

**UNIVERSITY OF ALABAMA SYSTEM
BOARD RULE 415
BOARD SUBMITTAL CHECKLIST CRITERIA**

**BOARD SUBMITTAL CHECKLIST NO. 2
CAPITAL PROJECT - STAGE II SUBMITTAL ^{/1}
(Architect Ranking, Project Scope and Project Budget) ^{/8}**

CAMPUS: The University of Alabama

PROJECT NAME: Tom Barnes Education Center - Renovation & Add for Literacy Center

MEETING DATE: February 3 - 4, 2022

- | | |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | 1. Board Submittal Checklist No. 2 |
| <input checked="" type="checkbox"/> | 2. Transmittal Letter to Chancellor from Campus President requesting project be placed on the agendas for the forthcoming Physical Properties Committee and Board of Trustees (or Executive Committee) Meetings |
| <input checked="" type="checkbox"/> | 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) by the Board of Trustees |
| <input checked="" type="checkbox"/> | 4. Executive Summary – Proposed Capital Project ^{/2} |
| <input checked="" type="checkbox"/> | 5. Executive Summary – Architect, Engineer, Selection Process (include Interview Outline). ^{/3, /4, /5} |
| <input checked="" type="checkbox"/> | 6. Campus letter requesting approval of the ranking of firms and authority to Submit to the Physical Properties Committee for approval – signed by Chair of the Physical Properties Committee and UA System Senior Vice Chancellor for Finance and Administration ^{/6} |
| <input type="checkbox"/> | 7. Preliminary Business Plan (if applicable) ^{/7} |
| <input checked="" type="checkbox"/> | 8. Campus map(s) showing project site |

Prepared by:

DocuSigned by:

Matt Skinner

33522AA78D264BD...

Approved by:

^{/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

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

December 16, 2021

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

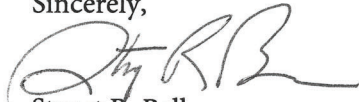
Dear Chancellor St. John:

I am pleased to send to you for consideration by the Board of Trustees at its February 4, 2022 meeting the following resolution:

- Board Item – Action: Stage II Submittal: Tom Barnes Education Center – Addition for Literacy Center, UA Project #426-21-2631

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

Sincerely,



Stuart R. Bell
President

Enclosure



RESOLUTION

TOM BARNES EDUCATION CENTER – RENOVATION AND ADDITION FOR LITERACY CENTER

WHEREAS, on November 5, 2021, in accordance with Board Rule 415, The Board of Trustees of The University of Alabama (“Board”) approved the Stage I submittal for the Tom Barnes Education Center – Renovation and Addition for Literacy Center Project (“Project”) to be located at the Tom Barnes Education Center at 260 Kilgore Lane on the Peter Bryce Campus; and

WHEREAS, the Project is designed to broaden and help enliven the work of the Belser-Parton Literacy Center, whose mission is associated with training teachers, assisting families with home literacy programs, conducting research on reading, and providing clinical support for struggling readers; and

WHEREAS, the Project will also support the mission of The Fayard Endowed Chair in Literacy Education enabled through the generous gift of Gary P. Fayard and Nancy S. Fayard; and

WHEREAS, the Project will consist of the renovation of the existing 2,465 square foot (sf) gymnasium into classroom space and a 1,570-sf addition at the northwest side of the building; and

WHEREAS, the Consultant Selection Committee, appointed by The University of Alabama (“University”) has completed Part 1 of the Consultant Selection Process in accordance with Board Rule 415 and negotiations for the Project will be conducted with the top ranked firm following Board approval as follows:

Ranking of Top Firms:

1. CMH Architects, Birmingham, Alabama
2. Ghafari Associates, Birmingham, Alabama
3. TRI Architecture, Birmingham, Alabama

WHEREAS, the Project will be funded from College of Education Reserves in the amount of \$800,000, the Office of Academic Affairs Reserves in the amount of \$500,000, and University Central Reserves in the amount of \$500,000; and

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

WHEREAS, the budget for the Project remains as stipulated below:

BUDGET:	CURRENT
Construction	\$ 1,230,000
Furniture, Fixtures, and Equipment	\$ 250,000
Security/Access Control	\$ 5,000
Telecommunication/Data	\$ 10,000
Contingency (10%)*	\$ 123,000
UA Project Management Fee (3%)**	\$ 40,590
Architect/Engineer Fee (~8.3%***)	\$ 101,844
Expenses (Geotech, Construction Materials Testing)	\$ 24,567
Other Fees and Services (Testing, Advertising, Printing)	\$ 14,999
TOTAL PROJECT COST	\$ 1,800,000

*Contingency is based on 10% of the cost of Construction.

