

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

**BOARD SUBMITTAL CHECKLIST NO. 4
CAPITAL PROJECT - STAGE IV SUBMITTAL ^{/1}
(Construction Contract Award)**

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Beta Theta Pi Rear Addition

MEETING DATE: September 5, 2024

- 1. Board Submittal Checklist No. 4
- 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 Construction Contract Award, Construction Budget and Project Budget by the Board of Trustees
- 4. 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}
- 5. Tabulation of competitive bids – certified by Project Architect/Construction Manager
- 6. Recommendations for Contract Award by Architect/Construction Manager
- 7. Campus Map(s) showing project site
- 8. Final Business Plan (if applicable) ^{/3}

Prepared by: Michael Hand

Approved by:



^{/1} Reference Tab 3I - Board Rule 415 Instructional Guide

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

^{/3} Reference Tab 3V - Board Rule 415 Instructional Guide

August 7, 2024

Interim Chancellor Sid J. Trant
The University of Alabama System
500 University Boulevard East
Tuscaloosa, Alabama 35401

Dear Interim Chancellor Sid Trant:

I am pleased to send to you for approval under Board Rule 415 the attached documents for a Stage IV submittal for the Beta Theta Pi Rear Addition project.

The resolution requests authorization to award the construction contract for the Construction - Addition Package and approval of the reallocated budget and revised funding.

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 at their regular meeting on September 5, 2024.

Sincerely,



Stuart R. Bell
President

Enclosure



THE UNIVERSITY OF ALABAMA**Approving the reallocated project budget, granting authorization to execute a Construction Contract for the Beta Theta Pi Fraternity House Rear Addition****RESOLUTION**

WHEREAS, on February 2, 2024, in accordance with Board Rule 415, The Board of Trustees of The University of Alabama (“Board”) approved Stage I and Stage II submittals for the Beta Theta Pi Rear Addition project (“Project”) to be located at 960 University Boulevard; and

WHEREAS, the Project will allow for an addition to the north elevation (“rear”) of the Beta Theta Pi (“Chapter”) fraternity house, consisting of a 1,000 square foot extension to the existing game room and an additional 200 square feet of needed storage space for a total increase of 1,200 square feet; and

WHEREAS, the addition will enhance the functionality of the house and the student-life experience for both existing and future members by aligning the house with current trends in Greek life, which will aid in recruitment and Chapter growth; and

WHEREAS, to mitigate the impact to Chapter members during the Fall semester, and to meet the Chapter’s request to occupy the additional space by the Spring 2025 semester, the University has sequenced the Project to include a preliminary Utilities and Infrastructure relocation package ahead of the main construction package; and

WHEREAS, Ellis Architects (“Ellis”) of Tuscaloosa, Alabama, was engaged by the University and the Chapter to perform due diligence and programming services for this Project, thereby gaining valuable insight to the Project and specific Chapter needs; and

WHEREAS, this insight, as well as Ellis’s knowledge of University Standards, design principles, and procedures, will greatly facilitate an efficient design and administrative process; and

WHEREAS, Ellis has agreed to accelerate design services so that the Project can be completed, and the additional space fully utilized for the Spring 2025 semester; and

WHEREAS, on February 2, 2024, in accordance with Board Rule 415, due to the abovementioned benefits to the University, the Board authorized the University to waive the Consultant Selection Process and to utilize Ellis to provide design services for the Project; and

WHEREAS, the University has negotiated a final design fee based on 7.7% of the cost of the main construction package, with a 1.18 renovation factor, plus additional services of a not-to-exceed amount of \$1,000, less a credit of \$9,700, which represents a discount of approximately 23% of the standard fee; and

WHEREAS, the engineering services for the Construction – Utilities & Infrastructure Package will be a direct engineering services agreement between the University and a civil engineering firm to ensure coordination with critical University utilities in the area and City of Tuscaloosa requirements; and

WHEREAS, to best serve the members and further support Chapter operations, the Chapter desired to minimally increase the size of the addition by 300 square feet for a total of 1,500 square feet which will more fully utilize the available lot and provide additional program benefit into the future for the Chapter; and

WHEREAS, the Chapter further desired to reduce operational expense related to exterior maintenance and to provide an outdoor gathering space for its members by including a hardscape patio directly adjacent to the east of the addition; and

WHEREAS, on April 12, 2024, the Board approved the scope change and associated budget increase from \$1,171,205 to \$1,384,904; and

