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Honorable Chairs of the Senate Committee on Ways and Means, House Committee on Ways and Means, and Joint Committee on Higher Education:

Pursuant to line item 1596-2417 of the FY24 budget, I am pleased to submit the FY24 Fair Share Higher Education Capital Funding Legislative Report. This report outlines how the \$50 million of funding is being allocated across our public universities and highlights specific uses of funds.

I'm proud of the partnership between the Executive Office of Education (EOE), the Department of Higher Education (DHE), and Division of Capital Asset Management and Maintenance (DCAMM) to implement this program. Investing in the infrastructure of our public higher education system is critical as we continue to expand access and affordability for students across Massachusetts.

In addition, as part of the Healey-Driscoll administration's whole of government approach to clean climate, these capital investments in our institutions of higher learning prioritize energy savings and decarbonization. Forward-looking investments like these will advance the climate resiliency of our public universities and colleges, allowing them to serve future generations of Massachusetts learners.

We are deeply grateful for the Legislature's partnership on making these investments a reality through the FY24 budget. Should you have any questions regarding this report, please contact Abigail Fee, EOE's General Council, at abigail.fee2@mass.gov.

Sincerely,

Dr. Patrick Tutwiler
Secretary of Education

FY24 Fair Share Higher Education Capital Funding Legislative Report

Introduction

The Executive Office of Education respectfully submits this report to the Legislature pursuant to line item 1596-2417 of the FY24 GAA.

For a deferred maintenance capital program to provide support to projects at institutions of higher education in the commonwealth; provided, that projects supported under the program shall include, but not limited, to:

(i) heating, ventilation and air conditioning systems maintenance.

(ii) federal Americans with Disabilities Act accessibility compliance projects;

(iii) window replacement; and

(iv) decarbonization or clean energy projects; provided further, that the program shall be administered by the division of capital asset management and maintenance in collaboration with the executive office of education; and provided further, that not later than May 31, 2024, the executive office of education shall submit a report to the joint committee on higher education and the house and senate committees on ways and means including, but not limited to: (a) a list of the institutions receiving funds; (b) the amounts granted to each institution; and (c) the types of projects that received funding.. \$50,000,000

Overview

The Executive Office of Education (EOE), the Department of Higher Education (DHE), and Division of Capital Asset Management and Maintenance (DCAMM) work collaboratively on public Higher Education Strategic Capital policy, investments, and project implementation related to the 15 Community Colleges, nine State Universities and University of Massachusetts with a primary focus on critical repairs, critical infrastructure project and major capital projects (modernizing existing as well as building new buildings).

DCAMM works with state agencies to create and manage forward-thinking, sustainable buildings to meet the needs of the citizens they serve. DCAMM oversees the Commonwealth's capital assets, totaling over 65 million square feet and including all state buildings except authority, county, municipally owned, or other non-state buildings occupied by state agencies. DCAMM partners with fellow agencies to help them meet their strategic needs with fiscally responsible building and real estate solutions and supports the growth of the Commonwealth's economy by actively engaging with private sector partners to make it easier to do business with the Commonwealth.

The Commonwealth's public higher education system serves nearly 153,000 students and generates two-thirds of the carbon emissions in the DCAMM portfolio. The Commonwealth's public higher education institutions are a portfolio of buildings across the state, totaling over 28.6 million gross square feet of state-owned active building space.

Use of 1596-2417 Fair Share Funding

The Fiscal Year 2024 budget, signed by Governor Maura Healey in August 2023, established this funding program as part of a blueprint to utilize new revenue generated from the Fair Share income surtax. Line 1596-2417 provides \$50 million of Fair Share resources to support public higher education capital deferred maintenance funding provided that projects supported under the program shall include, but not limited, to: (i) heating, ventilation and air conditioning systems maintenance; (ii) federal Americans with Disabilities Act accessibility compliance projects; (iii) window replacement; and (iv) decarbonization or clean energy projects.

