

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

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

**CAMPUS:** The University of Alabama, Tuscaloosa, Alabama

**PROJECT NAME:** Finance Administrative Services Building Renovation

**MEETING DATE:** April 13 - 14, 2023

- ☒ 1. Board Submittal Checklist No. 2
- ☒ 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
- ☒ 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
- ☒ 4. Executive Summary – Proposed Capital Project <sup>/2</sup>
- ☒ 5. Executive Summary – Architect, Engineer, Selection Process (include Interview Outline). <sup>/3, /4, /5</sup>
- ☒ 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 <sup>/6</sup>
- ☐ 7. Preliminary Business Plan (if applicable) <sup>/7</sup>
- ☒ 8. Campus map(s) showing project site

Prepared by: Suzanne Webster

Approved by:

*Tim Leopard*

<sup>/1</sup> Reference Tab 3H – Board Rule 415 Instructional Guide

<sup>/2</sup> Reference Tab 3E – Board Rule 415 Instructional Guide

<sup>/3</sup> Reference Tab 3K – Board Rule 415 Instructional Guide

<sup>/4</sup> Reference Tab 3L – Board Rule 415 Instructional Guide

<sup>/5</sup> Reference Tab 3M – Board Rule 415 Instructional Guide

<sup>/6</sup> Reference Tab 3N – Board Rule 415 Instructional Guide

<sup>/7</sup> Reference Tab 3V – Board Rule 415 Instructional Guide

<sup>/8</sup> 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

March 2, 2023

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 approval under Board Rule 415 the attached documents for a Stage II submittal for the Finance Administrative Services Building Renovation project.

The resolution requests authorization to negotiate an Owner Designer Agreement with B Group Architecture of Birmingham, Alabama, as the principal design firm for the project.

The item has been thoroughly reviewed and has my endorsement. With your concurrence, I ask that it be added to the agenda for The Board of Trustees of The University of Alabama at their regular meeting on April 13 – 14, 2023.

Sincerely,



Stuart R. Bell  
President

Enclosure



THE UNIVERSITY OF ALABAMA

**RESOLUTION**

**AUTHORIZATION TO NEGOTIATE AN OWNER/ARCHITECT AGREEMENT  
FOR THE FINANCE ADMINISTRATIVE SERVICES BUILDING RENOVATION**

WHEREAS, on February 3, 2023, in accordance with Board Rule 415, the Board of Trustees of The University of Alabama (“Board”) approved a Stage I submittal for the Finance Administrative Services Building Renovation project (“Project”) to be located at 220 Paul W. Bryant Drive East; and

WHEREAS, the University acquired the property in 1975 as part of the Urban Renewal Plan adopted by the community in 1971; and

WHEREAS, the University subsequently leased the property to the Alabama Credit Union in 1983 and, as the lease is expiring, the University would now like to utilize the property and adapt the existing facility for institutional purposes; and

WHEREAS, the Project will include the interior renovation of the existing 9,089 gross square foot building to house the Office of Finance and related departments including Financial Accounting and Reporting, the Tax Office, the Budget Office, and Finance Information Systems and Data Integrity; and

WHEREAS, the renovation will provide a centralized location for Office of Finance operations and allow for the reallocation of vacated space within the Rose Administration Building to support critical needs there; 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. B Group Architecture, Birmingham, Alabama
2. Christopher Architecture and Interiors, Birmingham, Alabama
3. LIVE Design Group, Birmingham, Alabama

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 Project will be funded from University Central Reserves in the amount of \$6,068,550 and will address deferred maintenance liabilities in the amount of \$2,415,420; and

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

<b>BUDGET:</b>		<b>CURRENT</b>
Construction	\$	3,900,000
Landscaping	\$	85,000
Furniture, Fixtures and Equipment	\$	775,000
Security/Access Control	\$	75,000
Telecommunication/Data	\$	75,000
Contingency* (10%)	\$	398,500
UA Project Management Fee** (3%)	\$	131,505
Architect/Engineer Fee*** (~8.13%)	\$	323,781
Commissioning	\$	25,000
Other****	\$	279,764
<b>TOTAL PROJECT COST</b>	<b>\$</b>	<b><u>6,068,550</u></b>

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

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

\*\*\*Architect/Engineer Fee is based on 6.5% of the cost of Construction and Landscaping, plus a renovation factor of 25% (8.13% total fee).

\*\*\*\*Other expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

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 to negotiate an owner designer agreement with B Group Architecture, of Birmingham, Alabama, for design services in accordance with Board Rule 415 for this Project.



