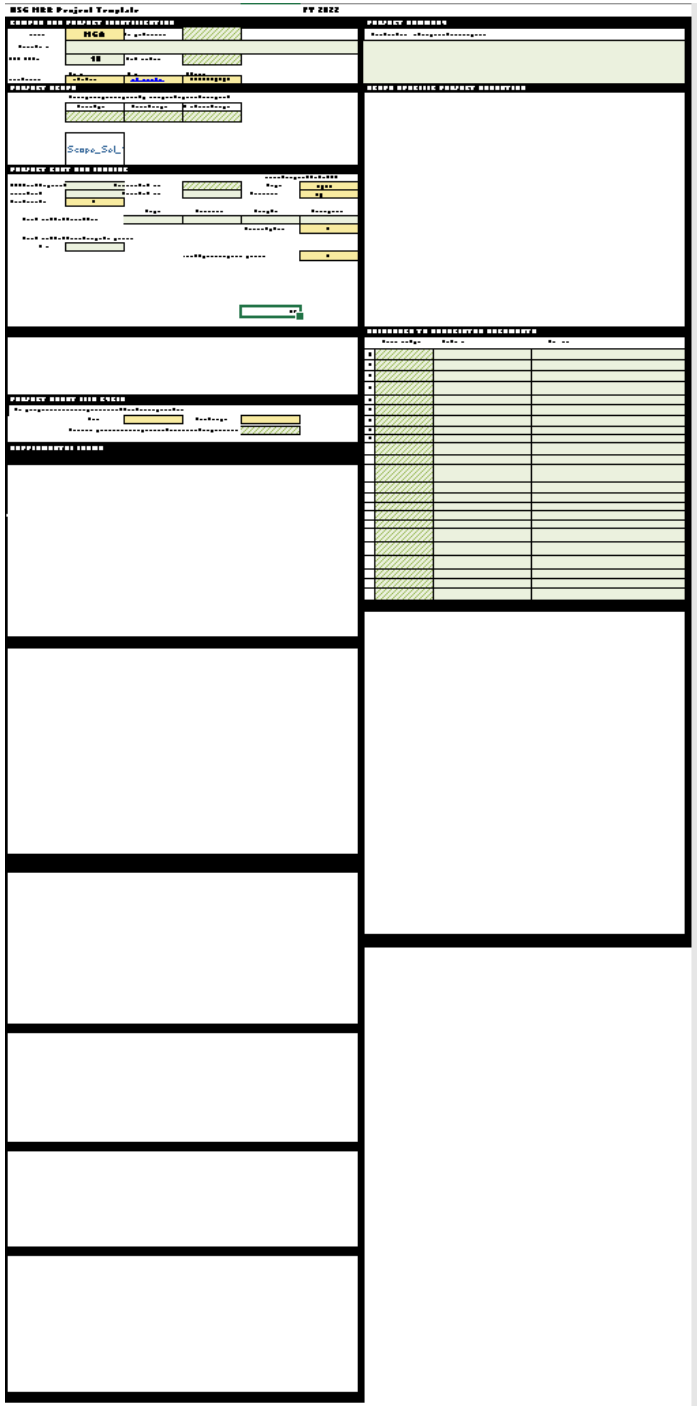


USG MRR PROJECT TEMPLATE FY 2023

REFERENCE AND INFORMATION

Contents:

- Key Issues and Cautions 2
- Primary New/Revised Features 3-9
- Template Navigation Aids 10-11
- Template Structure Breakdown 12-32

USG MRR PROJECT TEMPLATE FY 2023

KEY ISSUES/CAUTIONS – TAKE HEED FOR BEST RESULTS:

- Large file can take more than a minute to load
- If you are not using Excel 2021 or Excel 365, the dynamic arrays that provide available unique project priority selection will not work. Please let us know if you are using Excel 2019 or previous and we will provide you a functional template.
- The workbook structure IS NOT LOCKED in order to enable automatic tab naming based on selected project prioritization. To protect workbook logic and function:
  - DO NOT INSERT NEW SHEETS
  - DO NOT MOVE THE LOCATION OF ANY SHEET TABS IN THE WORKBOOK
  - DO NOT UNHIDE ANY HIDDEN SHEETS
  - DO NOT DELETE ANY SHEETS
- Using template in a shared environment and editing/saving in a shared drive can potentially cause corruption in the macro coding:
  - IF POSSIBLE, TRY TO SAVE THE TEMPLATE FILE TO A LOCAL HARD DRIVE
  - BACK THE FILE UP FREQUENTLY TO A LOCAL HARD DRIVE

USG MRR PROJECT TEMPLATE FY 2023

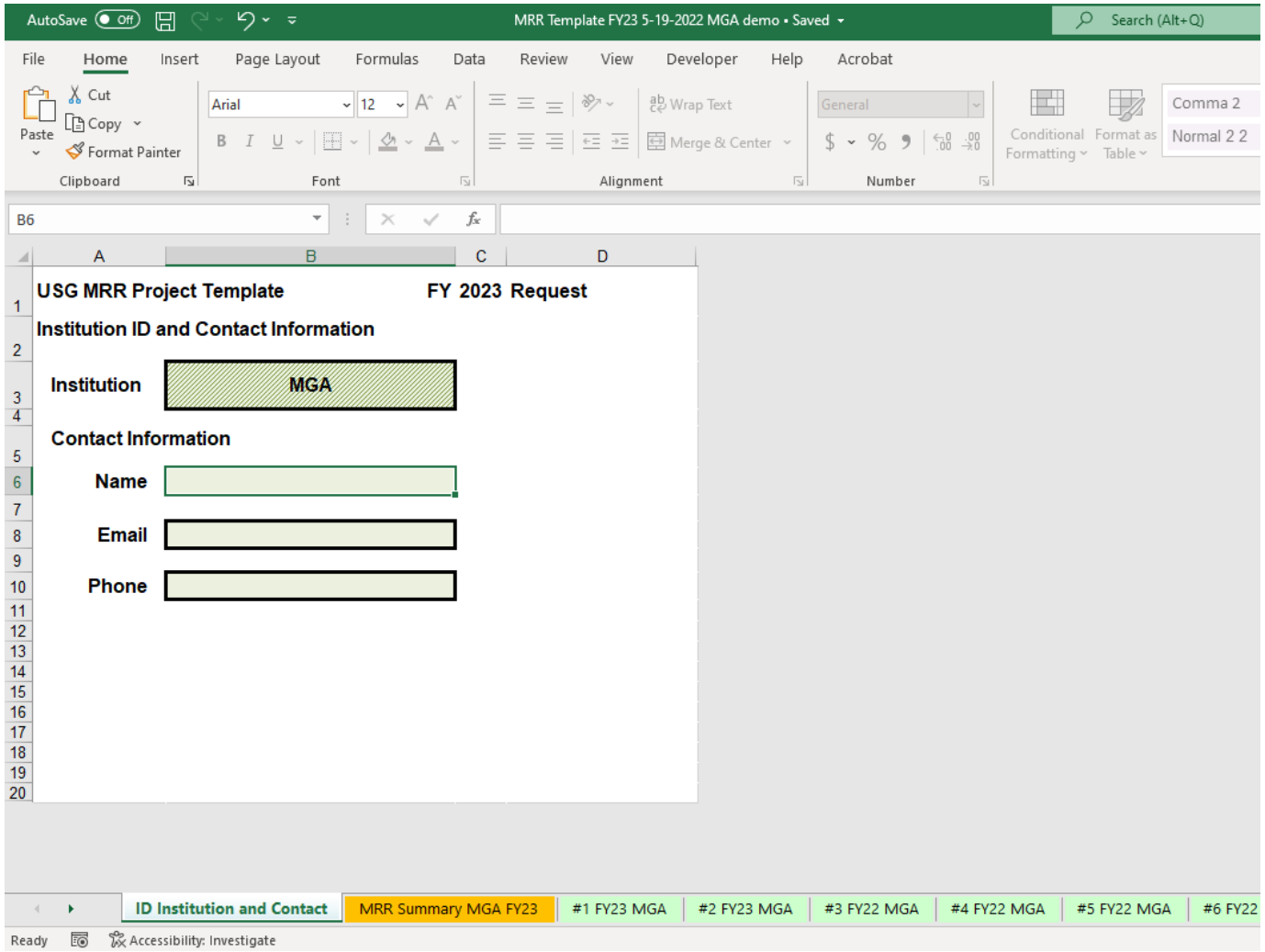
PRIMARY NEW/REVISED FEATURES

- ID Institution and Contact Sheet 4
- Template file now institution-specific 4
- Preloaded original FY22 project sheets 5
- Project priority selection 6
- Project and prioritization review summary 7-8

USG MRR PROJECT TEMPLATE FY 2023

NEW FEATURES

- ID Institution and Contact Sheet

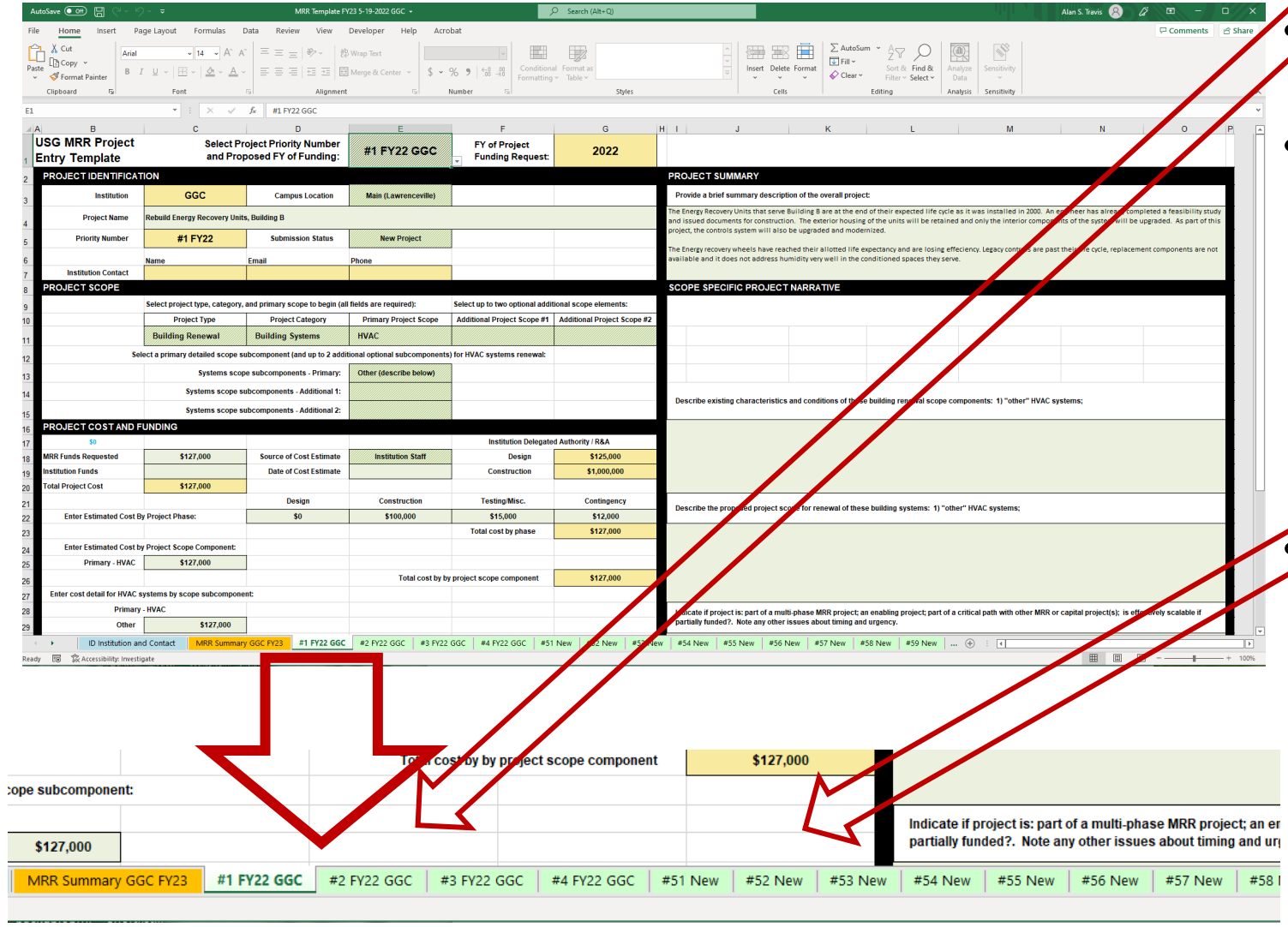


- Since Institution is pre-selected, template files are now institution-specific
- Fill out contact info

USG MRR PROJECT TEMPLATE FY 2023

NEW FEATURES

- Preloaded FY22 Project Sheets

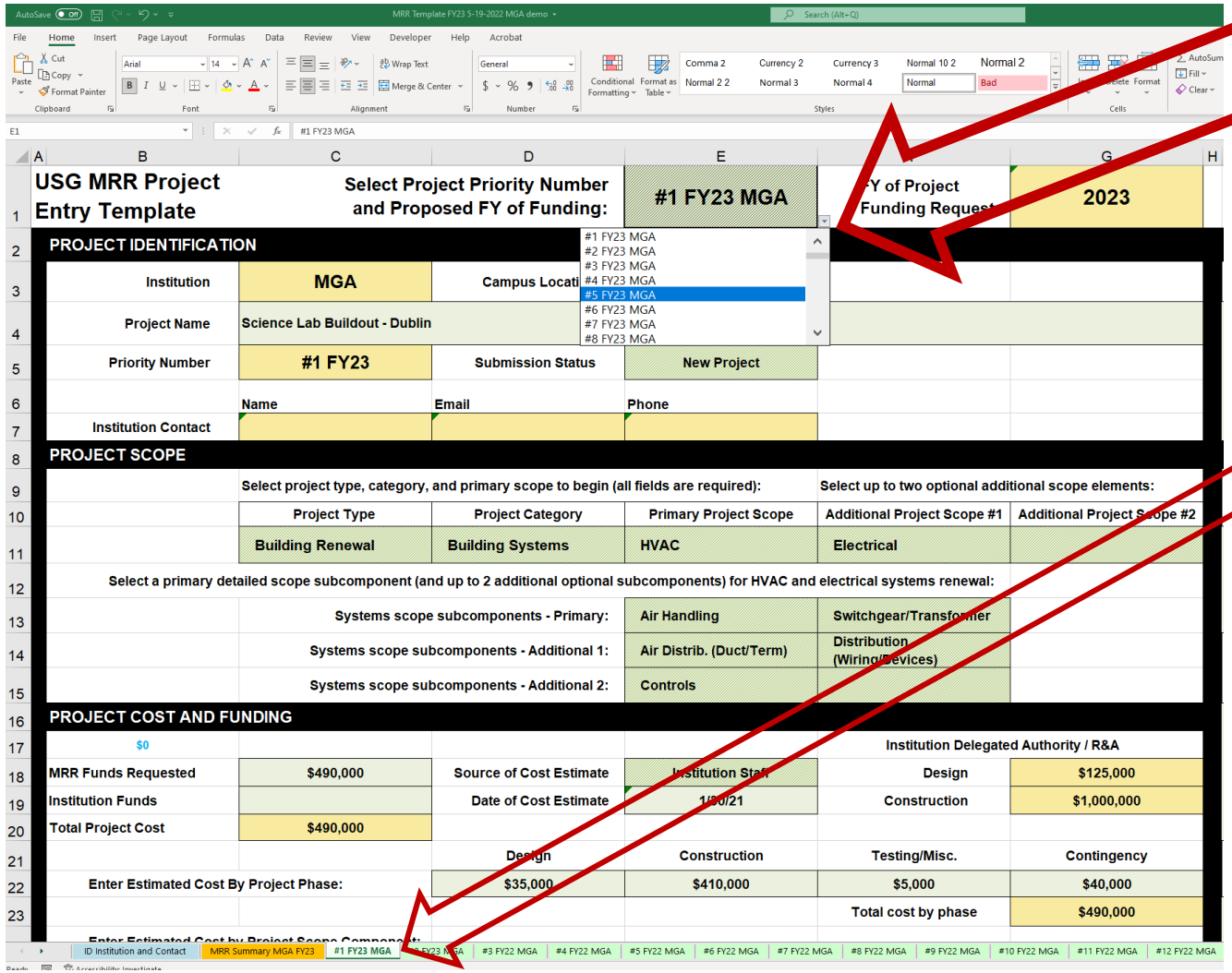


- All original FY22 Project information tabs are preloaded into the FY23 Template.
- You have several options with FY22 tabs:
  - Leave them alone– they do not have to be cleared and reused.
  - Bring FY22 projects forward into FY23 request as-is
  - Edit and update the FY22 projects brought into FY23.
- Template file also contains blank new project tabs numbered 51-100, which can be brought into FY23 and filled out with new project information.

