



Construction Outlook for U.S. and Georgia

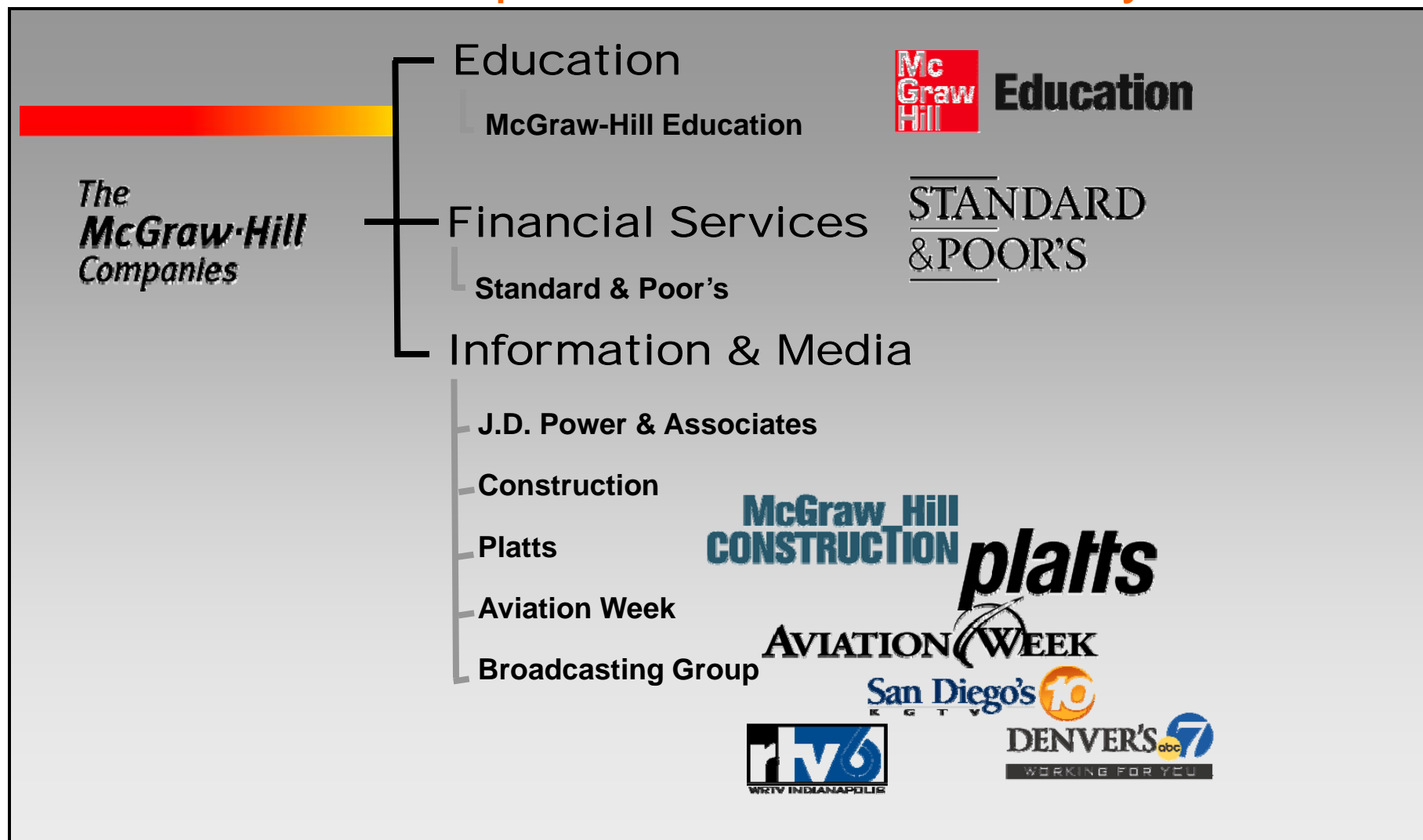
Ginger Flores
McGraw-Hill Construction

Construction Market Forecasting Service
Second Quarter 2010 Report
Released: June 2010