WHEREAS, on April 12, 2024, the Board approved the Stage III submittal for the Project; and

WHEREAS, on April 18, 2024, pursuant to Title 39, Public Works provisions of the Code of Alabama, competitive bids were received for the Construction – Utilities & Infrastructure Package for the Project and Central Alabama Asphalt & Construction Co, LLC, Tuscaloosa, Alabama (“CAA”), was declared the lowest responsible bidder with a base bid of \$209,015 as referenced on the certified bid tab; and

WHEREAS, the total proposed contract award of \$209,015 exceeded the budgeted amount of \$125,000 included in the previously approved project budget; and

WHEREAS, in accordance with Board Rule 415, on June 7, 2024, the Board authorized the University to award the construction contract for the Construction – Utilities and Infrastructure Package to CAA for a total contract amount of \$209,015; and

WHEREAS, on June 7, 2024, the Board approved a Revised Budget from \$1,384,904 to \$1,409,361 to reflect the construction bid results and associated revisions to soft cost; and

WHEREAS, on July 18, 2024, pursuant to Title 39, Public Works provisions of the Code of Alabama, competitive bids were received for the Construction – Addition Package for the Project and Snow-Blakeney Construction, Inc., Tuscaloosa, Alabama (“Snow-Blakeney”), was declared the lowest responsible bidder with an adjusted base bid of \$906,130, as referenced on the certified bid tab; and

WHEREAS, in accordance with Board Rule 415, the University is requesting approval to award the construction contract for the Construction – Addition Package to Snow-Blakeney for a total contract amount of \$906,130; and

WHEREAS, the existing Security & Access Control and Telecommunications and Data have been evaluated and confirmed that there is no additional need for services relative to the construction project; and

WHEREAS, the University is requesting approval of the reallocated project budget to reflect the construction bid results, associated revisions to soft costs, and the aforementioned changes; and

WHEREAS, the Project will be funded from Beta Theta Pi Chapter Reserves in the amount of \$1,309,361, which the University has verified, and a Chapter Payable in the amount of \$100,000 which will be in the form of a loan to Beta Theta Pi, and the Chapter is current with their existing note; and

WHEREAS, Beta Theta Pi has agreed to repay the loan of \$100,000 to the University and has shown through its Business Plan the ability to repay the loan; 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 reallocated budget for the Project is as stipulated below:

BUDGET:		REALLOCATED
Construction – Addition Package	\$	906,130
Construction - Utilities & Infrastructure Package	\$	209,015
Landscaping (bid with Addition Package)	\$	0
Security & Access Control	\$	0
Telecomm & Data	\$	5,000
Contingency ¹ (5%)	\$	45,307
UA Project Management Fee ² (4.5%)	\$	52,220
Architect/Engineer Fee ³ (~7.4%)	\$	83,923
Other ⁴	\$	107,766
Escalation ⁵	\$	0
TOTAL PROJECT COST	\$	1,409,361

¹Contingency is based on 5% of the Construction – Addition Package.

²UA Project Management Fee is based on 4.5% of the Construction Packages and Contingency.

³Architect/Engineer Fee is based on 7.4% of the Construction - Addition Package plus a 1.18 Renovation Factor, plus \$1,000 in NTE Additional Services, less a \$9,700 credit, plus a lump sum engineering fee of \$11,250 for the Construction – Utilities & Infrastructure Package plus \$3,500 in NTE Additional Services, less a credit of \$1,250 that will be a direct engineering services agreement between the University and a civil engineer to ensure coordination with critical University utilities in the area.

⁴Other expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

⁵Escalation is currently based on an anticipated 1% inflation per month through September of 2024 and 0.5% per month thereafter. Therefore, escalation was calculated on a 5% basis for the Addition Package and Landscaping related construction and soft costs for this project based on the bid date of July 2024 and has been applied to the Construction – Addition Package subsequent to the bid opening.

Current Package for Contract Award Approval

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

1. The Budget Reallocation for the Project is hereby approved as stipulated above.
2. The revised funding for the Project is hereby approved as stipulated above.

BE IT FURTHER RESOLVED that Stuart R. Bell, President, Cheryl Mowdy, Interim 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 to execute the aforementioned contract with Snow-Blakeney Construction, Inc. of Tuscaloosa, Alabama for the Construction - Addition Package for the Project in accordance with Board Rule 415.