USG MRR PROJECT TEMPLATE FY 2023

NEW FEATURES

- Project Priority Selection

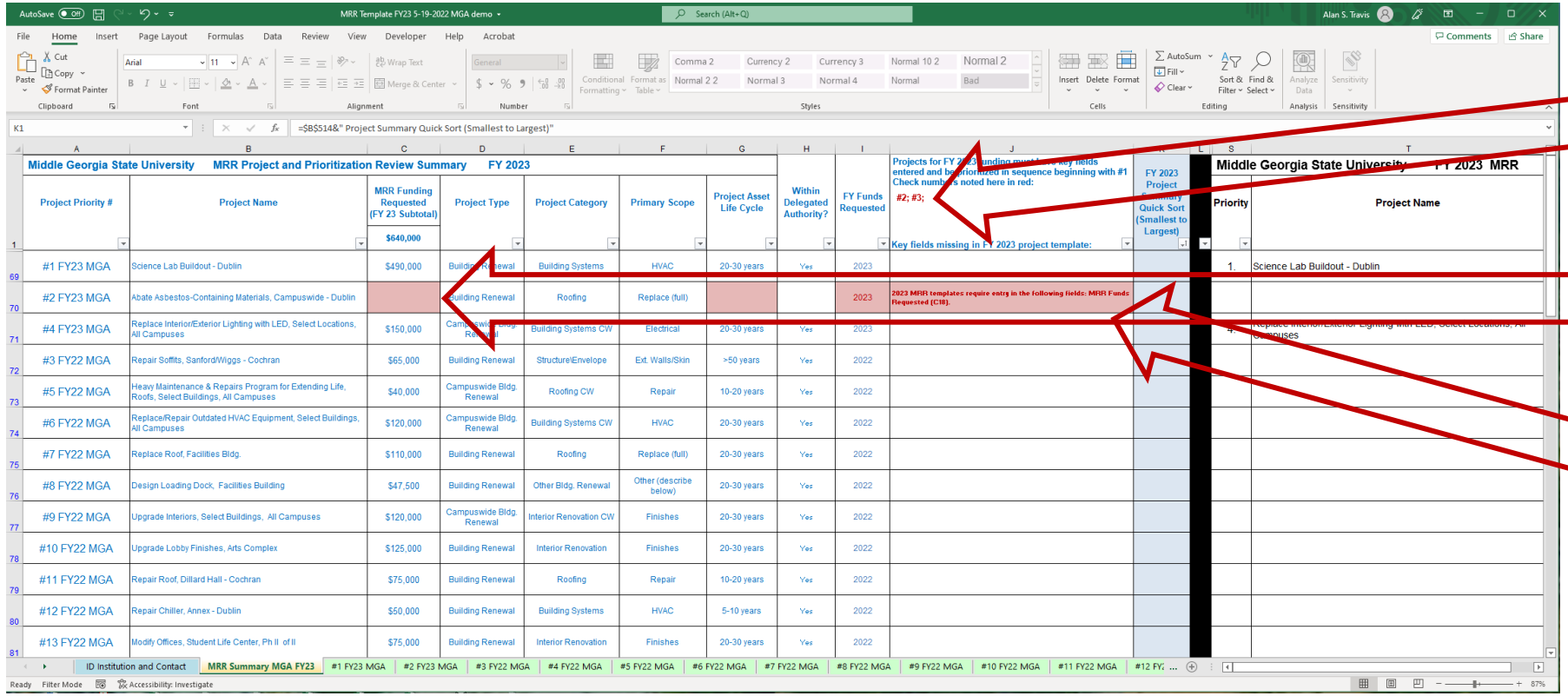


- FY of proposed project funding and priority order within FY are now selected in Cell E1 dropdown on each individual project tab
- Dropdown will only allow selection of numbers that are not yet selected
- Changing prioritization will automatically change the sheet tab name once you select any cell other than E1
- You can select FY23 project priority numbers or one of 26 placeholder project IDs (PH-A - PH-Z)
- FY23 Projects must have key fields out and be in sequential order beginning with #1 to populate the FY23 BOR summary

USG MRR PROJECT TEMPLATE FY 2023

NEW FEATURES

- Project And Priority Review Summary

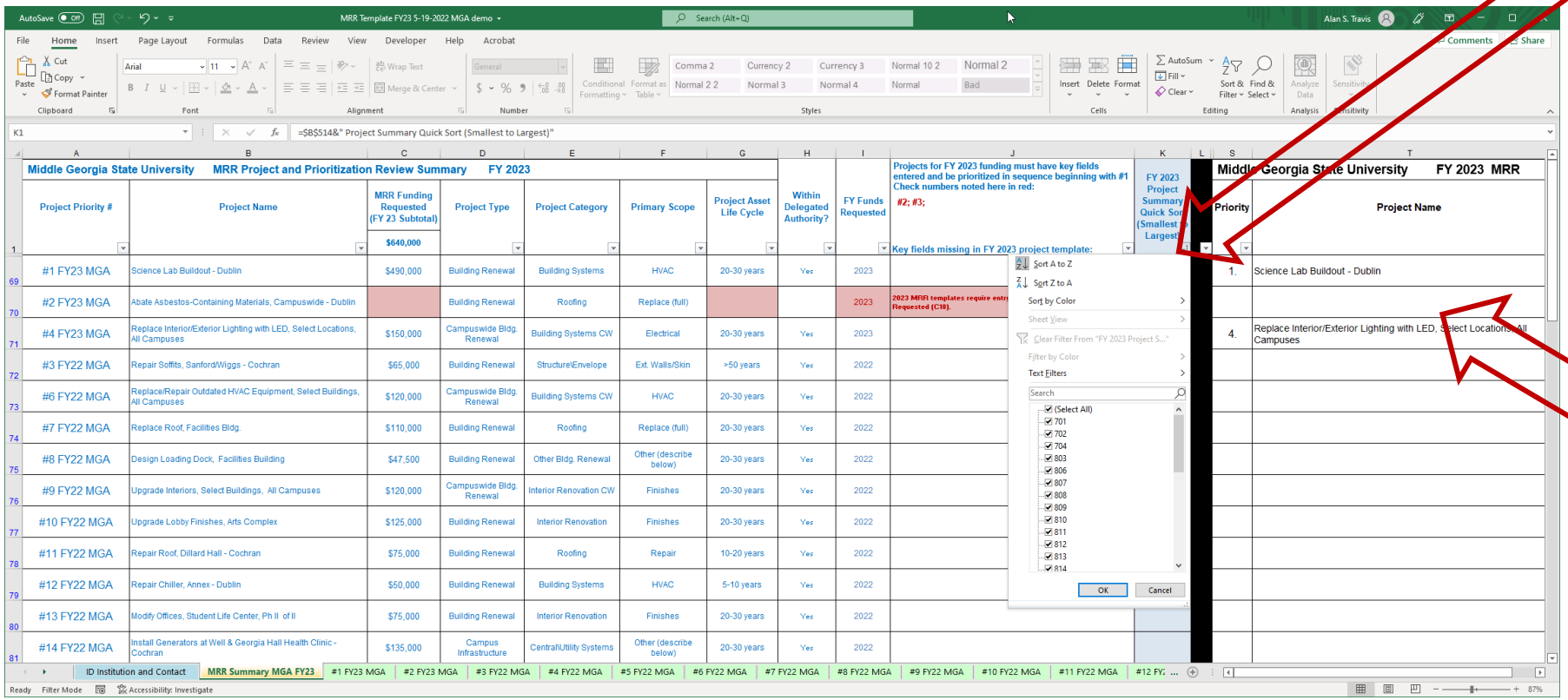


- New summary review tool begins at A1 in blue font.
- Summary automatically updates as edits are made in project tabs
- FY23 projects must be sequential beginning with #1 – missing or incomplete FY23 projects are automatically noted in J1
- Key fields that are missing in the individual FY23 project templates are highlighted in red.
- Any missing key fields and their template cell reference are also identified in project specific notes in Col J

USG MRR PROJECT TEMPLATE FY 2023

NEW FEATURES

- Project And Priority Review Summary



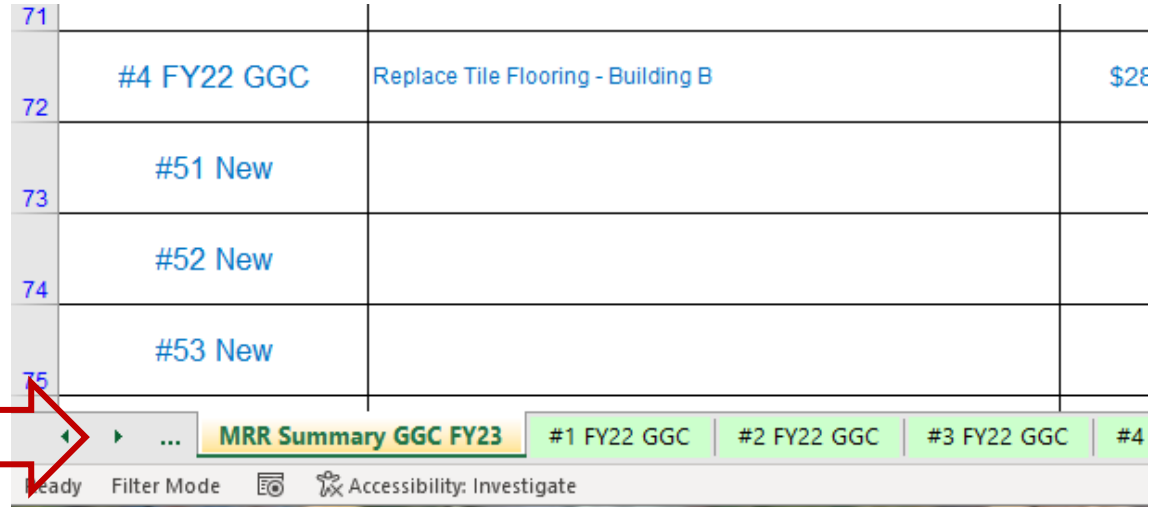
- The summary can be sorted – the easiest way to reset the project priorities in logical order is to use the “Quick Sort” in Cell K1 – “sort A-Z” to reset the summary projects in the following order:
  1. FY23 1-x
  2. FY22 1-x
  3. Placeholders PH-A – PH-x
  4. Blank New Project Tabs 51-x
- Any FY23 project without key information (Project Type/Category/ Primary Scope, amount of MRR $ requested) will not carry over to the FY23 BOR summary in black font beginning in Column S

USG MRR PROJECT TEMPLATE FY 2023

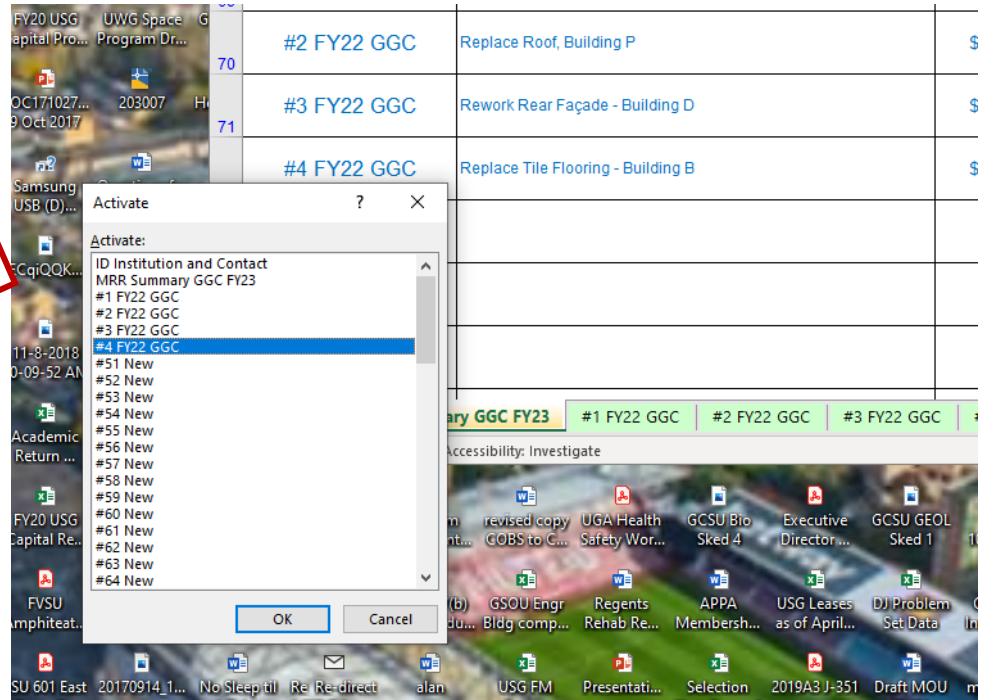
Template Navigation Aids

To go directly to a specific tab:

a. Right Click between the arrows on the navigation menu in lower right corner of screen



b. Highlight desired tab and left click “OK”



