Credit Rating Agency Information

UCONN 2000
General Obligation Debt Service Commitment New Money & Refunding Bonds 2019 Series

Office of Treasury Services
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I. Overview

- UConn General Obligation Bonds 2019 Series A secured by the State’s Debt Service Commitment (“GO-DSC 2019A New Money and Refunding”)
  - Expected Construction Fund Deposit $175 million for various UCONN 2000 Projects
  - $165 million for Storrs & Regional Campus (7 projects) and
  - $10 million for Health Center (1 project) authorized to date

- UConn General Obligation Refunding Bonds 2019 Series A secured by the State’s Debt Service Commitment (“GO-DSC Refunding 2019-A”)
  - Provide debt service savings to the Program and the State by refunding certain maturities of previously issued UCONN 2000 GO-DSC Bonds
II. UCONN 2000 Phase I, II & III

**UCONN 2000 General Obligation Debt Service Commitment Act Authorized Limits (includes Next Generation)**

<table>
<thead>
<tr>
<th>Phase</th>
<th>DSC Limit</th>
<th>Date DSC Limit Reached</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase I</td>
<td>$382,000,000</td>
<td>April 8, 1999 (Actual)</td>
</tr>
<tr>
<td>Phase II</td>
<td>$580,000,000</td>
<td>Spring 2005 (Actual)</td>
</tr>
<tr>
<td>Phase III</td>
<td>$3,320,900,000</td>
<td>Spring 2027 (Projected)</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$4,282,900,000</td>
<td>Spring 2027</td>
</tr>
</tbody>
</table>

The balance of the estimated cost of UCONN 2000 projects which is not to be financed by the University’s Bonds secured by the State Debt Service Commitment or the State’s bonds may be met by the issuance of special obligation bonds (“Special Obligation Bonds”) of the University, or from gifts or other revenue or borrowing resources of the University, or through the deferring of projects or achieved savings.
II. UCONN 2000 Phase I, II & III

UCONN 2000 GO-DSC BONDS

- Phase I & II & III GO-DSC Funding – $4,282.9 billion, 32 year program (FY96 to FY27).
- As of March 2019 $3,346,400,000 of Phase I, II & III projects have been authorized by the Board of Trustees and the Governor for funding with GO-DSC bond proceeds, including $302.4 million authorized and unissued.
- More than half way through UCONN 2000 GO-DSC $4,282.9 billion project funding listed in Act: with $2,844 billion issued as of March 14, 2019.
  - $3,144.0 billion of Phase I, II & III GO-DSC issued to date: $1,369.8 billion for Storrs & Regionals and $812.2 million for UConn Health.
  - $962 million of which Phase I & II GO-DSC issued for Storrs & Regionals.
- $936.5 million of future GO-DSC fiscal year 2020 to 2027 authorizations remaining in Act.

OTHER UCONN2000 DEBT (NON GO-DSC)

- $374.2 million in Special Obligation bonds authorized for project funding of which $341.1 million issued to date to be repaid by the University from certain pledged revenues (i.e. room/board and other fee proceeds). A remaining authorization of $33 million has not been issued.
- UCONN 2000 Heating Plant Upgrade (Co-Gen) was financed by $81.9 million non-publicly issued debt.

• The Act amendments included adding Phase III (21st Century UConn), extending the DSC funding another 10 years; made certain fiscal year reallocations; and authorized additional projects including Health Center Projects.

• In 2011, the General Assembly enacted and the Governor signed PA 11-75 An Act Concerning the University of Connecticut Health Center which provided more funds for the Health Center, including John Dempsey Hospital, and extended the Act to 2018 and also PA 11-57 for creation of world-class Technology Park on the Storrs Campus to serve as a cornerstone for a new Connecticut research triangle.

• During the January 2014 Legislative Session the Act was amended by Next Generation Connecticut which increased DSC funding, added to the project list, and extended the Act to 2024.

• As Amended to date, the UCONN 2000 program including Phases I, II and III currently is estimated to cost $4,619.3 million (of which $3,833 billion is for Storrs and Regional Campuses and $786.3 million is for UConn Health Projects), of which $4,282.9 billion may be financed with State Debt Service Commitment bonds.

