

Wilson, Kimberly M

From: Wilson, Kimberly M
Sent: Thursday, September 6, 2018 9:28 AM
To: Fannin, Cristina; Morris, Brad S; Cottingham, Lindsey K; DuConge', John J; Gaines, Kynthia; Sheffield, Spencer J; Weiland, Malte; Powell, Daniel S
Cc: john.richardson@facilities.gatech.edu; Goldfarb, David L; Scott JOnes
Subject: Fee Billing on GTFI Projects

All,

Please read through the email below. On GTFI projects, where contracts are not routed through our accounting system, we need to meet with John Richardson to set up a billing cycle for Facilities Fees. You'll need to let John know your budgeted \$amount for fees, if there is a GT Peoplesoft # that needs to be hit, or if invoices need to be submitted to GTRI for payment. These fees support the salaries of a large number of staff in our department so it is very important that we collect them.

When you have time, please take a few minutes to meet with John to make a plan for your current project/s.

Thanks
Kim

From: Wilson, Kimberly M
Sent: Thursday, September 6, 2018 8:30 AM
To: john.richardson@facilities.gatech.edu
Cc: Goldfarb, David L <david.goldfarb@facilities.gatech.edu>; Scott JOnes <scott.jones@facilities.gatech.edu>
Subject: Fee Billing on GTFI Projects

John,

As a follow up to our meeting, we need to check our billing for Facilities Fees on these projects where contracts do not route through our system. We need to confirm the budget with the PM so we don't overbill what they are forecasting. For example, Football Locker came in under budget, so we need to bill against the actual funds expended. Student Center has some sort of alternative agreement and the budget has been reduced because we have a program manager. We also need to confirm with the PM where the bills should hit – For example on Dalney, Brad may want the bills to hit the GT PS#, not the bond funds.

CAP Project:

- * Dalney (Brad)
- * Football Locker Room (Lindsey)
- * GTRI Cobb (Lindsey)
- * Kendeda / Living Building (John)
- * Student Center (John) no GTFI contracts to date – also note that we reduced our fees on this project.

Minor Projects:

- * North Ave Domestic Water Heater (Brad)
- * North Ave South Deck (Brad)
- * CNES Back End Phase II (Cristina)
- * CODA Power (Kynthia) - project has not started yet.

Kim Wilson, RA

Associate Director of Construction Services

Georgia Institute of Technology | Facilities Design & Construction

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151 6th Street NW, Atlanta, GA 30332-0351 [MAP](#)

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kim.wilson@facilities.gatech.edu

Wilson, Kimberly M

From: Wilson, Kimberly M
Sent: Monday, August 27, 2018 5:00 PM
To: 'Fannin, Cristina'; Spiro, Gregory M; Sheffield, Spencer J; Weiland, Malte; Morris, Brad S; DuConge', John J; Cottingham, Lindsey K; Gaines, Kynthia
Cc: Scott JOnes; Jelin, Gary P (gary.jelin@facilities.gatech.edu); Goldfarb, David L; john.richardson@facilities.gatech.edu; Johnson, Walter K; Oliver-Staley, Aisha H; MacArthur, Kelly B
Subject: GTFI Contracts - Abila Accounting Software - New Requirements

All,

GTFI is going to start tracking our encumbrances (commitments) in their Abila accounting system. Currently, they only track paid-out amounts. This will be very helpful as a tool for project managers to reconcile their project accounting. We will have access to the Abila software here, and David Goldfarb's team will be

We need some near term assistance from PMs managing GTFI Projects as follows:

- Please include **AIM project number and GTFI contract number on all memorandum coversheets for contracts and invoices moving forward.**
- Be sure to log all contracts and assign a GTFI contract number on our internal GTFI contract numbering log. (Don't add a contract number for change orders or add services.)

Long term transition to Abila:

I will request a copy of Walter's current accounting spreadsheets for our current projects, and we may need to provide him with a list of contracts (encumbrances) for ongoing larger projects so that GTFI can get these projects caught up in Abila. More to follow on this.

Let me know if you have any questions.

Thanks
Kim

From: Wilson, Kimberly M
Sent: Friday, August 10, 2018 2:57 PM
To: Fannin, Cristina <crisrina.fannin@facilities.gatech.edu>; Spiro, Gregory M <greg.spiro@facilities.gatech.edu>; Sheffield, Spencer J <spencer.sheffield@aux.gatech.edu>; Weiland, Malte <malte.weiland@aux.gatech.edu>; Morris, Brad S <brad.morris@aux.gatech.edu>; DuConge', John J <jd245@gatech.edu>; Cottingham, Lindsey K <lindsey.cottingham@facilities.gatech.edu>
Cc: Scott JOnes <scott.jones@facilities.gatech.edu>; Jelin, Gary P (gary.jelin@facilities.gatech.edu) <gary.jelin@facilities.gatech.edu>; Goldfarb, David L <david.goldfarb@facilities.gatech.edu>; Oliver-Staley, Aisha H <aisha.oliver-staley@carnegie.gatech.edu>
Subject: GTFI Contracts - Insurance Certificates

All,

Right now insurance requirements for GTFI projects vary by project / contract. We are working to standardize this and hopefully bring this oversight under our Facilities contract administrators.