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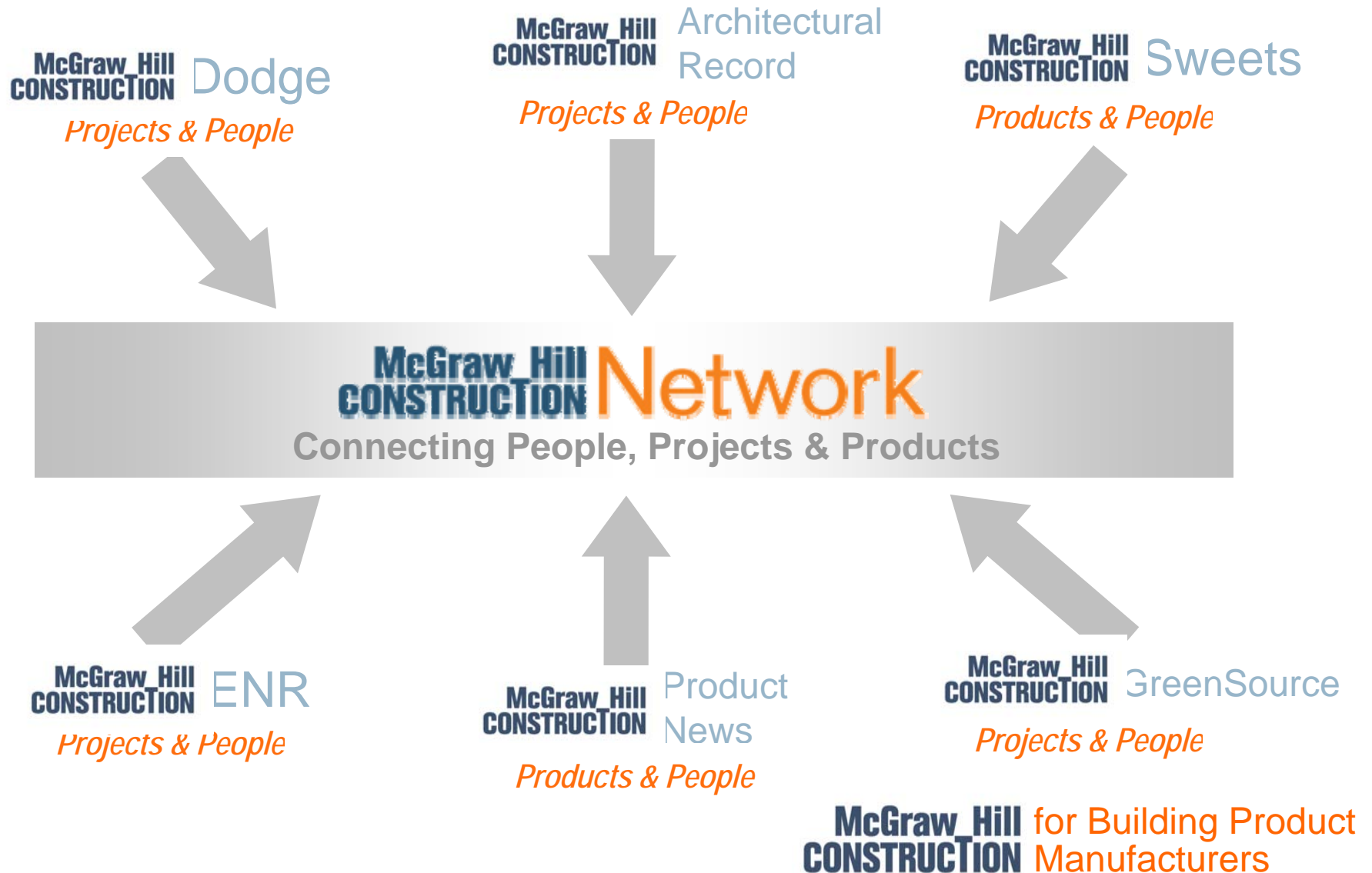
Market leadership for more than a century...



