

35TH ANNUAL OFFICIAL EDUCATION

CONSTRUCTION REPORT



By Joe Agron

Spending on construction by the nation's education institutions increased in 2008, reversing four years of declines in total annual expenditures, according to *American School & University's* 35th annual Official Education Construction Report.

One of the reasons for the increase in spending was the fact that the majority of the construction projects were started prior to the escalation of the economic crisis and were locked in to higher prices for materials and labor, among other things. Total spending on new, addition and modernization construction by school districts and higher-education institutions

increased to \$43.3 billion in 2008 from \$32.9 billion the year before.

Spending by school districts increased to \$25.5 billion in 2008 from \$20.3 billion in 2007. New construction spending by K-12 institutions grew 18 percent and addition/modernization spending jumped 46 percent. Colleges and universities spent \$17.8 billion on construction in 2008, up from \$12.7 billion the year before. Expenditures grew 35 percent for new construction and 48 percent for additions and modernizations.

The following pages contain the authoritative source for education construction data, detailing spending by

type of institution; projected spending through 2011; per-square-foot and per-student costs; and much more. In addition, data on the impact of green and security on education construction is included, providing you with insight as you plan future construction projects.

For those looking for additional data, go online at www.ASUMag.com. Look for the "Web Exclusive" icon throughout this survey that will direct you to a special online area—and exclusive data not found in the print version on education construction expenditures as well as trend information for the past 35 years.

Continued . . .

Education construction completed in 2008

(\$000s)

The National Picture	
SCHOOL DISTRICTS	
\$17,327,270	New
\$8,185,048	Adds/Mods
\$25,512,318	TOTAL
COLLEGES	
\$9,829,779	New
\$7,955,333	Adds/Mods
\$17,785,112	TOTAL
ALL EDUCATION	
\$27,157,049	New
\$16,140,381	Adds/Mods
\$43,297,430	TOTAL

Education construction projected to be completed in 2009-2011

(\$000s)

The National Picture	
SCHOOL DISTRICTS	
\$43,750,822	New
\$19,605,268	Adds/Mods
\$63,356,090	TOTAL
COLLEGES	
\$29,483,012	New
\$20,972,965	Adds/Mods
\$50,455,977	TOTAL
ALL EDUCATION	
\$73,233,834	New
\$40,578,233	Adds/Mods
\$113,812,067	TOTAL

The Trusted Source

As the bellwether report documenting education construction activity for the past 35 years, *American School & University's* Official Education Construction Report is regularly referenced by local, state and federal agencies, as well as the nation's leading news organizations. *AS&U* actually started compiling data on school and university construction in 1950 for the 1949 year. After a decade or so of yearly surveys, data began

being compiled sporadically until industry demand prompted *AS&U* to start collecting data annually again. The annual reports resurfaced in 1975 with information on education construction completed in 1974, and data has been collected and published every year since. ***American School & University is the only authorized source of this education construction information.***

New school costs

(MEDIAN)

	Elementary	Middle	High
Cost/Square Foot	\$154	\$167	\$154
Cost/Student	\$18,833	\$24,143	\$23,125
Square Feet/Student	123	145	150
Number of Pupils	600	700	1,600
Size (sq. ft.)	73,590	101,328	240,695
Total Cost (\$000)	\$11,300	\$16,900	\$37,000

CLICK 101



WEB EXCLUSIVE

•TIMELINE: Education construction: the past 35 years

•CHART: Carpeting and air conditioning

ASUMAG.COM/EXCLUSIVE

New college building data

(MEDIAN)

Total cost (\$million)

■ **\$15.7**

Size (sq. ft.)