In the interim, for all of your projects that are GTFI projects, where GTFI has executed the contract, each of you need to take responsibility for:

- Sending the first insurance certificate to Aisha so that she can have her outside counsel review it for coverage and ensure that coverage meets contract provisions.
- Make sure we have a current insurance certificate on file for all contracts.
- File all insurance certificates that you receive on the P-drive in the project folder.

A few things to remember on GTFI projects – see yellow highlighting on sample attached.

- Certificate holder should be GTFI
- Additional insured should be GIT and BOR
- Project name should be on certificate.
- Limits are based on contract language and may exceed BOR requirements.

Note that sometimes the certificates are mailed to Aisha, and then she forwards them on to us. I delivered a batch of them recently to each of you.

Kim Wilson, RA

Associate Director of Construction Services

Georgia Institute of Technology | Facilities Design & Construction

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151 6th Street NW, Atlanta, GA 30332-0351 [MAP](#)

www.facilities.gatech.edu

kim.wilson@facilities.gatech.edu



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

01/16/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	Aon Risk Services South, Inc. 3565 Piedmont Road, Building One, Suite 700 Atlanta, GA 30305	CONTACT NAME:	Ms. Sarah Coburn	
		PHONE (A/C, No, Ext):	(404) 240-6070	FAX (A/C, No): (404) 264-3002
		E-MAIL ADDRESS:	Sarah.coburn@aon.com	
		INSURER(S) AFFORDING COVERAGE		NAIC #
		INSURER A:	Zurich American Insurance Company	16535
		INSURER B:	American Guarantee and Liability Insurance Company	26247
		INSURER C:	American Zurich Insurance Company	40142
		INSURER D:	Starr Indemnity & Liability Company	38318
		INSURER E:	Great American Insurance Company of N.Y.	22136

COVERAGES CERTIFICATE NUMBER: REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY			GLO 1071274-00	09/18/2017	09/18/2022	General Aggregate \$ 4,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						Products-Completed Operations \$ 4,000,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						Personal & Advertising Injury \$ 2,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						Each Occurrence \$ 2,000,000
	<input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						Damage to Premises Rented to You \$ 300,000
							Medical Expense \$ 10,000
	AUTOMOBILE LIABILITY						
	<input type="checkbox"/> ANY AUTO						
	<input type="checkbox"/> ALL OWNED AUTOS						
	<input type="checkbox"/> HIRED AUTOS						
	<input type="checkbox"/> SCHEDULED AUTOS						
	<input type="checkbox"/> NON-OWNED AUTOS						
B	<input type="checkbox"/> UMBRELLA LIAB			SXS 1071290-00	09/18/2017	09/18/2022	General Aggregate \$ 10,000,000
	<input checked="" type="checkbox"/> EXCESS LIAB						Products-Completed Operations \$ 10,000,000
	<input type="checkbox"/> CLAIMS-MADE						Each Occurrence \$ 10,000,000
	DED RETENTION \$						
C	WORKERS' COMPENSATION AND EMPLOYER'S LIABILITY			WC 1071276-00 and its renewals	09/18/2017	09/18/2018	<input checked="" type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> Y/N
							Bodily Injury by Disease - Policy Limit \$ 1,000,000
							Bodily Injury by Disease - Ea. Employee \$ 1,000,000

ADDITIONAL POLICIES

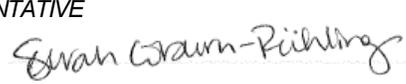
D	EXCESS LIABILITY			1000023920	09/18/2017	09/18/2022	General Aggregate \$ 15,000,000
							Products-Completed Operations \$ 15,000,000
							Each Occurrence \$ 15,000,000
E	EXCESS LIABILITY			EXC 2063581	09/18/2017	09/18/2022	General Aggregate \$ 25,000,000
							Products-Completed Operations \$ 25,000,000
							Each Occurrence \$ 25,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

NEW SOUTH CONSTRUCTION ROLLING CONTRACTOR CONTROLLED INSURANCE PROGRAM 2 ("RCPIP 2") - DESIGNATED PROJECT SITE - DALNEY BUILDING