**UA Project Management Fee is based on 3% of the costs of Construction and Contingency.

***Architect/Engineer Fee is based on 7.2% of the cost of Construction plus a 1.15 Renovation Factor.

NOW, THEREFORE, BE IT RESOLVED by The Board of Trustees of The University of Alabama 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 of Trustees to execute an architectural design agreement with CMH Architects, Birmingham, Alabama, for architectural services in accordance with Board Rule 415 for this Project.

EXECUTIVE SUMMARY
PROPOSED CAPITAL PROJECT
BOARD OF TRUSTEES SUBMITTAL

Meeting Date: February 3 – 4, 2022

CAMPUS: The University of Alabama, Tuscaloosa, Alabama
Tom Barnes Education Center – Renovation and Addition for Literacy Center

PROJECT NAME: Center

PROJECT NUMBER: 426-21-2631

PROJECT LOCATION: Tom Barnes Education Center at 260 Kilgore Lane, Peter Bryce Campus

ARCHITECT: Requesting in this submittal

THIS SUBMITTAL:	PREVIOUS APPROVALS:
<input type="checkbox"/> Stage I	November 5, 2021
<input checked="" type="checkbox"/> Stage II	
<input type="checkbox"/> Campus Master Plan Amendment	
<input type="checkbox"/> Stage III	
<input type="checkbox"/> Stage IV	

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input type="checkbox"/> Building Construction	Classroom Facilities	~49%	2,000
<input checked="" type="checkbox"/> Building Addition	Office Facilities	~20%	800
<input checked="" type="checkbox"/> Building Renovation	Central Service / Support	~ 3%	120
<input type="checkbox"/> Equipment	Circulation Area	~28%	1,115
TOTAL		100%	4,035

BUDGET	Preliminary
Construction	\$ 1,230,000
Furniture, Fixtures and Equipment	\$ 250,000
Security/Access Control	\$ 5,000
Telecommunication/Data	\$ 10,000
Contingency (10%)	\$ 123,000
UA Project Management Fee (3%)	\$ 40,590
Architect/Engineer Fee (8.3%)	\$ 101,844
Expenses (Geotech, Construction Materials Testing)	\$ 24,567
Other Fees and Services (testing, advertising, printing)	\$ 14,999
TOTAL PROJECT COST	\$ 1,800,000

*Contingency is based on 10% of the costs of Construction and Landscaping.

*UA Project Management Fee is based on 3% of the costs of Construction, Landscaping, and Contingency.

***Architect/Engineer Fee is based on 5.9% of the costs of Construction and Landscaping.

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:	
(Utilities, Housekeeping, Maintenance, Insurance, Other)	
1,570 sf x ~\$6.03/sf	\$ 9,467
Total Estimated Annual O&M Costs:	\$ 9,467

FUNDING SOURCE:	
Office of Academic Affairs Reserves	\$ 500,000
College of Education Reserves	\$ 800,000
University Central Reserves	\$ 500,000
O&M Costs:	University Annual Operating Funds \$ 9,467

NEW EQUIPMENT REQUIRED	
Total Equipment Costs:	N/A

PROJECT SCOPE:

The Tom Barnes Education Center – Renovation and Addition for Literacy Center Project (“Project”), located at 260 Kilgore Lane, will address space needs for the College of Education and related renovation work as necessary to support the Belser-Parton Literacy Center and the work of the Fayard Endowed Chair in Literacy Education.

The Project will renovate the existing 2,465 square foot (sf) gymnasium into classroom space. The new classrooms will seat approximately 25 people each when used separately. An operable partition dividing the classrooms will allow for simultaneous use for approximately 50 people when opened. The classrooms will be fitted with new audio-visual technology as well as mobile furniture to facilitate individual or group work.