• During October 2017, the Connecticut General Assembly passed Public Act No. 17-2 and the Governor signed on October 31, 2017 “An Act Concerning the State Budget for the Biennium Ending June 30, 2019, Making Appropriations Therefor, Authorizing and Adjusting Bonds of the State And Implementing Provisions of the Budget” that which among other things, moved some of the authorized DSC bond funding from fiscal years 2018 through 2023 and added some to 2024 and spread the rest to the newly added fiscal years 2025, 2026 and 2027 (without changing total DSC funding); and also renamed some projects and added others.
GO-DSC 2019 New Money Bonds Authorized Pursuant to 21st, 22nd, 23rd, 24th and 25th Supplemental Indentures

- Trustees approved 21st on June 24, 2015
- The Governor approved 21st on July 10, 2015
- Trustees approved 22nd on June 29, 2016
- The Governor approved 22nd on July 5, 2016
- Trustees approved 23rd on November 1, 2017
- The Governor approved 23rd on November 21, 2017
- Trustees approved 24th (Refunding only) June 28, 2017
- The Trustees approved 25th on June 27, 2018
- The Governor approved 25th on July 2, 2018
- $202.4 million authorized and unissued including $200 million for UCONN 2000 Projects Authorized by 25th Supplemental Indenture; and $2.4 million for UCONN 2000 Projects authorized by Carry Forwards from prior Supplemental Indentures.
## UConn Storrs and Regionals

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Estimated to Issue</th>
</tr>
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<tbody>
<tr>
<td>Academic and Research Facilities</td>
<td>$50,000,000.00</td>
</tr>
<tr>
<td>Arjona and Monteith (new classroom buildings)</td>
<td>1,908.00</td>
</tr>
<tr>
<td>Avery Point Renovation</td>
<td>8,196.00</td>
</tr>
<tr>
<td>Deferred Maintenance/Code Compliance/ADA Compliance/Infrastructure Improvements &amp; Renovation</td>
<td></td>
</tr>
<tr>
<td>Lump Sum and Utility, Administrative and Support Facilities</td>
<td>89,326,807.00</td>
</tr>
<tr>
<td>Fine Arts Phase II</td>
<td>23,650,000.00</td>
</tr>
<tr>
<td>Koons Hall Renovation/Addition</td>
<td>13,089.00</td>
</tr>
<tr>
<td>Residential Life Facilities</td>
<td>2,000,000.00</td>
</tr>
<tr>
<td><strong>Subtotal — Storrs and Regionals</strong></td>
<td><strong>$165,000,000.00</strong></td>
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</tbody>
</table>

## UConn Health

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Estimated to Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equipment, Library Collections and Telecommunications - Health Center</td>
<td>$10,000,000.00</td>
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</tbody>
</table>

## Total — Storrs and UConn Health

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Estimated to Issue</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total — Storrs and UConn Health</strong></td>
<td><strong>$175,000,000.00</strong></td>
</tr>
</tbody>
</table>
VI. GO-DSC 2019 Series A – Security and Expected

Bondholder Security & Ratings

- Pledge of and lien upon the State Debt Service Commitment
  - Debt Service Commitment by the State to punctually pay Special Debt Service Requirements out of the resources of the State’s General Fund
  - Debt Service paid by the State on behalf of UConn directly to Trustee Bank

- Pledge of full faith and credit of the University

Current Ratings for UConn General Obligation Debt Service Commitment Bonds 2019 Series A
As of March 14, 2019
- Standard & Poor’s “AA-” negative
- Moody’s “A1” stable
- Fitch “A” stable
### Proposed General Obligation DSC Bonds, 2019 Series A
**Fixed Rate New Money Bond Issue**

<table>
<thead>
<tr>
<th>Construction fund deposit</th>
<th>$175,000,000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debt service structure</td>
<td>20-year level principal</td>
</tr>
<tr>
<td>Dated date</td>
<td>To Be Determined</td>
</tr>
<tr>
<td>Closing</td>
<td>On or About 5/8/2019</td>
</tr>
</tbody>
</table>

*Preliminary
+Does not include possible refunding
VIII. Recent Developments

- An Act Concerning Next Generation Connecticut ("Next Generation Connecticut") was adopted by the January session of the 2014 Connecticut General Assembly. It (1) authorizes $1,551 million in new bonds, secured by the State’s Debt Service Commitment, under UConn 2000.

