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

**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

**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)
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
- Schematic Design
- Final Design/Early Construction
- Construction
- Sub Completion
Portfolio Summary:

**Projects by Campus**

- Amherst: 14
- Lowell: 6
- Dartmouth: 4
- Boston: 6

**Funding for Projects**

- Bond: 50%
- Local: 23%
- External: 18%
- P3: 7%
- State: 2%
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 ≥ 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/](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