GEORGIA INSTITUTE OF TECHNOLOGY AND BOARD OF REGENTS OF THE UNIVERSITY SYSTEM OF GEORGIA ARE ADDITIONAL INSURED WITH RESPECTS TO GENERAL LIABILITY AND EXCESS LIABILITY, AS REQUIRED BY WRITTEN CONTRACT. 90-DAY NOTICE OF CANCELLATION APPLIES; 10-DAY FOR NON PAYMENT OF PREMIUM

CERTIFICATE HOLDER**CANCELLATION**

Georgia Tech Facilities, Inc. 221 Uncle Heinie Way Lyman Hall Building, Suite 305 Atlanta, GA 30332-0257	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 
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GEORGIA TECH FACILITIES INC. INSURANCE REQUIREMENTS

- GTFI has different insurance requirements which are outlined in the contract by project.
- Some differences include: GTFI is listed as a certificate holder, the limits may exceed BOR requirements, and GIT and BOR need to be listed as additional insured.
- PM Responsibilities:
 - Ensure that current certificates of insurance are on file.
 - Ensure that insurance certificates are reviewed by GTFI before contracts are executed.

ACORD®		CERTIFICATE OF LIABILITY INSURANCE				DATE (MMDDYYYY)	
						9/26/2017	
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.							
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).							
PRODUCER	Aon Risk Services South, Inc. Atlanta GA Office, 3565 Piedmont Bldg 1; S #700 Atlanta, GA 30305 (404) 261-3400 Ms. Sarah Coburn			CONTACT NAME:	Ms. Sarah Coburn		
		PHONE (A/C No. Ext):	(404) 240-6070		FAX (A/C No.):	(404) 264-3002	
		E-MAIL ADDRESS:	Sarah.coburn@aon.com				
		INSURER(S) AFFORDING COVERAGE			NAIC #		
		INSURER A:	Zurich North America		16535		
		INSURER B:	American Guarantee & Liability Insurance Co.		26247		
		INSURER C:	Starr Indemnity & Liability Insurance Co		38318		
		INSURER D:	Great American Assurance Company		26344		
		INSURER E:					
		INSURER F:					
INSURED		New South Construction, Co. 1180 West Peachtree St., Suite 700 Atlanta, GA 30309					
COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:			
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.							
INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MMDD/YYYY)	POLICY EXP (MMDD/YYYY)	LIMITS
A	GENERAL LIABILITY						
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR			GLO 5781400-00	01/01/2017	01/01/2018	Per Claim/Occ \$ 2,000,000 General Agg \$ 4,000,000 Prod & Comp Opp Agg \$ 4,000,000 Personal & Adv. Injury \$ 2,000,000 Fire Damage \$ 300,000 Medical Expense \$ 10,000
	AGGREGATE LIMIT APPLIES PER:						
	<input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC						
	AUTOMOBILE LIABILITY						
	<input type="checkbox"/> ANY AUTO						
	<input type="checkbox"/> ALL OWNED AUTOS						
	<input type="checkbox"/> HIRED AUTOS						
	<input type="checkbox"/> SCHEDULED AUTOS						
	<input type="checkbox"/> NON-OWNED AUTOS						
B	UMBRELLA LIAB						
	<input checked="" type="checkbox"/> EXCESS LIAB			SXS 5781565-00	01/01/2017	01/01/2018	Per Claim/Occ \$ 10,000,000 Aggregate \$ 10,000,000
	<input type="checkbox"/> DED						
	<input type="checkbox"/> RETENTION \$						
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY						
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input checked="" type="checkbox"/>			WC 5781401-00	01/01/2017	01/01/2018	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER EL Each Accident \$ 1,000,000 EL Disease Policy Limit \$ 1,000,000 EL Disease Each Accident \$ 1,000,000
	DESCRIPTION OF OPERATIONS below						
C	UMBRELLA LIAB						
	<input checked="" type="checkbox"/> EXCESS LIAB			10000020600	01/01/2017	01/01/2018	Per Claim/Occ \$ 15,000,000 Aggregate \$ 15,000,000
	<input type="checkbox"/> DED						
	<input type="checkbox"/> RETENTION \$						
D	UMBRELLA LIAB						
	<input checked="" type="checkbox"/> EXCESS LIAB			EXC 0862283	01/01/2017	01/01/2018	Per Claim/Occ \$ 25,000,000 Aggregate \$ 25,000,000
	<input type="checkbox"/> DED						
	<input type="checkbox"/> RETENTION \$						
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)							
NEW SOUTH CONSTRUCTION CO., CONTRACTORS CONTROLLED INSURANCE PROGRAM; DESIGNATED PROJECT SITE: DALNEY BUILDING							
GEORGIA INSTITUTE OF TECHNOLOGY AND BOARD OF REGENTS OF THE UNIVERSITY SYSTEM OF GEORGIA ARE ADDITIONAL INSURED WITH RESPECTS TO GENERAL LIABILITY AND EXCESS LIABILITY, AS REQUIRED BY WRITTEN CONTRACT.							
90-DAY NOTICE OF CANCELLATION APPLIES: 10-DAY FOR NON PAYMENT OF PREMIUM.							
CERTIFICATE HOLDER				CANCELLATION			
Georgia Tech Facilities, Inc. 221 Uncle Heinie Way Lyman Hall Building, Suite 305 Atlanta, GA 30332-0257				SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.			
				AUTHORIZED REPRESENTATIVE <i>Sarah Coburn-Pickling</i>			

