

Note: Instructions for Completing in *[Italics]*

SCHEDULE OF PROJECT DETAILS
for the
Agreement Between Owner and Design Professional
for Contractor Projects

(Form Date: GC July 2018; Rev. 9/22, 2/25)

[PROJECT NAME]
U-M Project No. P _____

This SCHEDULE OF PROJECT DETAILS supplements and is incorporated into the Agreement Between Owner and Design Professional dated _____ between THE REGENTS OF THE UNIVERSITY OF MICHIGAN, and _____.

1. Project Description (Agreement §2.1)

[UM Project Name and Project Description]

2. “Fixed Limit of Construction Cost” (Agreement §1.3 and Article 7)

\$ _____

3. Basic Lump Sum Fee (Agreement §4.1)

The Basic Lump Sum Fee is \$ _____. This is a lump sum amount which is compensable for completion of the professional services for the project and payable in accordance with the payment schedule detailed herein.

Note: The language highlighted below is to be used in DRAFT versions of the SOPD only for purposes of calculating the Basic Lump Sum Fee. When the final SOPD is executed, this language will be removed since the fee is administered as a Lump Sum.

The Basic Lump Sum Fee is a sum calculated by multiplying the agreed upon fee percentage, _____%, times the Fixed Limit of Construction Cost, regardless of what the actual Construction Cost may turn out to be. (For AEC DM’s, please see Project Management Manual section 4 for guidelines regarding agreed upon fee calculation.)

The basic fee percentage is derived by the following formula:

$$\text{basic fee percentage} = \frac{34}{\text{Log}_{10} [\text{construction cost}/85]}$$

The Basic Lump Sum Fee includes the following field observation during the construction period:

Hours per Week Firm Name Type of Architect/Engineer

4. Sub-consultants (Agreement §1.18)

Sub-consultants that are included in the Basic Services are as follows:

Firm Name Type of Architect/Engineer

5. Reimbursable Expenses Allowance (Agreement Article 5)

An allowance of \$_____ is provided for reimbursable expenses as defined in Article 5 of the Agreement and in accordance with Exhibit 1 – The University of Michigan Architecture, Engineering and Construction - Reimbursement Expense Guidelines.

These guidelines are for Design Professionals and their Sub-consultants.

6. Extra Services (Agreement Article 6)

Services of additional Sub-consultants required and pre-approved extra services which are not included in the Basic Fee are as follows:

Firm Name Type of Architect/Engineer Additional Fee

The following additional field observation will be provided for a total Extra Service fee of \$_____.

Hours per Week Firm Name Type of Architect/Engineer

An additional allowance of \$_____ is provided for extra services that may be created and defined during the project execution as described in Article 6 of the Agreement.

7. Requests for Payment (Agreement §4.1.1)

The Design Professional's requests for payment shall be proportioned for each phase of service in accordance with the following schedule:

Schematic Design Phase	20%
Design Development Phase	20%
Construction Documents Phase	40%
Construction Services Phase	20%

8. Design Packages (Agreement §1.16)

The following is the title and description for each of the [*insert number of design packages*] separate Design Packages that are to be prepared for this project:

<u>Title</u>	<u>Description</u>	<u>Bid Document Release Date</u>
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9. Preliminary Design Schedule (Agreement §1.15.1)

Milestone dates for the design and services are as follows:

	Start	Finish
Schematic Design (including Owner Review)	_____	_____
Design Development (including Owner Review)	_____	_____
Construction Documents (and Bid and Award)	_____	_____
Construction Services (including Commissioning)	_____	_____

10. Furnishings and Equipment Layout (Agreement §3.3.2)

The Design Professional is to provide the following as a Basic Service under the Agreement: [*choose one, other will be deleted*]

- Review the preliminary furnishings and equipment layout provided by the Owner's Representative to assure compliance with architectural, structural, electrical, plumbing and mechanical systems.
- Prepare a furnishings and equipment layout and submit it to the Owner's Representative for review and comment.