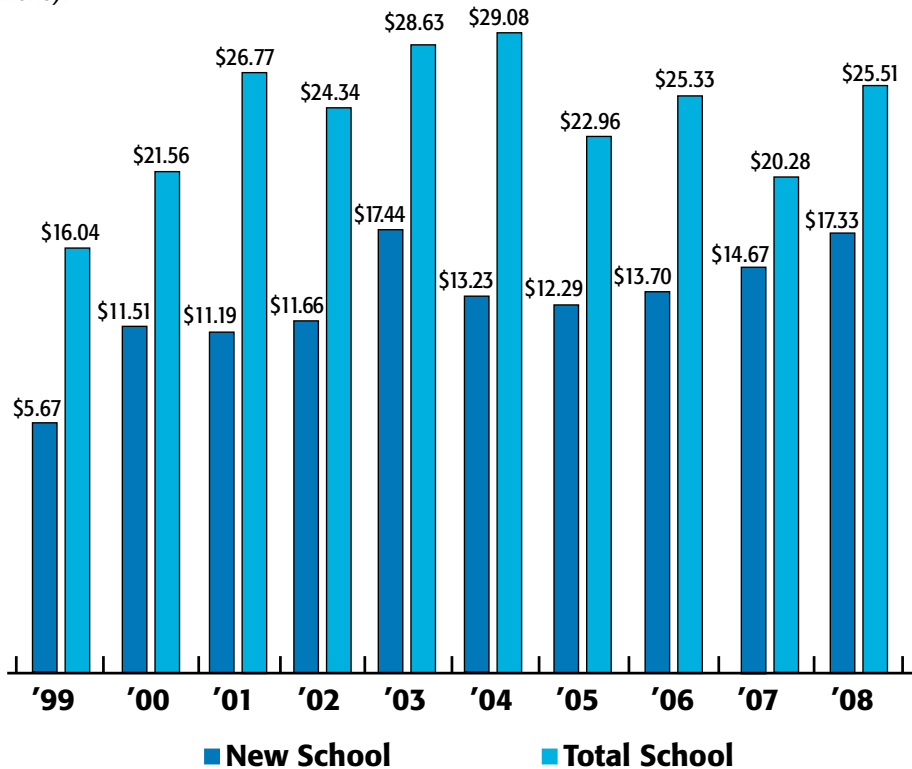
■ **73,425**

Number of FTE students

■ **600**

School construction trends—10 years of activity

Construction spending by school districts increased in 2008 from a decade's low in 2007. Results over the past 10 years (\$ billions):



Long-lasting fixtures + less maintenance = better value

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Locker lockers | Mitty® partitions

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School Data

4,235

Mean number of students at responding school districts.

29

Percentage of school districts completing some form of construction project in 2008.

46

Percentage of school districts planning a construction project to be completed by 2011.

\$17.8

Amount, in millions, the median new school district construction project completed by 2011 is expected to cost.

\$38

Amount, in millions, the mean new school district construction project completed by 2011 is expected to cost.

CLICK 101



WEB EXCLUSIVE

- CHART: How the construction dollars are divided
- TIMELINE: Enrollment and construction—SCHOOLS

ASUMAG.COM/EXCLUSIVE

College Data

7,087

Mean number of FTE students at responding colleges and universities.

57

Percentage of colleges and universities completing some form of construction project in 2008.

70

Percentage of colleges and universities planning a construction project to be completed by 2011.

\$18

Amount, in millions, the median new college and university construction project completed by 2011 is expected to cost.

\$37.1

Amount, in millions, the mean new college and university construction project completed by 2011 is expected to cost.

Arriving at the results

Results for the 35th annual Official Education Construction Report were compiled via a detailed questionnaire sent to chief business officials at the nation's school districts and colleges, asking about construction completed during the past year and construction planned to be completed in the next three years.

Administrators that completed or planned construction during this timeframe were then asked to provide a variety of details on the amount being spent, the type of construction being done (new, addition or modernization), and the expected completion date. All respondents involved with new and retrofit construction were asked to provide additional information on each project. Follow-up correspondence was made to clarify some data. Responses were separated by institution type, region of the country and institution size, and projected across the education universe.

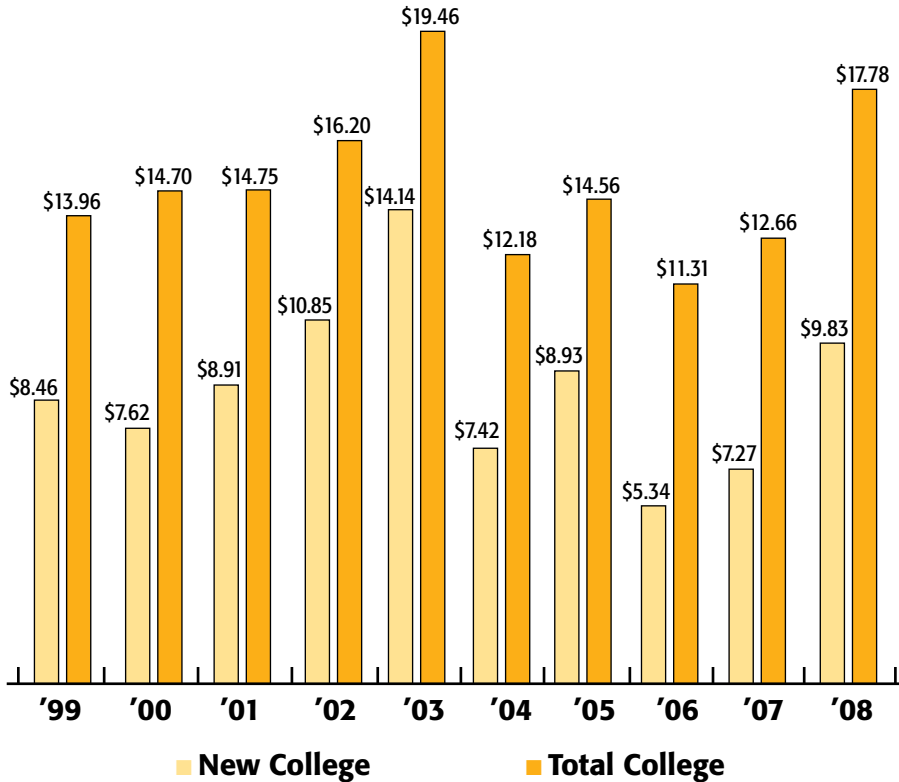
Total education construction activity—10 years

