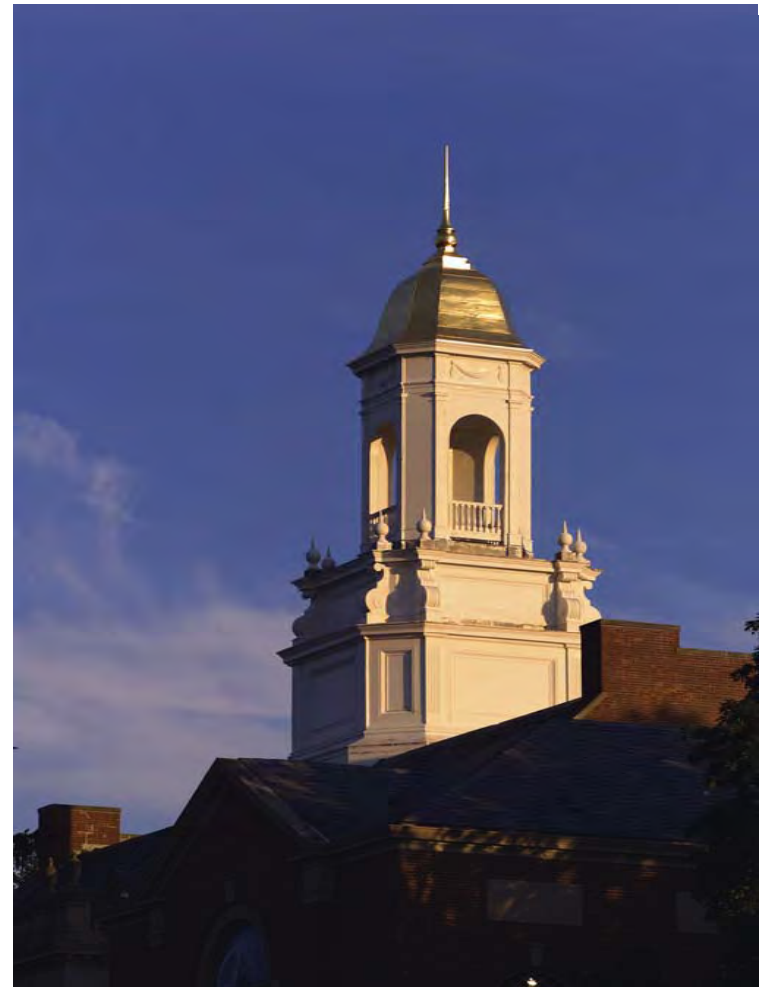




University of Connecticut

Capital Planning Workshop

August 21, 2003



In 1995...

We Had Crumbling Infrastructure











In 1995... UCONN 2000 became Law



Completed Projects

- **Agriculture Biotechnology Facility**
- **Alumni Quadrant Renovations**
- **Avery Point Marine Science Research Center**
- **Babbidge Library**
- **Central Warehouse-New**
- **Charter Oak Apartments & Suites**
- **Chemistry Building**
- **East Campus North Renovations**
- **Gampel Pavilion Seating Expansion**
- **Gampel Basement Renovations**
- **Gant Plaza Deck**
- **Grad Dorm Renovations**
- **Heating Plant Upgrade**
- **Hilltop Dormitory-New**
- **Hilltop Dormitory Renovations**
- **Hilltop Dorm-Apartments**
- **Horticultural Storage/Museum of Natural History**
- **Ice Rink Enclosure**
- **Litchfield Agricultural Center**
- **Mansfield Apartments Renovation**
- **Mansfield Training School Improvements**
- **Monteith Renovations**
- **Music & Drama Addition**
- **North Campus Renovations**
- **North Superblock Site & Utilities**
- **Northwest Quadrant Renovation**
- **North Parking Garage**
- **Pedestrian Mall-Fairfield Road**
- **Precision Manufacturing Enterprise Building**
- **School of Business-New**
- **Shippee / Buckley Renovations**
- **South Campus Complex**
- **South Parking Garage**
- **Stamford Downtown Relocation**
- **Student Recreation Facility Renovation**
- **Technology Quadrant-Phase IA**
- **Technology Quadrant-Phase II**
- **Towers Dining Hall**
- **Towers Greek Housing Complex**
- **Underground Steam & Water Upgrade**
- **University Programs Building**
- **Visitors Center**
- **Waring Building Conversion**
- **Waterbury Campus Relocation**
- **Waterbury Property Purchase**
- **West Campus Renovations**
- **White Building Renovation**
- **Wilbur Cross Building Renovation**

8 Years Later... We Have Rebuilt Campuses



Chemistry Building



School of Business



Avery Point Marine Sciences Research Center



Waterbury Campus



Stamford Campus-GE Capital Edgelab



South Campus



Charter Oak Apartments



North Parking Garage



New Signage / Pedestrian Focus



New Utility Infrastructure

Projects in Construction or Design

- **Avery Point Undergraduate Building Renovation**
- **Benton State Art Museum Addition**
- **Business School Renovation**
- **Cogeneration Chiller Facility**
- **Deferred Maintenance & Renovations**
- **Equipment, Library, Telecommunications**
- **Gentry Renovations**
- **Pharmacy/Biology Building**
- **Student Union Addition**
- **Torrey Life Science Renovation**
- **Towers Renovations**