11. Interior Design and Furnishing Services (Agreement §3.4.6)

The Design Professional is to provide the following as a Basic Service or pre-approved extra services under the Agreement: [*defined by the Design Manager*]

12. Insurance (Agreement §11.2)

The Design Professional shall promptly obtain and maintain the following insurance coverages:

- A. Commercial General Liability for bodily injury and property damage including contractual liability with limits not less than \$1 million per occurrence and \$2 million aggregate and naming the Regents of the University of Michigan as an additional insured.
- B. Auto Liability for owned, hired, or leased vehicles with a combined single limit not less than \$1 million.
- C. Worker's Compensation adequate to meet State of Michigan statutory limits. Employers Liability with a limit not less than \$500,000 per occurrence.
- D. Professional Liability, on a **claims made** basis, with limits of _____. (Fill in the blank with the amount of coverage that the firm maintains with that being no less than the figure indicated below.) Any and all limits shall be considered available to support the indemnification included in this agreement.

Fixed Limit of Construction Cost

\$0 – 50 million
Over \$50 million

Minimum PL Coverage

\$2 million
\$5 million

13. Other Additions and Changes to Agreement (if any)

(Remainder of page left intentionally blank.)

14. Summary of Compensation Amounts

Basic Fee (Lump Sum)	\$ _____
Reimbursable Expenses (Allowance)	\$ _____
Additional Sub-consultants and pre-approved extra services (Lump Sum)	\$ _____
Additional Field Observation (Allowance)	\$ _____
Extra Services (Allowance)	\$ _____
Total Agreement Amount	\$ _____

(FIRM NAME)

The Design Professional

By _____
(Signature)

(Printed Name)

(Title)

**THE REGENTS OF THE UNIVERSITY
OF MICHIGAN**

Owner

By _____
Geoffrey S. Chatas
Executive Vice President and
Chief Financial Officer

The University of Michigan
Architecture, Engineering and Construction
Reimbursement Expense Guidelines
For Professional Services
As of January 1, 2025

Allowable Reimbursement of Personal Expenses
While Traveling on Authorized University Business

Airfare and Rail

- Coach fare only. First class and business class travel is allowed only under rare circumstances and requires prior approval from a senior university official.
- Ticket receipt with itinerary
- E-ticket/Internet-Original receipt/statement required indicating method of payment
- The University prefers a U.S. carrier be used when possible
- Flights should be booked at least 14 days in advance unless an acceptable business purpose arises

Lodging/Ground Transportation

- On Campus Lodging per diem – (car rental/gas not allowed):
 - \$205.00/person/night
 - **On Campus U-M suppliers****
- Ground Transportation:
 - Actual and reasonable expenses
- Off Campus Lodging per diem:
 - \$162.00/person/night
 - **Use preferred U-M suppliers****
- Car Rental per diem (includes gas):
 - \$105.00/day
- **OR**
- Other Ground Transportation:
 - Actual and reasonable expenses
- If visit does not include an overnight stay, car rental/gas **OR** ground transportation will be reimbursed with original receipt
 - University consultants on University business are eligible to use the University's Contract's when making National Car Rental and Enterprise reservations by using <https://partners.rentalcar.com/whitepine/#/business-use/car-rental>. Utilize either program, unless less costly rental is available.

Meals (including incidentals)

- Per diem:
 - \$80.00/person/full day
 - \$40.00/person/half day (less than 5 hours)

Alcoholic Beverages

- The University shall fund no alcohol

Other Expenses

- Personal automobile mileage <https://www.gsa.gov> under POV Mileage Reimbursement Rates. This rate includes the cost of gas.
- Parking

General Information

- Any item over \$25.00 requires an original receipt except per diem items when billing the per diem rate.
- Request the University of Michigan rate when making reservations for lodging, for potential lower rate.
- Expense reports must be submitted within 45 calendar days from the end of the trip, or within 45 calendar days from the transaction date for the purpose of other allowable expenses. Expenses submitted in excess of 45 calendar days will not be reimbursed.
- Cost of transportation, nor living expenses, shall not be reimbursed for travel between Owner's AEC office in Ann Arbor and/or project site and Design Professional/Consultant's home office address that is within a 75 mile radius.
- Please use the link below for a sample template when submitting invoices for reimbursable expenses: <https://umaec.umich.edu/wp-content/uploads/2025/01/2025-Reimbursement-Expense-Template.xlsx>