The Project will also include a 1,570-sf addition at the northwest side of the building that includes six faculty offices and a work room. The addition has been intentionally designed with respect to maintaining appropriate setbacks from the nearby Peter Bryce Boulevard, and existing site utilities. The location of the offices will have direct adjacency and connectivity to the renovated classrooms.

The exterior materials of the addition will be carefully and intentionally selected to blend with the existing building. There is sufficient heating and cooling capacity in the current system, therefore no change of major building infrastructure will be required.

The Project will address approximately \$61,625 in deferred maintenance liabilities.

PROJECT STATUS

SCHEMATIC DESIGN:	Date Initiated	February 2022
	% Complete	0%
	Date Completed	April 2022
PRELIMINARY DESIGN:	Date Initiated	April 2022
	% Complete	0%
	Date Completed	May 2022
CONSTRUCTION DOCUMENTS:	Date Initiated	May 2022
	% Complete	0%
	Date Completed	June 2022
SCHEDULED BID DATE:		July 2022

**N/A on Stage I Projects*

RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS

The Tom Barnes Education Center – Renovation and Addition for Literacy Center Project (“Project”) will allow the Belser-Parton Literacy Center (“Center”) to grow its reputation as an interventionist agency that will produce grant and contract related resources that will strengthen options for recruiting and supporting graduate students in literacy related research.

The renovated site will also be a center for teacher development. The intent is that the Center can positively affect enrollment in teacher education because of its connection to schools and families and its focus on what might be the most important thing that schools do – teach children how to read.

The renovation is designed to broaden and help enliven the work of the Center, whose mission is associated with training teachers, assisting families with home literacy programs, conducting research on reading, and providing clinical support for struggling readers. Each of these purposes is tied to the University’s primary mission of advancing teaching, research, and service. The renovated space will provide the program the necessary square footage needed to expand services to the community.

Part 1

EXECUTIVE SUMMARY
CONSULTANT SELECTION PROCESS
BOARD OF TRUSTEES SUBMITTAL

Meeting Date: February 3 – 4, 2022
 Campus: The University of Alabama
Tom Barnes Education Center – Renovation and Addition for Literacy Center
 Project Name: Center
 UA Project #: 426-21-2631
 Project Location: Current site of Tom Barnes Education Center at 260 Kilgore Lane
 Prepared By: Vince Dooley/Mary Kathryn Holt Date: December 9, 2021

Project Type		Range of Construction Costs	
<input checked="" type="checkbox"/>	Building Renovations	\$ 600,001	to \$ 700,000
<input checked="" type="checkbox"/>	Building Addition	\$ 600,001	to \$ 700,000
<input type="checkbox"/>	New Construction	\$	to \$
<input type="checkbox"/>	Campus Infrastructure	\$	to \$
<input type="checkbox"/>	Equipment	\$	to \$
<input type="checkbox"/>	Other	\$	to \$

Building Type – Group I		Percentage of Project
<input type="checkbox"/>	Industrial Building Without Special Facilities	%
<input type="checkbox"/>	Parking Structures/Repetitive Garages	%
<input type="checkbox"/>	Simple Loft Type Structure	%
<input type="checkbox"/>	Warehouses/Utility Type Buildings	%
<input type="checkbox"/>	Other	%

Building Type – Group II		Percentage of Project
<input type="checkbox"/>	Apartments and Dormitories	%
<input type="checkbox"/>	Exhibit Halls	%
<input type="checkbox"/>	Manufacture/Industrial Facilities	%
<input type="checkbox"/>	Office Building (Without Tenant Improvements)	%
<input type="checkbox"/>	Printing Plants	%
<input type="checkbox"/>	Service Garage/Facility	%
<input type="checkbox"/>	Other (Storm Shelter and Multi-Purpose Event)	%