Total spending on construction by all education institutions over the past 10 years (in \$ billions):



College construction trends—10 years of activity

Construction spending by colleges and universities continued to climb in 2008, with new construction making up more than half the expenditures. Results over the decade (\$ billions):



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Construction Insight: School Districts

School construction projects are embracing green principles and security considerations. As part of AS&U's Official Education Construction Report, those SCHOOL DISTRICTS that completed new projects or

were planning to complete construction by 2011 were asked a number of questions regarding the importance of green and security issues in their programs.

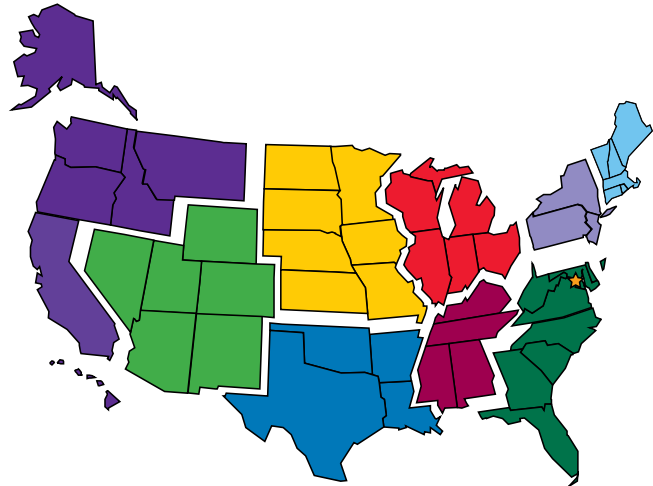
Here are the results:

How important is the incorporation of security equipment (cameras, locks/access control, etc.) in your construction project?

National: 59.3% very important.

South Atlantic (DC, DE, FL, GA, MD, NC, SC, VA, WV) ranked the highest (71.4% very important).

East South Central (AL, KY, MS, TN) ranked the lowest (23.8% very important).



Are green/sustainable concepts important in determining the types of materials/products used in your construction project?

National: 70.7% yes.

Middle Atlantic (NJ, NY, PA) ranked the highest (85.0% yes).

West South Central (AR, LA, OK, TX) ranked the lowest (44.8% yes).

If yes, what areas incorporate green decisions?

LIGHTING/CONTROLS 86.0% (National)

•**New England** (CT, MA, ME, NH, RI, VT) ranked highest (100%).

•**East South Central** (AL, KY, MS, TN) ranked lowest (64.7%).

HVAC 77.3% (National)

•**New England** (CT, MA, ME, NH, RI, VT) ranked highest (100%).

•**East South Central** (AL, KY, MS, TN) ranked lowest (64.7%).

DAYLIGHTING/CONTROLS 70.7% (National)

•**Pacific** (AK, CA, HI, OR, WA) ranked highest (81.3%).

•**West North Central** (IA, KS, MN, MO, ND, NE, SD) ranked lowest (58.1%).

BUILDING MATERIALS 61.6% (National)

•**Middle Atlantic** (NJ, NY, PA) ranked highest (85.3%).

•**South Atlantic** (DC, DE, FL, GA, MD, NC, SC, VA, WV) ranked lowest (46.7%).

WASHROOMS 57.6% (National)

•**Middle Atlantic** (NJ, NY, PA) ranked highest (70.6%).

•**East South Central** (AL, KY, MS, TN) ranked lowest (29.4%).

ROOFING 56.3% (National)

•**West South Central** (AR, LA, OK, TX) ranked highest (84.6%).

•**East South Central** (AL, KY, MS, TN) ranked lowest (35.3%).