Gentry & Center for Undergraduate Education



Pharmacy Building



Student Union

UCONN 2000

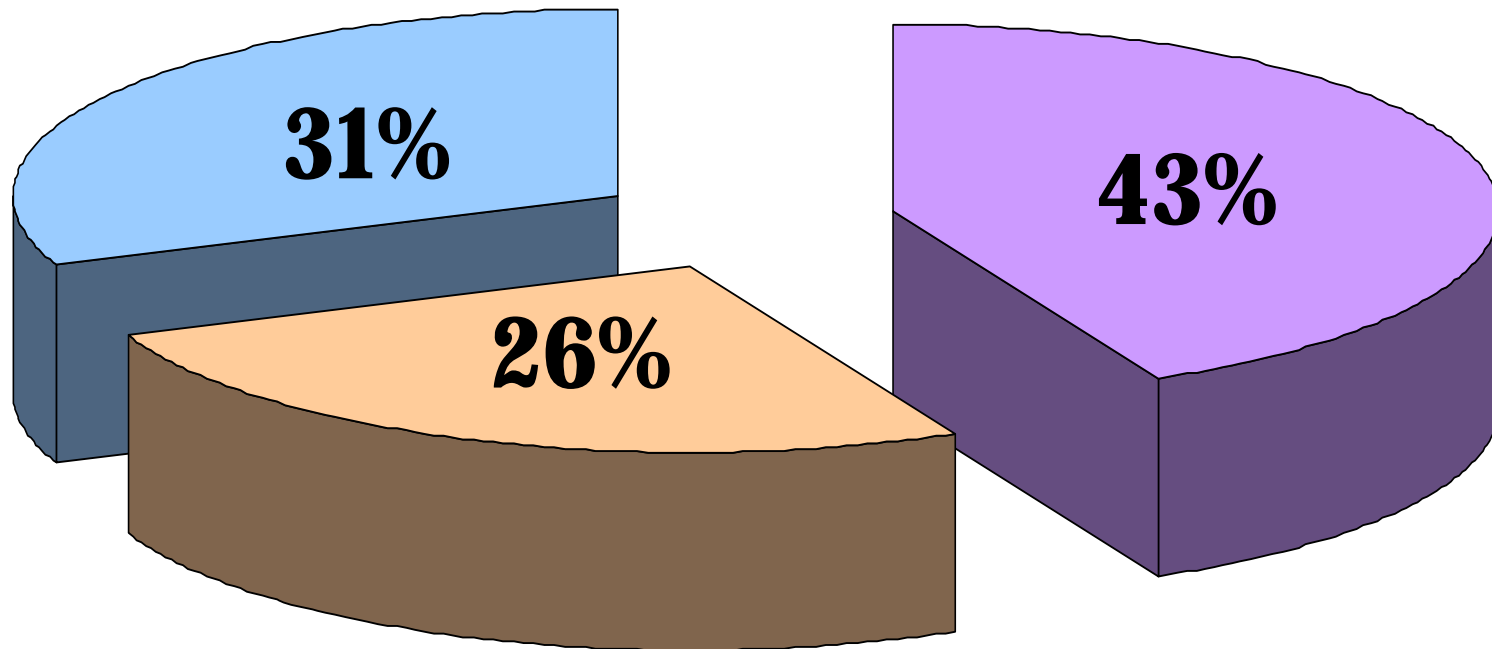
Here's Where We Are In Terms Of \$

- **\$912 million of projects authorized to date in bonds with state debt service commitment for 50 UCONN 2000 Projects**
- **\$205.1 million in special obligation bonds authorized to date net of refunded bonds (\$189.2 million for Projects)**
- **As of August 2003, \$792.2 million in construction-related contracts (exclusive of equipment)**
 - **89% (\$701.4 million) to Connecticut contractors**
 - **24% (\$183.5 million) to set-aside contractors**
 - **59% (\$107.4 million) to small business contractors**
 - **41% (\$76.1 million) to minority-and-women-owned contractors**

UCONN 2000

Gross Square Footage-Storrs & Regionals

- **New Construction: 3,452,161 GSF**
- **Total Renovation: 2,112,628 GSF**
- **Partial Renovation: 2,509,718 GSF**



New Construction



IT Engineering Building

New Construction



Agriculture Biotechnology Building

Total Renovation



College of Liberal Arts and Sciences

Total Renovation



Homer Babbidge Library Information Cafe

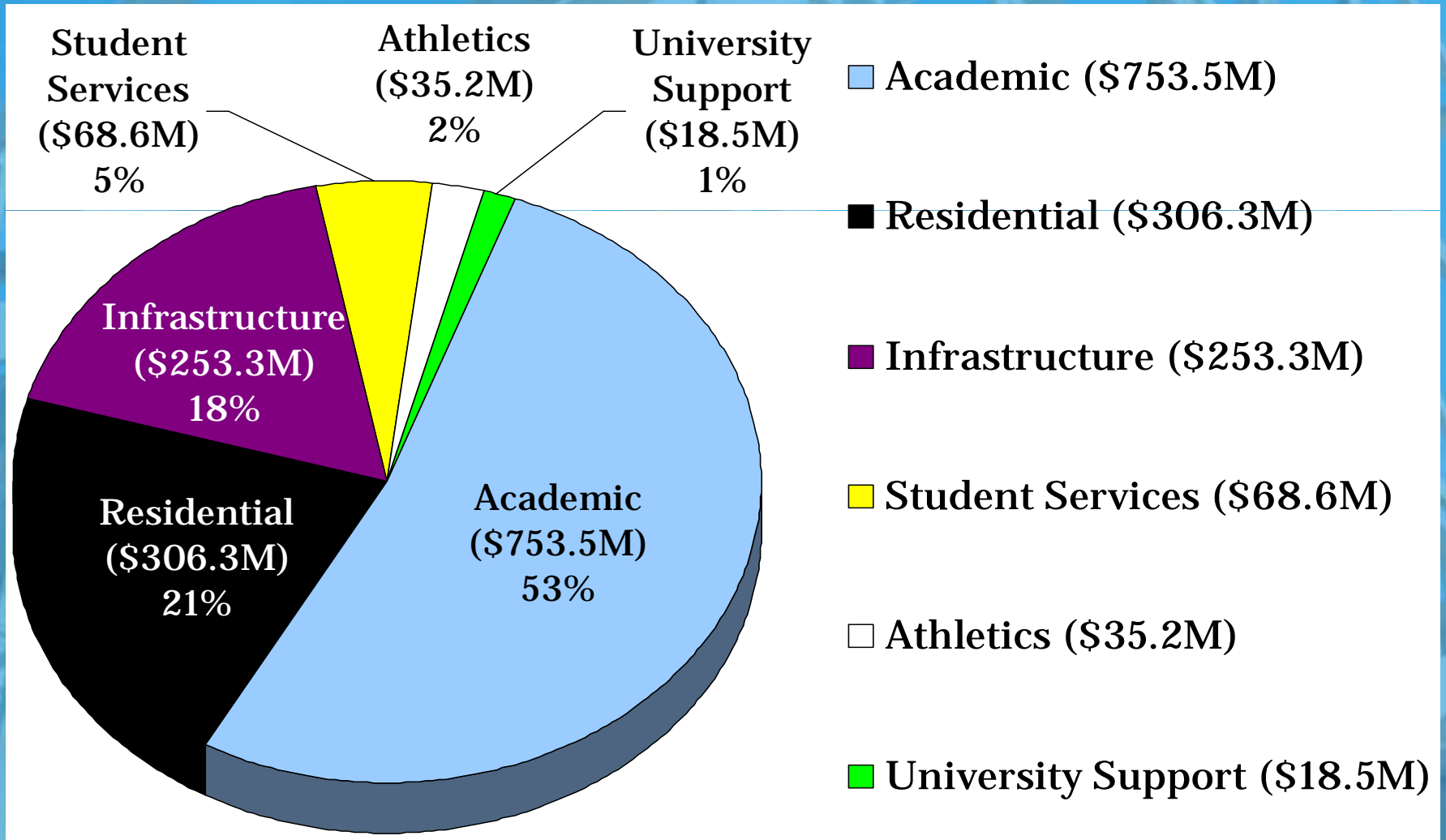
Partial Renovation



High-Tech Classrooms

UCONN 2000

Here's Where We Are By Program All Funding Sources - \$1,435.4 M



Academic Funding



Biology Physics Building

Academic Funding



Biology Physics Building Lab

Academic Funding



Stamford Campus

Residential Funding



Northwest Dining Hall

Residential Funding



Hilltop Suites

Residential Funding



Hilltop Apartments

Student Services Funding



Wilbur Cross



**8 Years
Have Produced Other Changes**

Our Experience

The Experience of Others

Our Experience

- **Project Management**
- **Policy Oversight**
- **External Reviews**
- **On Time & On Budget**

The Experience of Others

- **Students**
- **Instructional Environment**
- **Research Capacity**
- **Financial Community**
- **Awards**
- **Alumni, Donors & Visitors**
- **Legislative Response**