USG MRR PROJECT TEMPLATE FY 2023

Other Updates/Issues:

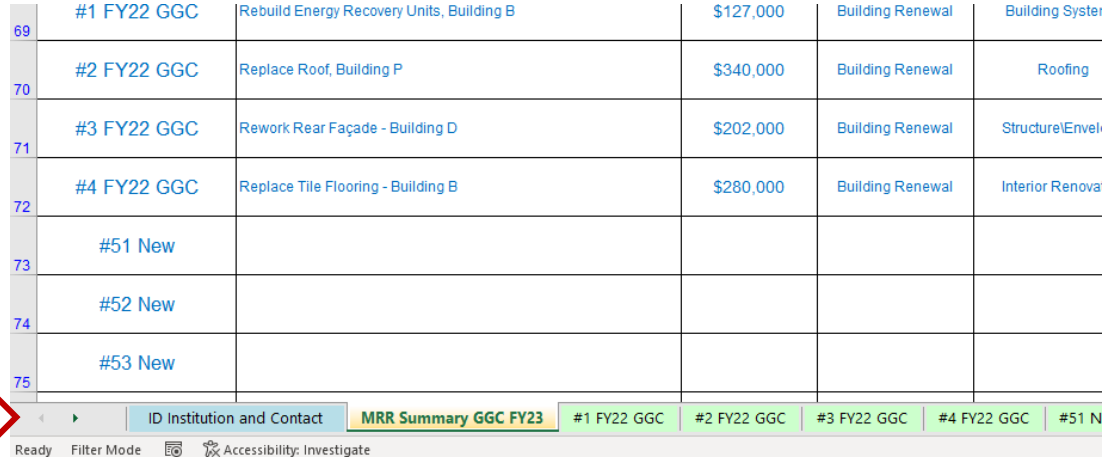
- Macro coding has been repaired to prevent VBA error dialogs when selecting and changing Project Type/Category/Scope. If you do happen to get a VBA error message, click “End” to move on – do not try to debug.
- When changing Project Type/Category/Scope, all downrange data fields will clear and reset with two exceptions:
  - Exception 1 - narrative text boxes (other than project summary) must be manually cleared.
  - Exception 2 – the coding that clears the entry for secondary cost information in C29-31 on some projects does not work in all circumstances – you may need to clear these cells manually depending on your selections.

USG MRR PROJECT TEMPLATE FY 2023

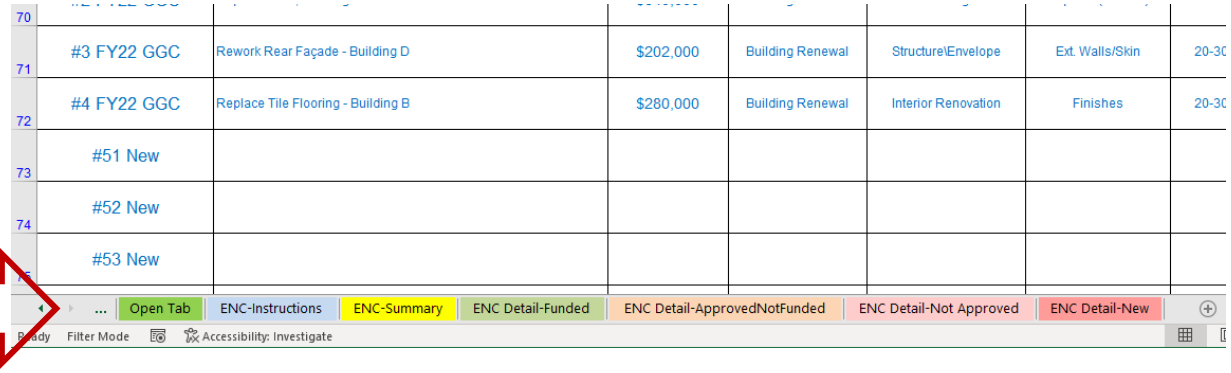
Template Navigation Aids

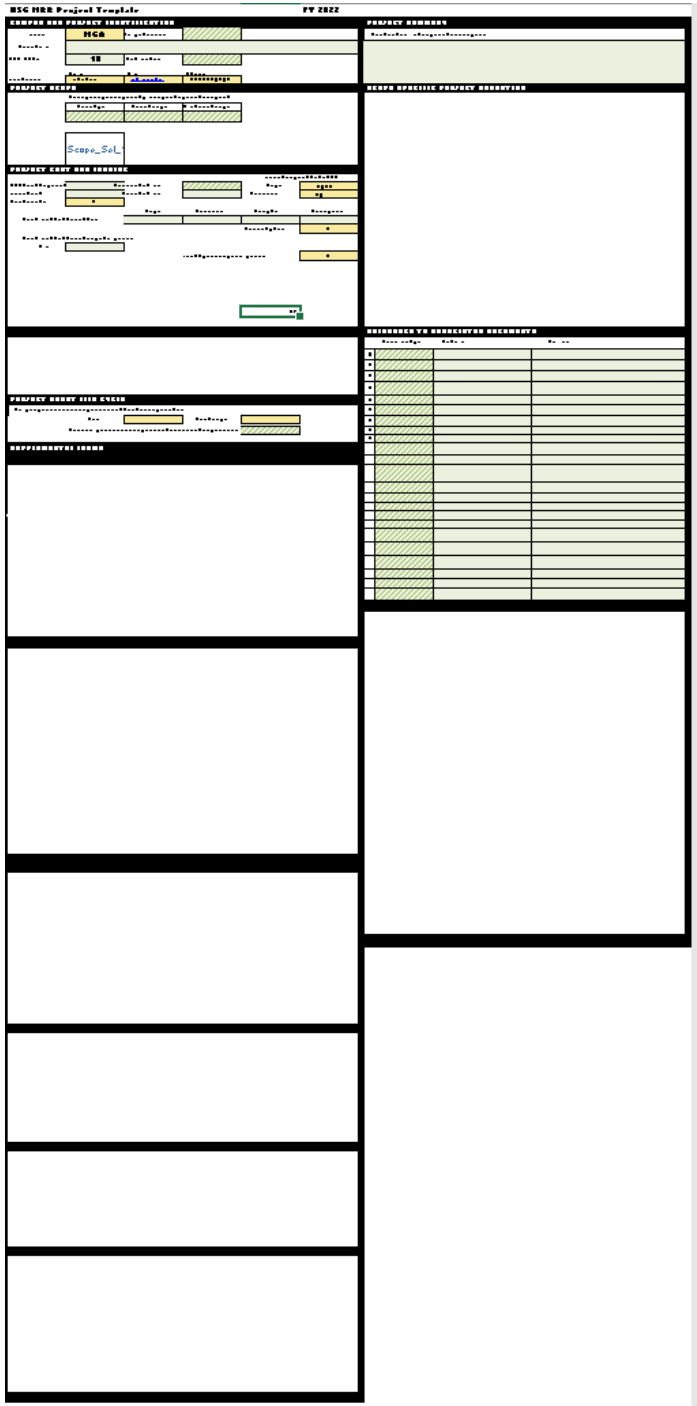
To jump directly to the beginning or end of the workbook sheet tab array without scrolling:

a. Press “Ctrl” and left click the **left** arrow to go directly to the beginning (left edge) of the worksheet tab array



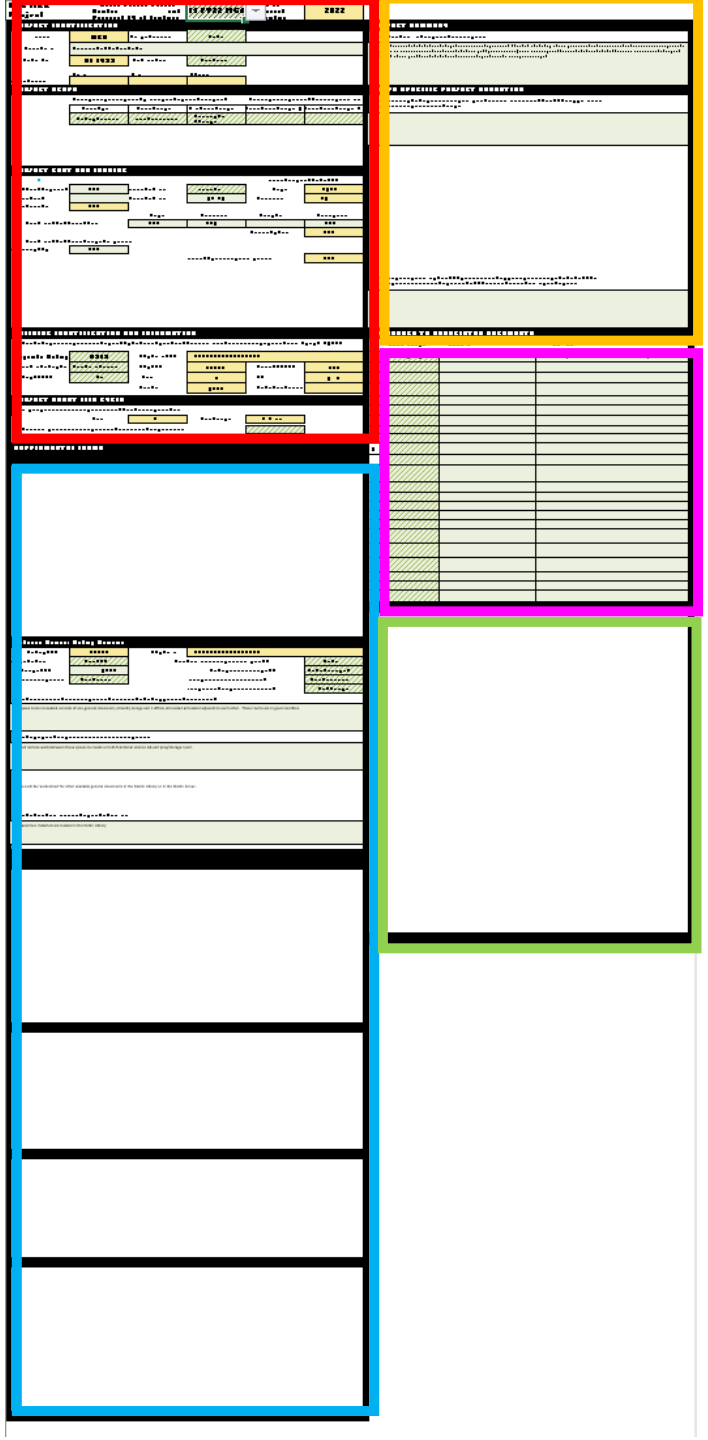
b. Press “Ctrl” and left click the **right** arrow to go directly to the tab at the beginning of the worksheet array





USG MRR PROJECT TEMPLATE FY 2023

Template Structure Breakdown



MAIN PROJECT FORM
(Rows 1-47)

Campus and Project ID
Project Scope
Project Cost and Funding
Building ID and Info
Project Asset Life Cycle

NARRATIVE FORMS

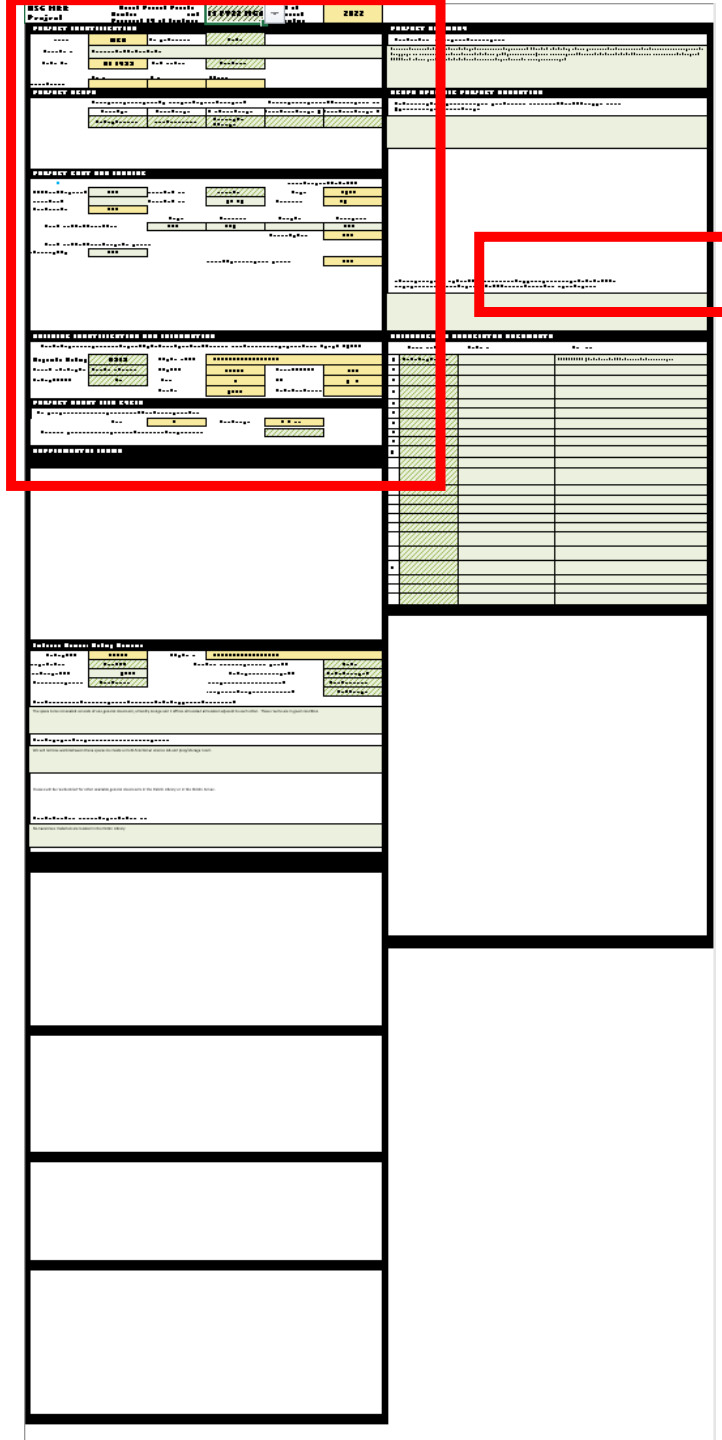
Project Summary
Scope-Specific Narrative

DOCUMENT REFERENCE

SUPPLEMENTAL FORMS
Rows 48-166

Roofing
Interior Renovation
Chillers
(HVAC/Central Plant)
Air Handling
DX Systems
Boilers
(HVAC/Central Plant)