FLOORING/CARPETING 54.1% (National)

•**Pacific** (AK, CA, HI, OR, WA) ranked highest (72.7%).

•**East South Central** (AL, KY, MS, TN) ranked lowest (35.3%).

FURNITURE/FURNISHINGS 29.3% (National)

•**Pacific** (AK, CA, HI, OR, WA) ranked highest (45.5%).

•**East North Central** (IL, IN, MI, OH, WI) ranked lowest (22.9%).

Construction Insight: Colleges

As part of AS&U's Official Education Construction Report, COLLEGES that completed new projects or were planning to complete construction by 2011 were asked

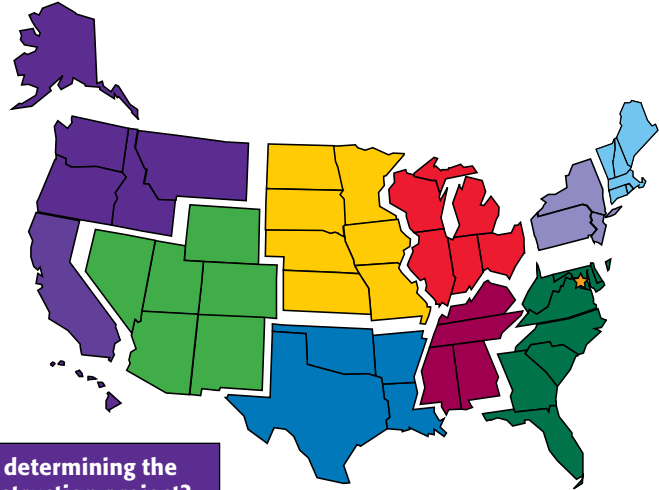
a number of questions regarding the importance of green and security issues in their programs. Here are the results:

How important is the incorporation of security equipment (cameras, locks/access control, etc.) in your construction project?

National 62.2% (very important).

West South Central (AR, LA, OK, TX) and **Mountain** (AZ, CO, ID, MT, NM, NV, UT, WY) ranked the highest (66.7% very important).

New England (CT, MA, ME, NH, RI, VT) ranked the lowest (41.7% very important).



Are green/sustainable concepts important in determining the types of materials/products used in your construction project?

National: 88.3% yes.

New England (CT, MA, ME, NH, RI, VT) and **Mountain** (AZ, CO, ID, MT, NM, NV, UT, WY) ranked the highest (100% yes).

West South Central (AR, LA, OK, TX) ranked the lowest (70.8% yes).

If yes, what areas incorporate green decisions?

LIGHTING/CONTROLS 86.2% (National)

• **East North Central** (IL, IN, MI, OH, WI) ranked highest (95.3%).

• **New England** (CT, MA, ME, NH, RI, VT) ranked lowest (66.7%).

HVAC 84.2% (National)

• **Mountain** (AZ, CO, ID, MT, NM, NV, UT, WY) ranked highest (100%).

• **New England** (CT, MA, ME, NH, RI, VT) ranked lowest (66.7%).

BUILDING MATERIALS 79.3% (National)

• **Mountain** (AZ, CO, ID, MT, NM, NV, UT, WY) ranked highest (94.4%).

• **East South Central** (AL, KY, MS, TN) ranked lowest (64.3%).

DAYLIGHTING/WINDOWS 77.8% (National)

• **Mountain** (AZ, CO, ID, MT, NM, NV, UT, WY) ranked highest (94.4%).

• **East South Central** (AL, KY, MS, TN) ranked lowest (64.3%).

FLOORING/CARPETING 67% (National)

• **Mountain** (AZ, CO, ID, MT, NM, NV, UT, WY) and **Pacific** (AK, CA, HI, OR, WA) ranked highest (77.8%).

• **New England** (CT, MA, ME, NH, RI, VT) ranked lowest (41.7%).

WASHROOMS 66% (National)

• **New England** (CT, MA, ME, NH, RI, VT) ranked highest (75%).

• **West South Central** (AR, LA, OK, TX) ranked lowest (35.3%).

ROOFING 65% (National)

• **Pacific** (AK, CA, HI, OR, WA) ranked highest (83.3%).

• **South Atlantic** (DC, DE, FL, GA, MD, NC, SC, VA, WV) ranked lowest (54.8%).

FURNITURE/FURNISHINGS 47.8% (National)

• **Pacific** (AK, CA, HI, OR, WA) ranked highest (61.1%).

• **East South Central** (AL, KY, MS, TN) ranked lowest (28.6%).

*Agron, editor-in-chief, can be reached at JAgtron@ASUmag.com.
Research conducted by Elinor Rice, senior research manager, Penton Media.*