic Affairs Reserves in the amount of \$750,000, University Plant Reserves in the amount of \$750,000 and College of Continuing Reserves in the amount of \$7,625,000.

Operations and Maintenance (O&M) Annual Costs Projections				
Expense	FY 2020 - 2021 Base Data /8	First Full /YR Occupancy FY	Successive Five (5) Year Projections /9	
Maintenance				
Elevator Service				
Building Repairs				
Building Services				
Electric, Natural Gas, Steam		(\$94,800)	(\$150,000)	
Chilled Water				
Water and Sewer				
Insurance				
Safety Support				
Operations Staff Support Funding				
Other				
Totals	N/A	(\$94,800)	(\$150,000)	

8. Estimate of operations and maintenance (O&M) costs for the initial occupancy year and projections for succeeding five (5) year period.

/8 Latest Fiscal Year Data used as Base Year for Projections

/9 Combined Costs for next Five (5) Years of Occupancy

Comments:

This Project replaces existing local utility infrastructure with more efficient centralized equipment.

Source(s)	Occupancy Yr. /9 (FY)	Future Years /10	Status /7
Tuition			
Student Fees			
Investment Income			
Auxiliary Income			
• External			
• Internal			
*Educational Sales & Services	(\$94,800)	(\$150,000)	
• External			
• Internal			
Direct Grant(s)			
Reallocated Funds /11			
Gifts			
Other			
Total/YR	(\$94,800)	(\$150,000)	N/A

9. Source of funds for projected ongoing operations and maintenance (O&M) costs for this project.

/9 Initial Full Yr. of Occupancy

/10 Next Five (5) Yrs. Occupancy

/11 Funds Reallocated from other sources

/7 Approved, allocated, pending

Comments:

As the existing facilities served by the proposed plant are already budgeted there will be no increase necessary in O&M funding.

*Due to the replacement of multiple local utility infrastructure locations with more centralized and energy efficient equipment there will be projected savings of approximately \$250,000 during the first six years. Savings resulting from the execution of this Project will help offset future energy inflation cost and additional energy cost from campus growth.

Ongoing O&M cost will be funded from the annual operating budget.

10. Are development expenditures for this Project being used to reduce the current deferred maintenance/facilities renewal liabilities for the Campus?

\$ 2,639,405 ~**32%** % of Total Development Costs

Comments:

Differed Maintenance liabilities addressed in this Project include two (2) 225-ton chillers and one (1) 450-ton cooling tower and several local air-cooled chillers and associated equipment.

11. What other development alternatives were considered in the planning process for this Project? /13

Comments:

It was originally considered to provide a central plant in the Capstone Parking Deck to serve the area, but that space was subsequently allocated to the Event Management Center.

A development alternative considered was to continue using the existing equipment; however, the buildings currently supplied with thermal energy by independent boilers and chillers are less efficient and more maintenance-intensive than buildings served by central plants. The existing chiller yard also would have had to be increased when the equipment is replaced as the existing equipment is not sized appropriately for current code with respect to make up/ outside air.

/13 Renovation vs. new construction, adaptive reuse of underutilized buildings, etc.

12. Explain how the project will promote adequacy of campus facilities in relation to the University's Mission and scope of programs and/or services:

Comments:

Connection of these buildings to the district energy plant will eliminate equipment single point of failures that result in complete heating and/or cooling system failure at any given facility whereby increasing facility uptime and comfort whereby enhancing the experience for those utilizing these facilities.

The new equipment will also allow the University to provide appropriate heating and air conditioning to meet current standards for air quality, temperature and humidity – particularly important in Moody Music with stringent requirements for the musical instruments.

13. How does the project correlate to the University's strategic goals?

Comments:

Maintaining comfortable, pleasant and continuously operating facilities are factors that enhance the campus environment, thereby correlating to Strategic Goal #1 to provide a premiere education, and #3 to recruit and retain top tier students, faculty and staff. Reducing the quantity of noisy and unsightly mechanical equipment and increasing the reliability of the overall systems support these goals.

14. Which of the six University of Alabama System Core Principles does this project support?

Comments:

This Project supports core principle number 3. Upgrading the cooling systems in the most economical way possible will improve the environment within those structures while saving energy and supporting a competitive cost of attendance, thereby ensuring accountability and maintenance of the highest standards of excellence.