- In 2017 PA 17-2 amended the Act by moving some of the authorized DSC bond funding from fiscal years 2018 through 2023 and added it to 2024, and the newly added fiscal years 2025, 2026 and 2027 (without changing total DSC funding) and added/renamed projects.

- Possible Public Private Partnership for UCONN 2000 project Ice Rink Enclosure on the Storrs campus.
IX. GO-DSC 2019 Series A - Financing Schedule

Receive ratings Around 4/8/2019
Due Diligence April 10, 2019
POS Mailing April 11, 2019
Ads Begin Week of 4/14/2019
Retail Pricing Around 4/22/2019 to 4/23/2019
Institutional Pricing Around 4/24/2019
Pre-Closing Around 5/7/2019
Closing Around 5/8/2019
X. General Obligation DSC Bond Allocations

UCONN 2000 Act – Fiscal Year Allocations (reflects Next Generation) - Generally expect to Issue a GO-DSC New Money Bond every fiscal year

<table>
<thead>
<tr>
<th>FY</th>
<th>DSC Amount</th>
<th>FY</th>
<th>DSC Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1996</td>
<td>$ 112,542,000.00 Issued</td>
<td>2012</td>
<td>$ 157,200,000.00 Issued</td>
</tr>
<tr>
<td>1997</td>
<td>$ 112,001,000.00 Issued</td>
<td>2013</td>
<td>$ 143,000,000.00 Issued</td>
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<tr>
<td>1998</td>
<td>$ 93,146,000.00 Issued</td>
<td>2014</td>
<td>$ 204,400,000.00 Issued</td>
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<tr>
<td>1999</td>
<td>$ 64,311,000.00 Issued</td>
<td>2015</td>
<td>$ 315,500,000.00 Issued</td>
</tr>
<tr>
<td>2000</td>
<td>$ 130,000,000.00 Issued</td>
<td>2016</td>
<td>$ 312,100,000.00 Partially Issued</td>
</tr>
<tr>
<td>2001</td>
<td>$ 100,000,000.00 Issued</td>
<td>2017</td>
<td>$ 240,400,000.00 Partially Issued</td>
</tr>
<tr>
<td>2002</td>
<td>$ 100,000,000.00 Issued</td>
<td>2018</td>
<td>$ 200,000,000.00 To be issued in DSC 2019</td>
</tr>
<tr>
<td>2003</td>
<td>$ 100,000,000.00 Issued</td>
<td>2019</td>
<td>$ 200,000,000.00 To be issued in DSC2019</td>
</tr>
<tr>
<td>2004</td>
<td>$ 100,000,000.00 Issued</td>
<td>2020</td>
<td>$ 291,600,000.00 Future</td>
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<tr>
<td>2005</td>
<td>$ 100,000,000.00 Issued</td>
<td>2021</td>
<td>$ 186,200,000.00 Future</td>
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<tr>
<td>2006</td>
<td>$ 79,000,000.00 Issued</td>
<td>2022</td>
<td>$ 101,400,000.00 Future</td>
</tr>
<tr>
<td>2007</td>
<td>$ 89,000,000.00 Issued</td>
<td>2023</td>
<td>$ 98,000,000.00 Future</td>
</tr>
<tr>
<td>2008</td>
<td>$ 115,000,000.00 Issued</td>
<td>2024</td>
<td>$ 85,000,000.00 Future</td>
</tr>
<tr>
<td>2009</td>
<td>$ 140,000,000.00 Issued</td>
<td>2025</td>
<td>$ 70,100,000.00 Future</td>
</tr>
<tr>
<td>2010</td>
<td>$ -</td>
<td>2026</td>
<td>$ 63,600,000.00 Future</td>
</tr>
<tr>
<td>2011</td>
<td>$ 138,800,000.00 Issued</td>
<td>2027</td>
<td>$ 40,600,000.00 Future</td>
</tr>
</tbody>
</table>