BOR R&A Form (autofill)



USG MRR Project Entry Template	Select Project Priority Number and Proposed FY of Funding:	#1 FY23 MGA	FY of Project Funding Request:	2023

PROJECT IDENTIFICATION

Institution	MGA	Campus Location	Dublin		
Project Name	Science Lab Buildout – Dublin				
Priority Number	#1 FY23	Submission Status	New Project		
	Name	Email	Phone		
Institution Contact					

PROJECT SCOPE

Select project type, category, and primary scope to begin (all fields are required) Select up to two optional additional scope elements:

Project Type	Project Category	Primary Project Scope	Additional Project Scope #1	Additional Project Scope #2
Building Renewal	Building Systems	HVAC	Electrical	

ct a primary detailed scope subcomponent (and up to 2 additional optional subcomponents) for HVAC and electrical systems renewal:

Systems scope subcomponents – Primary:	Air Handling	Switchgear/Transformer
Systems scope subcomponents – Additional 1:	Air Distrib. (Duct/Term)	Distribution (Wiring/Devices)
Systems scope subcomponents – Additional 2:	Controls	

PROJECT COST AND FUNDING

$0				Institution Delegated Authority / R&A	
MRR Funds Requested	$490,000	Source of Cost Estimate	Institution Staff	Design	$125,000
Institution Funds		Date of Cost Estimate	1/30/21	Construction	$1,000,000
Total Project Cost	$490,000				

	Design	Construction	Testing/Misc.	Contingency
Enter Estimated Cost By Project Phase:	$35,000	$410,000	$5,000	$40,000
			Total cost by phase	$490,000

Enter Estimated Cost by Project Scope Component:				
Primary – HVAC	$400,000	Addl. #1 – Electrical	$90,000	
			Total cost by by project scope component	$490,000

Enter cost detail for HVAC and electrical systems by scope subcomponent:

Primary – HVAC		Addl. #1 – Electrical	
Air Handling	$270,000	Switchgr/Transfmr	$60,000
Air Distribution	$100,000	Distribution	$10,000
Controls	$50,000		
Total HVAC Systems	$420,000	Total Electrical Systems	$70,000

BUILDING IDENTIFICATION AND INFORMATION

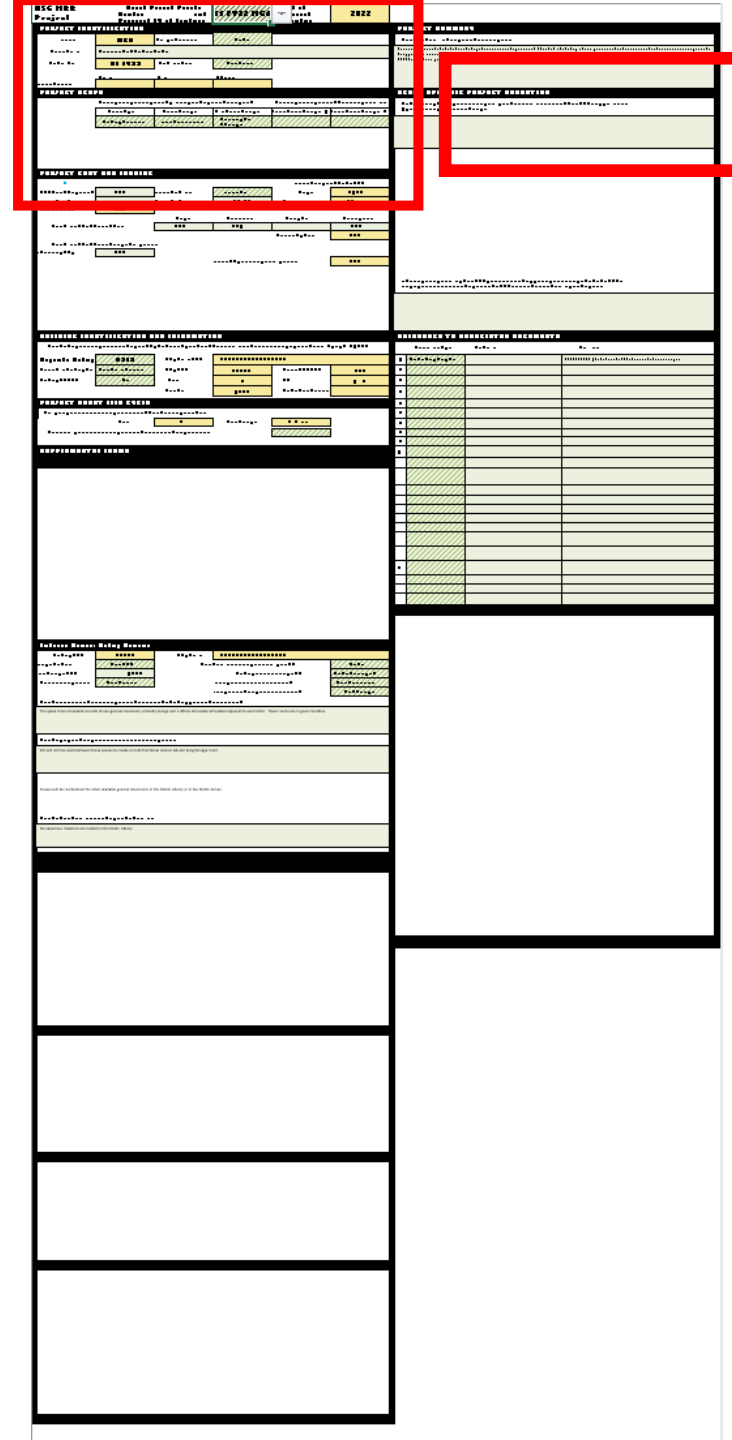
For all building renewal projects. select Regents Bldg. Code and provide additional information. Selection autopopulates data from Spring 2021 FIDC.

Regents Building Code	0312	Bldg. Name (FIDC)	DUBLIN CENTER LIBRARY		
Current Primary Building U	Academic – General	Bldg GSF	29,765	Owned by BOR?	YES
Building FCAR?	No	# Floors	2	RI %	100%
		Year Built	1998	Yr of Last Major Renov.	

PROJECT ASSET LIFE CYCLE

Composite project asset life cycle range (calculated based on scope and cost):

	Years	27.4	Year Range	20-30 years
Select composite asset life cycle range to override calculated range (if necessary):				



Project Scope

3 Minimum Required Scope Fields for all projects

- Project Type
- Project Category
- Primary Project Scope

Project won't populate FY23 request without entry

USG MRR Project Entry Template	Select Project Priority Number and Proposed FY of Funding:	#1 FY23 MGA	FY of Project Funding Request:	2023

PROJECT IDENTIFICATION

Institution	MGA	Campus Location	Dublin		
Project Name	Science Lab Buildout - Dublin				
Priority Number	#1 FY23	Submission Status	New Project		
	Name	Email	Phone		
Institution Contact					

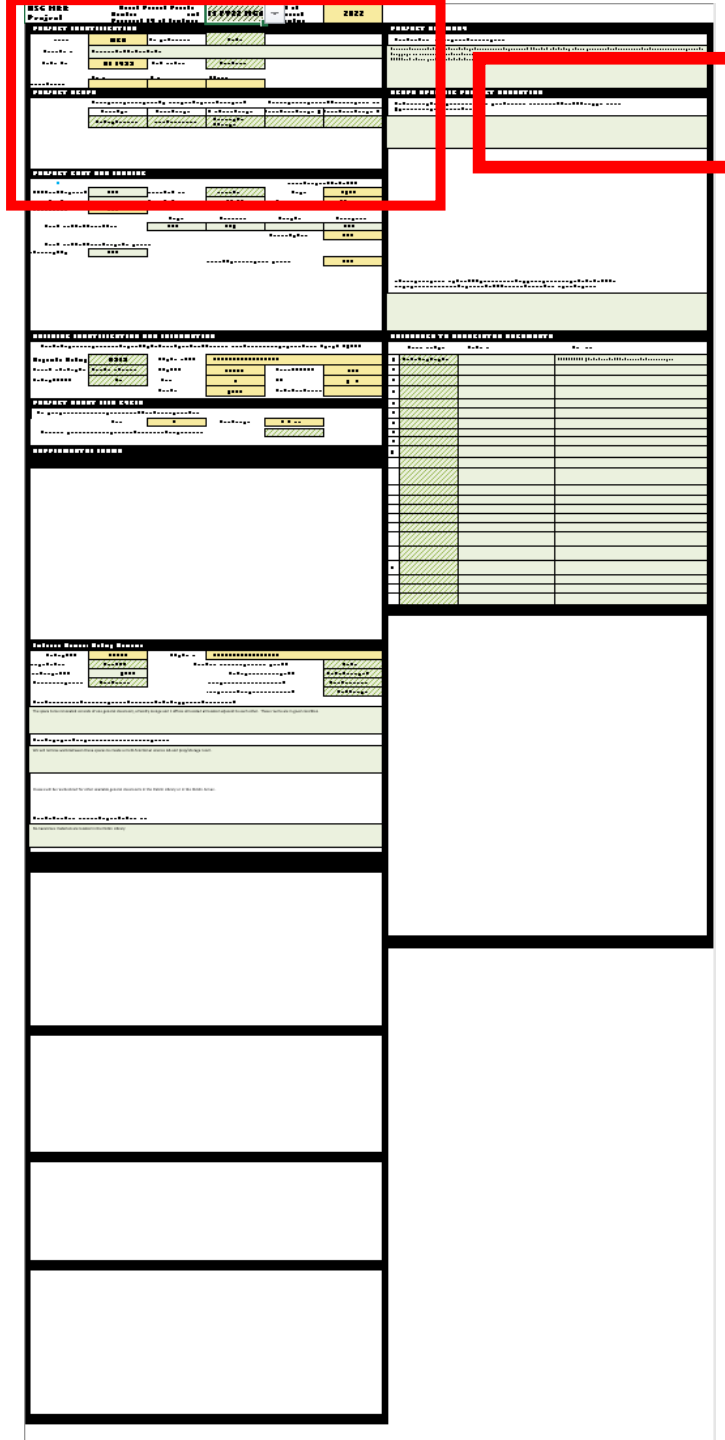
PROJECT SCOPE

	Select project type, category, and primary scope to begin (all fields are required):			Select up to two optional additional scope elements:	
	Project Type	Project Category	Primary Project Scope	Additional Project Scope #1	Additional Project Scope #2
	Building Renewal	Building Systems	HVAC	Electrical	

Select a primary detailed scope subcomponent (and up to 2 additional optional subcomponents) for HVAC and electrical systems renewal:

Systems scope subcomponents - Primary:	Air Handling	Switchgear/Transformer
Systems scope subcomponents - Additional 1:	Air Distrib. (Duct/Term)	Distribution (Wiring/Devices)
Systems scope subcomponents - Additional 2:	Controls	

PROJECT COST AND FUNDING



Project Scope

3 Project Types – SELECT ONE

- Building Renewal
- Campus Infrastructure
- Campuswide Building Renewal

USG MRR Project Entry Template	Select Project Priority Number and Proposed FY of Funding:	#1 FY23 MGA	FY of Project Funding Request:	2023

PROJECT IDENTIFICATION

Institution	MGA	Campus Location	Dublin		
Project Name	Science Lab Buildout - Dublin				
Priority Number	#1 FY23	Submission Status	New Project		
	Name	Email	Phone		
Institution Contact					

PROJECT SCOPE

	Select project type, category, and primary scope to begin (all fields are required):			Select up to two optional additional scope elements:	
	Project Type	Project Category	Primary Project Scope	Additional Project Scope #1	Additional Project Scope #2
	Building Renewal	Building Systems	HVAC	Electrical	

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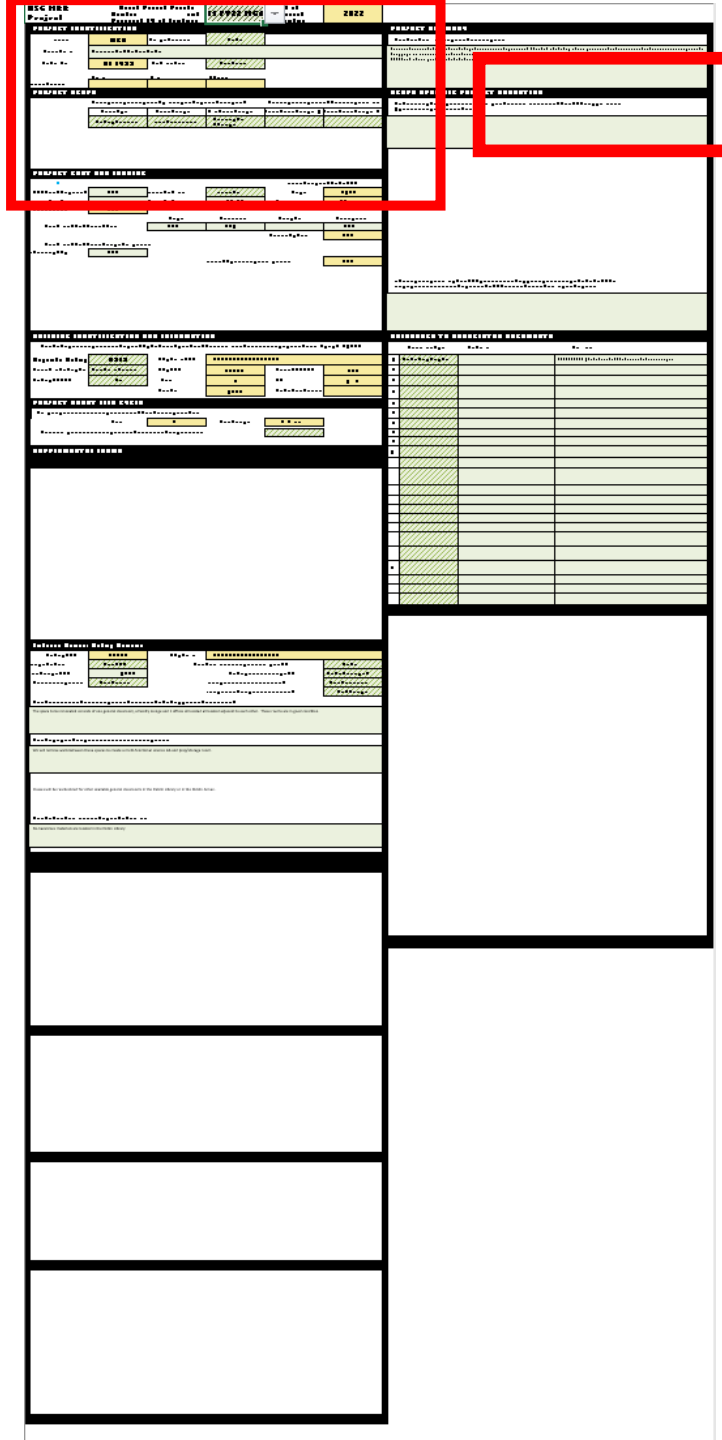
Systems scope subcomponents - Additional 1:	Air Distrib. (Duct/Term)	Distribution (Wiring/Devices)
Systems scope subcomponents - Additional 2:	Controls	