Wilson, Kimberly M

From: Wilson, Kimberly M
Sent: Wednesday, May 2, 2018 3:58 PM
To: Fannin, Cristina; Sheffield, Spencer J; Morris, Brad S; Weiland, Malte; Cottingham, Lindsey K; DuConge, John J; Spiro, Gregory M
Cc: Scott JOnes
Subject: Memo Templates - GTFI Contract Approval + Invoice Approval
Attachments: GTFI Invoice Memo.docx; GTFI Contract Routing Memo.docx

All,

Lets start using the same memo format for internal approval and routing of contracts to GTFI, and for invoices submitted to GTFI. Attached are sample memos on our current Facilities Management letter head.

Items to Note:

- Include the GTFI contract number and GT AIM project number.
- Log ALL contracts on the GTFI log on the CAP Projects Drive.
- Route all GTFI contracts through me and Scott regardless of what the DMSA or PMSA says....
- Maintain a copy of all executed contracts, insurance certificates, and invoices in your project file on the Projects Drive. (This is the only record copy on GTFI projects!)

We will eventually get this into Image Now, but for now let's all try to do things the same way. Please let me know if you have any suggestions for changes. I'll put these on the forms website for future reference.

Thanks

Kim Wilson, RA

Associate Director of Construction Services
Georgia Institute of Technology | Facilities Design & Construction

404-771-6439
151 6th Street NW, Atlanta, GA 30332-0351 [MAP](#)
www.facilities.gatech.edu
kim.wilson@facilities.gatech.edu



OFFICE OF FACILITIES DESIGN AND CONSTRUCTION
CAPITAL PROJECTS
Georgia Institute of Technology
955 Fowler St., NW
Atlanta, Georgia 30332-0410

DATE: August 30, 2017

FROM: Spencer Sheffield, Project Manager

THRU: Spencer Sheffield, Senior Construction PM Aux. Services (Review: SS)

TO: Jim Pierce, GTFI Assistant Treasury

RE: North Avenue Apartments Boiler Replacement
Mann Mechanical Co. Inc.
(Contract # GTF-17-09) (GT Project # 0276-2017)
Pay Application #1– Construction Services

The attached Mann Mechanical Co. Inc. Invoice # 1 for construction services at North Avenue Apartments is submitted for payment. The project engineer, Johnson, Spellman Associates, and GT Facilities D&C have reviewed and certified the invoice for payment in the amount of \$ 86,853.60 for the period ending August 31, 2017.

If otherwise found to be in order, please pay from NAA project bond funds by check to:

Mann Mechanical Co, Inc.
c/o Hiram Facundo
100 Pine Street
Avondale Estates, GA 30002

Enclosure: Mann Mechanical Co, Inc. Pay App 1, W9 and Interim Lien Waiver for Construction Services.

Cc: Project File (electronic copy)

DATE: April 1, 2010

FROM: Your Name, Project Manager

THRU: Scott Jones, AVP Facilities Design and Construction (_____)
Kim Wilson, AD Facilities Construction (_____)

TO: Aisha Oliver-Staley, Executive Director for Georgia Tech Facilities, Inc.

RE: North Avenue Apartments Residential Dining Hall (GT Project #0245-2018)
Commissioning Agent – Johnson, Spellman & Associates, Inc. (GTF-09-05)

Attached is a copy of the North Avenue Apartments Residential Dining Hall Commissioning Agent contract between GT Facilities, Inc. and Johnson, Spellman & Associates, Inc.

Add any information that may be required for management to understand what the change order or contract is, and how it will be paid for....

A Certificates of Insurance, reviewed by your outside counsel and confirmed to comply with GTFI minimum insurance requirements, is also attached for your records.

If otherwise found to be in order, please executed the attached contract and return an executed PDF copy by email to my attention.

Enclosure: North Avenue Apartments Dining Hall, Commissioning Agent Contract

Cc: Project File