$ 4,282,900,000.00
XI. UCONN 2000 GO DSC Authorized Projects
Phase I & II

<table>
<thead>
<tr>
<th>UConn 2000 Project</th>
<th>Phase I &amp; II Authorized And Issued Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agricultural Biotechnology Facility Completion</td>
<td>3,600,000.00</td>
</tr>
<tr>
<td>Agricultural Biotechnology Facility</td>
<td>9,400,000.00</td>
</tr>
<tr>
<td>Alumni Quadrant Renovations</td>
<td>11,183,623.91</td>
</tr>
<tr>
<td>Avery Point Marine Science Research Center-Phase I</td>
<td>30,000,000.00</td>
</tr>
<tr>
<td>Avery Point Marine Science Research Center-Phase II</td>
<td>7,254,246.03</td>
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<tr>
<td>Avery Point Renovation</td>
<td>4,875,717.46</td>
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<tr>
<td>Benton State Art Museum Addition</td>
<td>700,000.00</td>
</tr>
<tr>
<td>Business School Renovation</td>
<td>7,958,470.42</td>
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<tr>
<td>Central Warehouse New*</td>
<td>6,933,751.77</td>
</tr>
<tr>
<td>Chemistry Building</td>
<td>53,062,000.00</td>
</tr>
<tr>
<td>Deferred Maintenance &amp; Renovation Lump Sum</td>
<td>40,798,259.65</td>
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<tr>
<td>Deferred Maintenance &amp; Renovation Lump Sum Balance</td>
<td>117,386,096.72</td>
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<tr>
<td>East Campus North Renovations</td>
<td>7,382,604.53</td>
</tr>
<tr>
<td>Equipment, Library Collections &amp; Telecommunications</td>
<td>60,500,000.00</td>
</tr>
<tr>
<td>Equipment, Library Collections &amp; Telecommunications Completion</td>
<td>105,812,000.00</td>
</tr>
<tr>
<td>Gant Plaza Deck</td>
<td>7,287,174.10</td>
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<tr>
<td>Gentry Renovation</td>
<td>9,664,596.69</td>
</tr>
<tr>
<td>Grad Domi Renovations</td>
<td>2,928,227.59</td>
</tr>
<tr>
<td>Heating Plant Upgrade</td>
<td>9,969,000.00</td>
</tr>
<tr>
<td>Hilltop Dormitory Renovations</td>
<td>8,176,528.89</td>
</tr>
<tr>
<td>Ice Rink Enclosure</td>
<td>3,280,000.00</td>
</tr>
<tr>
<td>International House Conversion (a.k.a. Museum of Natural History)</td>
<td>886,134.00</td>
</tr>
<tr>
<td>Litchfield Agricultural Center-Phase I</td>
<td>1,000,000.00</td>
</tr>
<tr>
<td>Mansfield Apartments Renovation</td>
<td>2,071,000.00</td>
</tr>
<tr>
<td>Mansfield Training School Improvements</td>
<td>3,500,000.00</td>
</tr>
<tr>
<td>Monteith Renovation</td>
<td>444,348.00</td>
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<tr>
<td>Music Drama Addition</td>
<td>7,400,000.00</td>
</tr>
<tr>
<td>North Campus Renovation</td>
<td>10,996,050.15</td>
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Continued on next page
XI. UCONN 2000 GO DSC Authorized Projects Phase I & II