PROJECT COST AND FUNDING



Project Scope

Project Categories – SELECT ONE

- Specific to Project Type

USG MRR Project Entry Template	Select Project Priority Number and Proposed FY of Funding:	#1 FY23 MGA	FY of Project Funding Request:	2023

PROJECT IDENTIFICATION

Institution	MGA	Campus Location	Dublin		
Project Name	Science Lab Buildout - Dublin				
Priority Number	#1 FY23	Submission Status	New Project		
	Name	Email	Phone		
Institution Contact					

PROJECT SCOPE

	Select project type, category, and primary scope to begin (all fields are required):			Select up to two optional additional scope elements:	
	Project Type	Project Category	Primary Project Scope	Additional Project Scope #1	Additional Project Scope #2
	Building Renewal	Building Systems	HVAC	Electrical	
Select a primary detailed scope subcomponent (and up to 2 additional optional subcomponents) for HVAC and electrical systems renewal:					
	Systems scope subcomponents - Primary:		Air Handling	Switchgear/Transformer	
	Systems scope subcomponents - Additional 1:		Air Distrib. (Duct/Term)	Distribution (Wiring/Devices)	
	Systems scope subcomponents - Additional 2:		Controls		

PROJECT COST AND FUNDING

Project Categories

BUILDING RENEWAL

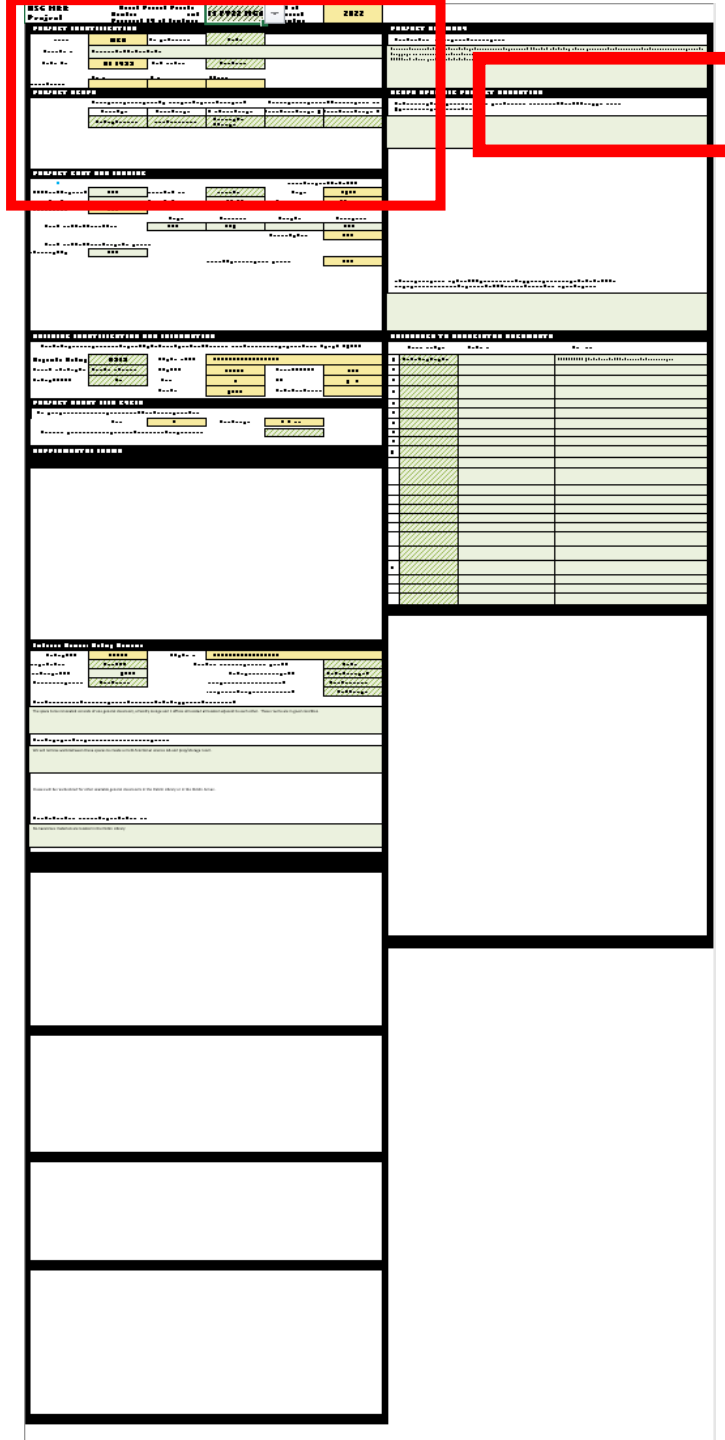
- Building Systems
- Roofing
- Structure/Envelope
- Life Safety
- Compliance
- Interior Renovation
- Other

CAMPUS INFRASTRUCTURE

- Central/Utility Systems
- Vehicle/Ped Circulation
- Life/Safety/Compliance
- Other

CAMPUWIDE BLDG. RENEWAL

- Building Systems
- Roofing
- Structure/Envelope
- Life Safety
- Compliance
- Interior Renovation
- Other



Project Scope

- Primary scope is minimum depth for project ID
- Refine scope of Building Renewal and Infrastructure by adding project scope elements

USG MRR Project Entry Template	Select Project Priority Number and Proposed FY of Funding:	#1 FY23 MGA	FY of Project Funding Request:	2023

PROJECT IDENTIFICATION

Institution	MGA	Campus Location	Dublin		
Project Name	Science Lab Buildout - Dublin				
Priority Number	#1 FY23	Submission Status	New Project		
	Name	Email	Phone		
Institution Contact					

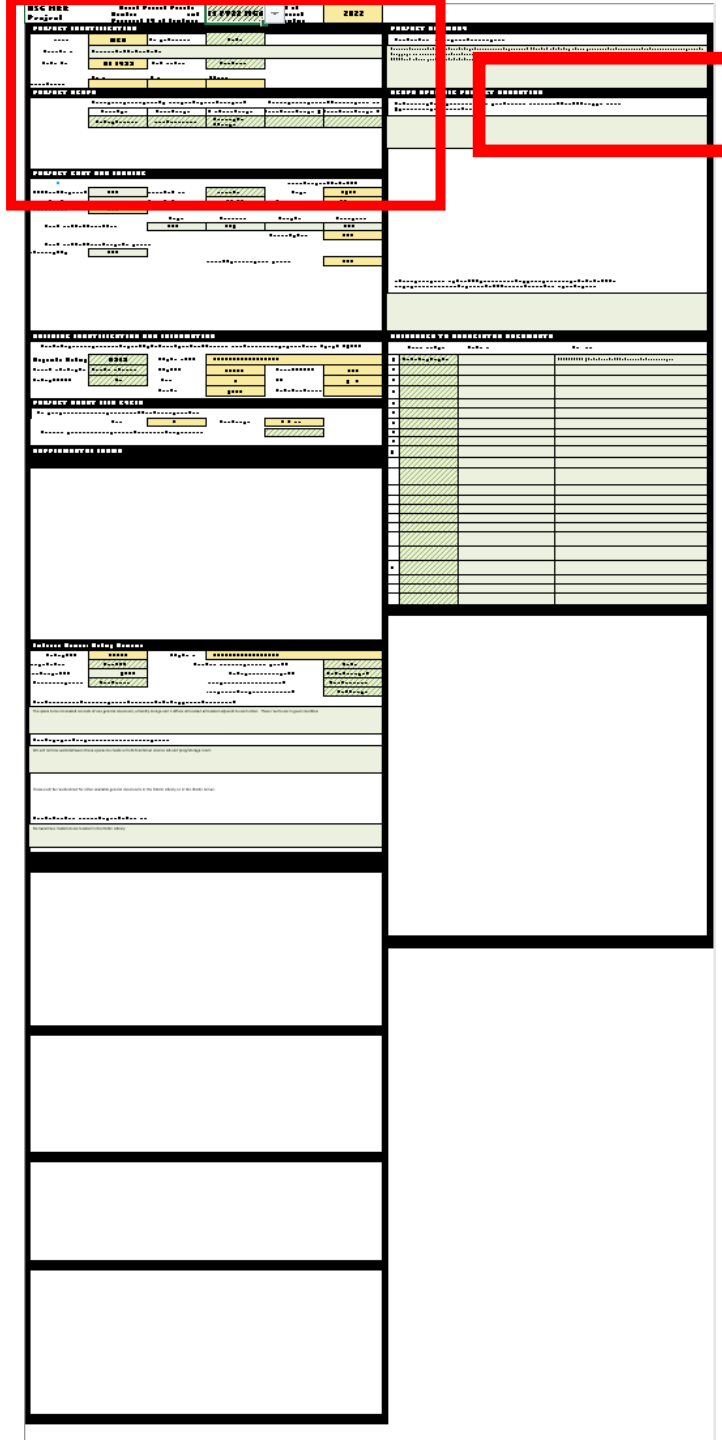
PROJECT SCOPE

	Select project type, category, and primary scope to begin (all fields are required):			Select up to two optional additional scope elements:	
	Project Type	Project Category	Primary Project Scope	Additional Project Scope #1	Additional Project Scope #2
	Building Renewal	Building Systems	HVAC	Electrical	

Select a primary detailed scope subcomponent (and up to 2 additional optional subcomponents) for HVAC and Electrical systems renewal:

Systems scope subcomponents - Primary:	Air Handling	Switchgear/Transformer
Systems scope subcomponents - Additional 1:	Air Distrib. (Duct/Term)	Distribution (Wiring/Devices)
Systems scope subcomponents - Additional 2:	Controls	

PROJECT COST AND FUNDING



Project Scope

- For HVAC, Electrical, and Central Plant Scope – enter at least one systems scope subcomponent

USG MRR Project Entry Template		Select Project Priority Number and Proposed FY of Funding:	#1 FY23 MGA	FY of Project Funding Request:	2023

PROJECT IDENTIFICATION

Institution	MGA	Campus Location	Dublin		
Project Name	Science Lab Buildout - Dublin				
Priority Number	#1 FY23	Submission Status	New Project		
	Name	Email	Phone		
Institution Contact					

PROJECT SCOPE

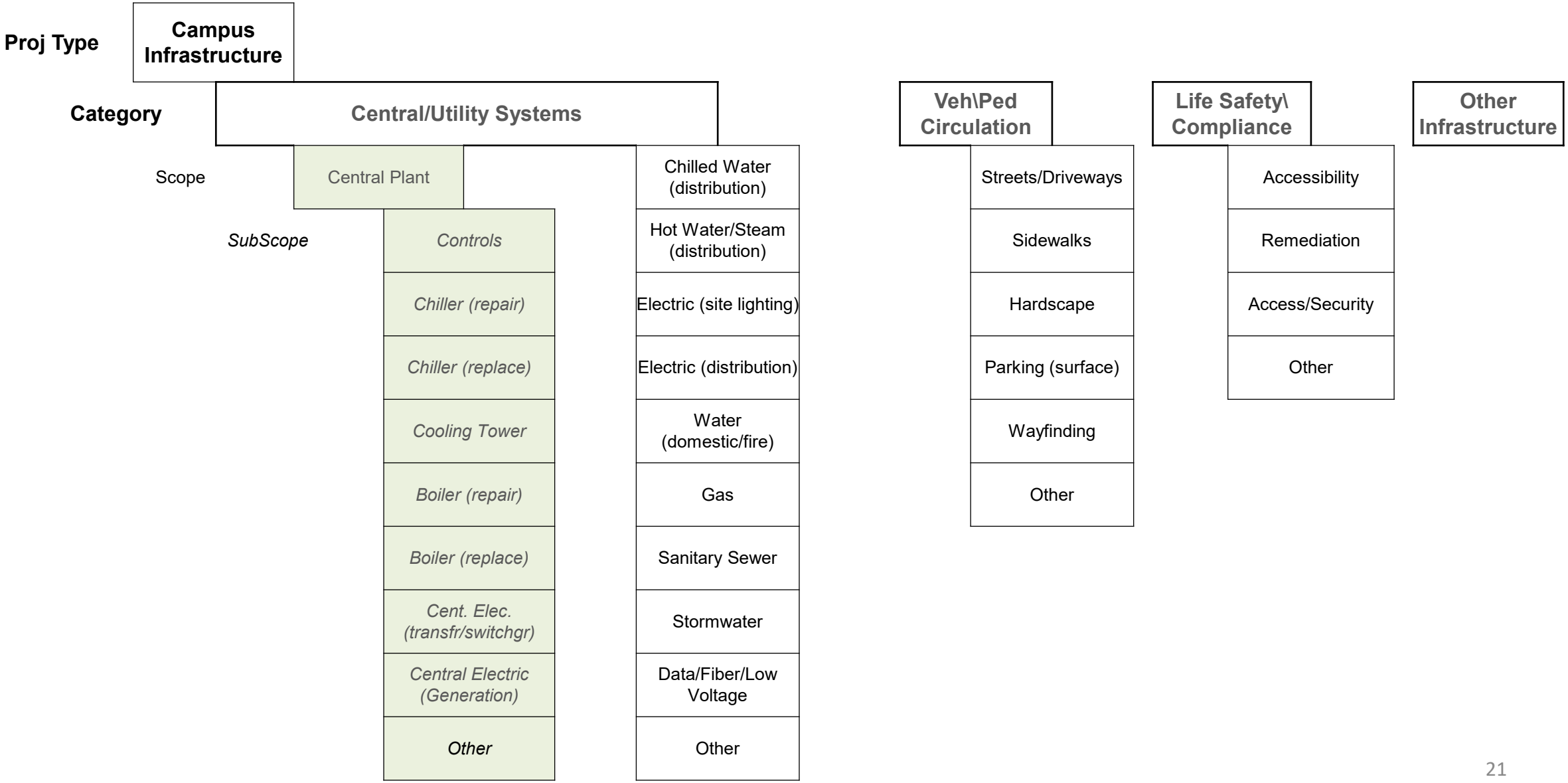
	Select project type, category, and primary scope to begin (all fields are required):			Select up to two optional additional scope elements:	
	Project Type	Project Category	Primary Project Scope	Additional Project Scope #1	Additional Project Scope #2
	Building Renewal	Building Systems	HVAC	Electrical	