Student Experience



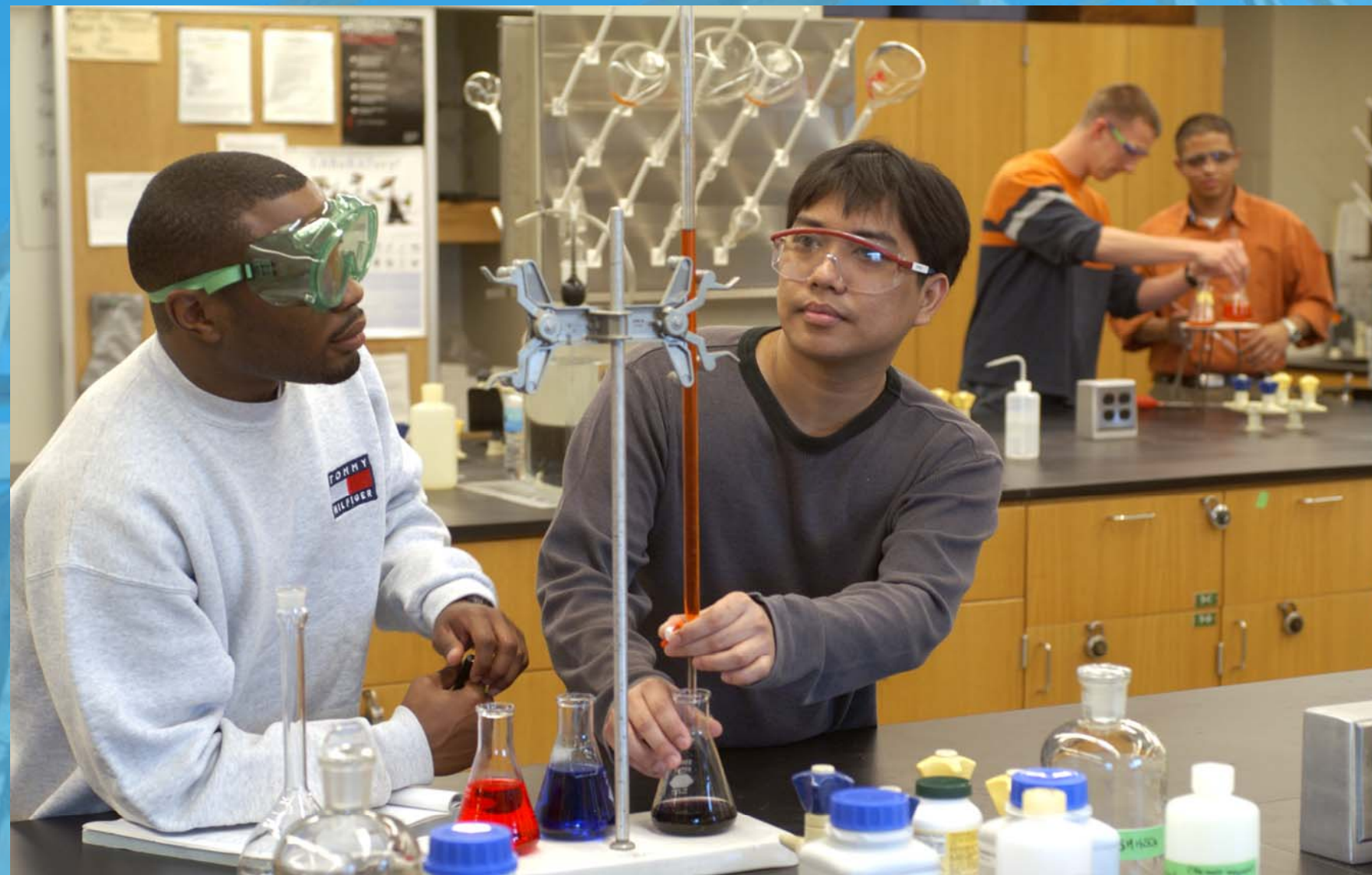
Convocation Picnic

Instructional Environment



Chemistry Building Lecture Hall

Research Capacity



Chemistry Lab

Financial Community

- **Bond Credit Ratings**
 - Consistent strong ratings
 - Consistent strong market acceptance
 - Comparable low debt service costs

- **UCONN 2000 State Debt Service Commitment Bonds**
 - Fitch: AA-
 - Moody's: Aa3
 - Standard & Poor's: AA

- **UCONN 2000 Special Obligation Bonds**
 - Moody's: Aa3
 - Standard & Poor's: AA-

Awards



Lodewick Visitors Center

Alumni, Donors & Visitors



Lodewick Visitors Center

Legislative Program Review & Investigation Report

- Concluded that the program is well managed, incorporates industry best practices & delivers quality facilities on time and on budget
- No recommendations for legislative changes
- Three programmatic recommendations already underway

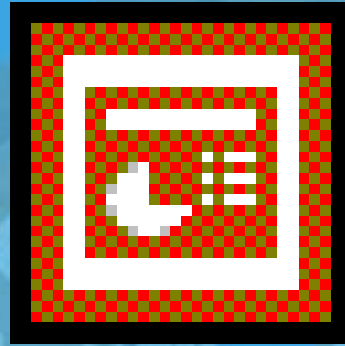


Planning

- **Proven value**
- **Expanded Capital Planning**
 - **Storrs Master Plan**
 - Added Agriculture/East Campus, North Campus & Depot Campus
 - Currently being updated
 - **Health Center Master Plan**
- **Program Planning**
 - **Storrs-Academic Plan**
 - **Health Center-Strategic Plan**
 - **Information Technology**
 - Storrs Network Plan complete, IT Plan coming
 - Health Center Strategic IT Plan complete

Storrs Master Plan





Master Plan Update

Storrs & Regionals

Capital Workshop Goals

- Review 21st Century UConn Structure
- Discuss a very general, very tentative capital plan with focus on project sequencing in early years
- Confirm project list
- Master Indenture Amendment to come in September

Capital Program

3 Phases + 2 names = 1 Capital Program

- **UCONN 2000 - Phase I & II**
 - **Storrs & Regionals**
 - **\$962 million – 10 year program (FY96-FY05)**

- **21st Century UConn – Phase III**
 - **Health Center, Storrs & Regionals**
 - **\$1.3 billion – 11 year program (FY05-FY15)**

21st Century UConn



21st Century UConn

- **Program Structure**
- **Annual Process**
- **Health Center**
- **Other Capital Funding Sources**

Program Structure

- **Project List in Law**
- **Authority delegated to Board of Trustees**
- **University administers program**
- **Annual Bond Caps (note constraints early years)**
- **Debt Service Commitment & Special Revenue Bonds**
- **Project List v. Funding Totals**

Board of Trustee Annual Process

- **General capital plan-flexible**
- **Annual project list & supplemental indenture**
- **Submit list to Governor**
- **List triggers expenditure plan**
- **Work closely with Office of State Treasurer**

Health Center

- **First time on project list**
- **Need to integrate into planning and annual caps**
- **Single administrative structure**
- **Board of Directors will recommend project list annually to Board of Trustees for approval**

Other Capital Funding Sources

- **General Obligation Bond but UCONN 2000 authority (Waterbury & Law School)**
- **Health Center**
 - **State General Obligation Bonds**
 - **Federal Facilities & Administrative Use Allowance**
 - **Other Cash Resources (Depreciation, Clinical Revenues, etc)**
 - **Private Financing**
- **Master Lease (Storrs & Health Center)**
- **Capital Financing Leases**

21st Century UConn

- **Still have significant needs**
- **Development of project list**
- **Heavy on renovations**
- **Even most major projects are replacements**

Much remains to be done...



