



UMass Building Authority

April 4, 2019

ACEC 17th Annual State Markets Conference



Presentation Focus

- Overview: Capital Program
- Change in project portfolio
- Project approval process
- Working with UMBA
- Procurement process
- Recent developments
- Upcoming opportunities
- Projects on the horizon



University of Massachusetts Building Authority

Capital Projects (30) - \$1.48 Billion of Activity Initiated

Amherst - Estimated Project Costs: \$623M

Whitmore Deferred Maintenance (MEP)
Isenberg School of Management Addition & Renovation
Research Laboratory Vivarium Improvements
CHP Additional Capacity & North Substation / Ductbank
LSL - Biomedical Engineering Lab Fit-out (LSL Backfill)
Fine Arts Center Bridge Renovations
Worcester Commons
Student Union Renovations
McGuirk Stadium Upgrades
EHS Renovations at Goessmann
Central Campus Core Utilities, Landscape & Accessibility
Housing Expansion (P3)
North Village Apartments (P3)
Office / Lab / Academic Renovations

Dartmouth – Estimated Project Costs: \$227M

Classroom, Teaching Labs & Learning Space Improvements
New Housing & Dining Facility (P3)
SENG Building System Renovations
Ice Rink & Field House (P3)

Boston – Estimated Project Costs: \$499M

Utility Corridor and Roadway Relocation
Parking Garage
Renovation of Existing Academic Buildings
Clark Envelope Replacement
Elevator Upgrades
Substructure Demolition and Quadrangle Development

Lowell – Estimated Project Costs: \$130M

Perry Hall Renovation & Expansion
Dandeneau Hall (Pasteur Renovations - NQ Phase 2)
Coburn Hall Addition and Renovation
Aikens Recreational Fields
Olsen Renovations (Phase 1)
Cumnock Hall Marketplace

Program Overview:

Projects in Study and Design

- Amherst Campus – Central Heating Plant Expanded Capacity, McGuirk Stadium Upgrades, Goessmann Renovation, Whitmore Deferred Maintenance, Fine Arts Center Renovation, Central Campus Core
- Boston Campus – Substructure Demolition & Quadrangle Development
- Dartmouth Campus –SENG Renovation

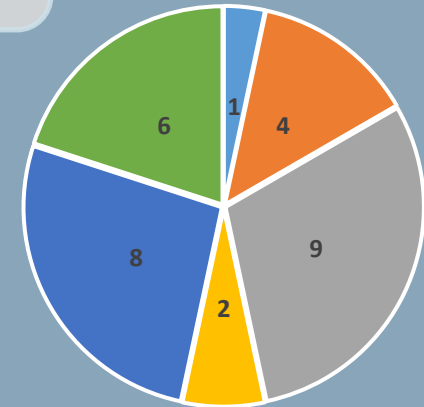
Projects in Construction

- Amherst Campus –Research Laboratory Renovations, Biomedical Engineering, Worcester Commons, Student Union
- Boston Campus – Renovation of Existing Academic Buildings, UCRR, Elevator Upgrades
- Dartmouth Campus – Classroom & Laboratory Space Improvements, P3 Residence Hall
- Lowell Campus –Coburn Hall, Olsen Hall, Perry Hall

Projects in Closeout

- Amherst Campus – Chiller Plant Upgrades, Isenberg Expansion
- Boston Campus – Parking Garage, P3 Residence Hall,
- Dartmouth Campus – School of Marine Sciences
- Lowell Campus –Dandeneau Hall, Cumnock Dining