Select a primary detailed scope subcomponent (and up to 2 additional optional subcomponents) for HVAC and electrical systems renewal:

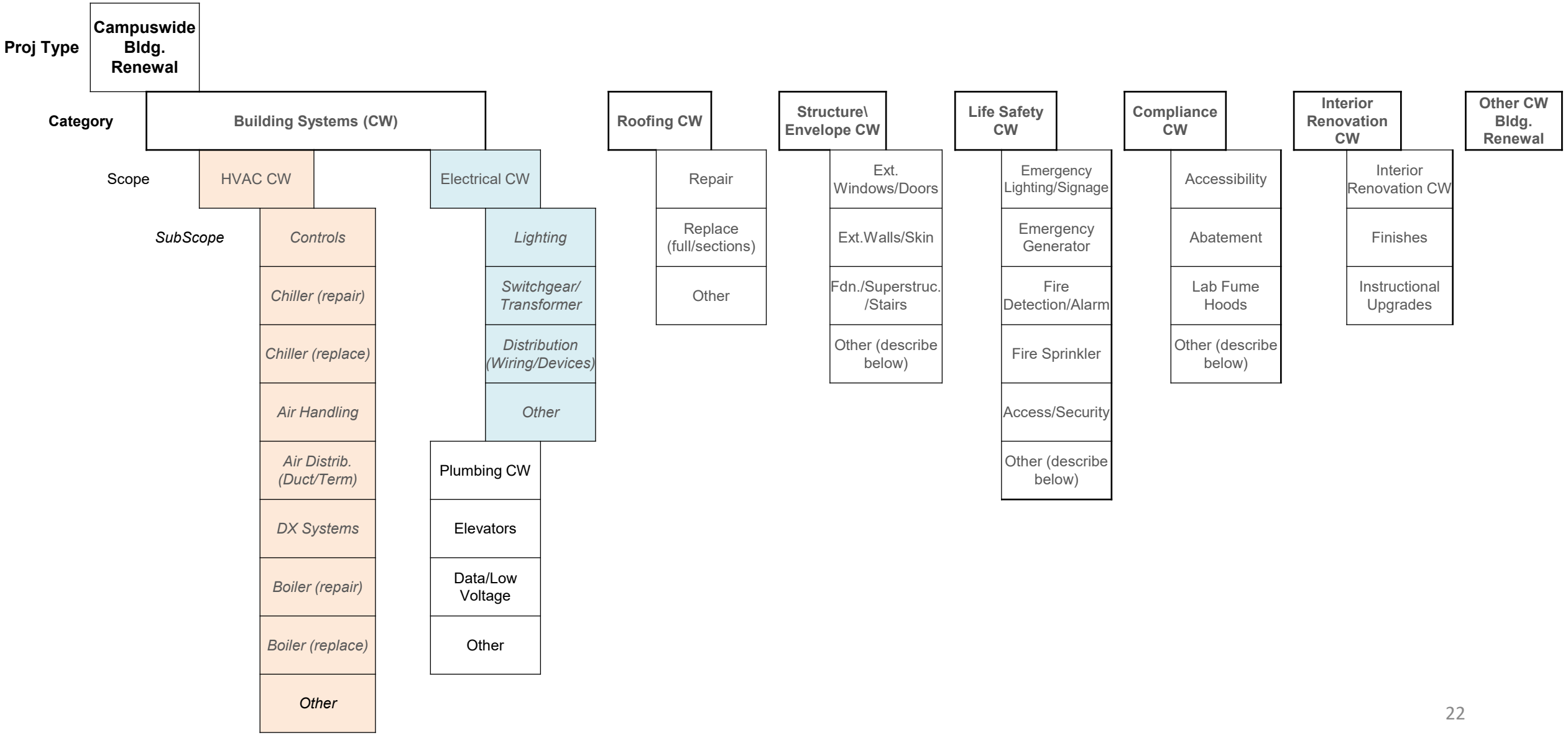
Systems scope subcomponents - Primary:	Air Handling	Switchgear/Transformer
Systems scope subcomponents - Additional 1:	Air Distrib. (Duct/Term)	Distribution (Wiring/Devices)
Systems scope subcomponents - Additional 2:	Controls	

PROJECT COST AND FUNDING

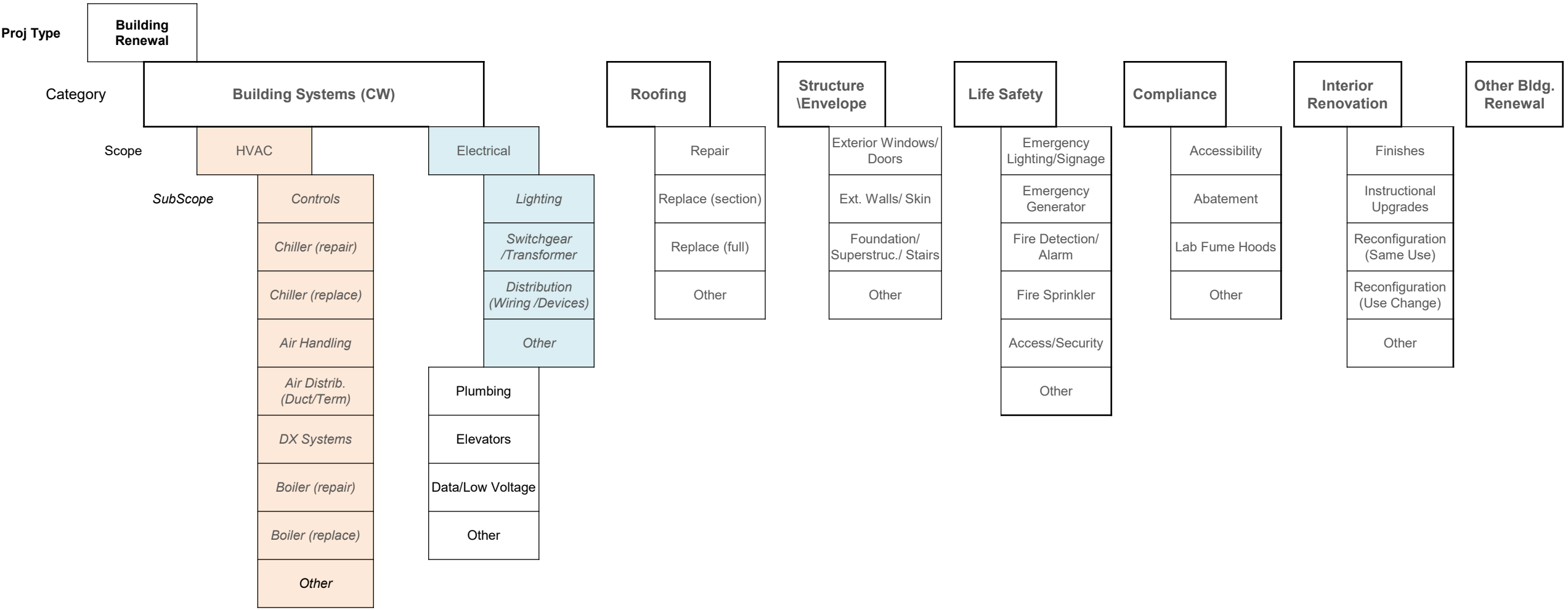
MRR Project Scope Tree – Campus Infrastructure



MRR Project Scope Tree – Campuswide Building Renewal

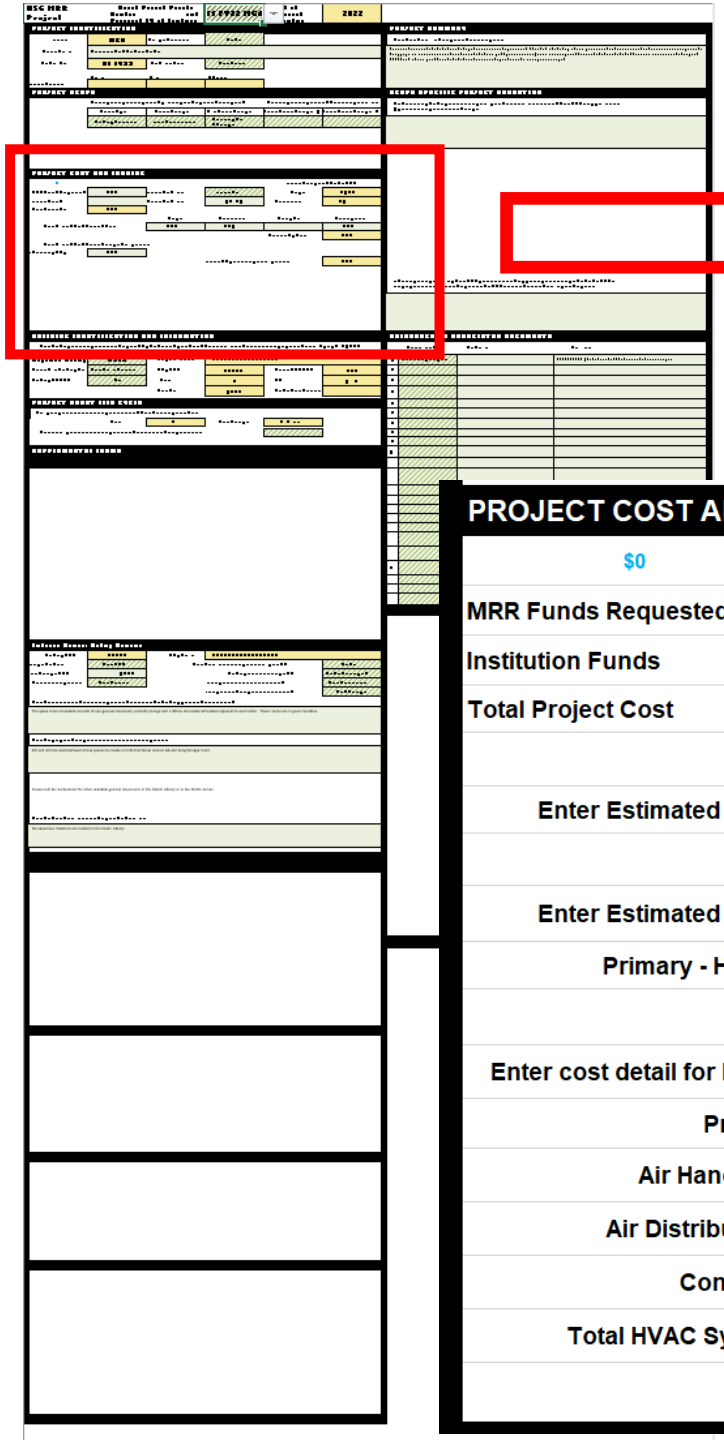


MRR Project Scope Tree – Building Renewal



Project Cost and Funding

- All funding info must be entered for FY23 projects
  - MRR Funds requested required to populate FY23 summary
  - Cost by project phase and scope component required to populate Asset Life Cycle range



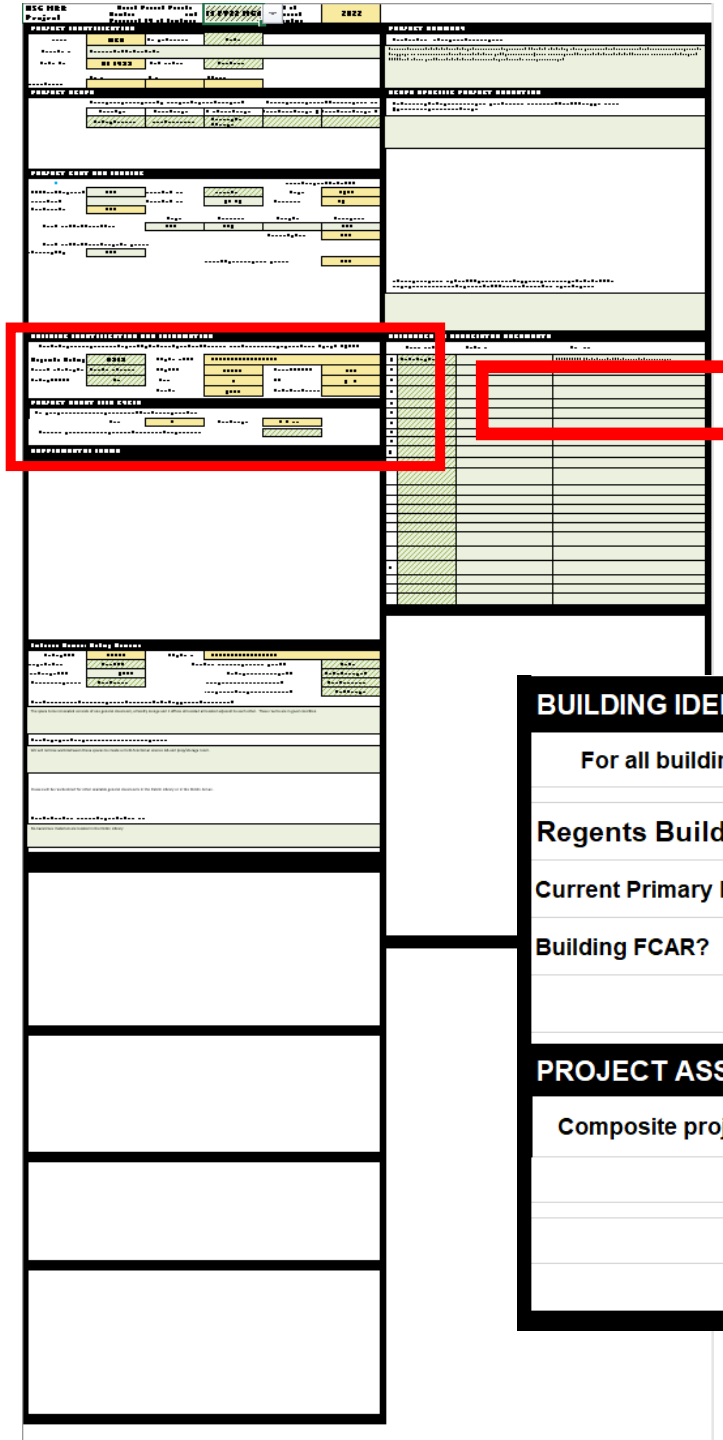
PROJECT COST AND FUNDING

$0				Institution Delegated Authority / R&A	
MRR Funds Requested	$490,000	Source of Cost Estimate	Institution Staff	Design	$125,000
Institution Funds		Date of Cost Estimate	1/30/21	Construction	$1,000,000
Total Project Cost	$490,000				
		Design	Construction	Testing/Misc.	Contingency
Enter Estimated Cost By Project Phase:		$35,000	$410,000	$5,000	$40,000
				Total cost by phase	$490,000
Enter Estimated Cost by Project Scope Component:					
Primary - HVAC	$400,000	Addl. #1 - Electrical	$90,000		
			Total cost by by project scope component		$490,000
Enter cost detail for HVAC and electrical systems by scope subcomponent:					
Primary - HVAC		Addl. #1 - Electrical			
Air Handling	$270,000	Switchgr/Transfmr	$60,000		
Air Distribution	$100,000	Distribution	$10,000		
Controls	$50,000				
Total HVAC Systems	$420,000	Total Electrical Systems	$70,000		

Building ID

Required for:

- Building Renewal projects
- Central Plant Projects (within building)
- Use FIDC tab near end of tab array to locate correct Regents Building Code



BUILDING IDENTIFICATION AND INFORMATION

For all building renewal projects. select Regents Bldg. Code and provide additional information. Selection autopopulates data from Spring 2021 FIDC.