<table>
<thead>
<tr>
<th>UConn 2000 Project</th>
<th>Phase I &amp; II Authorized Amounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Superblock Site &amp; Utilities</td>
<td>7,668,000.00</td>
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<tr>
<td>Northwest Quadrant Renovation-Phase I</td>
<td>2,001,000.00</td>
</tr>
<tr>
<td>Northwest Quadrant Renovation-Phase II</td>
<td>30,000,000.00</td>
</tr>
<tr>
<td>Parking Garage-North</td>
<td>9,658,000.00</td>
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<tr>
<td>Pedestrian Walkways (a.k.a. Fairfield Road Pedestrian Mall)</td>
<td>6,074,000.00</td>
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<tr>
<td>School of Business</td>
<td>25,652,366.00</td>
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<tr>
<td>School of Pharmacy</td>
<td>88,609,000.00</td>
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<tr>
<td>Shippee/Buckley Renovations</td>
<td>6,920,000.00</td>
</tr>
<tr>
<td>South Campus Complex</td>
<td>12,251,000.00</td>
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<tr>
<td>Stamford Downtown Relocation-Phase I</td>
<td>55,781,471.55</td>
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<tr>
<td>Student Union Addition</td>
<td>44,622,633.00</td>
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<tr>
<td>Technology Quadrant-Phase I</td>
<td>39,993,000.00</td>
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<tr>
<td>Technology Quadrant-Phase II</td>
<td>34,120,000.00</td>
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<tr>
<td>Torrey Life Science Renovation</td>
<td>251,109.43</td>
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<tr>
<td>Towers Renovation</td>
<td>17,950,243.11</td>
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<tr>
<td>Underground Steam &amp; Water Upgrade</td>
<td>6,000,000.00</td>
</tr>
<tr>
<td>Underground Steam &amp; Water Upgrade Completion</td>
<td>6,000,000.00</td>
</tr>
<tr>
<td>Waring Building Conversion</td>
<td>11,452,000.00</td>
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<tr>
<td>Waterbury Property Purchase</td>
<td>200,000.00</td>
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<tr>
<td>West Campus Renovations</td>
<td>519,507.2G</td>
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<tr>
<td>White Building Renovation</td>
<td>2,427,268.8G</td>
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<tr>
<td>Wilbur Cross Building Renovation</td>
<td>19,999,571.00</td>
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<tr>
<td>Totals Phase I &amp; II</td>
<td><strong>$962,000,000.00</strong></td>
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### XII. UCONN 2000 GO DSC Authorized Projects
#### Phase III

<table>
<thead>
<tr>
<th>UCONN 2000 NAME PROJECT (Includes Next Generation)</th>
<th>Phase III Authorized</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic and Research Facilities</td>
<td>122,407,429.00</td>
</tr>
<tr>
<td>Arjona and Monteith (new classroom buildings)</td>
<td>128,518,947.28</td>
</tr>
<tr>
<td>Avery Point Campus Undergraduate and Library Building</td>
<td>10,461,245.77</td>
</tr>
<tr>
<td>Avery Point Renovation</td>
<td>8,429,576.54</td>
</tr>
<tr>
<td>Beach Hall Renovations</td>
<td>5,150,972.33</td>
</tr>
<tr>
<td>Benton State Art Museum Addition</td>
<td>2,903,508.88</td>
</tr>
<tr>
<td>Biobehavioral Complex Replacement</td>
<td>3,589,141.00</td>
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<tr>
<td>Bishop Renovation</td>
<td>2,480,140.83</td>
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<tr>
<td>Deferred Maintenance/Code Compliance/ADA Compliance/Infrastructure Improvements &amp; Renovation</td>
<td></td>
</tr>
<tr>
<td>Lump Sum and Utility, Administrative and Support Facilities¹</td>
<td>503,438,491.34</td>
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<tr>
<td>Engineering Building (with Environmental Research Institute)</td>
<td>93,412,822.00</td>
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<tr>
<td>Equipment, Library Collections &amp; Telecommunications</td>
<td>147,591,656.00</td>
</tr>
<tr>
<td>Family Studies (DRM) Renovation</td>
<td>2,868,306.20</td>
</tr>
<tr>
<td>Farm Buildings Repairs/Replacement</td>
<td>6,408,304.09</td>
</tr>
<tr>
<td>Fine Arts Phase II</td>
<td>34,778,424.00</td>
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<tr>
<td>Floriculture Greenhouse</td>
<td>6,691,798.67</td>
</tr>
<tr>
<td>Gant Building Renovations</td>
<td>12,455,770.32</td>
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<tr>
<td>Gentry Completion</td>
<td>9,628,208.95</td>
</tr>
<tr>
<td>Hartford Relocation Acquisition/Renovation</td>
<td>140,000,000.14</td>
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<tr>
<td>Heating Plant Upgrade</td>
<td>16,283,897.00</td>
</tr>
<tr>
<td>Intramural, Recreational and Intercollegiate Facilities</td>
<td>31,009,920.63</td>
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<tr>
<td>Jorgensen Renovation</td>
<td>3,934,474.58</td>
</tr>
<tr>
<td>Koons Hall Renovation/Addition</td>
<td>1,530,057.00</td>
</tr>
<tr>
<td>Lakeside Renovation</td>
<td>3,800,000.00</td>
</tr>
<tr>
<td>Law School Renovations/Improvements</td>
<td>16,691,342.94</td>
</tr>
<tr>
<td>Manchester Hall Renovation</td>
<td>772,577.13</td>
</tr>
<tr>
<td>Mansfield Training School Improvements</td>
<td>3,014,780.00</td>
</tr>
<tr>
<td>Natural History Museum Completion</td>
<td>500,000.00</td>
</tr>
<tr>
<td>North Hillside Road Completion</td>
<td>8,200,000.00</td>
</tr>
<tr>
<td>Old Central Warehouse</td>
<td>126,000.00</td>
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<tr>
<td>Parking Garage #3</td>
<td>75,214.27</td>
</tr>
<tr>
<td>Psychology Building Renovation/Addition</td>
<td>24,337,399.00</td>
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## XII. UCONN 2000 GO DSC Authorized Projects