Building Type – Group III		Percentage of Project	
<input checked="" type="checkbox"/>	College Classroom Facilities	60	%
<input type="checkbox"/>	Convention Facilities	_____	%
<input type="checkbox"/>	Extended Care Facilities	_____	%
<input type="checkbox"/>	Gymnasiums	_____	%
<input type="checkbox"/>	Hospitals	_____	%
<input type="checkbox"/>	Institutional Dining Halls	_____	%
<input type="checkbox"/>	Laboratories	_____	%
<input type="checkbox"/>	Libraries	_____	%
<input type="checkbox"/>	Medical Schools	_____	%
<input type="checkbox"/>	Medical Office Facilities and Clinics	_____	%
<input type="checkbox"/>	Mental Institutions	_____	%
<input type="checkbox"/>	Office Buildings (with tenant improvements)	40	%
<input type="checkbox"/>	Parks	_____	%
<input type="checkbox"/>	Playground and Recreational Facilities	_____	%
<input type="checkbox"/>	Public Health Centers	_____	%
<input type="checkbox"/>	Research Facilities	_____	%
<input type="checkbox"/>	Stadiums	_____	%
<input type="checkbox"/>	Central Utilities Plants	_____	%
<input type="checkbox"/>	Water Supply and Distribution Plants	_____	%
<input type="checkbox"/>	Sewage Treatment and Underground Systems	_____	%
<input type="checkbox"/>	Electrical Substations and Primary and Secondary Distribution Systems, Roads, Bridges and Major Site Improvements when performed as Independent projects		%

Building Type – Group IV		Percentage of Project	
<input type="checkbox"/>	Aquariums		%
<input type="checkbox"/>	Auditoriums	_____	%
<input type="checkbox"/>	Art Galleries	_____	%
<input type="checkbox"/>	College Buildings with special features	_____	%
<input type="checkbox"/>	Communications Buildings	_____	%
<input type="checkbox"/>	Special Schools	_____	%
<input type="checkbox"/>	Theaters and similar facilities	_____	%
<input type="checkbox"/>	Other	_____	%

Building Type – Group V	Percentage of Project
<input type="checkbox"/> Residences and Specialized Decorative Buildings	_____ %
<input type="checkbox"/> Other	_____ %

Repetitive Design or Duplication of Facilities
Does the Building Program/Requirements support repetitive design or duplication of Facilities justifying an adjustment in A/E Design Fees? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Building Program Development
Will the A/E Agreement require the Development of a Comprehensive Building/Design Program in lieu of one provided by Owner requiring an adjustment in A/E Fees? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Construction Consultant Services
Will the University be utilizing a Construction Consultant who will perform some of the services normally provided by the Architect requiring an adjustment of A/E Fees? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Multiple Prime Trade Contracts
Will the project be competitively bid and constructed using Multiple Trade Contracts requiring additional services from the A/E? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Design Build Services
Will the University be using a Design/Build process, which will result in a reduction in contracted design services and a corresponding adjustment in A/E Fees? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Architect/Engineer Project Notifications
<input type="checkbox"/> Advertised through State Division of Construction Management
<input type="checkbox"/> Local/State Trade Journals
<input checked="" type="checkbox"/> Posted on Campus Web Pages
<input checked="" type="checkbox"/> Direct Contact with A/E Companies/Firms
<input checked="" type="checkbox"/> Other: Newspaper and email distribution list

Appointed Consultant Selection Committee (CSC): (Name and Title)

1. Mary Kathryn Holt, Senior Project Manager
2. Vince Dooley, Architectural Design Coordinator
3. Jason Bigelow, University Architect
4. Susanna Johnson, Director, Furnishings and Design
5. Luoheng Han, Senior Associate Provost for Academic Affairs

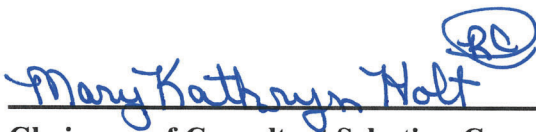
Qualified Firms/Companies Submitted:

1. CMH Architects, Birmingham, AL
2. Ghafari, Birmingham, AL
3. TRI, Birmingham, AL
4. Payne Design Group Associates, Montgomery, AL


Ranking of Most Qualified Firms to be submitted to the Physical Properties Committee

1. CMH Architects, Birmingham, AL
2. Ghafari Associates, Birmingham, AL
3. TRI Architecture, Birmingham, AL

Reviewed and approved by:



Chairman of Consultant Selection Committee



Vice President for Finance and Operations and Treasurer

Oral Interview Criteria/Focus
Tom Barnes Education Center -
Renovation and Addition for Literacy Center
for the University of Alabama
UA Project No. 426-21-2631
Date: November 17, 2021