15. What would be the immediate impact on campus programs and enrollment if this project is not approved?

Comments:

The immediate impact is the loss of an opportunity to:

- 1. Reduce risk of campus program downtime due to failure of antiquated equipment and systems with single point of failure conditions.
- 2. Enhance the environment of the campus by removal of unsightly and noisy mechanical equipment.



University of Alabama System 500 University Boulevard East Tuscaloosa, AL 35401 205.34B.6432

October 23, 2020

MEMORANDUM

- TO: Dr. Dana Keith, Vice Chancellor for Finance and Administration Trustee Karen Brooks, Chairman, Physical Properties Committee
- FROM: Michael Rodgers
- SUBJECT: Board Rule 415 Waiver Architect/Engineer Selection Process Bryant Conference Center Central Energy Plant @ UA

Dr. Keith and Trustee Brooks:

Board Rule 415 provides a detailed process for the selection and approval of Architects, Engineers, and construction professionals. Campus officials are required to appoint a Selection Committee which, after careful review of all qualified firms, is to submit a ranking of the most qualified professionals to the Physical Properties Committee for approval and authorization to negotiate a Consulting Agreement.

You will find attached a request to waive this Consultant Selection Process on the above referenced project. The University would like to contract with LIVE Design Group of Birmingham, AL based on the following:

- 1.) **Familiarity with the Project.** LIVE Design Group (LIVE) was previously selected as the top ranked firm for the Bryant Conference Center (BCC) Renovation and Addition (approved by the Board in February 2015), and has developed the Master Plan for the BCC. LIVE's familiarity and knowledge of the existing facility and the University's standards will facilitate an efficient design process. LIVE has committed to complete the design to allow the Project to proceed in spring 2020 with completion by winter 2021.
- 2.) **Financial Impact.** The University has negotiated a design fee of 6.2% of the cost of construction (estimated at \$7,450,000.00), a not-to-exceed amount of \$4,620.00 for additional services, and a lump-sum discount of \$5,000.00 for work previously performed. The total estimated fee is \$456,900.00.

I have reviewed this request and the associated documentation and recommend approval by the Vice Chancellor and the Chair of the Physical Properties Committee. Thereafter, campus officials will be authorized to proceed in negotiating a Consultant Agreement with the preferred firm.

Sincerely,

Michael Rodgers Assistant Vice Chancellor for Construction Management



Division of Finance and Operations Vice President

October 23, 2020

Dr. Dana S. Keith Vice Chancellor for Finance and Administration Sid McDonald Hall 500 University Boulevard, East Tuscaloosa, AL 35401

Trustee Karen Brooks Chair, Physical Properties Committee 2555 14th Street, East Tuscaloosa, AL 35404

RE: Request for Waiver of Consultant Selection Process Bryant Conference Center and Moody Music District Energy Plant UA Project #337-20-2307

Dear Dr. Keith and Trustee Brooks:

LIVE Design Group, of Birmingham, Alabama (LIVE Design), has previously been engaged by The University of Alabama ("University") to perform due diligence programming, and schematic design services for the Bryant Conference Center and Moody Music District Energy Plant project ("Project") to be located immediately north of Bryant Conference Center ("BCC") adjacent to the existing mechanical yard that supports BCC and just west of the loading dock area. The Project will replace mechanical systems that are beyond their useful life and provide adequate cooling capacity to service Bryant Conference Center, Alumni Hall, Frank Moody Music Building, and Bryant Museum.

LIVE Design was previously selected to provide design services for the renovation and addition for BCC and has developed the master plan for BCC. As a result, LIVE Design has exclusive knowledge of the design and construction of the area and the Project and familiarity of the University's standards, therefore resulting in an efficient design process and ensuring coordination with the existing infrastructure, systems, and materials and the proposed renovations to BCC. LIVE Design is committed to completing the design to allow the Project to proceed as scheduled in spring 2020 with Project completion by winter 2021.

Accordingly, the University has negotiated a design fee based on 6.2% of the cost of Construction, plus \$4,620 for additional services, *no application of the renovation factor* and a credit in the amount of \$5,000 for previous work performed on BCC. The Project will also require significant operational and shutdown coordination from the design team with the connected facilities and service utilities.