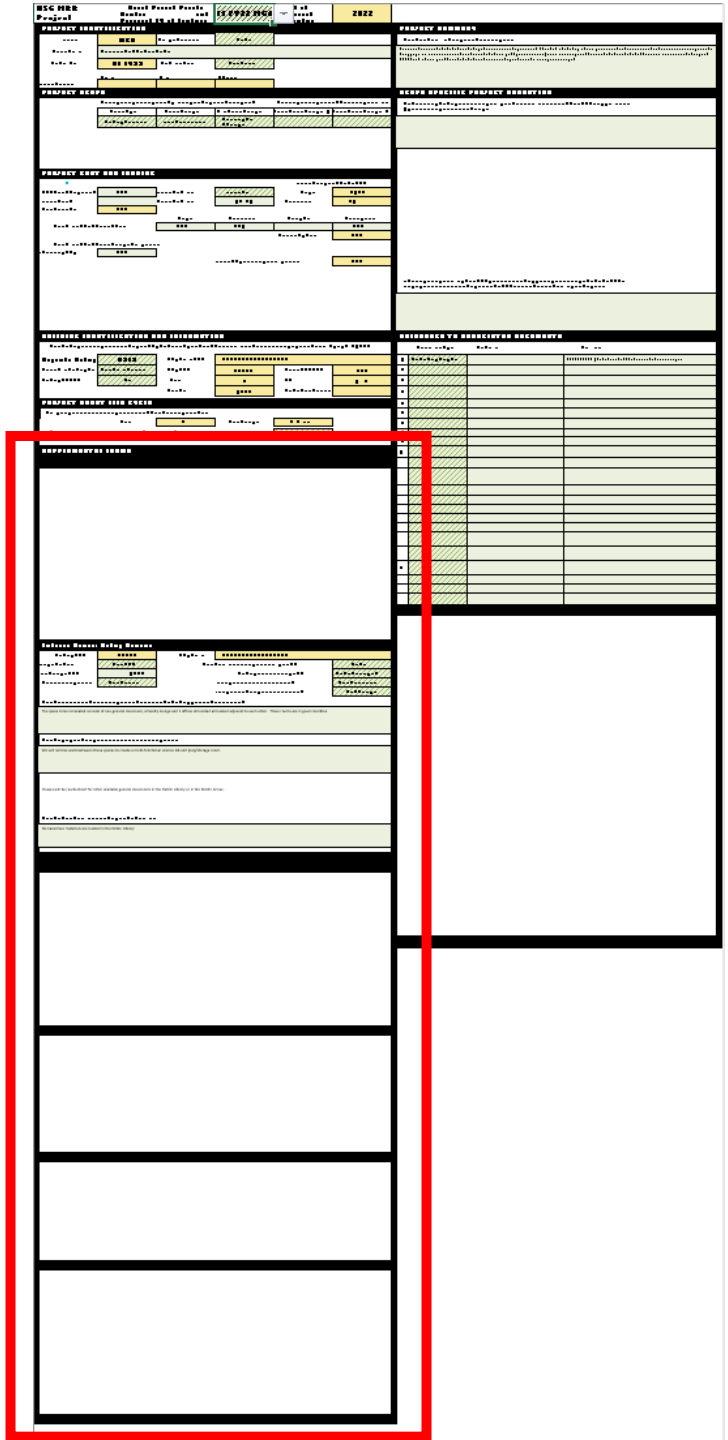
Regents Building Code	0312	Bldg. Name (FIDC)	DUBLIN CENTER LIBRARY		
Current Primary Building Use	Academic - General	Bldg GSF	29,765	Owned by BOR?	YES
Building FCAR?	No	# Floors	2	RI %	100%
		Year Built	1998	Yr of Last Major Renov.	

PROJECT ASSET LIFE CYCLE

Composite project asset life cycle range (calculated based on scope and cost):

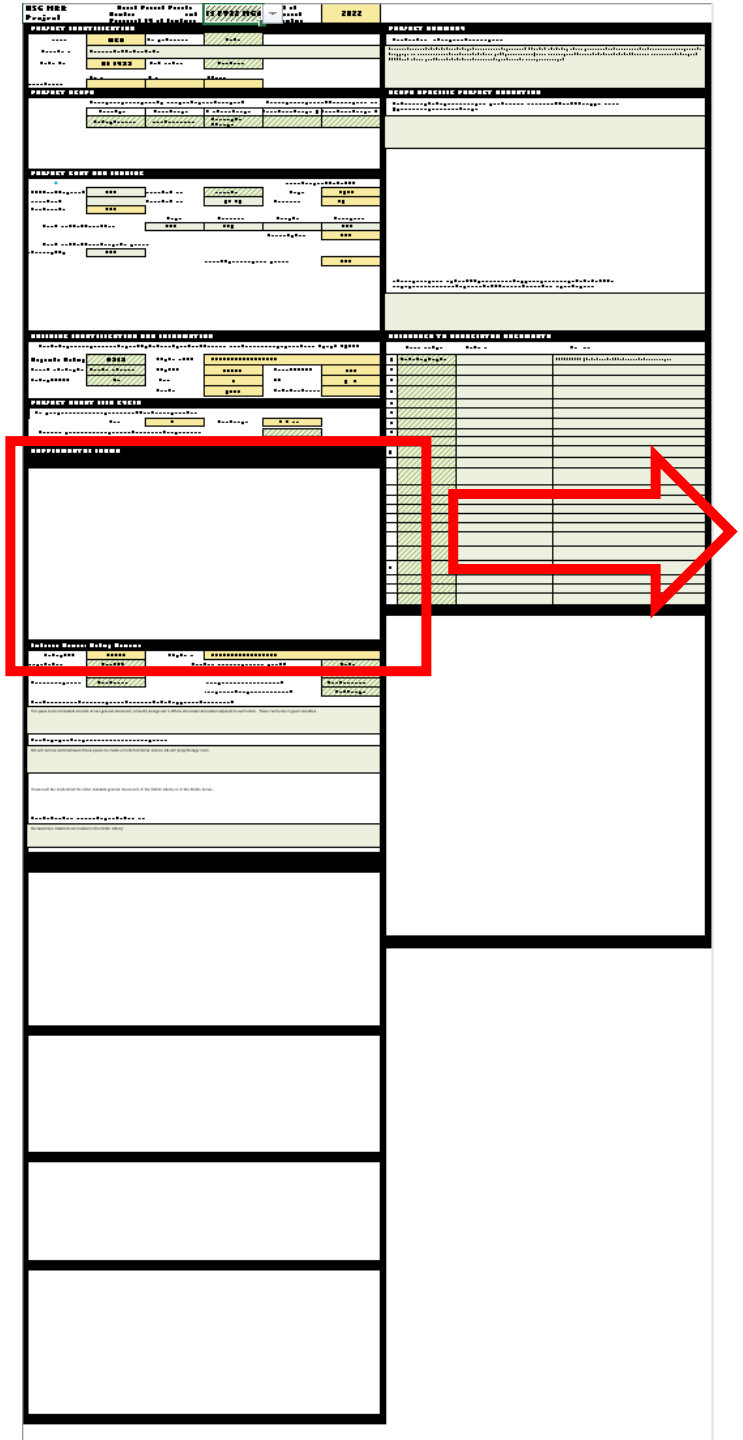
Years	27.4	Year Range	20-30 years

Select composite asset life cycle range to override calculated range (if necessary):



Supplemental Forms

- Roofing (Rows 49-67)
- Interior Renovation (Rows 69-98)
- HVAC – Chiller (Rows 101-120)
- HVAC – Air Handling (Rows 121-135
- HVAC – DX Systems (Rows 137-148)
- HVAC – Boilers (Rows 149-165)



Supplemental Forms

SUPPLEMENTAL FORMS

Roofing - Building Renewal

		Bldg Name:	SCHOOL OF ARTS AND LETTERS
Does your institution have a roof inspection and maintenance program?			test test test
Yes		Provide brief description of roof program:	

Existing roof information

Roof construction type	Roof Area (sf)	Roof Age (in years)	Is roof under warranty?
Modified Bitumen	19,000	28	No

Describe condition and maintenance history of subject roof and related systems (flashing, parapet, etc.) Describe warranty if applicable.

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Replacement roof construction type:

TPO

Describe roof project scope and approach

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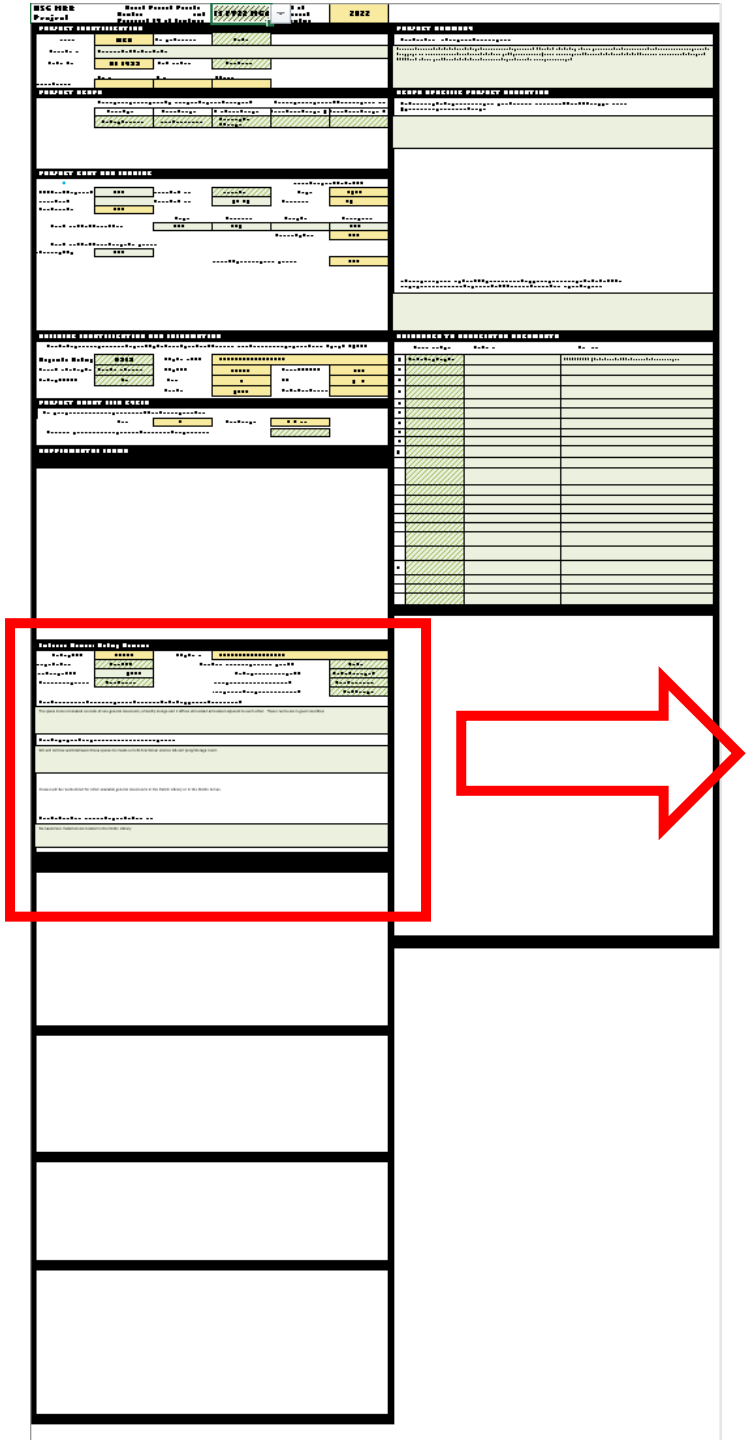
Supplemental Forms



Interior Renovation	Building Renewal			
Building GSF	36,502	Bldg Name:	SCHOOL OF ARTS AND LETTERS	
GSF in Scope (Full/Partial)	Partial GSF		Hazardous materials investigation completed?	No
Enter Project Scope GSF:	10,000		Is building currently occupied?	Yes - Fully Occupied
Extent of reconfiguration	Structural - Minor		Will current occupants relocate for renovation?	Partial Relocation
			Will occupancy change after renovation?	Partial Change

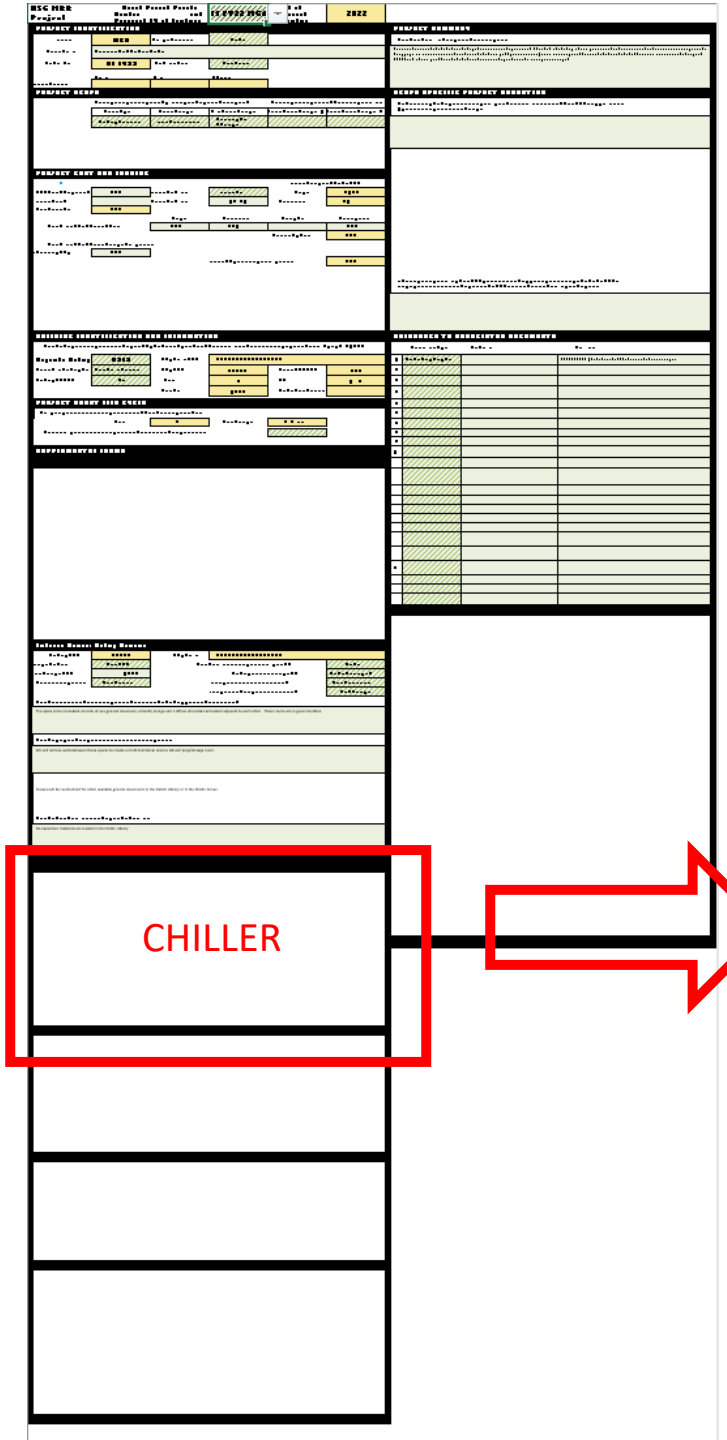
Describe current conditions, occupants, and functions of the building/space to be renovated

Describe proposed scope of renovation: interior reconfiguration; interior finishes; and instructional upgrades.