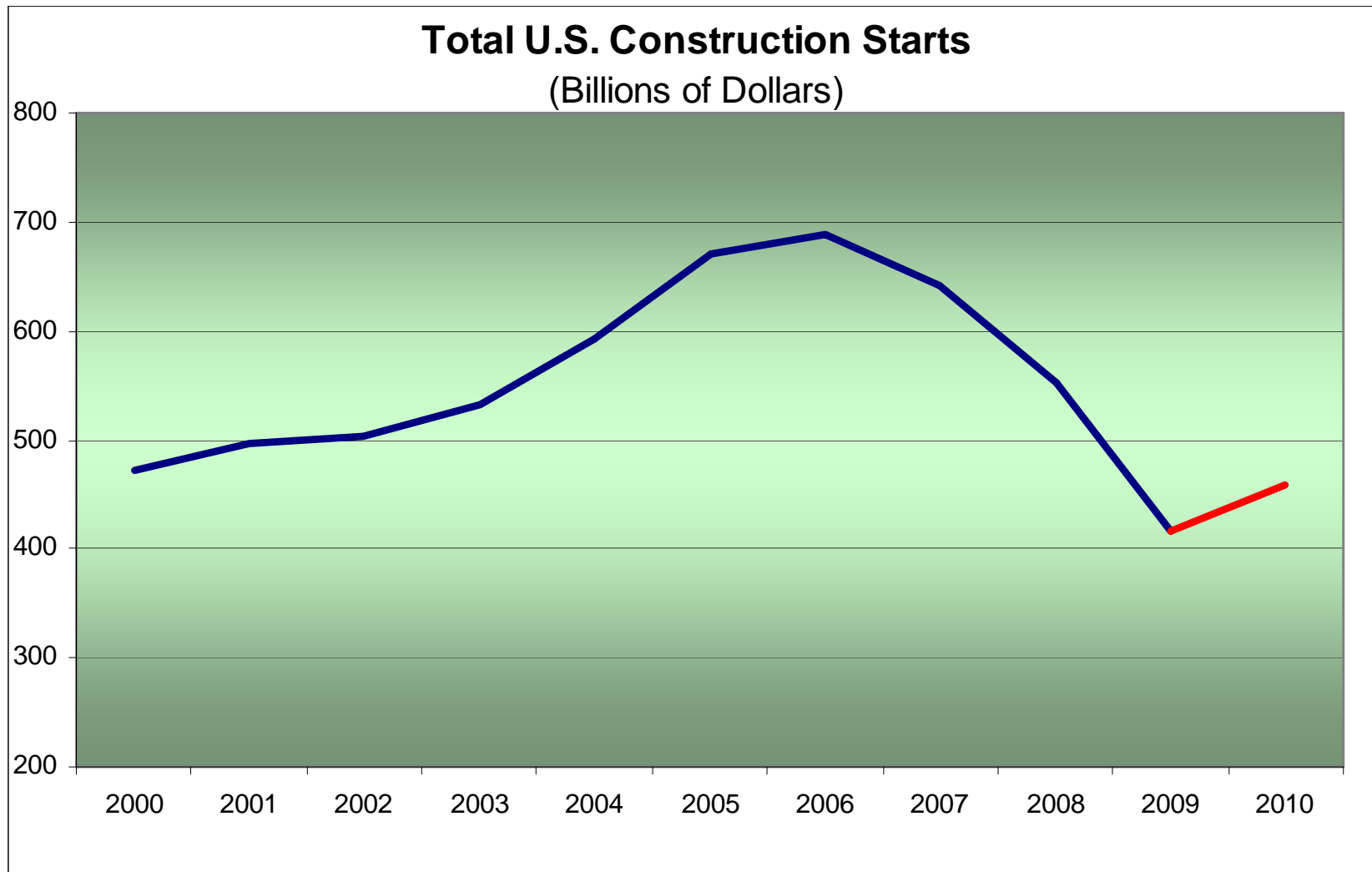
Leader in every market we serve.

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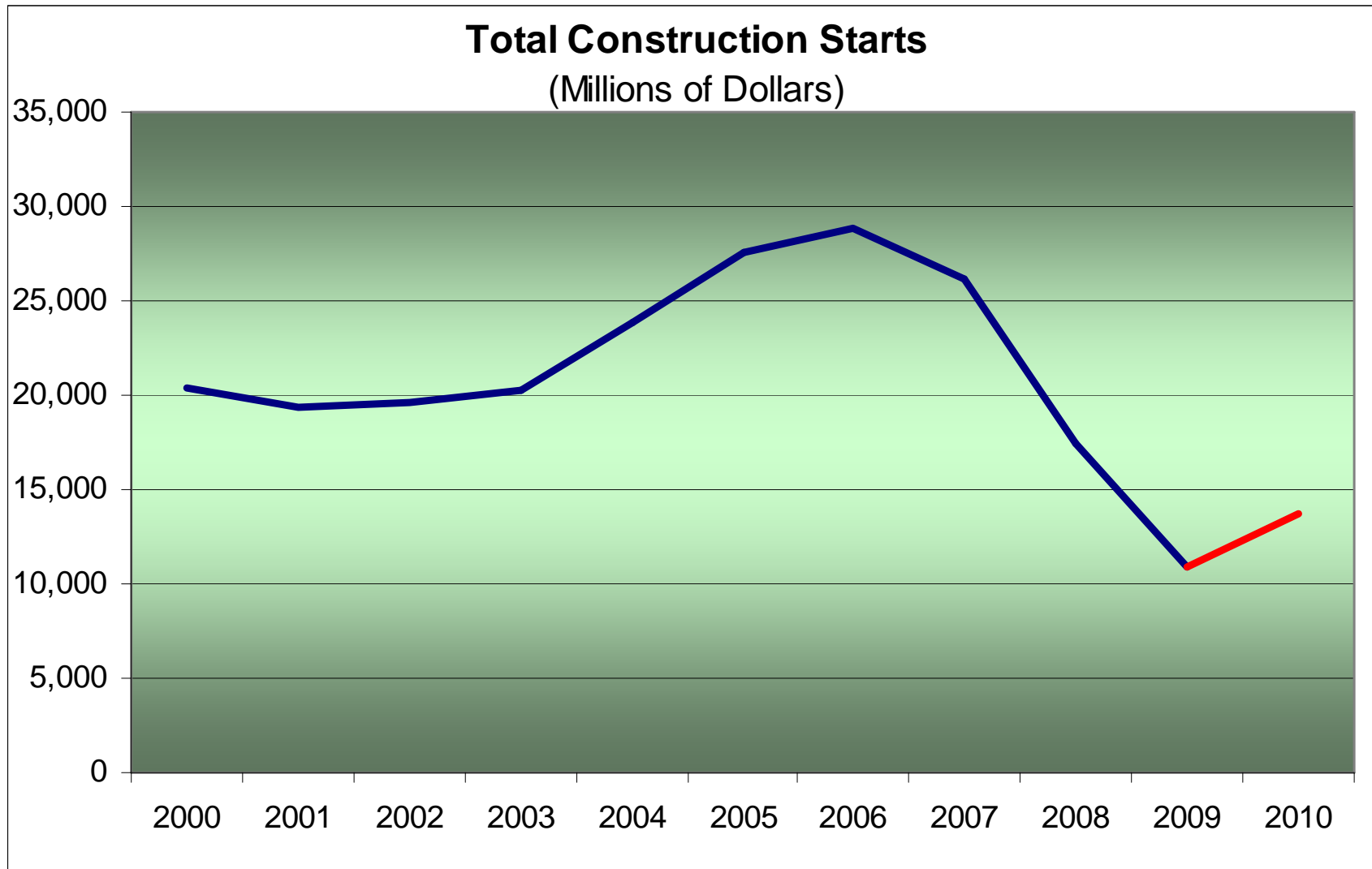
Connecting your products to the right projects & people...