Beach Hall



Beach Hall



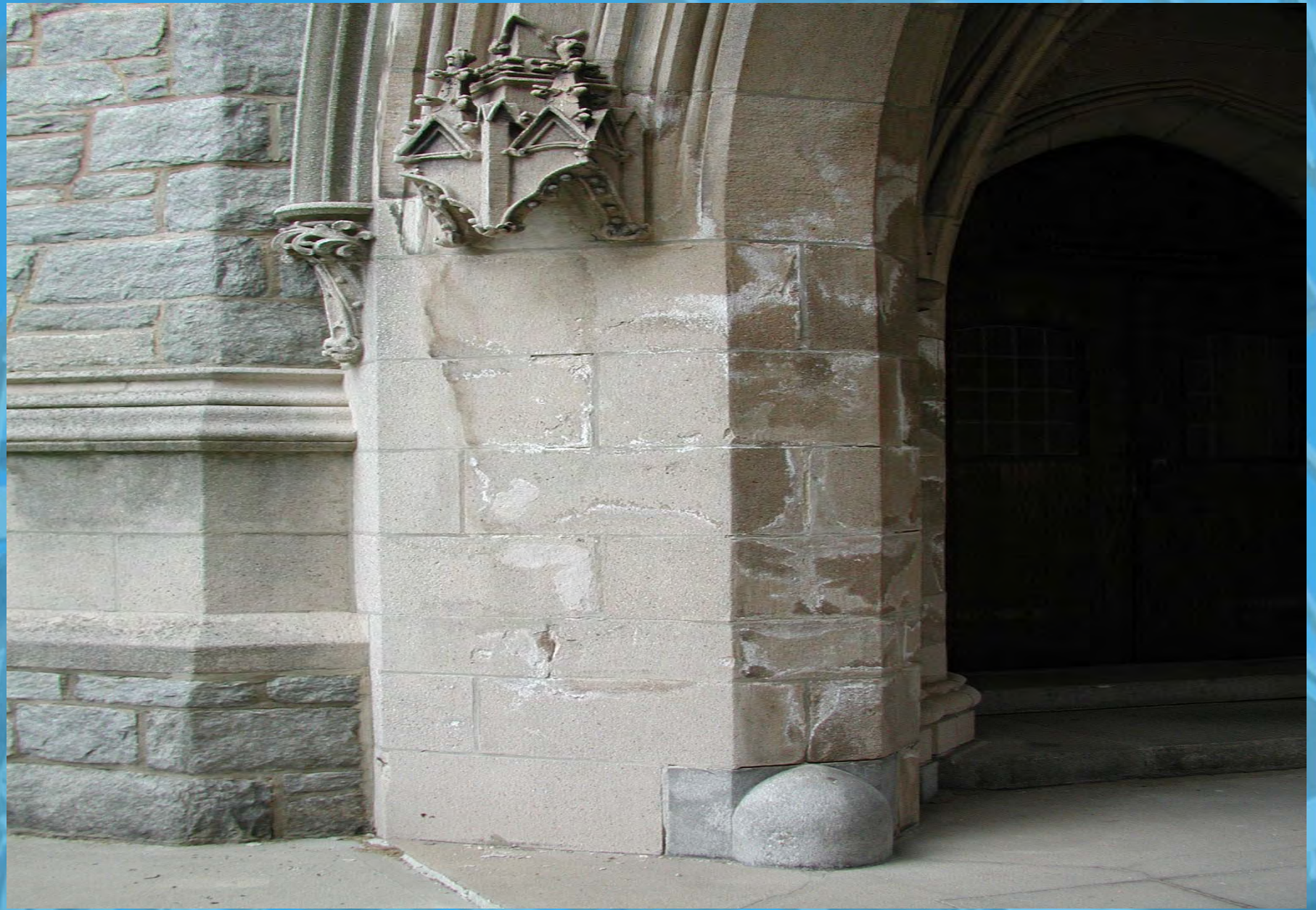
Beach Hall



Gant Building



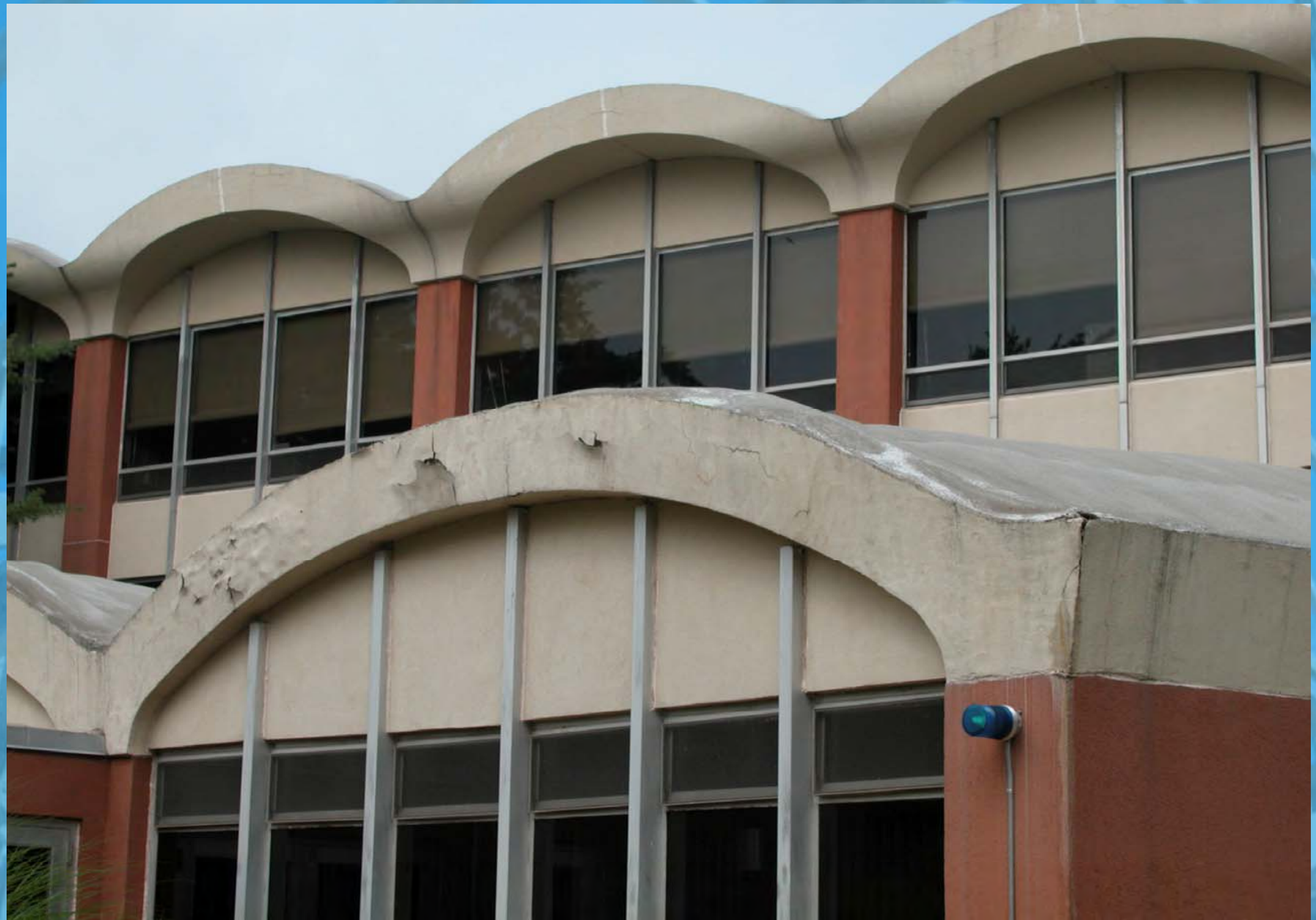
Gant Building



Law School Starr Hall



Law School Hosmer Hall



School of Social Work



West Hartford Chemistry Lab



Avery Point Campus Library



Avery Point Campus Auditorium



Depot Campus



Depot Campus

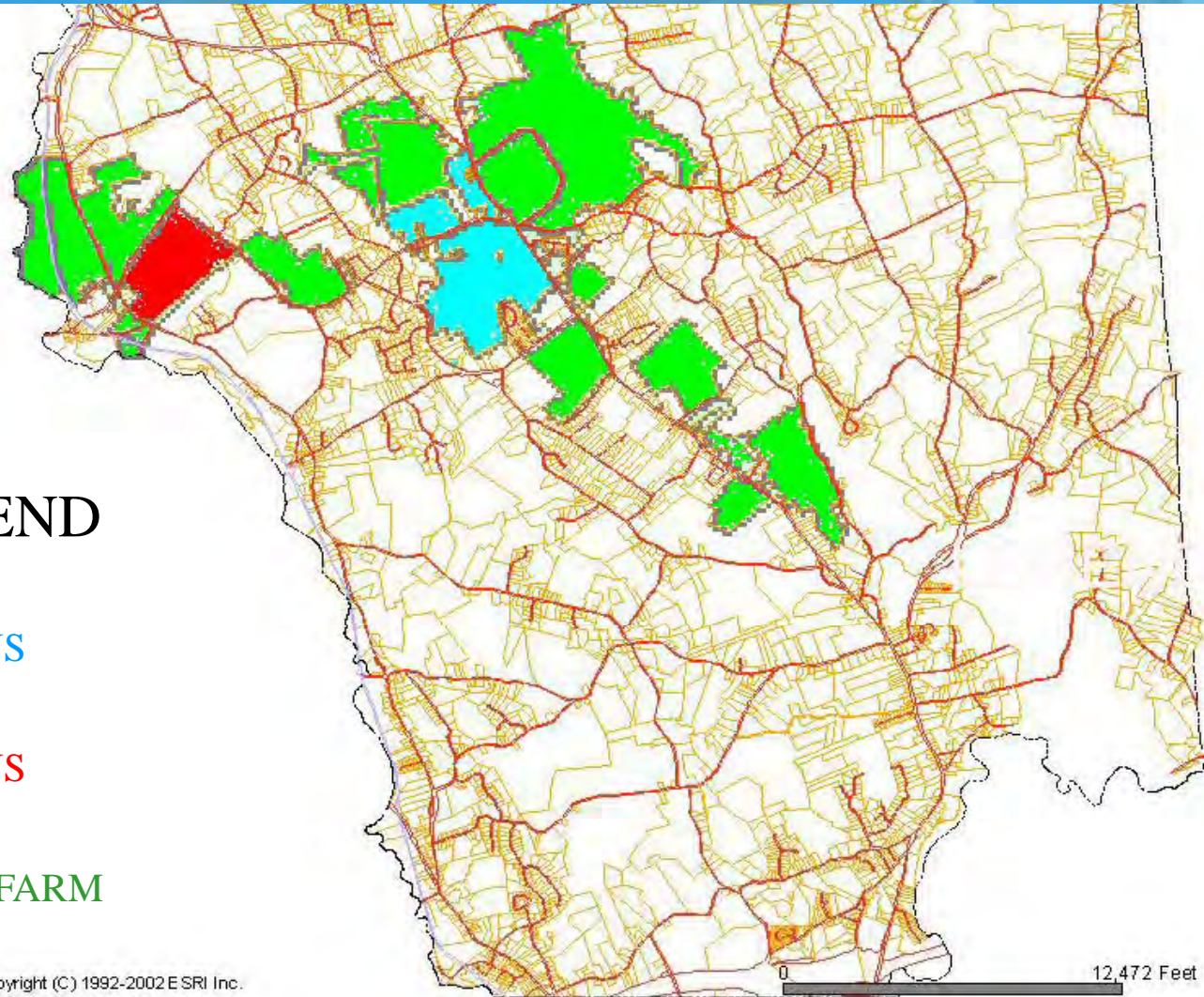


Publications Building



Publications Building

Land Use



LEGEND

CORE
CAMPUS

DEPOT
CAMPUS

OPEN
SPACE/FARM

Map created with ArcIMS - Copyright (C) 1992-2002 ESRI Inc.

12,472 Feet

Of the 3,600 acres the University owns at the Main Campus, 2,400 acres are devoted to open space and farmland and will continue to be.

21st Century UConn: Project Sequencing

➤ Storrs-Academic Plan

- Biology Completion
- Arjona/Monteith Replacement
- Fine Arts Complex
- North Hillside Road Extension
- Residential (West/Graduate Replacement)
- Intramural, Recreational & Intercollegiate Athletics Facility

➤ Health Center-Strategic Plan

- Research Tower
- Main Building Renovation
- Academic Building Renovation

Program Priorities

- **Academic Departments housed in Biology Complex, Arjona & Monteith:**
 - **Generated 62% increase in external research awards from FY00 to FY03**
 - **Taught approximately 20% of the total Storrs credit hours for 2002-03**

