



facility resource center

FRED Facilities Presentation

November 13, 2025

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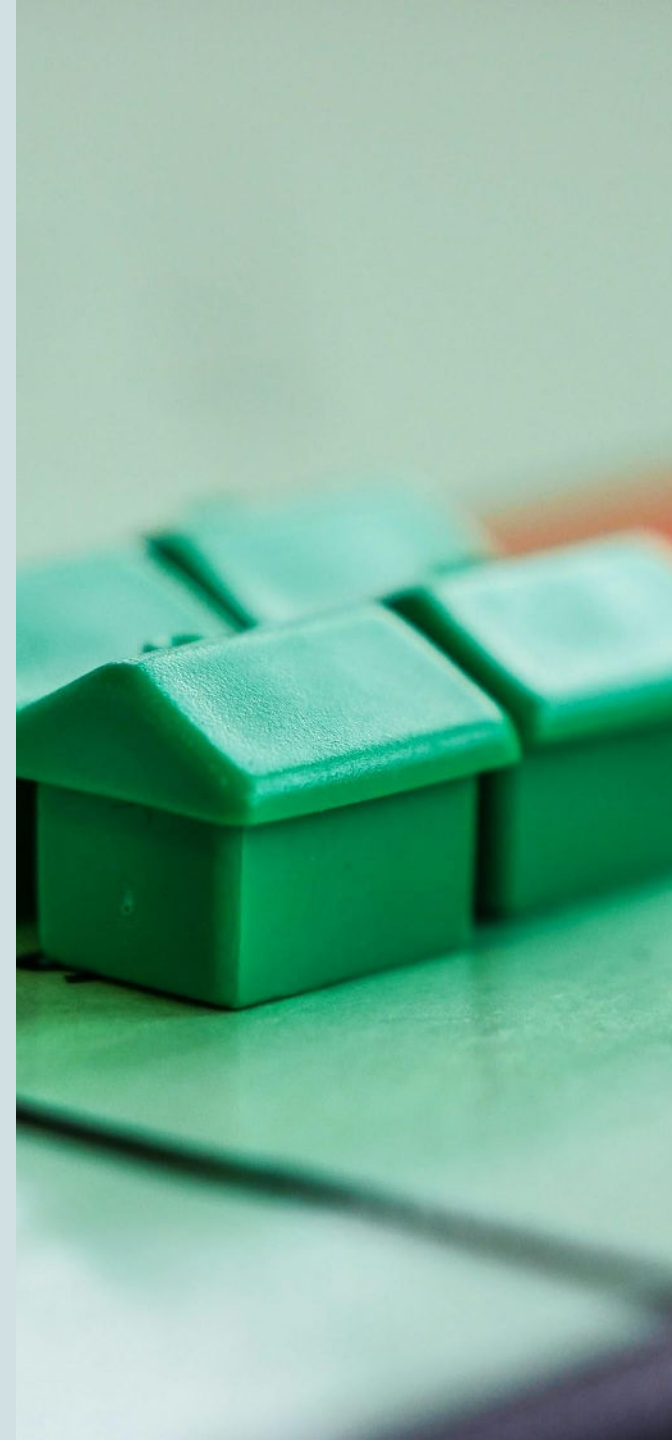
Block A

Who is at your table & why?

Icebreaker Exercise

I will be building a school...

1. Write down names and roles of 3 people you would invite to your team and why?
2. Talk about the list with the person sitting next to you.