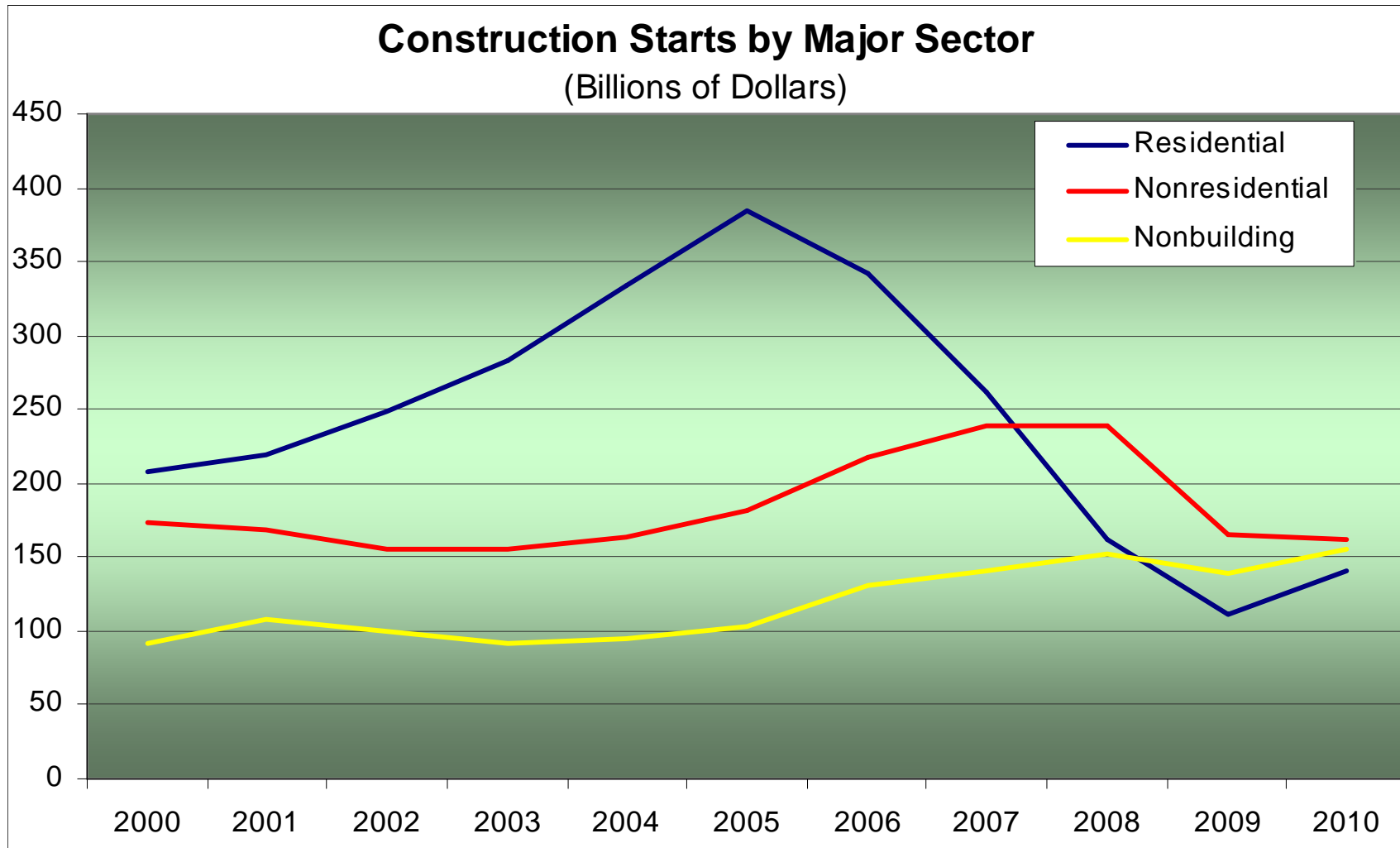
U.S. Construction Will Pick Up in 2010



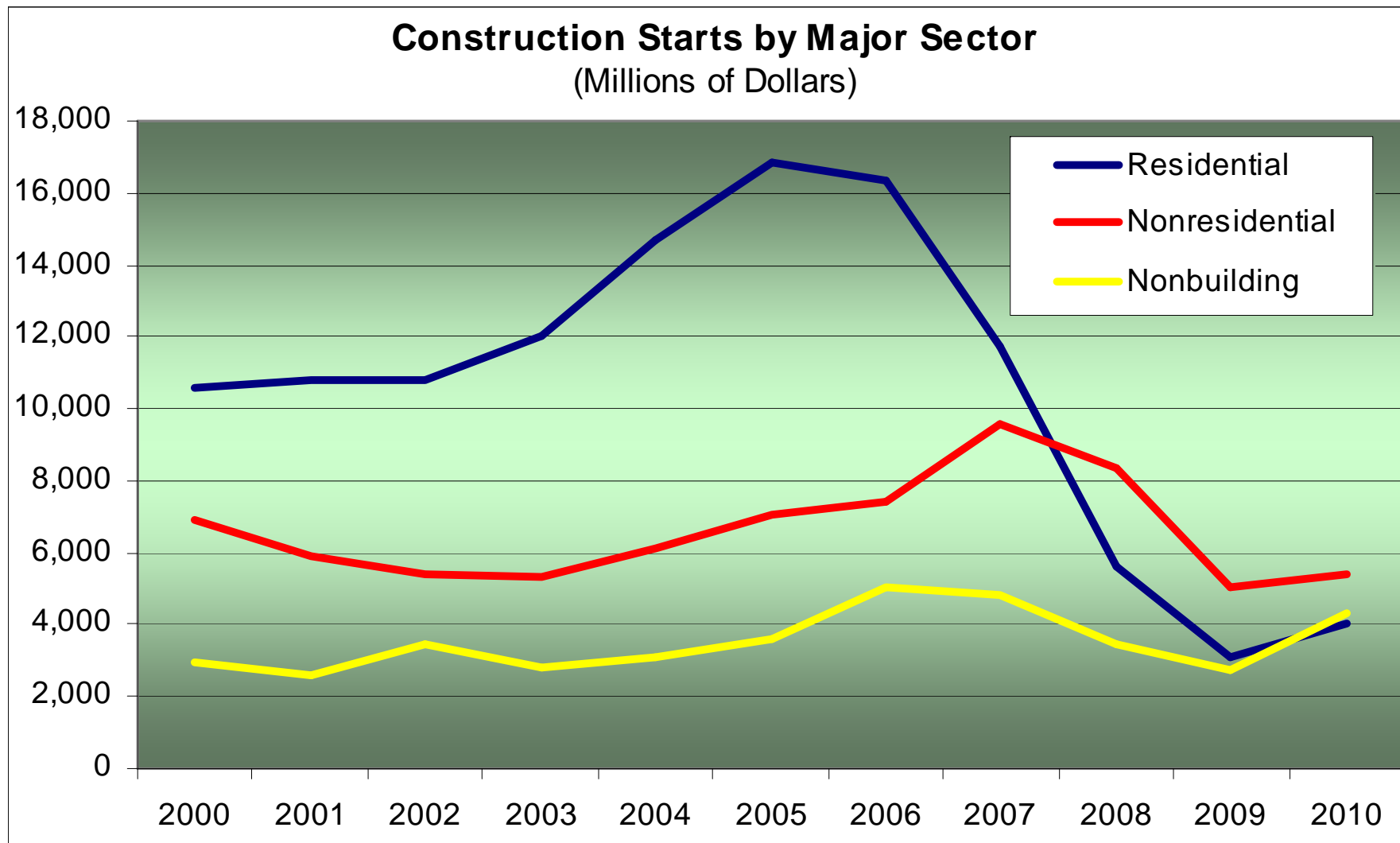
Georgia Construction Will Also Improve

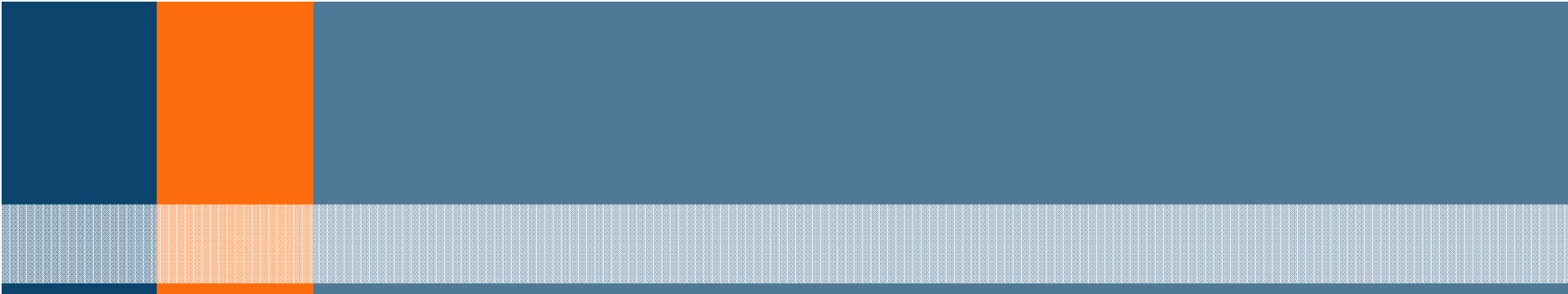


Res and Nonbuilding Up, Nonres Lingers



