

Doc. T93-122, as amended
Passed by the BoT
12/1/93
Revised: 8/7/02
Revised: 11/16/05

UNIVERSITY OF MASSACHUSETTS
LAND AND FACILITIES USE PLANNING POLICY

INTRODUCTION

This policy is intended to provide guidance in facilities and land use planning at the campuses, in particular with respect to decisions on changes in existing facilities, the construction of new facilities, and the transfer of University property to outside parties.

Facilities planning should be an integral part of the long-range and strategic planning processes, as it affects all aspects of the campuses' programs and operations. Participants in this process should include strategic planning committees, facilities managers, and physical plant directors. While specific assumptions and criteria may vary for short-term and long-range projects, the long-range objectives of the campus must underlie both. The goals and priorities in the campus master plans should form the basis for all facilities planning and land use decisions, regardless of whether the campus is contemplating changes in existing uses of facilities, the development of unused land, the construction or renovation of new facilities, or the transfer of property to an outside party.

CAMPUS LAND AND FACILITIES USE MASTER PLANS

A land and facilities use master plan is for the purpose of establishing a framework for orderly growth and development of capital improvements that is responsive to a campus' current and projected needs and sufficiently flexible to accommodate changes that can be expected to occur in a dynamic environment. The plan is to describe the optimal development of the available space consistent with the approved mission statement of the campus. The plan is a working document that will require evaluation and updating periodically to ensure its consistency with revised mission statements and with other circumstances. The plan does not constitute a commitment to a specific timetable for the completion of projects. A land and facilities use master plan is a component of the overall planning responsibility of the President, Chancellors and Board of Trustees.

Each campus shall prepare a land and facilities use master plan which should include, but not be limited to:

- information about the campus' role and mission and how these relate to facilities and land use requirements;
- a description of existing land and facilities, including a description of the possible new or revised use of existing land and facilities;
- projections of future land and facilities needs; and
- assumptions and criteria to meet identified needs.

The plan shall be consistent with the mission of the campus as the mission statement has been approved by the Board of Trustees.

The plan shall be consistent with State requirements for facilities and land use master plans.

The plan shall be evaluated and updated on a periodic basis, including when substantial changes to the campus' mission statement have taken place, or at least every seven years after initial approval of a campus land and facilities use master plan.

The institution's land and facilities use master plan shall be reviewed by the President for consistency with these requirements for land and facilities use master plans, and with the System wide Strategic Priorities established by the Board of Trustees.

The President shall approve the land and facilities use master plan for each campus after said review.

CHANGE IN EXISTING USE

In assessing proposals for a substantive change in the use of existing facilities and/or land, campuses should consider:

- The use should be consistent with and should further the goals and objectives of the campus as detailed in the campus land and facilities use master plan and other long-range plans and mission statements.
- The short-term and long-range cost implications must be beneficial to the University.
- There should be no adverse legal implications for the University.
- The use should interface appropriately with neighboring facilities, agencies and communities.
- The use should complement existing architectural and functional characteristics of the campus.
- There should be minimal adverse impact on pedestrian and vehicular traffic routes.

NEW CONSTRUCTION OR MAJOR RENOVATION PROJECTS

All new construction or renovation projects with a total project cost exceeding \$1,000,000 dollars shall be approved by the Board of Trustees. All new construction or renovation projects with a total project cost between \$500,000 and \$1,000,000 shall be approved by the President, and all projects less than \$500,000 shall be approved by Chancellors.

The President shall establish and maintain guidelines to be followed by campuses in preparing said proposals for new construction or renovation projects. These guidelines shall include but not be limited to statements of how the new project fits with the campus master plan, plans for construction funding, debt service if necessary, and operating funds for the project when completed.

RESERVES FOR RENEWAL AND FUNDING FOR ON-GOING MAINTENANCE OF NEW FACILITIES

One and one half percent (1.5%) of the total construction cost of all new construction projects shall annually be set aside in a reserve fund to provide funding for the general renewal, replacement and renovation of campus facilities. In addition, an amount equal to three and one half percent (3.5%) of the total construction cost of all new construction projects shall be expended annually for the operational and maintenance expenses, excluding utilities, of the campus facilities; and campuses shall prioritize such spending so as to provide the maximum useful life of all new construction projects.

DISPOSITION OF REAL PROPERTY

The land on which the University is situated is owned by the Commonwealth of Massachusetts and the University is entrusted with its stewardship. The University's role as steward of this property is crucial, since the prudent use of our limited resources is key to our ability to provide for our future needs and to meet our long-range commitments to the citizens of the Commonwealth.

When a proposed use involves a long-term lease or transfer of land to a non-University affiliated person or organization, final review and approval by the President and Board of Trustees is required in addition to the necessary campus approvals. The President may approve short-term leases of five years or less.

In order to allow for adequate review and analysis, campus proposals for the long-term lease or transfer of University land to a non-University affiliated person or organization must be presented to the Board of Trustees for informational purposes at one meeting and presented at a later meeting for approval. Such proposals should be complete and contain particular findings as to why the property in question is surplus to both the current and foreseeable needs of the University.

Current laws generally require approval by the Division of Capital Asset Management and Maintenance (DCAM) and/or the Legislature and Governor of proposals for the transfer of University real property. Proposals requiring such approval must be also approved by the Board in accordance with this policy prior to any submission to DCAM, the Governor, or the Legislature.

The President shall establish and maintain guidelines to be followed by campuses in preparing proposals for disposition of real property. These guidelines shall include, but not be limited to, identification of the clear benefit to the University of the disposition and how the disposition would support the campus mission and master plan.