Biology Completion



21st Century UConn: Storrs

Arjona / Monteith Replacement



21st Century UConn: Storrs

Arjona / Monteith Replacement



21st Century UConn: Storrs

Arjona / Monteith Replacement



21st Century UConn: Storrs

Arjona / Monteith Replacement



21st Century UConn: Storrs

Arjona / Monteith Replacement



21st Century UConn: Storrs

Fine Arts Complex



21st Century UConn: Storrs

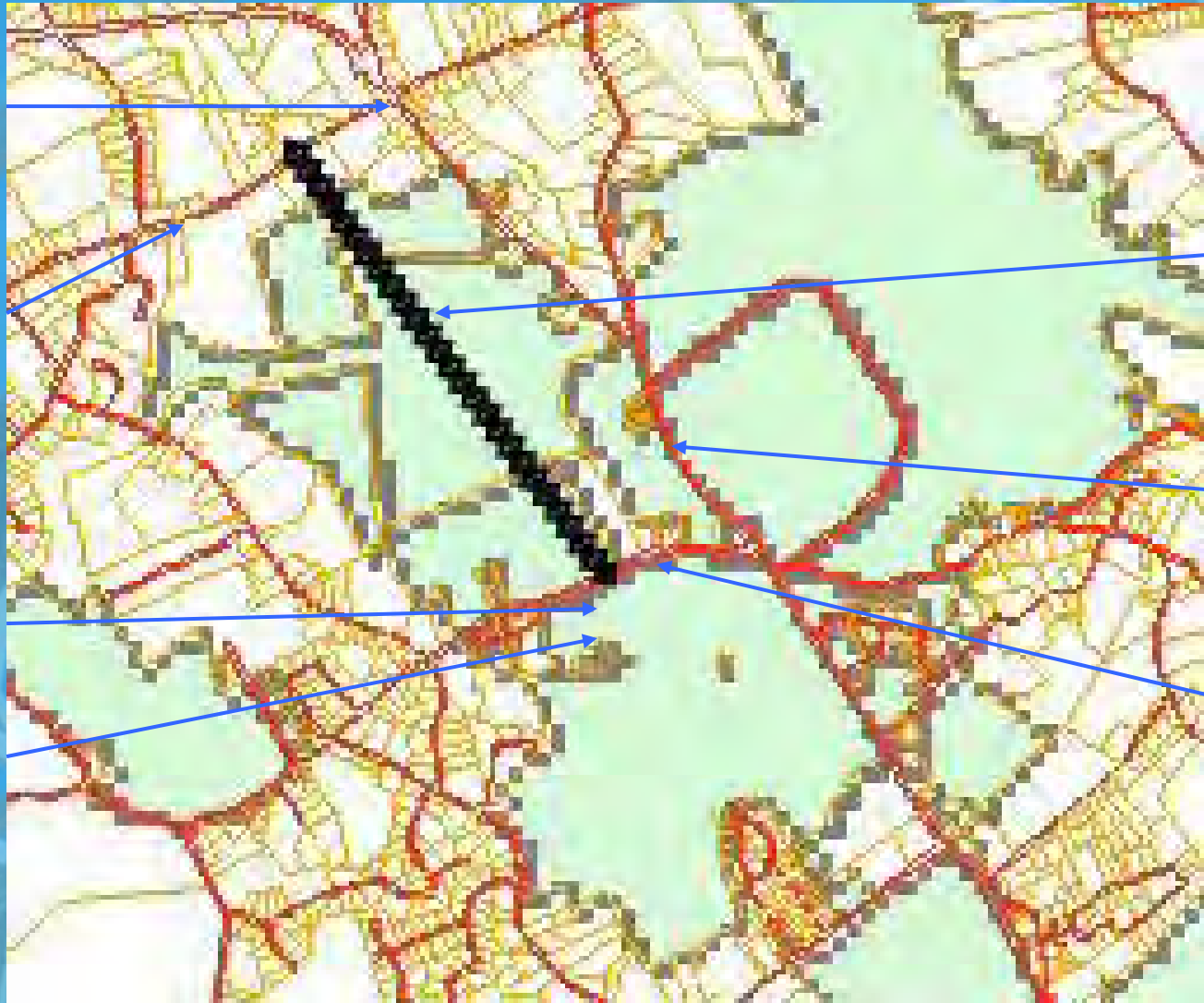
North Hillside Road

Four
Corners

US Rt 44

Visitors
Center

Parking
Garage



Proposed
Road

Rt 195

North
Eagleville
Road

21st Century UConn: Storrs

Residential

(West/Graduate Replacement)



21st Century UConn: Storrs

Residential

(West/Graduate Replacement)



21st Century UConn: Storrs

Residential

(West/Graduate Replacement)



21st Century UConn: Storrs

Division of Athletics Department of Recreational Services

Enhancement of student experience
and quality of life



For 2002-03:

- 31,890 intramural participations
 - 4,344 participants (increase of 8% from 2001-02)
 - 3,396 games or matches
- 489,502 informal recreation participations
(increase of 85% from 1997-98)
- 45,773 participations in Special Programs, BodyWise Classes and Natural High Program, HuskyXcursions, Student Development Programs and Membership Programs

Intercollegiate Athletics

- 24 Varsity Sports (11 Men's, 13 Women's)
- Over 600 Student-Athletes
- *US News & World Report* ranked UConn's intercollegiate athletic program among the top 20 in the country based on academics, athletics and NCAA compliance
- *Sports Illustrated* ranked UConn's athletic program at number 31 in the country based on academic and athletic achievements
- *NACDA Director's Cup* ranked UConn's athletic program at number 14 in the country based on fall 2002 team results

Intramural, Recreational & Intercollegiate Athletics Facility



21st Century UConn: Storrs



Master Planning Process



University
of Connecticut
Health Center

Master Plan



Prepared By

*Flad & Associates
Frank Zilm & Associates
Affiliated Engineers*

- Commissioned a 10 year Master Plan update in December of 2001 to guide the physical development of the campus in supporting the academic and health services missions of the Health Center (last updated 1987)
- Engaged Flad & Associates of Stamford, CT and Madison, Wisconsin
- Conducted extensive interviews with senior management
- Held two half day retreats with the master plan steering committee representing each of the UCHC domains
- Held meetings with more than 50 departmental units
- UCHC Master Plan completed in November 2003 and presented to the entire UCHC community



UCHC ENVIRONS



University
of Connecticut
Health Center

Master Plan



Prepared By

*Flad & Associates
Frank Zilm & Associates
Affiliated Engineers*

10 Talcott

Exchange

162 acres

1.7 million net sf

204 bed hospital

**36 structures
including 508
space parking
garage**





GUIDING PRINCIPLES



University
of Connecticut
Health Center

Master Plan



Prepared By

*Flad & Associates
Frank Zilm & Associates
Affiliated Engineers*

- **Protect and improve the campus environment**
- **Provide for increases for research activity**
- **Ensure the quality of education programs and allow for their evolution**
- **Provide for improvements in patient care facilities**
- **Accommodate increases in ambulatory care**
- **Foster efficient utilization of facilities**





Key Findings



University
of Connecticut
Health Center

Master Plan



Prepared By

*Flad & Associates
Frank Zilm & Associates
Affiliated Engineers*

- A new research building will be required in the near term if recruitment and research funding patterns continue at projected levels.
- Existing space utilization is at maximum capacity institution wide.
- Need to improve space utilization of main lab (L) building through appropriate renovation and re-use.
- Numerous mechanical, electrical and plumbing issues are developing due to age of buildings and increasing functional demands.
- Improvements to student life will improve the competitiveness of the Schools.



Key Findings



University
of Connecticut
Health Center

Master Plan



Prepared By

Flad & Associates
Frank Zilm & Associates
Affiliated Engineers

- The 30 year old Quonset-style temporary metal buildings on the lower campus have exceeded the end of their useful lives.
- The Dowling buildings will require replacement in the next few years. Significant investment will be required to continue long-term use.
- Additional parking will be required to support any further development on the campus after the Ambulatory Surgery Center.
- Landscape quality of the campus is threatened by encroaching residential development and insufficient investment.
- Acquisition of adjacent properties will become critical to the institution's future.



Outdated temporary buildings



University
of Connecticut
Health Center

Master Plan



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Frank Zilm & Associates
Affiliated Engineers*





Rusting mechanical units



University
of Connecticut
Health Center

Master Plan



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Old equipment – difficult to maintain



University
of Connecticut
Health Center

Master Plan



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Inadequate space due to maximized capacity