Georgia Building Up Across the Board





The Outlook for Educational Buildings

Construction Market Forecasting Service
Second Quarter 2010 Report
Released: June 2010

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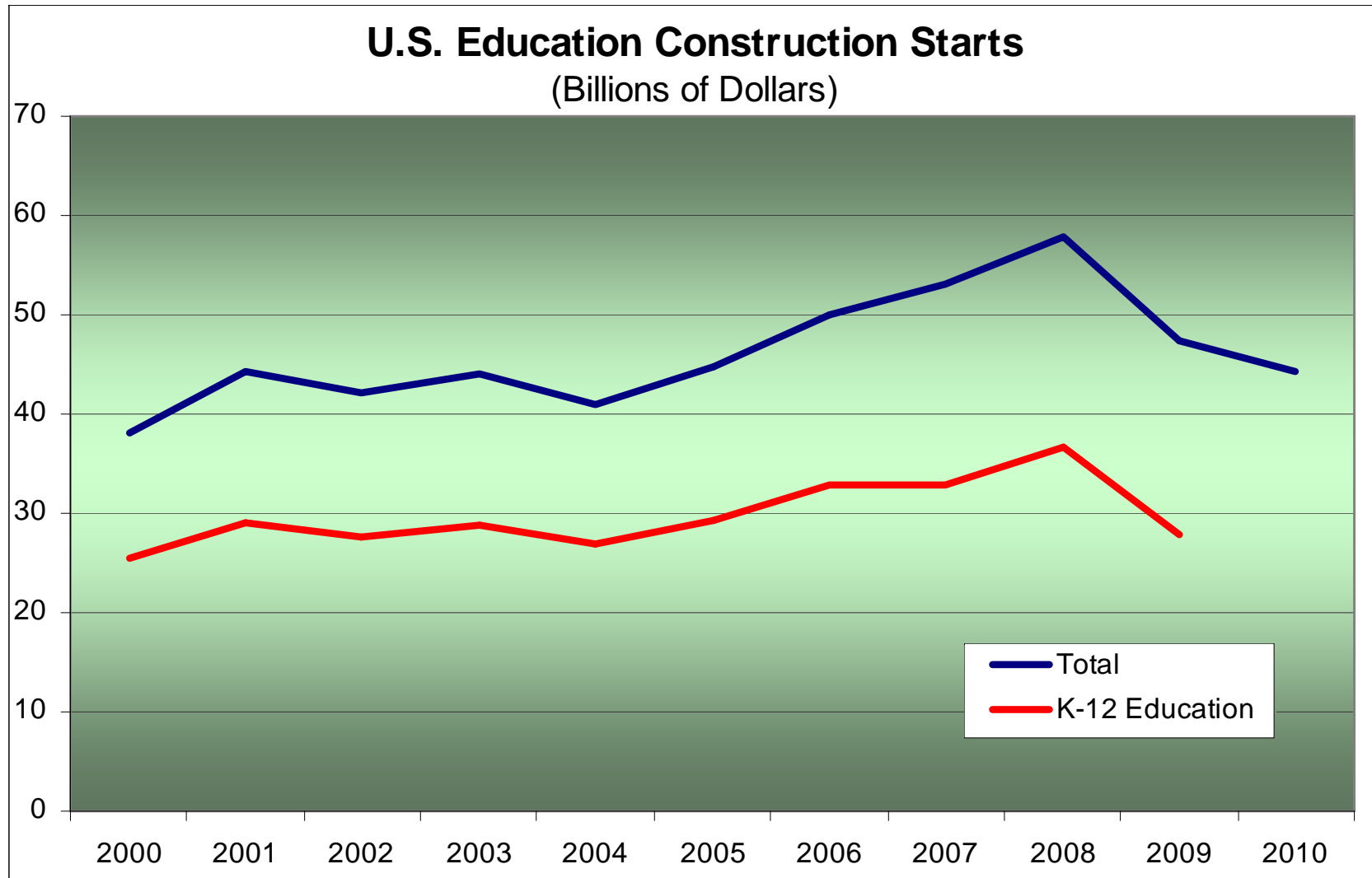
U.S. Education Construction to See Continued Declines

- The recession had debilitating effects on state and local government tax receipts.
- The banking crisis had debilitating effect on the financial system and lending.