The methodology to invest the Fair Share Higher Education Capital Funding was developed collaboratively between EOE, DHE, and DCAMM in consultation with the Massachusetts Association of Community Colleges, State University Council of Presidents and UMass President's Office. Examples of projects identified to be eligible for this program include but are not limited to:

- Energy efficiency projects that lessen the consumption of onsite fossil fuels
- Electrification--including but not limited to installing heat pumps or heat pump hot water heaters, EV charging, and onsite renewables
- Building envelope repairs--including but not limited to window replacements, door replacements, insulation, and weatherization
- Tree planting and the creation of carbon sinks
- Projects that encourage walking/biking in lieu of vehicular trips
- Programmatic projects that result in more efficient space use

Funding resources were allocated among the three public higher education segments (UMass Campuses, State Universities, and Community Colleges) based on the sector's share of the 28.6 million gross square feet of state owned of active building space. Resulting allocations are approximately \$26.5 million for the UMass system, approximately \$11.6 million for State Universities, and approximately \$11.9 million for Community Colleges. Funding was then made available to each of the institutions in the segments as follows.

| | Allocated Funds |
|---|---------------------|
| Community Colleges | |
| Berkshire Community College | \$791,694 |
| Bristol Community College | \$791,694 |
| Buker Hill Community College | \$791,694 |
| Cape Cod Community College | \$791,694 |
| Greenfield Community College | \$791,694 |
| Holyoke Community College | \$791,694 |
| Massasoit Community College | \$791,694 |
| MassBay Community College | \$791,694 |
| Middlesex Community College | \$791,694 |
| Mount Wachusett Community College | \$791,694 |
| Northern Essex | \$791,694 |
| North Shore Community College | \$791,694 |
| Quinsigamond Community College | \$791,694 |
| Roxbury Community College | \$791,694 |
| Springfield Technical Community College | \$791,694 |
| Total Funding for Community Colleges | \$11,875,410 |
| State Universities | |
| Bridgewater State University | \$1,292,058 |
| Fitchburg University | \$1,292,058 |
| Framingham State University | \$1,292,058 |
| Mass College of Art and Design | \$1,292,058 |
| Mass College of Liberal Art | \$1,292,058 |
| Mass Maritime Academy | \$1,292,058 |
| Sales State University | \$1,292,058 |
| Worcester State University | \$1,292,058 |
| Westfield State University | \$1,292,058 |
| Total for State Universities | \$11,628,522 |
| University of Massachusetts | |
| UMass Amherst | \$8,737,195 |
| UMass Boston | \$5,802,314 |
| UMass Dartmouth | \$2,793,451 |
| UMass Lowell | \$5,997,382 |
| UMass Medical | \$3,165,736 |
| Total University of Massachusetts | \$26,496,078 |
| Total Funding Three Sectors | \$50,000,010 |

Note: The overall allocation of \$26.5M was made to UMass based on its square footage. In turn, UMass was able to determine how to distribute funds across their campuses.

Under this program, the institutions were required to submit to DCAMM information on specific projects that advance state decarbonization efforts, address deferred maintenance, and increase climate resilience. Use of resources and implementation of the projects are being tracked via DCAMM's project management system.

Project Highlights

- Bunker Hill Community College is using funding to install EV charging station
- Roxbury Community College is using funding to support Geothermal Heat Pump replacement project to improve energy efficiency
- Worcester State University is using funding to reseal windows to increase energy efficiency
- Mass. Maritime Academy is using funding for New Pump and Chiller equipment to improve energy efficiency
- UMASS Dartmouth is using funding to support deferred maintenance window replacement in the Dion College of Nursing Building
- UMASS Boston is completed a right-sized renovation project for their Police Department that avoids new construction, reduces the footprint of the operation, and reuses underutilized campus space, saving both embodied and operational carbon impacts.
- UMASS Medical is improving the HVAC energy efficiency in its animal laboratories.
- Mass College of Art and Design is making HVAC energy improvements to their North Building
- Framingham State University is upgrading their Building Management System to improve more efficient operations