1. **Welcome/Introduction** (*time allotted = 5 minutes*)
 - a. Design Team
 - i. Brief introduction of your firm/team.
 - ii. Proposed consultants (engineers and specialty consultants are not required to be present at interviews).
2. **Renovation and Fit-out Expertise** - 20 (*time allotted = 25 minutes*)
 - a. Describe your team's expertise with this project type. Reference one **identical** or **similar** project and discuss any challenges and solutions during design and construction.
 - i. Discuss any critical roof, structural challenges, or envelope issues (If applicable).
 - ii. How did you handle massing, scale, etc. to ensure this new addition maintain context with the existing?
 - b. Provide an example of a design project add where you were constrained by site limitations, site utilities or other restrictions.
3. **Roles & Execution** - 4 points max (*time allotted = 5 minutes*)
 - a. Design and construction roles
 - i. Explain your firm's day to day roles and responsibilities for the project.
 - ii. For the leadership roles, explain the hierarchy of roles and who is ultimately accountable for project success.

- b. Provide a proposed Design & Construction schedule, with the assumption for a Stage III submittal to the Board of Trustees by June 2022.
 - i. Anticipated Bid Date Early of July 2022
- 4. **Questions & Answers** (*time allotted = 15 minutes*)

December 9, 2021

Dr. Dana S. Keith
Senior 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: Consultant Selection Process – Part 1
Tom Barnes Education Center- Renovation and Addition for Literacy Center
UA Project #: 426-21-2631

Dear Dr. Keith and Trustee Brooks,

Pursuant to Board Rule 415, on November 5, 2021, The Board of Trustees of The University of Alabama (“Board”) approved the Stage I submittal for the Tom Barnes Education Center- Renovation and Addition for Literacy Center Project (“Project”) to be located at the current Tom Barnes Education Center Addition site at 260 Kilgore Lane at a preliminary total Project budget amount of \$1,800,000.

Pursuant to Board Rule 415, notifications for the Project, including a brief description of the Project location, and preliminary budget were advertised, issued by email to Alabama-based firms and others in the consultant database, and posted on The University of Alabama (“University”) campus web page. Firms desiring to be considered were requested to provide brochures to the University outlining their qualifications, relevant experience, and proposed team members by October 13, 2021.

A Consultant Selection Committee, appointed by the University in accordance with the provisions of Board Rule 415, reviewed the submitted brochures and on November 17, 2021, interviewed the following architectural firms:

- CMH Architects, Birmingham, AL
- Ghafari Associates, Birmingham, AL
- TRI Architecture, Birmingham, AL

The Consultant Selection Committee then determined the following ranking for the firms deemed most qualified for the Project:

1. CMH Architects, Birmingham, AL
2. Ghafari Associates, Birmingham, AL
3. TRI Architecture, Birmingham, AL

The primary selection criteria used in the ranking of the firms included the following:

1. The firms represented a clear understanding of the Project program and goals, a design approach or methodology and standard of care necessary with renovation projects.
2. The firm's description of how they manage renovation and addition projects with respect to maintaining the project budget and schedule.
3. The firms experience and approach to programming and designing interior spaces that provide functional flexibility, include any emerging trends and how this can be achieved.
4. The firms are committed to using Alabama-based consultant engineers and architects for the Project.

Approval is hereby requested for:

1. The ranking of consultant firms listed hereinbefore.
2. Approval to submit these rankings to the Physical Properties Committee for consideration.

If you have any questions or concerns, please feel free to contact me.

Sincerely,



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

MMF/ccj

Attachment

pc/atchmt: Michael Rodgers
Tim Leopard
Mary Kathryn Holt
Vince Dooley

The above listing of firms ranked as the most qualified for the Project are hereby approved and by forwarding this executed document to the Chancellor's office, the rankings are approved for inclusion in the Board materials to the February 3 – 4, 2022, Physical Properties Committee.