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

**MEETING DATE:** April 13 – 14, 2023

**CAMPUS:** The University of Alabama, Tuscaloosa, Alabama  
Finance Administrative Services Building - former ACU Main Branch

**PROJECT NAME:** Branch

**PROJECT NUMBER:** 338-23-3205

**PROJECT LOCATION:** 220 Paul W. Bryant Drive East

**ARCHITECT:** B Group Architecture, Birmingham, AL – pending approval

**THIS SUBMITTAL:**

- ☐ Stage I
- ☒ Stage II
- ☐ Campus Master Plan Amendment
- ☐ Stage III
- ☐ Stage IV

**PREVIOUS APPROVALS:**

February 3, 2023

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input checked="" type="checkbox"/> Building Renovation	Office Facilities	~63%	5,766
	Conference Rooms	~14%	1,290
	Special Use Facilities	~23%	2,033
	<b>TOTAL</b>	<b>100%</b>	<b>9,089</b>

<b>BUDGET</b>	<b>Current</b>
Construction	\$ 3,900,000
Landscaping	\$ 85,000
Furniture, Fixtures and Equipment	\$ 775,000
Security/Access Control	\$ 75,000
Telecommunication/Data	\$ 75,000
Contingency* (10%)	\$ 398,500
UA Project Management Fee** (3%)	\$ 131,505
Architect/Engineer Fee*** (~8.13%)	\$ 323,781
Commissioning	\$ 25,000
Other ****	\$ 279,764
<b>TOTAL PROJECT COST</b>	<b>\$ 6,068,550</b>
<b>Total Construction Cost per square foot \$473</b>	

\*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 6.5% of the cost of Construction and Landscaping, plus a renovation factor of 25% (8.13% total fee).

\*\*\*\*Other fees and expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

<b>ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&amp;M) COSTS:</b>	
(Utilities, Housekeeping, Maintenance, Insurance, Other)	
9,089 sf x ~\$8.83/sf	\$ 80,270
<b>Total Estimated Annual O&amp;M Costs:</b>	<b>\$ 80,270</b>

<b>FUNDING SOURCE:</b>	
	University Central Reserves \$ 6,068,550
<b>O&amp;M Costs:</b>	University Annual Operating Funds \$ 80,270

<b>NEW EQUIPMENT REQUIRED</b>	
<b>Total Equipment Costs:</b>	N/A

**PROJECT SCOPE:**

The Finance Administrative Services Building Renovation will entail a full interior renovation of the existing 9,089 gross square feet building located at 220 Paul W. Bryant Drive East.

The building will house departments within the Office of Finance including Financial Accounting and Reporting, the Tax Office, the Budget Office, and Finance Information Systems and Data Integrity, providing centralized office, meeting, and support spaces. All building systems will also be replaced as they are at the end of their useful life.

Alabama Credit Union is currently constructing a new facility located on University Boulevard and will relocate when construction is complete, which will enable this project to proceed.

**PROJECT STATUS**

SCHEMATIC DESIGN:	Date Initiated	April 2023
	% Complete	0%
	Date Completed	May 2023
PRELIMINARY DESIGN:	Date Initiated	June 2023
	% Complete	0%
	Date Completed	July 2023
CONSTRUCTION DOCUMENTS:	Date Initiated	August 2023
	% Complete	0%
	Date Completed	October 2023
SCHEDULED BID DATE:		October 2023

*\*N/A on Stage I Projects*

## **RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS**

The proposed Finance Administrative Services Building Renovation project (“Project”) will support an enhanced training, meeting and workspace atmosphere for current and future staff, and right-size the operational and support space needs appropriate for the building and the users.

The departments proposed to be in the facility are functionally aligned but are currently housed in separate locations. This Project will allow for their co-location to enhance operations and efficiency. The new location will provide consolidation and easier access for campus customers and enhance collaboration between groups due to adjacency.

Moving to one location will allow for the reassignment of vacated space that can be used to meet the needs of other departments within Rose Administration.

The assigned departments work extensively with internal and external partners and this new location will provide ease of access for all clientele and partners.