Cost of the Work		Percentage Fee for Building Group III		Credits		Fee
\$7,450,000	Х	6.2%			=	\$461,900
\$7,450,000	х	6.2%	-	\$5,000		\$456,900

Bryant Conference Center and Moody Music District Energy Plant October 23, 2020 Page 2

Fee Savings is \$5,000 or approximately 1.2% of the standard fee for the Project.

This fee, as reflected with no applied renovation factor, represents a significant financial benefit to the campus.

Approval is hereby requested for:

- 1. Waiver of Consultant Selection process.
- 2. LIVE Design Group, Inc., Birmingham, Alabama, as the design service provider for the Project at a negotiated design fee based on 6.2% of the cost of construction plus \$4,620 for additional services less a credit in the amount of \$5,000.
- 3. Submittal to the Physical Properties Committee for review and approval.

For your convenience, a Project Summary has been attached. If you have any questions or concerns, please feel free to contact me.

Sincerely, Mathew M Jayack/ (M

Matthew M. Fajack Vice President for Finance and Operations and Treasurer

MMF/ccj

pc: Michael Rodgers Michael Lanier Tim Leopard Paul Davis

Recommended for approval.

Not Recommended for Approval. Submit to Physical Properties Committee.

DocuSigned by: Duna Skeith

Dr. Dana S. Keith, Vice Chancellor for Finance and Administration

Trustee Karen Brooks, Chair for Physical Properties Committee

.

THE UNIVERSITY OF ALABAMA SYSTEM PROJECT PLANNING REPORT DATE: NOVEMBER 12 - 13, 2020

X INITIAL REPORT INTERIM REPORT FINAL REPORT REPORT NO.

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

OFFICE OF THE PRESIDENT THE UNIVERSITY OF ALABAMA

3. ARCHITECT/ENGINEER:

1.	PROJECT:

FROM:

Bryant Conference Center and Moody Music District Energy Plant

Immediately north of Bryant Conference Center and south of Moody Music Building

2. LOCATION:

Requesting in this submittal

4. PROJECT STATUS:				
A. SCHEMATIC DESIGN	DATE INITIATED	September-20		
	% COMPLETE		100%	
	* DATE COMPLETED	(October-20	
D DDEI IMINIADV DESIGN.		,		
D. FRELIMINARY DESIGN:			Jctober-20	
	% COMPLETE * DATE COMPLETED		60%	
	* DATE COMPLETED	N	ovember-20	
C. CONSTRUCTION DOCUMENTS:	DATE INITIATED	(October-20	
	% COMPLETE		0%	
	* DATE COMPLETED	D	ecember-20	
D. SCHEDULED BID DATE:			February-21	
5. CURRENT PROJECT BUDGET:			ELIMINARY	
A. CONSTRUCTION			6,500,000	
B. EQUIPMENT			750,000	
C. LANDSCAPING			200,000	
D. SECURITY/ACCESS CONTROL			30,000	
E. TELECOMMUNICATION/DATA			30,000	
F. CONTINGENCY* (10%)			745,000	
G. UA PROJECT MANAGEMENT FEE** (3%)			245,850	
H. ARCHITECT/ENGINEER FEE*** (~6.2%)			461,520	
I. COMMISSIONING FEE			60,000	
J. EXPENSES (SURVEYS, TESTING, INSP	\$	60,000		
K. OTHER FEES AND SERVICES (TESTING, ADVERTISING, INSPECTIONS AND			42,630	
L. TOTAL PROJECT COST			9,125,000	
*Contingency is based on 5% of the cost of construction,	equipment, and landscaping.			
**UA Project Management for is based on 20/ of the see	t of comptimum time and include the description and continue to			

**UA Project Management fee is based on 3% of the cost of construction, equipment, landscaping, and contingency.

***Architect/Engineer fee is based on 6.2% of the cost of construction equipment, and landscaping, plus \$4,620 for additional services, less \$5,000 for previous work performed.

6. FUNDING/RESOURCES:	Office of Academic Affairs Reserves-\$750,000
	University Plant Reserves-\$750,000
7. REMARKS	College of Continuing Studies Reserves-\$7,625,000.
* FINAL AGENCY APPROVAL	SUBMITTED BY:

BRYANT CONFERENCE CENTER MOODY MUSIC DISTRICT ENERGY PLANT

Bryant Conference Center Existing Mechanical Yard Enclosure