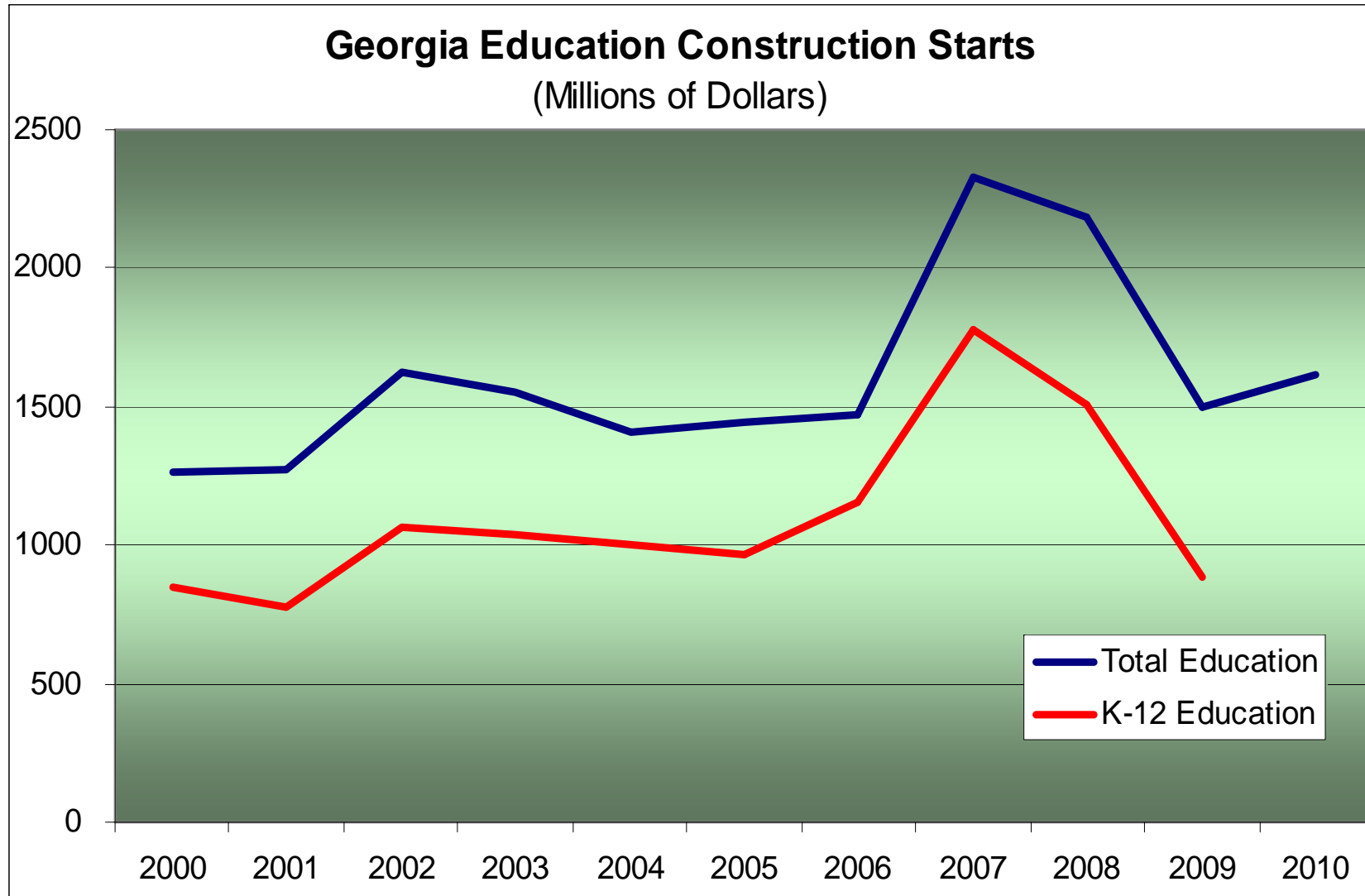


So, education construction will lag behind the overall recovery in the economy and the construction industry.