Describe swing space approach for relocated occupants. List new/proposed functions and occupants for renovated space, and indicate current location

Describe the physical and functional feasibility of the proposed structural reconfiguration.

Supplemental Forms



CHILLER

Central Plant Systems

Chiller (Replace) - Central Plant

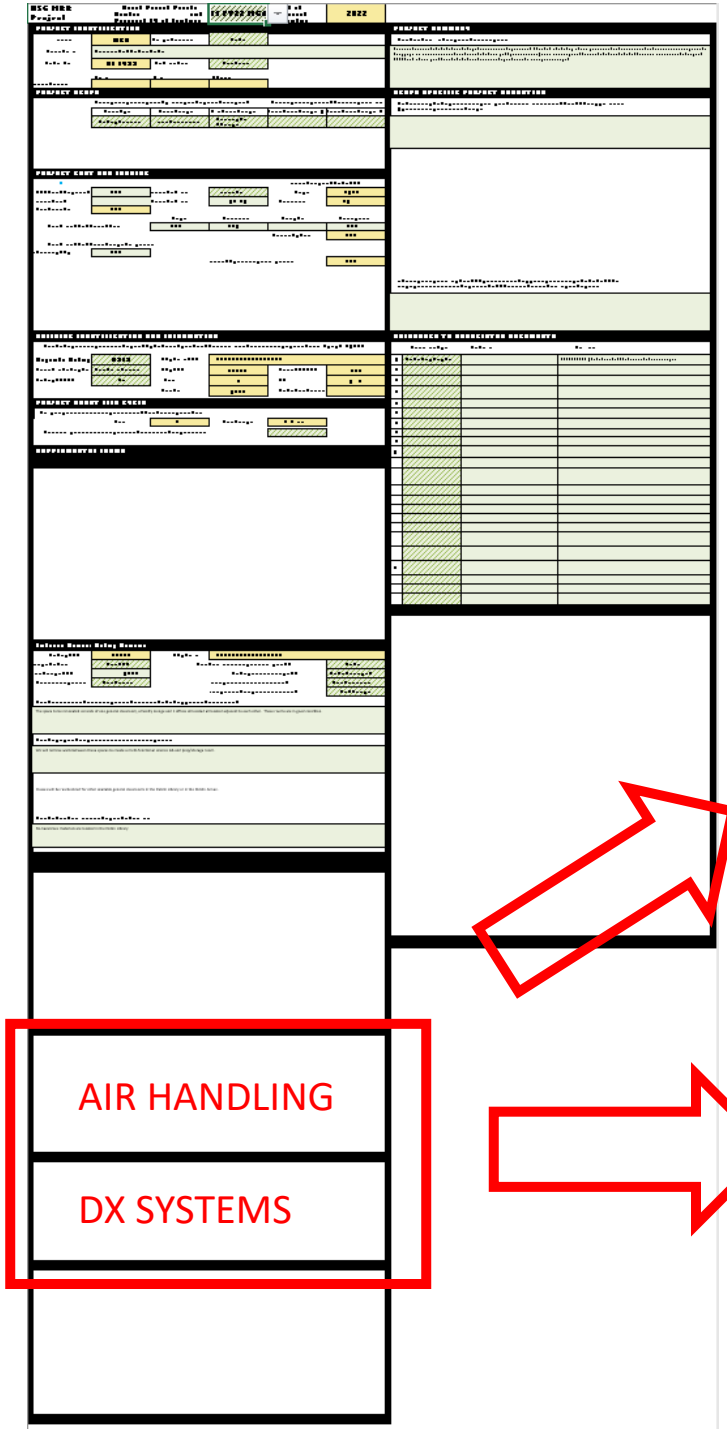
Bldg Name:	PLANT OPERATIONS				
	Type	Compressor	Capacity (tons)	Age (Years)	Years since major rebuild
Existing chiller #1	Water Cooled	Screw	250	20	10
Existing chiller #2					

Describe condition, maintenance history, and problems with existing central plant chiller equipment to be replaced.

	Type	Compressor	Capacity (tons)
Replacement Chiller #1	Water Cooled	Centrifugal	300
Replacement Chiller #1			

Describe the scope of the central plant chiller replacement project

Supplemental Forms



AIR HANDLING

DX SYSTEMS

Air Handling

	Bldg Name:	GEORGIA HALL		
	Type	Capacity (CFM)	Age (Years)	
Existing Air Handler #1	Rooftop	15,000	25	
Existing Air Handler #2	Indoor Unitary	20,000	25	
	Replacing Fan?	Replacing Cooling Coil?	Replacing Heating Coil?	Replacing Controls?
Work Scope - Air Handler #1	Yes	Yes	Yes	Yes
Work Scope - Air Handler #2	Yes	Yes	Yes	Yes

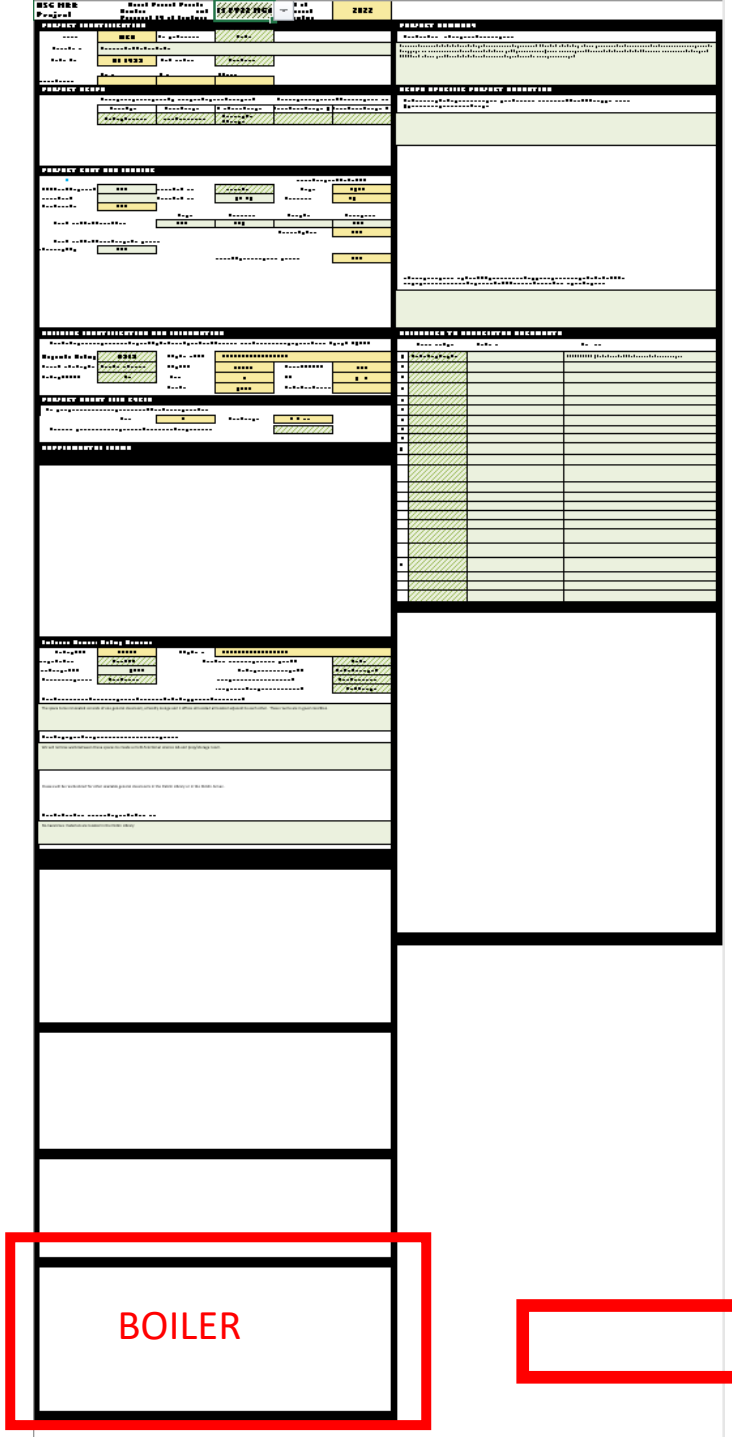
Describe condition and maintenance history of existing equipment. Discuss scope of work itemized above and any additional scope elements.

DX Systems

		Bldg Name:	GRACE HALL		
	Type	Replace or Repair	# Units	Capacity (tons, per unit)	Age Range (Years)
Existing DX System	Package-rooftop	Replace	2	10	20
	Type	# Units	Capacity (tons)		
Replacement DX System	Multi-Split	1	20		

Describe condition, maintenance history, and problems with existing DX equipment. Describe project scope and approach.

Supplemental Forms



BOILER

Boiler (Replace) Central Plant

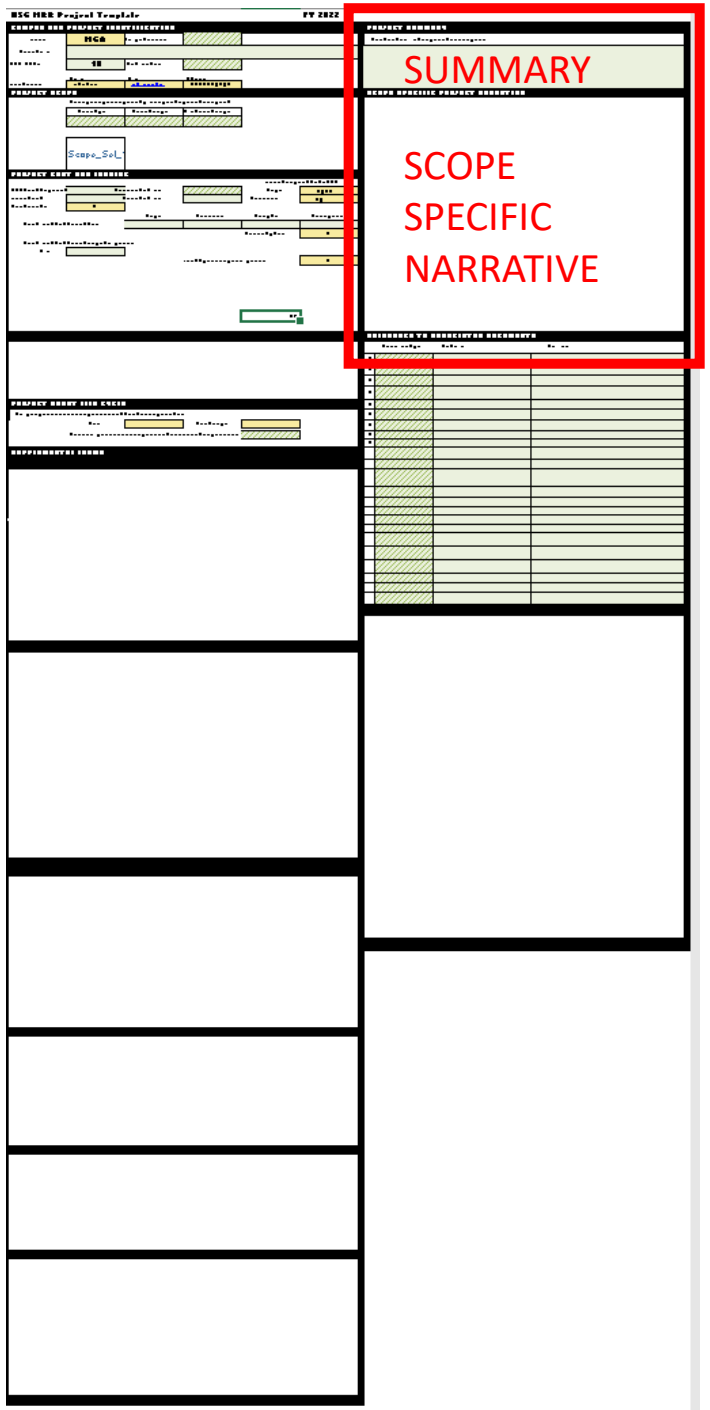
Bldg Name: PLANT OPERATIONS

	Type	Fuel	Age	Capacity (BTU)
Existing Boiler	Hot Water-Unitary	Gas	30	20000

Describe the condition, maintenance history, and problems with existing central plant boiler equipment to be replaced.

	Type	Fuel	Capacity (BTU)	# Units
Replacement Boiler	Hot Water- Modular	Gas	5000	4

Describe scope of central plant boiler replacement project



PROJECT SUMMARY

Provide a brief summary description of the overall project:

SCOPE SPECIFIC PROJECT NARRATIVE

For the following building renewal scope items, provide any information not fully addressed by the supplemental form: 1) air handling;

Describe existing characteristics and conditions of these building renewal scope components: 1) HVAC air distribution; 2) building HVAC controls; 3) switchgear/transformer; 4) electrical wiring/devices;

Describe the proposed project scope for renewal of these building systems: 1) HVAC air distribution; 2) building HVAC controls; 3) switchgear/transformer; 4) electrical wiring/devices;

Indicate if project is: part of a multi-phase MRR project; an enabling project; part of a critical path with other MRR or capital project(s); is effectively scalable if partially funded?. Note any other issues about timing and urgency.