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Health Center

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Overcrowded corridors



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Health Center

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Existing Lab conditions



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Health Center

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Inadequate Student Lounge



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Health Center

Master Plan



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MASTER PLAN



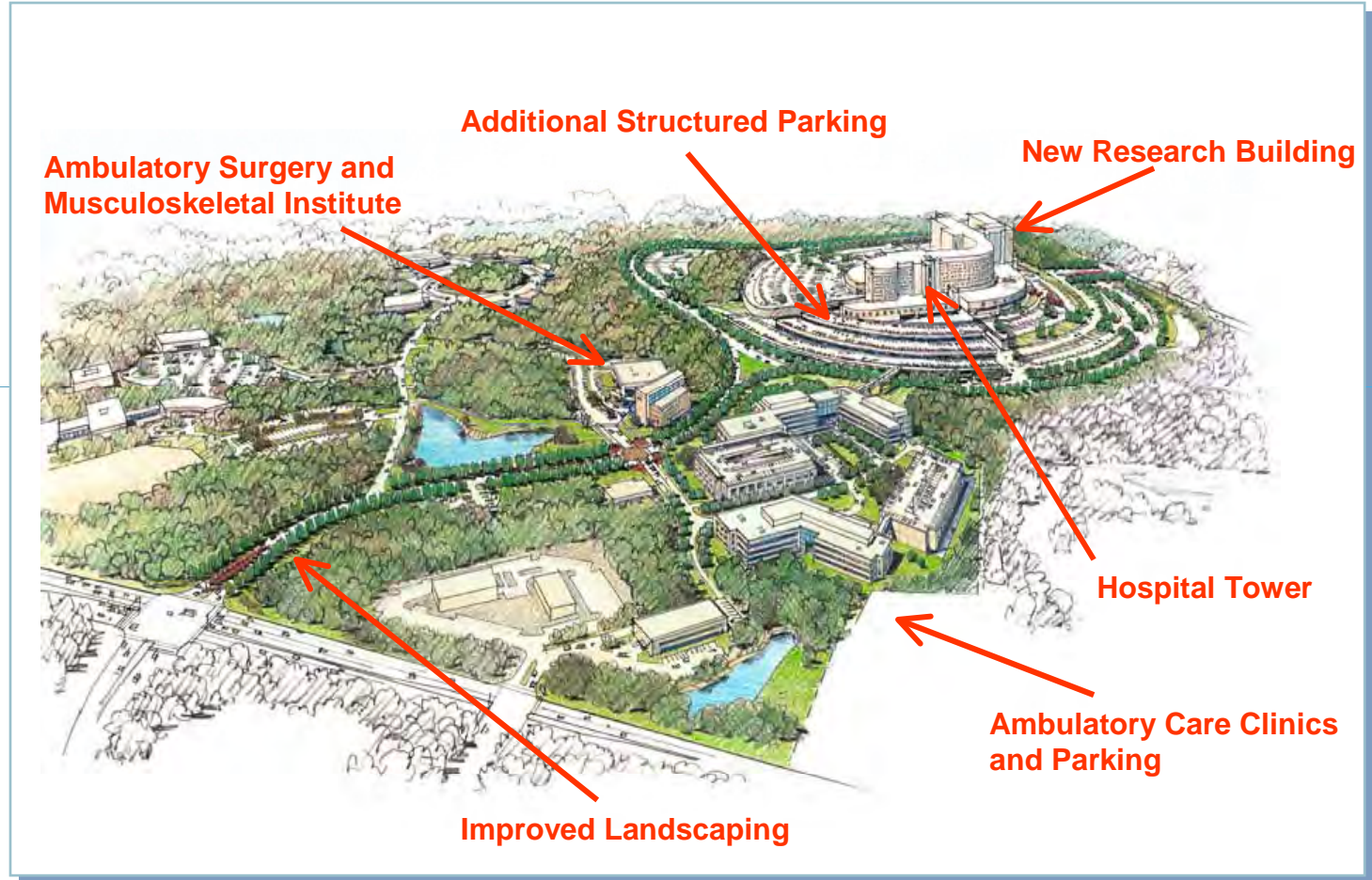
University
of Connecticut
Health Center

Master Plan



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CAMPUS ZONING



University
of Connecticut
Health Center

Master Plan

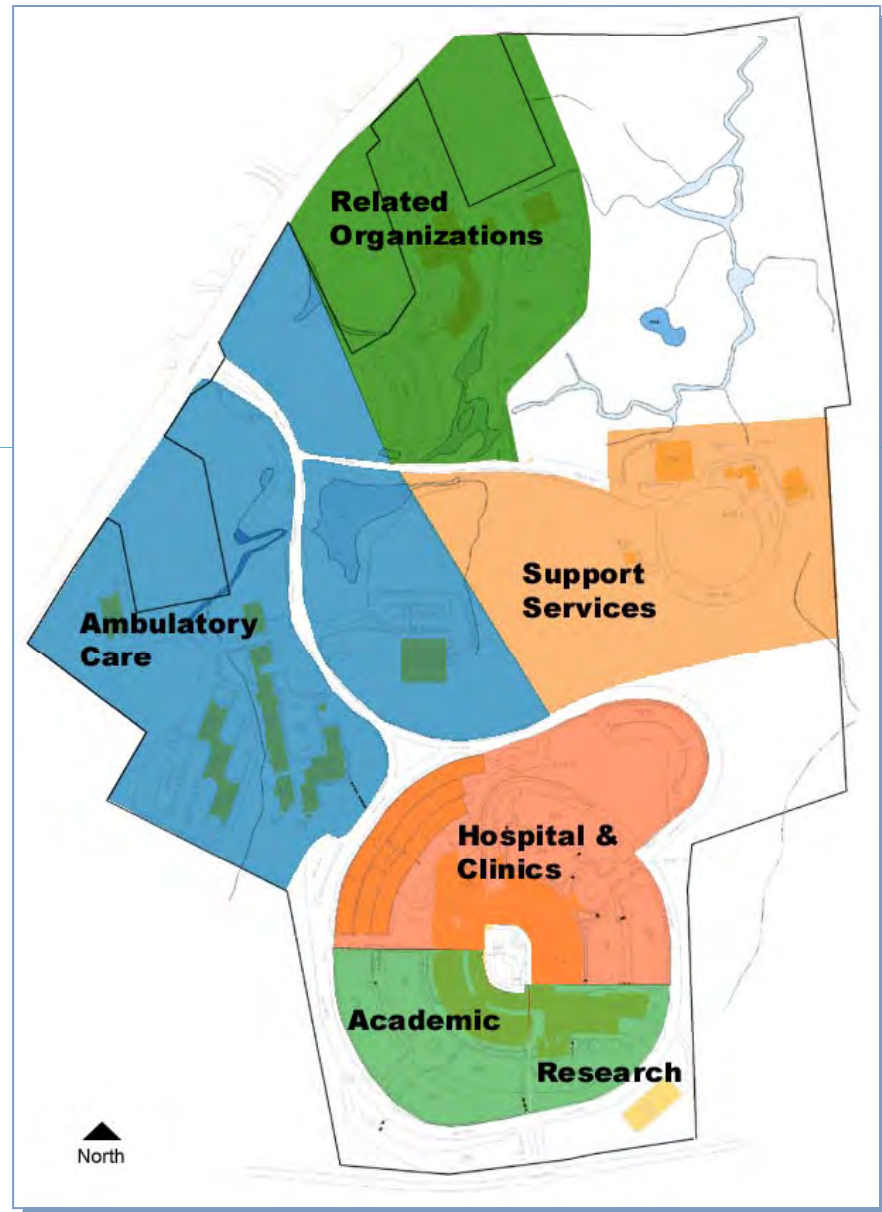


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- **Adopt campus development zones**