Combine your list with your neighbor

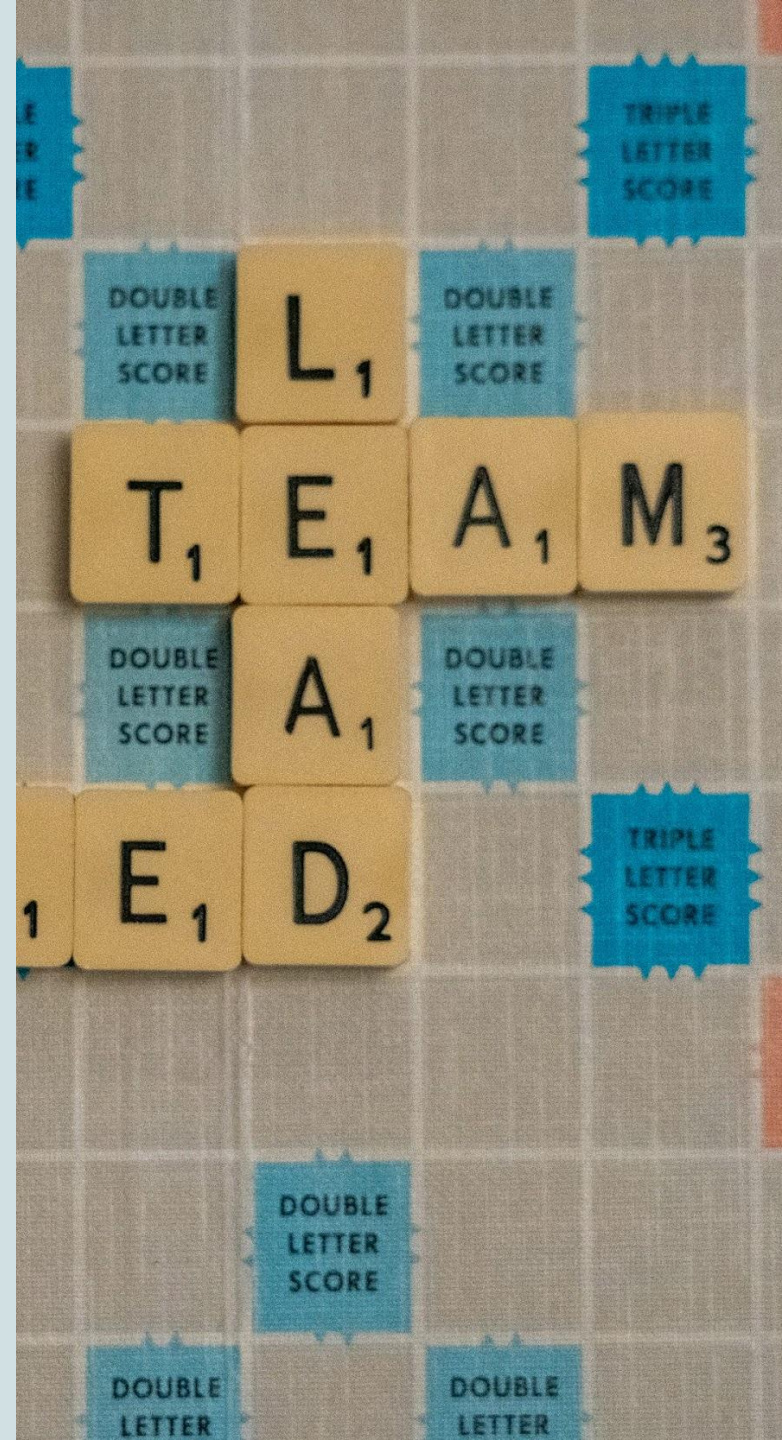
1. School Leader 1
2. School Leader 2
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____



Add 3 People to Your Combined List

School Leader 1

School Leader 2



Remove 4 People

1. School Leader 1
2. School Leader 2
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____
11. _____



Group 1

School Leader 1
School Leader 2

Group 2

1. School Leader 1
2. School Leader 2
3. -----
4. -----
5. -----
6. -----
7. -----



Refining the List

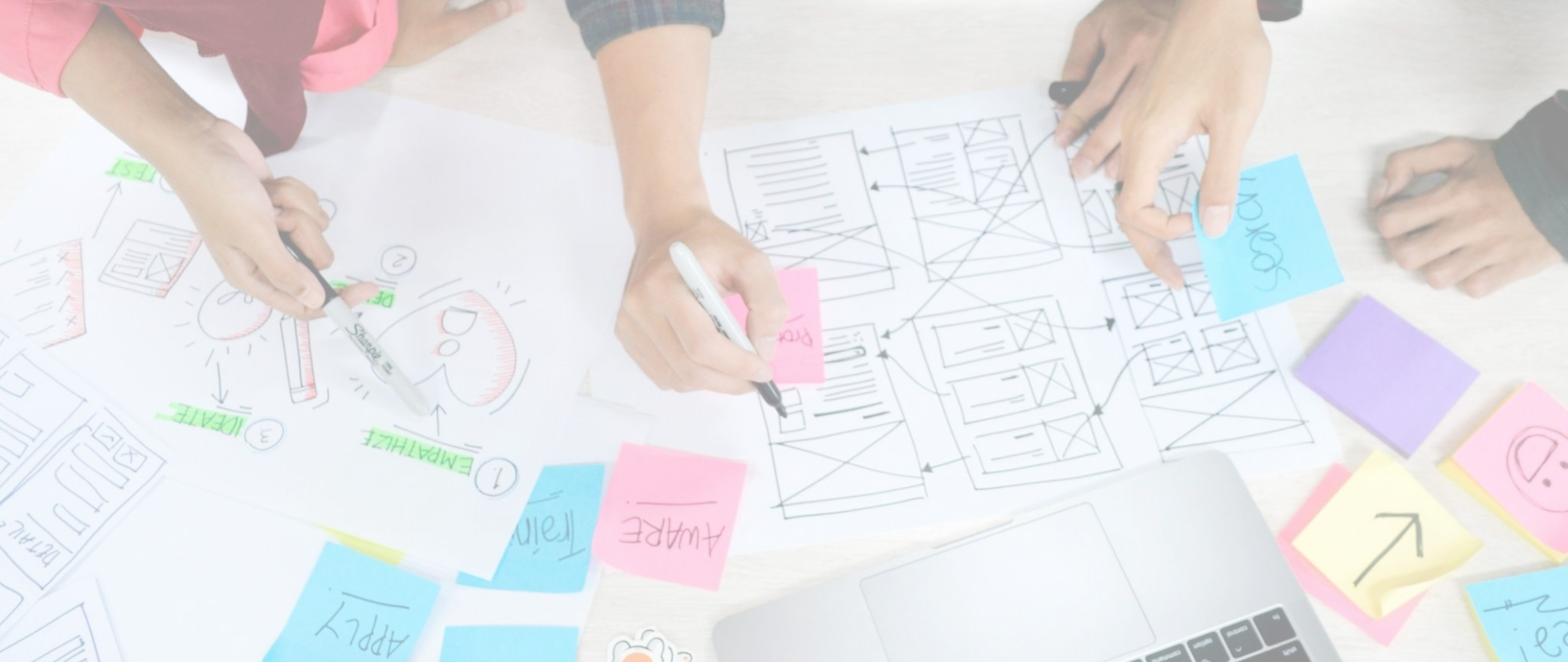
Think:

- Who would you remove from the other group's list and why?
- If you had to add to their list, who would it be and why?

Talk:

- about how your lists changed and why various roles/people were removed.





Case Study - Chatt Academy - Nolan McDaniel



Selecting a Team

A collection of office supplies is arranged on a light-colored surface. In the top left, a portion of a silver laptop is visible, showing the keyboard and trackpad. To its right is a spiral-bound notebook with a black cover, held open by a black paperclip. The notebook's pages are white and contain handwritten text in black ink. Below the notebook lies a white ruler with black markings. In the foreground, a white monthly planner is open, displaying a grid for the month of January. The planner has a header section with the title 'MONTHLY PLANNER' and a section for 'IMPORTANT DATES AND DEADLINES' at the bottom. The overall scene is brightly lit, with soft shadows cast by the objects.

Before assembling a team, define:

- Academics, grades, paradigm
- Project location
- Funding
- School budget
- Project size/Space needs
- Current & future enrollment
- New vs. renovation
- Project narrative
- Delivery methodology
- Timeline
- Political environment (both for potential sites, AHJ's, and for your plan)





**What challenges did you
have defining *your* needs?**

“Facilities Consultant”

- aka owner's rep
- aka program manager
- aka project manager
- aka real estate consultant
- aka fill in the _____

How do we pick one?



Criteria for “Facilities Consultant” Experience:

- Education Specific (E-Occupancy)
- Timelines
- Diligence
- Safety
- Grants (E-Rate)
- Workload
- Scopes



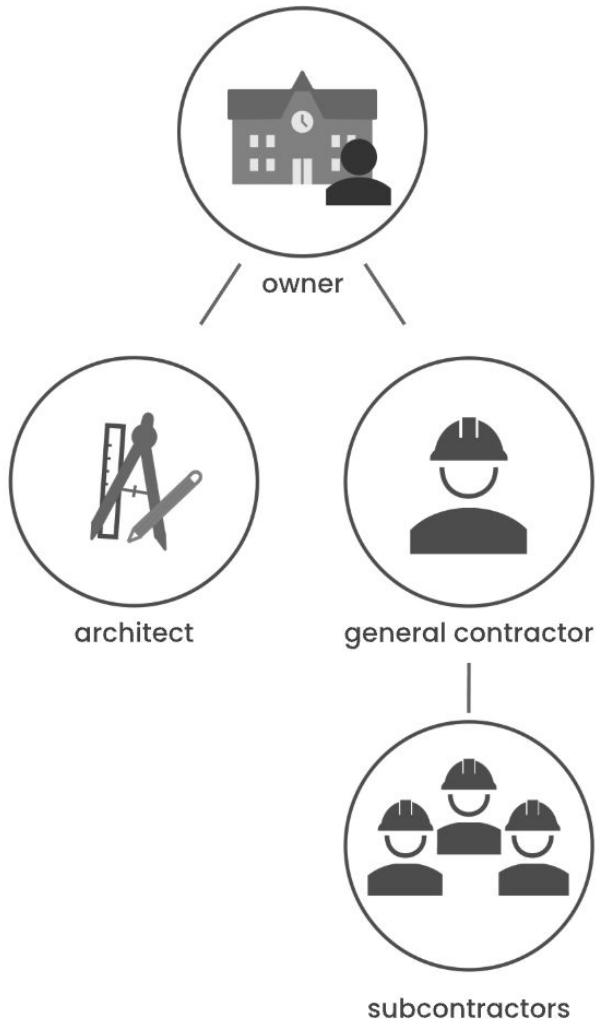
Forego Consultant? or Already Have One?