DocuSigned by:

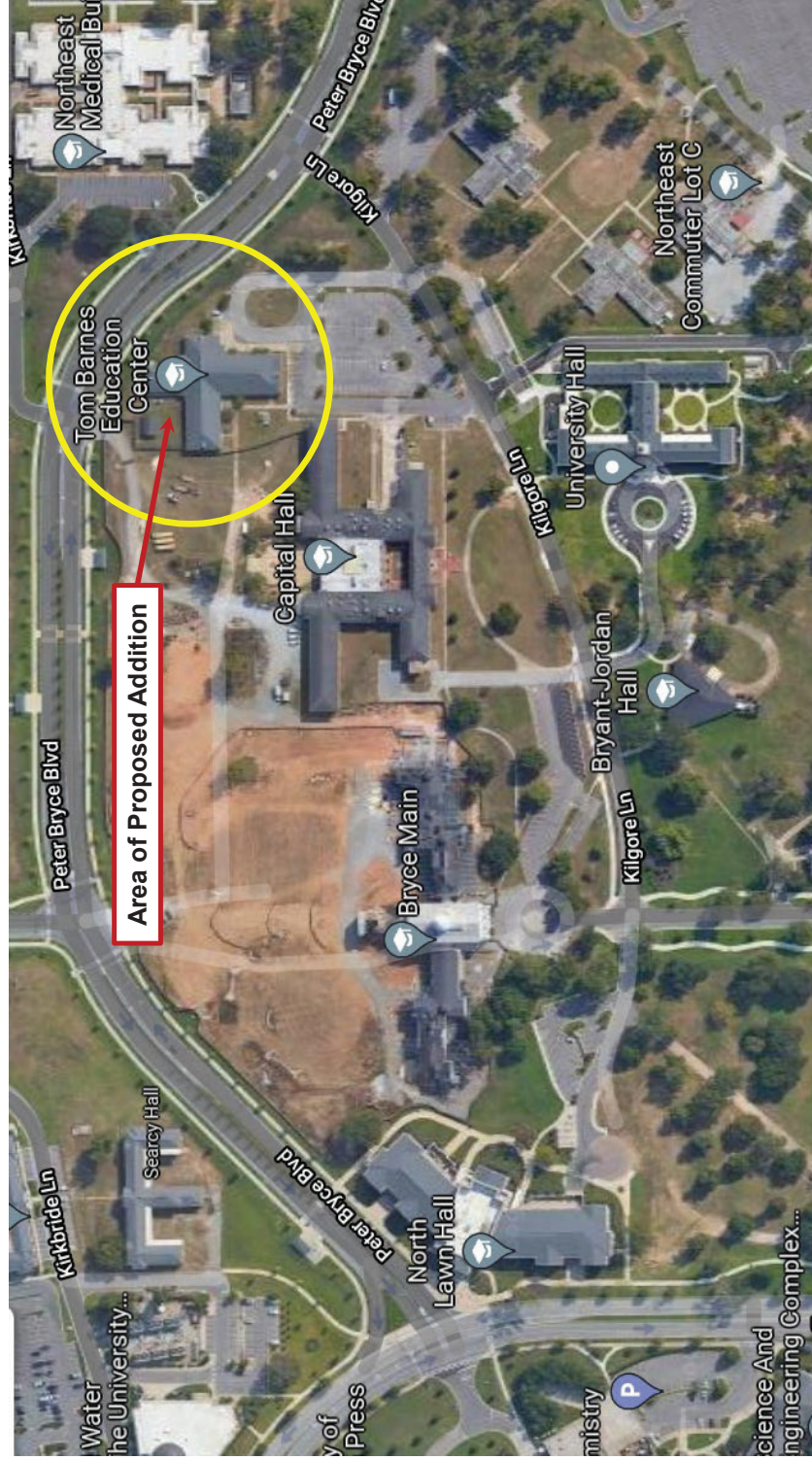
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Dr. Dana S. Keith: **Recommend for Approval**
Senior Vice Chancellor for Finance and Administration

DocuSigned by:

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Trustee Karen Brooks: **Approval Recommended**
Chair of the Physical Properties Committee

TOM BARNES EDUCATION CENTER RENOVATION AND ADDITION FOR LITERACY CENTER

SITE MAP



TOM BARNES EDUCATION CENTER RENOVATION AND ADDITION FOR LITERACY CENTER

LOCATION MAP