- **Plan right locations and best adjacencies**





RECOMMENDATIONS: RESEARCH



University
of Connecticut
Health Center

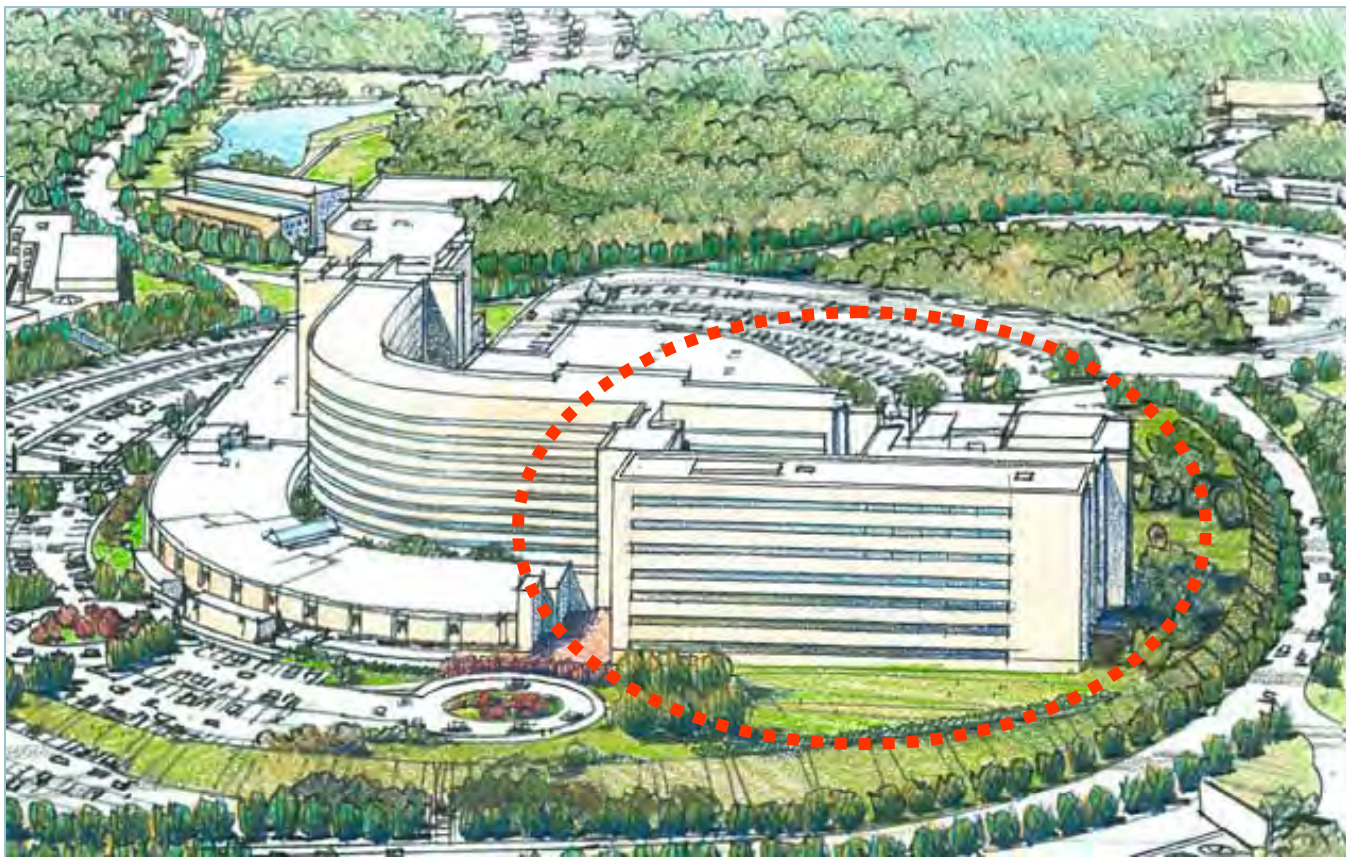
Master Plan



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Affiliated Engineers*

- **Provide additional research space**
- **Construct New Research Building planned as part of 21st Century UConn**





RECOMMENDATION: MAIN LAB (L)BUILDING



University
of Connecticut
Health Center

Master Plan



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- **Renovate Main Building L to modernize its mechanical and electrical systems and improve space utilization as provided in the 21st Century UConn plan.**





RECOMMENDATIONS: EDUCATION



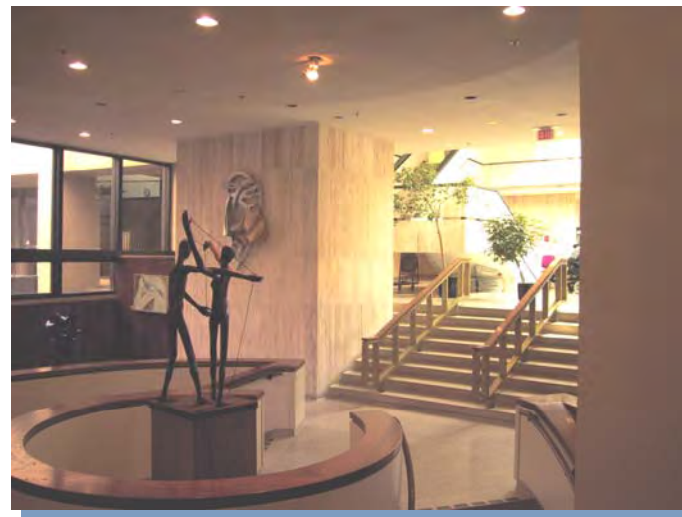
Master Plan



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- **Recapture educational space previously converted to other uses**
- **Improve student environment**
 - **Student Center/fitness center/bookstore**
 - **Library**
 - **Technology**





RECOMMENDATIONS: HEALTHCARE



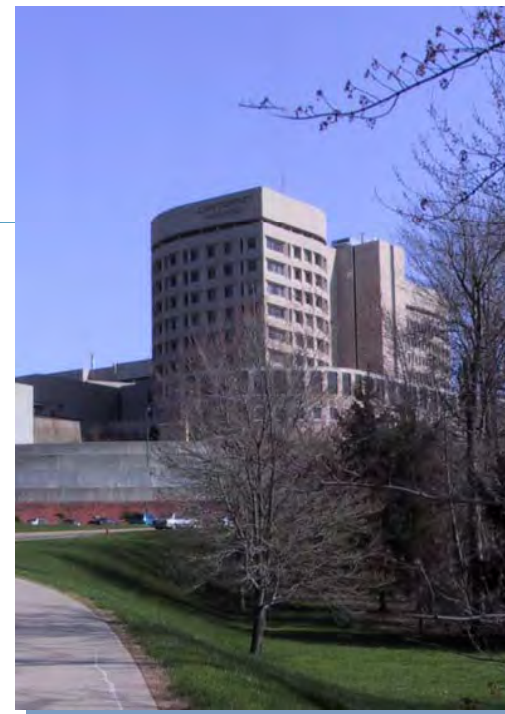
Master Plan



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- **Develop additional ambulatory care capacity**
- **Increase number of private inpatient rooms**





RECOMMENDATIONS: CAMPUS



University
of Connecticut
Health Center

Master Plan



Prepared By

*Flad & Associates
Frank Zilm & Associates
Affiliated Engineers*

- **Adopt campus development zones**
- **Establish rigorous and effective space management procedures**
- **Acquire additional property**
- **Expand infrastructure, including parking, to support new construction and changes in use**
- **Improve landscaping through additional plantings and maintain forested campus image**





FUTURE VIEW



University
of Connecticut
Health Center

Master Plan



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Planning Timetable

- **September 2003**
 - BOT adopts Project List & Master Indenture
- **October – November 2003**
 - Submit Project List to Office of Policy & Management
 - Submit Master Indenture to State Bond Commission
- **February – March 2004**
 - BOT adopts FY05 Capital Plan & Indenture
 - Submit FY05 Capital Plan & Indenture to Governor
- **July 2004**
 - Funds available for FY05 final year of UCONN 2000 & first year of 21st Century UConn

Capital Workshop Goals

- **21st Century UConn Structure**
- **Project sequencing**
- **Project list**
- **Master Indenture Amendment**



The End

**Board of Trustees
Budget Workshop
September 23, 2003**