You still need to decide the following....

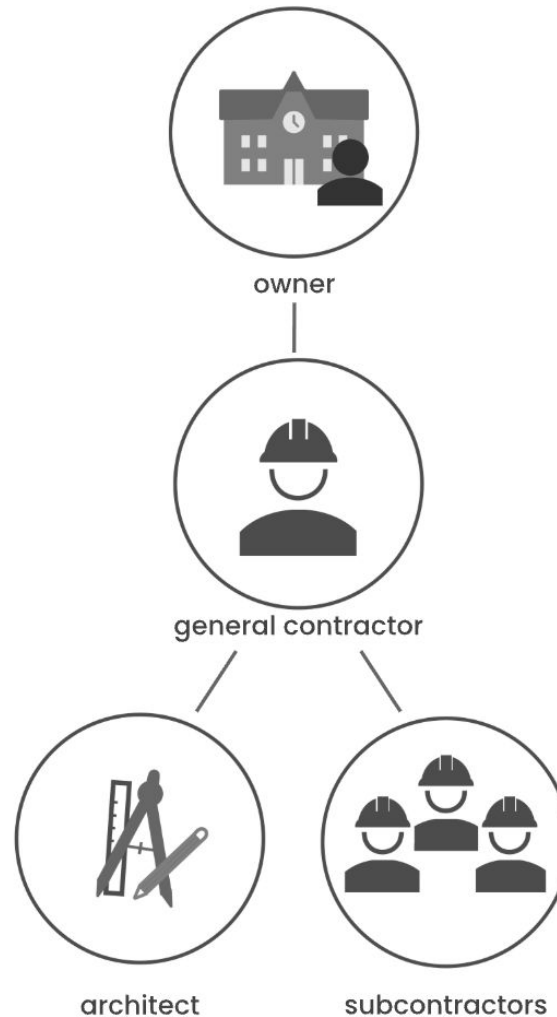


CONSTRUCTION METHODOLOGIES

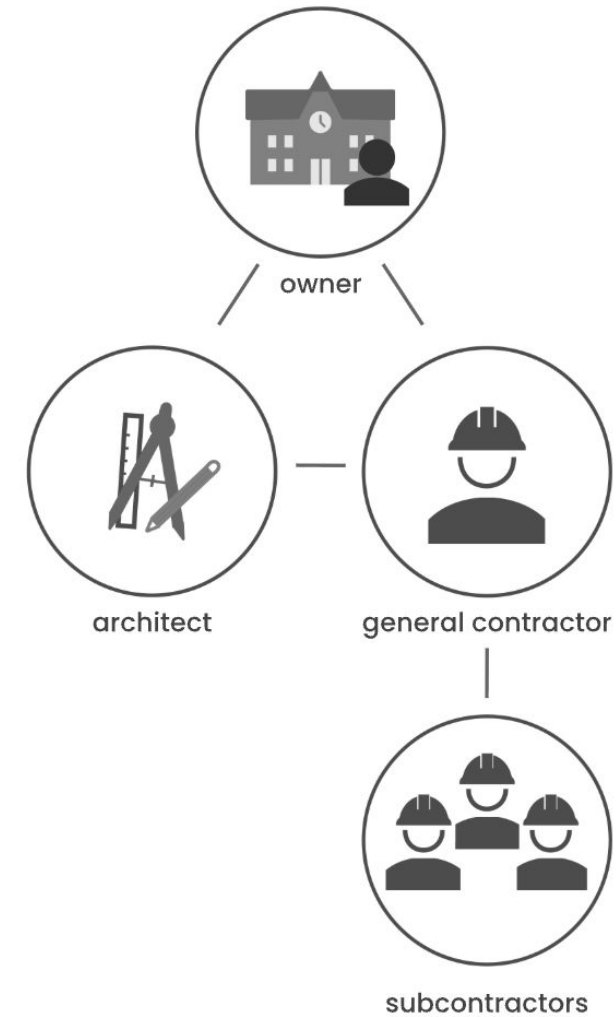
Design-Bid-Build



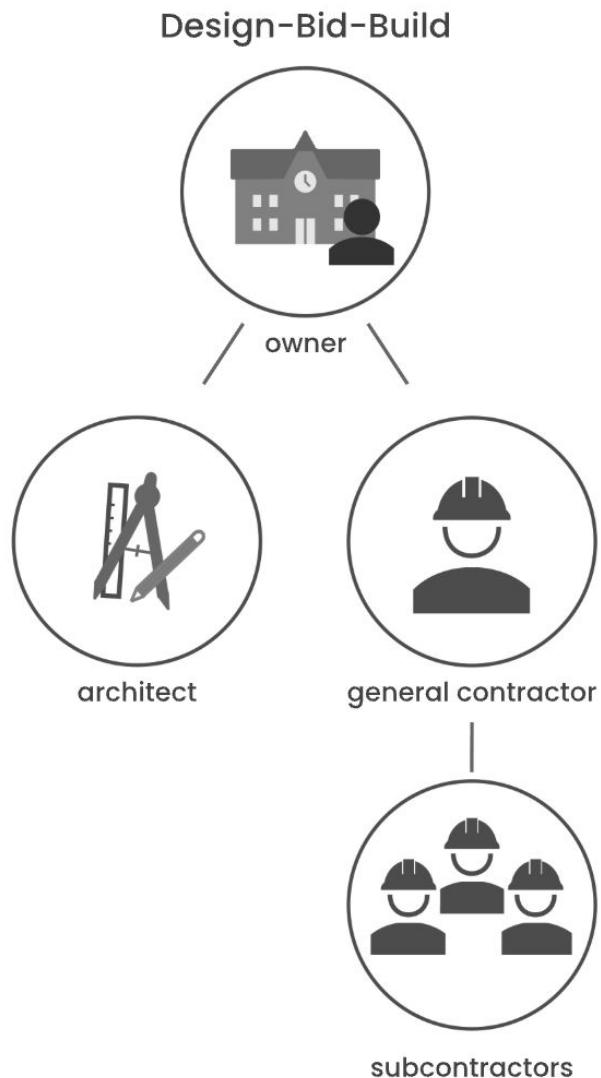
Design/Build



Construction Manager-at-Risk