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

MEETING DATE: September 5, 2024

CAMPUS: The University of Alabama, Tuscaloosa, Alabama

PROJECT NAME: Beta Theta Pi Rear Addition

PROJECT NUMBER: 908-24-3527

PROJECT LOCATION: 960 University Blvd

ARCHITECT: Ellis Architects, Inc., Tuscaloosa, AL

THIS SUBMITTAL:	PREVIOUS APPROVALS:
<input type="checkbox"/> Stage I	February 2, 2024
<input type="checkbox"/> Stage II, waiver request	February 2, 2024
<input type="checkbox"/> Campus Master Plan Amendment	
<input type="checkbox"/> Stage III	April 12, 2024
<input type="checkbox"/> Stage IV (Early Utility Package)	June 6, 2024
<input checked="" type="checkbox"/> Stage IV (Addition Package)	

PROJECT TYPE	SPACE CATEGORIES	PERCENTAGE	GSF
<input type="checkbox"/> Building Construction			
<input checked="" type="checkbox"/> Building Addition	Fraternity	100%	1,500
<input type="checkbox"/> Building Renovation			
<input type="checkbox"/> Equipment			
TOTAL		100%	1,500

BUDGET	Current	Reallocated
Construction – Addition Package	\$ 741,200	906,130
Construction - Utilities & Infrastructure Package	\$ 209,015	209,015
Landscaping (bid with Addition Package)	\$ 25,000	0
Security & Access Control	\$ 50,000	0
Telecomm & Data	\$ 50,000	5,000
Contingency ¹ (5%)	\$ 48,761	45,307
UA Project Management Fee ² (4.5%)	\$ 46,079	52,220
Architect/Engineer Fee ³ (~7.4%)	\$ 69,522	83,923
Other ⁴	\$ 125,000	107,766
Escalation ⁵	\$ 44,784	0
TOTAL PROJECT COST	\$ 1,409,361	1,409,361
Total Construction Cost per square foot \$774		

¹Contingency is based on 5% of the costs of the Construction – Addition Package.

²UA Project Management Fee is based on 4.5% of the costs of the Construction Packages and Contingency.

³Architect/Engineer Fee is based on 7.4% of the costs of the Construction - Addition Package plus a 1.18 Renovation Factor, plus \$1,000 in NTE Additional Services, less a \$9,700 credit, plus a lump sum engineering fee of \$11,250 for the Construction – Utilities & Infrastructure Package, plus \$3,500 in NTE Additional Services, less a credit of \$1,250 that will be a direct engineering services agreement between the University and a civil engineer to ensure coordination with critical University utilities in the area.

⁴Other fees and expenses include Geotech, Construction Materials Testing, Inspections, Advertising, Printing, and other associated project costs, as applicable.

⁵Escalation is currently based on an anticipated 1% inflation per month through September of 2024 and 0.5% per month thereafter. Therefore, escalation was calculated on a 5% basis for the Addition Package and Landscaping related construction and soft costs for this project based on the bid date of July 2024, as included in the Project Status, and has been applied to the Construction – Addition Package subsequent to the bid opening.

Current Package for Contract Award Approval

ESTIMATED ANNUAL OPERATING AND MAINTENANCE (O&M) COSTS:		
(Utilities, Housekeeping, Maintenance, Insurance, Other)		
0 sf x ~\$0.00/sf	\$	NA
Total Estimated Annual O&M Costs:	\$	NA*

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

NEW EQUIPMENT REQUIRED
Total Equipment Costs: N/A

PROJECT SCOPE:

The proposed Beta Theta Pi Rear Addition project (“Project”), located at 960 University Boulevard, will consist of an addition to the existing recreation room at the rear of the fraternity house. The renovation will enhance the functionality of the current recreation room and bring the house closer to current trends in Greek life which should aid in future recruitment and chapter growth.

The addition includes a 1,200 square foot extension of the current recreation room, approximately doubling the size of the space, as well as a 300 square foot storage room for much-needed storage capacity, making the total Project addition approximately 1,500 square feet. The area to the east of the new addition will be replaced with a hardscape to make a new outdoor gathering area, reducing maintenance expenses for the Chapter and further aiding in chapter growth.

The addition will be in general alignment with the back of the adjacent Phi Gamma Delta and Sigma Nu houses. Careful attention will be made to ensure that the materials used in the addition will match the existing house.

The Project will be executed in two phases: a preliminary Utilities and Infrastructure relocation package, tentatively planned for Summer 2024, and the Addition package, to be executed in Fall 2024 and completed in Spring 2025.