Projects by Phase

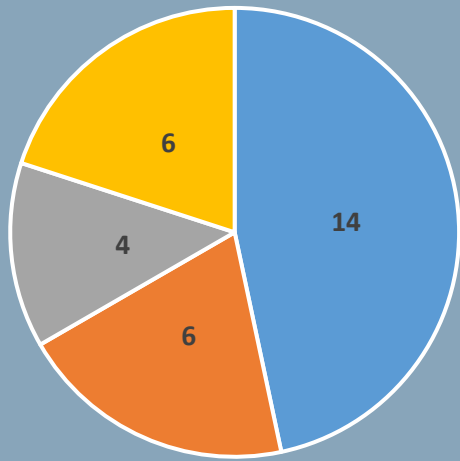


- Conceptual
- Design
- Construction

- Schematic Design
- Final Design/Early Construction
- Sub Completion

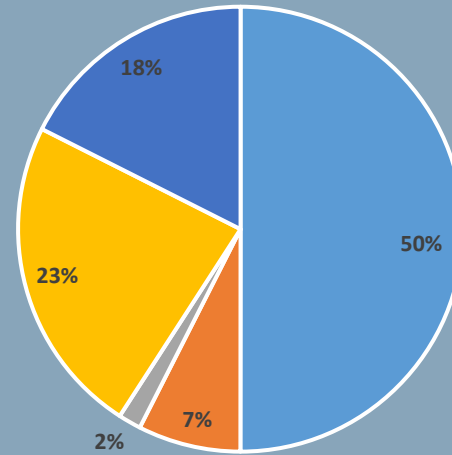
Portfolio Summary:

Projects by Campus



Amherst Lowell Dartmouth Boston

Funding for Projects



Bond Local External P3 State

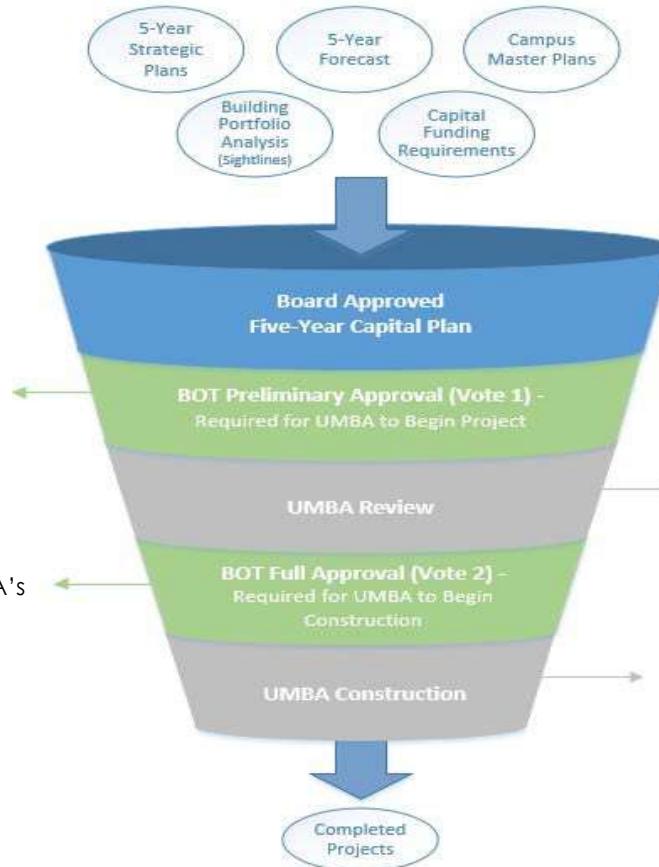
Capital Project Approval Process

Criteria:

- ✓Project to begin within 24 months
- ✓Funding source(s) identified
- ✓Impact on key financial ratios reviewed by A&F
- ✓Within 8% Debt affordability
- ✓UMBA seeks Commonwealth approval, if needed
- ✓Project may advance through study/schematic design

Criteria:

- ✓Project cost confirmed after UMBA's independent review.
- ✓Project may advance to design/construction.
- ✓Total Project Cost increases $\geq 10\%$ require additional Board approval.