Design-Bid-Build



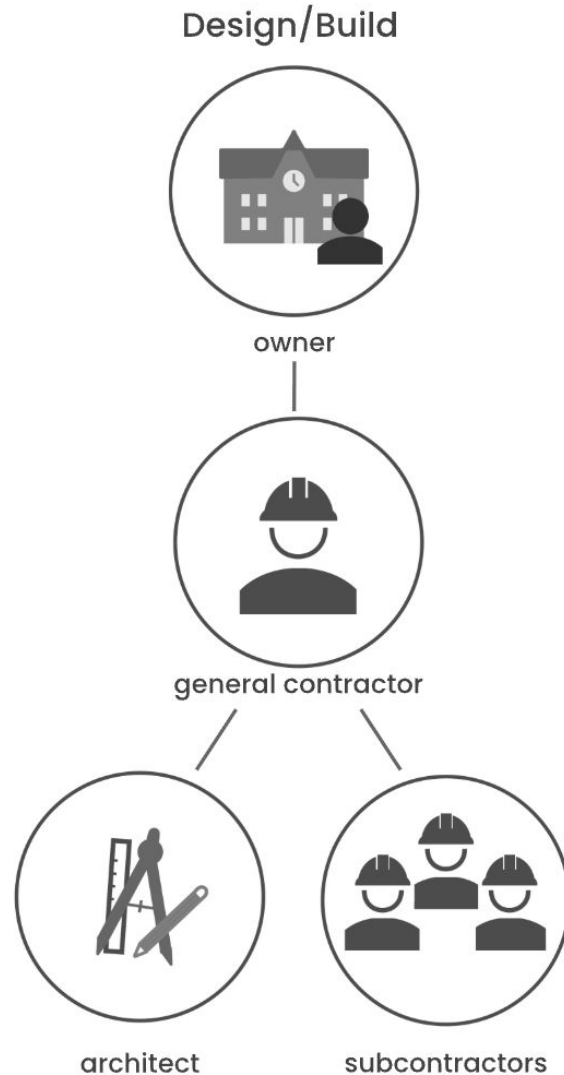
Pros:

- Plans already completed

Cons:

- Change orders
- RFI's
- Unforeseen Conditions
- Slowest of the three options

Design Build



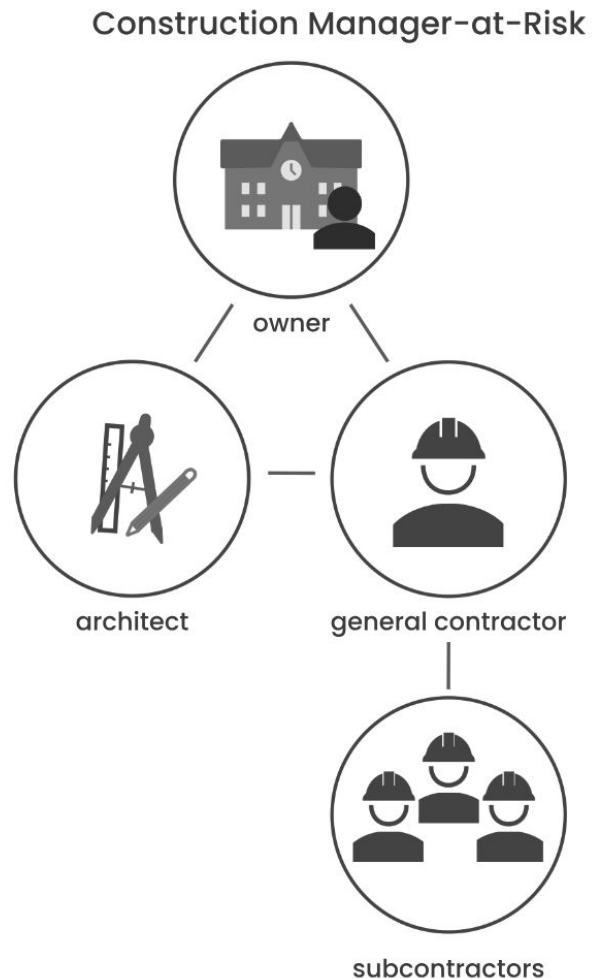
Pros:

- Speed
- Team

Cons:

- Some states also require an additional independent architect
- Fiduciary

CMAR/CMAC



Pros:

- Fiduciary is to the owner
- Dual Contracts

Cons:

- Sandbox is messy
- Roles/responsibilities

School's Facility Team

- School leader/s
 - role & decision making authority
- Board member/s
 - role & responsibilities
- Other expert vendors
 - make a list experts needed to support the school team



Assembling Experts on Facility Team



Real Estate Broker



Real Estate Consultant



Real Estate Attorney/Legal Representation



Financial Advisor/Financing
Partners/Lenders



Program Manager/Facilities
Consultant



Architectural Team



General Contractor



Project Manager



Owner's Representative



Third Party Inspectors



Insurance Provider

Right fit? ...consider experts':

- Cost
 - do they fit the budget
- Approach
 - project methodology
- Experience:
 - Education specific
 - E occupancy, timelines, diligence
 - Similar project
 - Size, pricepoint, local connections
- Foresight
 - Flagging project issues up-front
- Culture
 - How does the vendor add to & work with the school's facility team?



SELECTION CRITERIA

- Different criteria for different types of vendors
- Top two criteria are listed on each slide below



REAL ESTATE BROKER

- Help identify and evaluate potential sites
- Negotiate purchase or lease terms
- Provide market insights
- Selection Criteria:
 - #1 Local & familiar market knowledge
 - #2 Experience school deals



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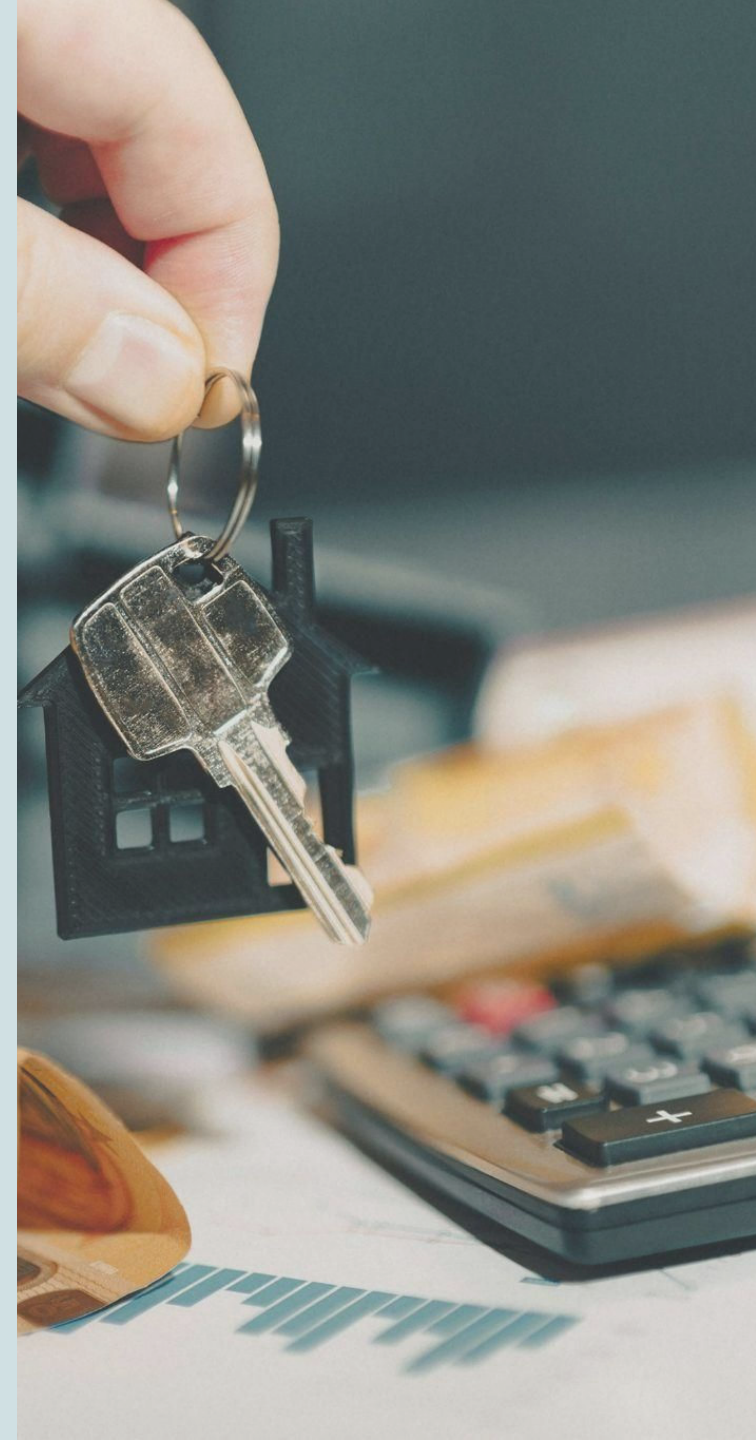