PROJECT STATUS		
SCHEMATIC DESIGN:	Date Initiated	December 2023
	% Complete	100%
	Date Completed	January 2024
PRELIMINARY DESIGN:	Date Initiated	January 2024
	% Complete	100%
	Date Completed	February 2024
<u>Utility and Infrastructure Package</u>		
CONSTRUCTION DOCUMENTS:	Date Initiated	February 2024
	% Complete	100%
	Date Completed	March 2024
BID DATE:		April 18, 2024
<u>Addition Package</u>		
CONSTRUCTION DOCUMENTS	Date Initiated	March 2024
	% Complete	100%
	Date Completed	June 2024
BID DATE:		July 18, 2024

**N/A on Stage I Projects*

RELATIONSHIP AND ENHANCEMENT OF CAMPUS PROGRAMS

The proposed project will enhance the student-life experience for existing and future members by providing additional gathering space in the recreation room and storage needed for the house. The addition will increase room functionality and bring the house up to current trends in Greek life.

TABULATION OF BIDS



Project Name
Beta Theta Pi Rear Addition

Bid Due
July 18, 2024 2:00 p.m. local time

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

UA Project No.
908-24-3605B

Bid Location
405 Cahaba Circle
Tuscaloosa, Alabama 35404

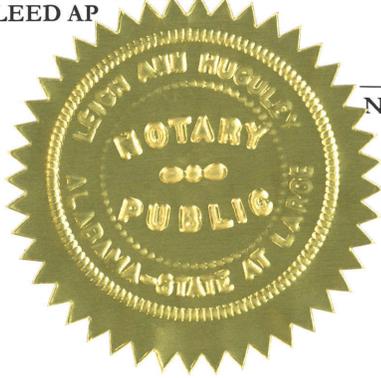
FUNDS AVAILABLE: Seven hundred forty-one thousand, two hundred dollars and 00/100 (\$741,200.00)
BIDS SHALL BE VALID FOR: Sixty (60) Days
CONSTRUCTION DURATION: Project Completion: April 4, 2025

CONTRACTOR	Hall-Taylor Construction Co., Inc.	J. T. Harrison Construction Co., Inc.	Snow-Blakeney Construction, Inc.
		4703 Fosters Industrial Ln. Tuscaloosa, AL 35401 (205) 758-8265 GC Lic. #13714	P. O. Box 21300 Tuscaloosa, AL 35402 (205) 333-1120 GC Lic. #20245
Addenda ONE - THREE	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<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	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
BONDING COMPANY OR BID DEPOSIT	RLI Insurance Company	Travelers Casualty & Surety Co. of America	Cincinnati Insurance Co.
UNIT PRICE #1 <i>Description on back of page</i>	\$ 24.00	\$ 38.00	\$ 24.00
UNIT PRICE #2 <i>Description on back of page</i>	\$ 1.50	\$ 8.00	\$ 1.50
UNIT PRICE #3 <i>Description on back of page</i>	\$ 6.00	\$ 7.00	\$ 6.00
UNIT PRICE #4 <i>Description on back of page</i>	\$ 5.00	\$ 5.00	\$ 5.00
UNIT PRICE #5 <i>Description on back of page</i>	\$ 10.00	\$ 15.00	\$ 10.00
BASE BID ON PROPOSAL	\$ 1,300,000.00	\$ 1,100,000.00	\$ 950,000.00
ENVELOPE ADJUSTMENT	(20,000.00)	(91,000.00)	(43,870.00)
TOTAL BID	\$ 1,280,000.00	\$ 1,009,000.00	\$ 906,130.00

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
 Caldwell Architects

Sworn to and subscribed before me this 18th day of July, 2024.




 Leigh Ann Huguley
 Notary Public

April 4, 2027
 My Commission Expires

Unit Price Descriptions:

Unit Price #1: Excavation & Replacement of Unsuitable Materials. Price per CYIP.

Unit Price #2: Erosion Control, Temporary Mulching (hydraulically applied). Price per SYIP.

Unit Price#3: Erosion Control, Silt Fence. Price per LF.

Unit Price#4: Erosion Control, Sand bags. Price per Sand Bag.

Unit Price#5: Erosion Control, ALDOT #57 Crushed Aggregate Limestone. Price per SYIP.

BETA THETA PI REAR ADDITION

Approved April 12, 2024



Existing

Area of Addition

BETA THETA PI REAR ADDITION

LOCATION MAP