Criteria:

- ✓Ongoing coordination with A&F on key financial ratios
- ✓Hire OPM and Begin project design
- ✓Review Deferred Maintenance
- ✓Develop schedule
- ✓Consider other enabling projects

Approved Projects:

- ✓Campuses make written request to UMPO to borrow.
- ✓State approval
- ✓Initiate bid process
- ✓Hire contractors
- ✓Begin Construction
- ✓Monitor project progress and cost

Procurement: Preferred Qualifications for Design & Engineering Firms

➤ Firm Experience

- ✓ Firm's local related project experience
- ✓ Ch. 149 & 149A Public Project experience
- ✓ Availability of assigned staff

➤ Project Approach

- ✓ Proposal is tailored to the uniqueness of the project scope
- ✓ Involvement of specialists when appropriate

➤ Solid Team

- ✓ Efficient structure
- ✓ Assigned staff members have relevant experience
- ✓ Firms have experience working together
- ✓ 17.9% Combined MBE / WBE Firm Participation for Design

➤ Project Control

- ✓ Ability to balance program and budget conflict
- ✓ Understanding of higher education market
- ✓ Skilled at working as part of project team

Procurement Process

- **Request for Proposal (RFP)**
 - ✓ Advertised in the Central Register
 - ✓ Available for download from the UMBA website:
<http://www.umassba.net/solicitations/>
 - ✓ Proposal submitted to UMBA
- **Selection Committee**
 - ✓ Selected for each project
 - ✓ Consists of UMBA, Campus, and Owner's Project Manager
 - ✓ Committee reviews proposals and shortlists most qualified firms
 - ✓ Shortlisted firms are interviewed
- **Business opportunities are available through project-specific proposals or through house doctor contracts**

Public Private Partnerships

- Request for Proposal for development team(RFP)
 - Development team will consist of finance team, project management, construction manager, and design team
 - Model we have used includes design/build components
 - Proposals are reviewed holistically
 - Selection process is in alignment with traditional process
 - Process includes additional layers of approval
 - Financial viability
 - UMBA/UMass Boards
 - State approval



Progress Update - Amherst

- \$62 million expansion of Isenberg School of Management opened in January
- \$16 million renovation of Life Sciences Labs is substantially complete
- \$14 million Biomedical Engineering Lab under construction
- \$32 million Central Campus Core Utilities, Landscape & Accessibility Project starting construction
- \$18 million McGuirk Stadium Upgrade starting construction
- \$68 million new Worcester Commons is under construction
- \$62 million renovation of Student Union Project is being bid now



Progress Update - Boston

- \$70 million New Parking Garage is open
- The P3 Residence Hall & Dining Facility opened in September
- The \$250 million Utility Corridor & Roadway Relocation is being wrapped up
- \$42 million Renovation of Existing Academic Buildings is under construction
- The \$115 million Substructure Demolition & Quad Redevelopment is in design
- Deferred Maintenance being addressed with Envelope & Elevator projects



Progress Update - Dartmouth

- \$55 million new School of Marine Sciences is complete
- \$140 million P3 Residence Hall & Dining Facility under construction
- Continued tackling of deferred maintenance by investing in classrooms, teaching labs, and learning spaces



Progress Update - Lowell

- \$42 million Perry Hall renovation is complete
- \$16 million Dandaneau Hall renovation opened in September
- \$47 million Coburn Hall expansion and renovation is at the mid-point of construction
- \$10 million Olsen Hall renovation for the Biology Department will be complete this summer



Upcoming Projects



- Amherst P3 Housing Initiatives. RFP will be issued:
 - \$175 million 1000-bed undergraduate, apartment style housing
 - \$70 million 240-unit graduate housing complex with a mix of 1-3 bedroom apartments
- \$7 million renovation of Amherst's Fine Arts Center
 - Selection of the design team in process
- \$14 million Goessmann Hall entering design for School of Public Health
- \$25 million Amherst Central Heating Plant Capacity Expansion is being studied
- \$45 million renovation of Dartmouth's Science & Engineering Building being studied



Projects on the horizon

- \$35 million renovation of Goodell Hall in Amherst to provide one-stop center for student services
- Partial renovation of Amherst's Lederle Research Tower for the math program
- Exploring possibility of a museum at UMass Amherst
- Demolition of Amherst's Bartlett Hall
- \$52 million for renovations to various office/lab/academic spaces in Amherst
- Exploring potential P3 for athletic facility in Dartmouth
- \$18 million of additional investments in Lowell's Olsen Hall
- Exploring potential P3 for athletic & recreation facilities in Lowell
- Upgrading of the electrical infrastructure on Lowell's South Campus