REAL ESTATE CONSULTANT

- Assess if properties are viable and align with goals, budget and regulations
- Assist with acquiring, evaluating and developing suitable facilities
- Selection Criteria:
 - #1 Can adapt to local challenges
 - #2 Experience with school deals



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ATTORNEY/ LEGAL REPRESENTATION

- Advise the school
 - lease negotiation
 - property purchase
 - vendor contracts
 - loan documents
- Selection Criteria:
 - #1 Real Estate Experience
 - #2 Familiar with the “sharks”



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FINANCIAL ADVISOR & FINANCING PARTNERS/ LENDERS

- Important to get assistance early
- How will the project will be financed?
 - CDFI, Commercial Bank, Nonprofits
- Criteria:
 - #1 Variety of products
 - #2 Appropriately licensed & registered



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PM/OR/Consultant

- Coordinate the project
- Manage team members on behalf of the school
- Selection Criteria:
 - #1 Total scope (education)
 - #2 Understands process & gaps



ARCHITECTURAL TEAM

- Develop space needs into viable concept
 - Code variances/requirements
 - Construction drawings
 - Local educational space requirements
-
- Selection Criteria:
 - #1 E specific
 - #2 Familiarity with AHJ



GENERAL CONTRACTOR

- Manage construction process from start to finish
- subs
- unforeseen – Death by RFI!
- Selection Criteria:
 - #1 Knows inspectors top 3
 - #2 Leans into solutions