### Phase III

<table>
<thead>
<tr>
<th>UCONN 2000 NAME PROJECT (Includes Next Generation)</th>
<th>Phase III Authorized</th>
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<tbody>
<tr>
<td>Residential Life Facilities</td>
<td>137,472,476.01</td>
</tr>
<tr>
<td>School of Pharmacy/Biology Completion</td>
<td>6,000,000.00</td>
</tr>
<tr>
<td>Stamford Campus Improvements/Housing</td>
<td>1,533,703.00</td>
</tr>
<tr>
<td>Storrs Hall Addition</td>
<td>14,664,091.44</td>
</tr>
<tr>
<td>Student Union Addition</td>
<td>13,000,000.00</td>
</tr>
<tr>
<td>Support Facility (Architectural and Engineering Services)</td>
<td>16,583.05</td>
</tr>
<tr>
<td>Torrey Renovation Completion and Biology Expansion</td>
<td>1,530,373.00</td>
</tr>
<tr>
<td>Torrington Campus Improvements</td>
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<td>Waterbury Downtown Campus</td>
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<td>West Hartford Campus Renovations/Improvements</td>
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<td>Young Building Renovation/Addition</td>
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<td><strong>Storrs &amp; Regionals Subtotal</strong></td>
<td><strong>1,558,500,000.00</strong></td>
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<tr>
<th>UConn Health</th>
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<tbody>
<tr>
<td>CLAC Renovation Biosafety Level 3 Lab</td>
<td>15,901,465.91</td>
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<td>Deferred Maintenance/Code Compliance/ADA Compliance/Infrastructure &amp; Improvements</td>
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<tr>
<td>Renovation Lump Sum and Utility, Administrative and Support Facilities – Health Center¹</td>
<td>50,951,263.91</td>
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<tr>
<td>Dental School Renovation</td>
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<td>Equipment, Library Collections and Telecommunications - Health Center</td>
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<td>Library/Student Computer Center Renovation</td>
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<td>Main Building Renovation</td>
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<td>Medical School Academic Building Renovation</td>
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<td>Planning and Design Costs</td>
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<td>Research Tower</td>
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<td>Support Building Addition/Renovation</td>
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<tr>
<td>The University of Connecticut Health Center New Construction and Renovation</td>
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<td><strong>Total — UConn Health Project List</strong></td>
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<thead>
<tr>
<th>TOTAL PHASE III PROJECTS</th>
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<tr>
<td><strong>TOTAL GO-DSC BONDS: PHASE I, II AND III PROJECTS</strong></td>
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<td><strong>TOTAL PHASE III PROJECTS</strong></td>
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