**Part 1**

**EXECUTIVE SUMMARY**  
**CONSULTANT SELECTION PROCESS**  
**BOARD OF TRUSTEES SUBMITTAL**

Meeting Date: April 13-14, 2023

Campus: The University of Alabama

Project Name: Finance Administrative Services Building Renovation

Project Location: 220 Paul W Bryant Dr East

Prepared By: Suzanne Webster

Date: February 27, 2023

Project Type		Range of Construction Costs		
<input checked="" type="checkbox"/>	Building Renovations	\$ 3,500,000	to	\$ 4,000,000
<input type="checkbox"/>	Building Addition	\$ _____	to	\$ _____
<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 type="checkbox"/> College Classroom Facilities	_____ %
<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 checked="" type="checkbox"/> Office Buildings (with tenant improvements)	100 %
<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. Suzanne Webster, Senior Project Manager
2. Vince Dooley, Architectural Design Coordinator
3. Jason Bigelow, University Architect
4. Susanna Johnson, Director, Furnishings and Design
5. Julie Shelton, Associate Vice President, Office of Finance
6. Caroline Railsback, Operations Coordinator, Office of Finance

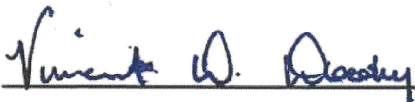
**Qualified Firms/Companies Submitted:**

1. B Group Architecture, Birmingham, Alabama
2. Christopher Architecture and Interiors, Birmingham, Alabama
3. LIVE Design Group, Birmingham, Alabama

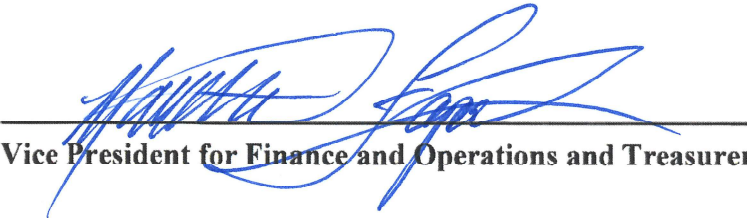
**Ranking of Most Qualified Firms to be submitted to the Physical Properties Committee**

1. B Group Architecture, Birmingham, Alabama
2. Christopher Architecture and Interiors, Birmingham, Alabama
3. LIVE Design Group, Birmingham, Alabama

**Reviewed and approved by:**



**Chairman of Consultant Selection Committee**



**Vice President for Finance and Operations and Treasurer**



February 28, 2023

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 14<sup>th</sup> Street, East  
Tuscaloosa, AL 35404

RE: Consultant Selection Process – Part 1  
Finance Administrative Services Building Renovation  
UA Project No: 338-23-3205

Dear Dr. Keith and Trustee Brooks,

Pursuant to Board Rule 415, on February 3, 2023, The Board of Trustees of The University of Alabama (“Board”) approved the Stage I submittal for the Finance Administrative Services Building Renovation (“Project”) to be located at 220 Paul W. Bryant Drive East, at a preliminary total Project budget amount of \$6,068,550.

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 January 30, 2023.

A Consultant Selection Committee, appointed by the University in accordance with the provisions of Board Rule 415, reviewed the submitted brochures and on February 21, 2023, interviewed the following architectural firms:

- Christopher Architecture and Interiors, Birmingham, Alabama
- B Group Architecture, Birmingham, Alabama
- LIVE Design Group, Birmingham, Alabama

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

1. B Group Architecture, Birmingham, Alabama
2. Christopher Architecture and Interiors, Birmingham, Alabama
3. LIVE Design Group, Birmingham, Alabama

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

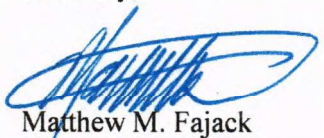
1. The firms represented a clear understanding of the Project program and goals, as well as how to achieve them, specifically, expertise and experience with renovations, system replacements, and design enhancements and detailing of existing building within the surrounding campus context.
2. The firms are familiar with the University facilities standards and the regulatory requirements for the design of the Project.
3. The firms presented the most favorable listing of qualified principals, staff, and associated engineers for the Project along with a commitment to meet the University's schedule for completion of the design and construction of the Project.
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  
Suzanne Webster  
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 April 13- 14, 2023, Physical Properties Committee.  
\*\*\*\*\*

DocuSigned by:

*Dana S Keith*

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

DocuSigned by:

*Karen P. Brooks*

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

# FINANCE ADMINISTRATIVE SERVICES BUILDING RENOVATION

## EAST ELEVATION





# FINANCE ADMINISTRATIVE SERVICES BUILDING RENOVATION

FROM BRYANT DRIVE LOOKING TO NORTHEAST



FINANCE ADMINISTRATIVE SERVICES BUILDING RENOVATION

LOCATION MAP