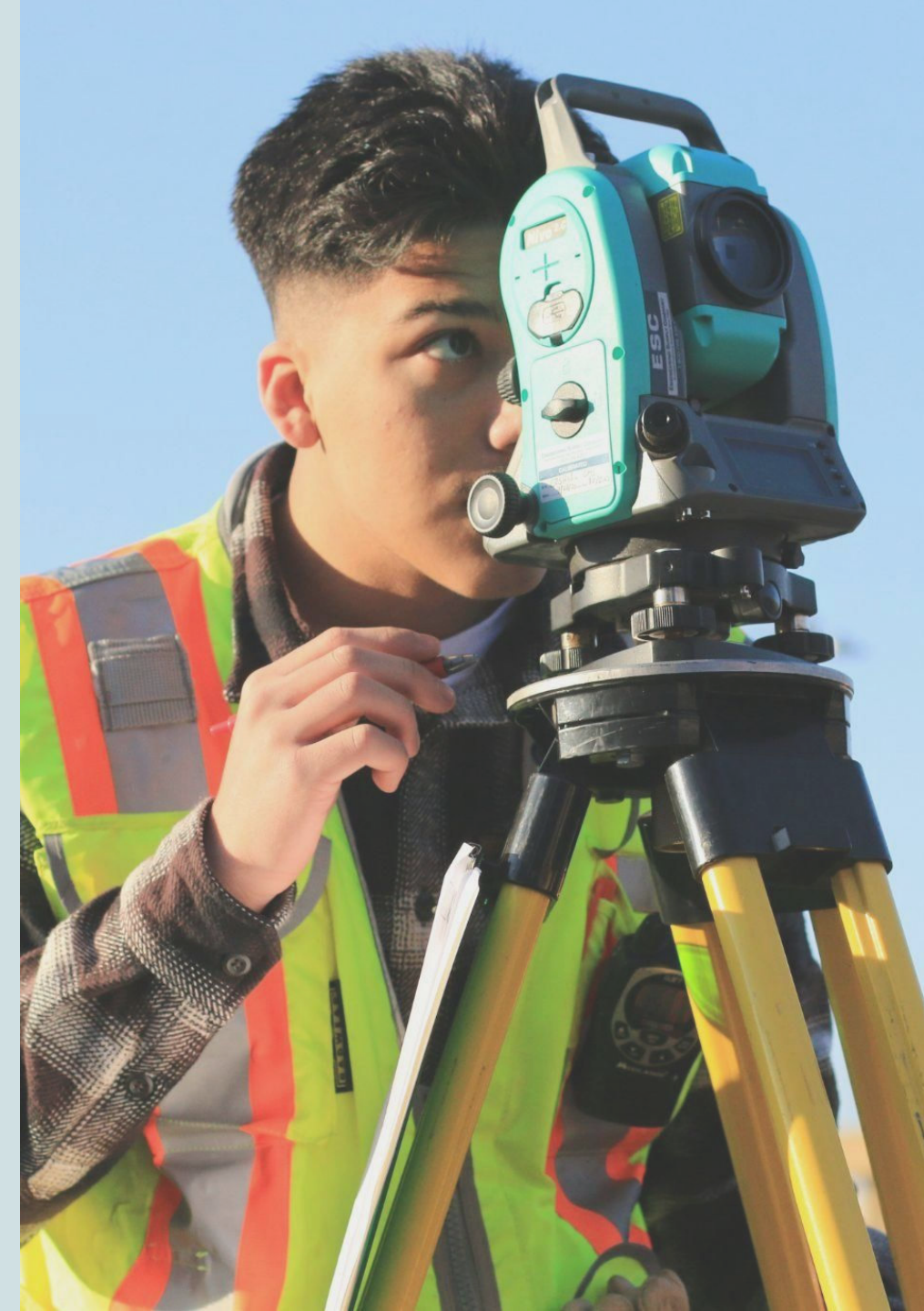


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THIRD PARTY INSPECTORS

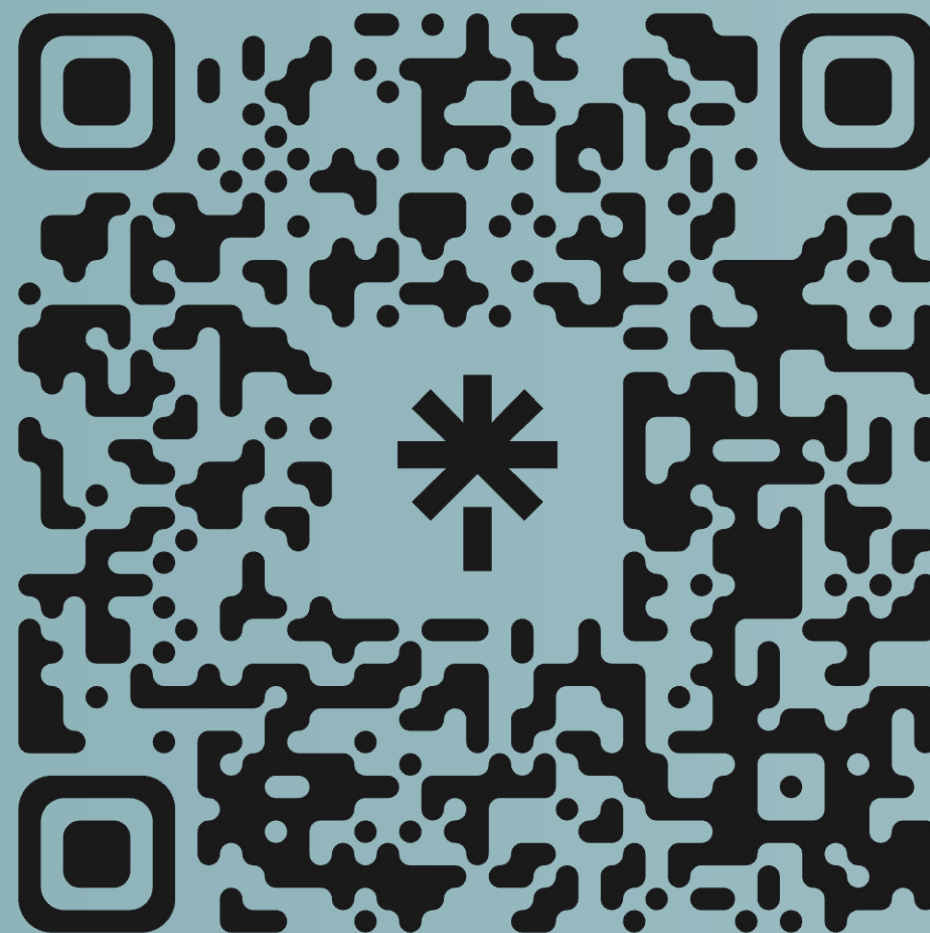
- Due diligence items
- Look over the project construction to make sure it is safe
- Selection Criteria:
 - #1 Proximity
 - #2 Reimbursement rate
 - #3 Collaboration w/ GC & Architect



INSURANCE PROVIDER

- Protect from risks
 - liability
 - property damage
 - compliance issues
 - secure environment for students, staff, assets
- Selection Criteria:
 - #1 Understands project
 - #2 "Right-sizing" project







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