1. **FACILITY DESCRIPTION**

Name of facility: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Source(s) of information: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date of benchmarking: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Data:**

Address of facility: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Designed enrollment (total) \_\_\_\_\_\_\_\_\_\_ students

Designed number of students per classroom \_\_\_\_\_\_\_\_\_\_ students/classroom

Gross square feet of building \_\_\_\_\_\_\_\_\_\_ GSF

Final construction cost: $\_\_\_\_\_\_\_\_\_\_

Total hard and soft costs per gross square foot: $\_\_\_\_\_\_\_\_\_\_/GSF

Year of construction contract: \_\_\_\_\_\_\_\_\_\_

Shovel to ribbon cutting (in months) \_\_\_\_\_\_\_\_\_\_ months

Annual maintenance and non-personnel operating cost $\_\_\_\_\_\_\_\_\_\_

Number of parking spaces \_\_\_\_\_\_\_\_\_\_ spaces

**Pick one:**

Project type:

* New construction, stand alone
* New construction, integrated addition
* Gut renovation
* Major system upgrade

Construction contract type:

* Stipulated Sum (aka fixed price with contingency, closed book)
* Guaranteed Maximum Price (aka fixed price with contingency, open book)
* Cost Plus

**Pick all that apply:**

Components

* Land acquisition
* Roadwork
* New infrastructure for utilities
* Extensive site grading and earthwork
* Demolition
* Hazardous materials abatement
* Geothermal system
* Solar panel system
* Gymnasium
* Auditorium
* Cafeteria
* Full service kitchen
* Basement
* Elevator beyond 2 floors
* Occupied roof
* Green roof

Market context

* Occupied site
* Certified business enterprise requirements
* Local purchasing requirements
* Local employment requirements
* Union labor
* Sustainability requirements
* Zoning variance or assessment
* Historic building requirements
* Fast-tracked schedule
1. **PARTNERS**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Partner Type | Firm | Point of Contact | Contact Info | Strengths | Weaknesses |
| Architect |  |  |  |  |  |
| Builder |  |  |  |  |  |
| Financing Agent |  |  |  |  |  |
| Project Manager / Owner’s Rep |  |  |  |  |  |
| Zoning Attorney |  |  |  |  |  |
| Construction Attorney |  |  |  |  |  |
| Maintenance contractor |  |  |  |  |  |
| Developer |  |  |  |  |  |
| Civil Engineer |  |  |  |  |  |
| Insurance Agent |  |  |  |  |  |
| Operator |  |  |  |  |  |

1. **LESSONS LEARNED**

|  |  |
| --- | --- |
| How much time and money did you spend, exploring a facility vision, before securing full funding? Where did that seed funding come from? |  |
| How did you decide on the risk sharing between partners, and what was the final partnership structure? (ex.) |  |
| What did you decide was your primary measure for success, and how did it turn out? |  |
| If you were to do it again, what would you do differently? The same? And why? |  |
| Did you phase the project? And if so, why, and if not, why not |  |
| How did you secure control of the property? (master lease, purchase, other?) |  |
| What enrollment growth did you assume in the design and financing plan? Are you hitting those targets? |  |
| What other schools do you suggest I talk with? |  |
|  |  |