Total U.S. Education Construction will Slip in 2010



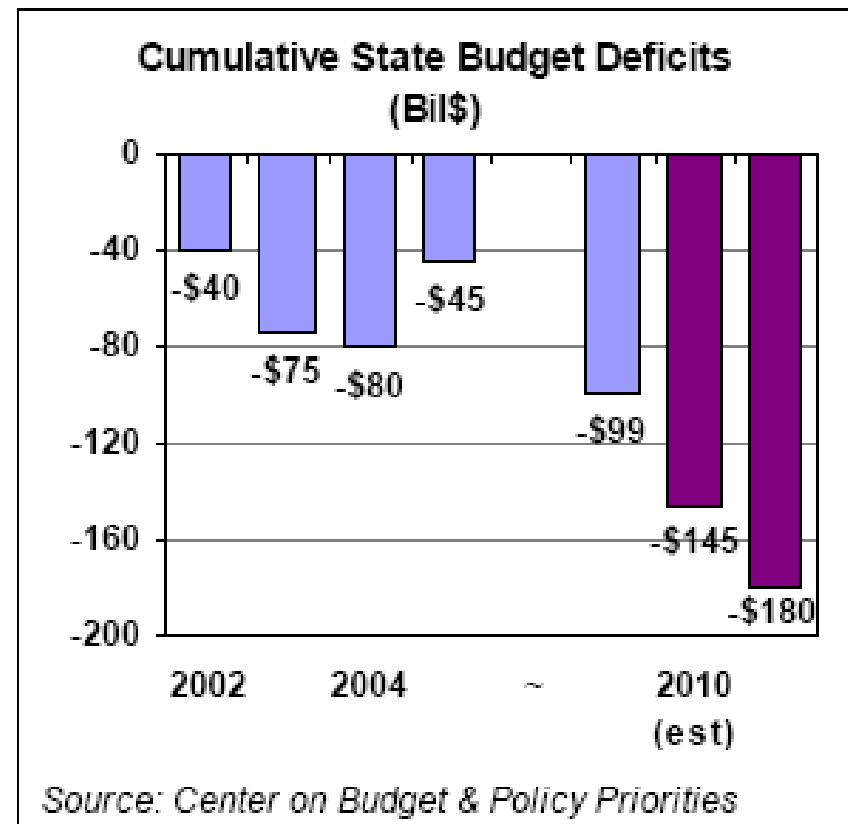
Georgia Education Construction Sees Small Gain



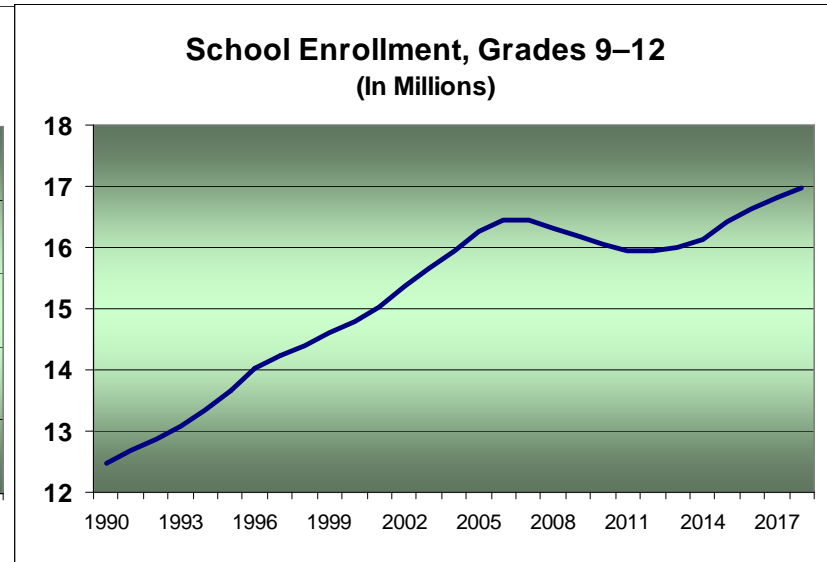
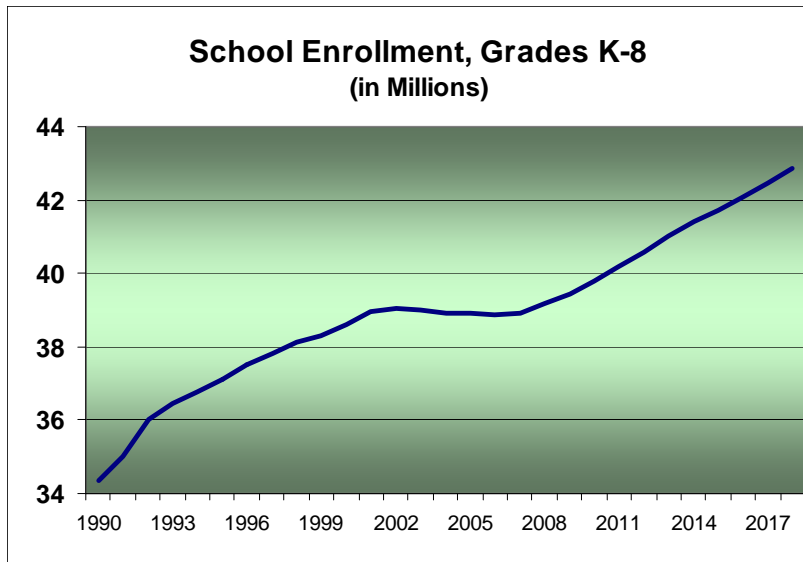
STATE BUDGET WOES

State coffers are likely to remain in the red for some time, dampening the prospects for a rebound in education construction.

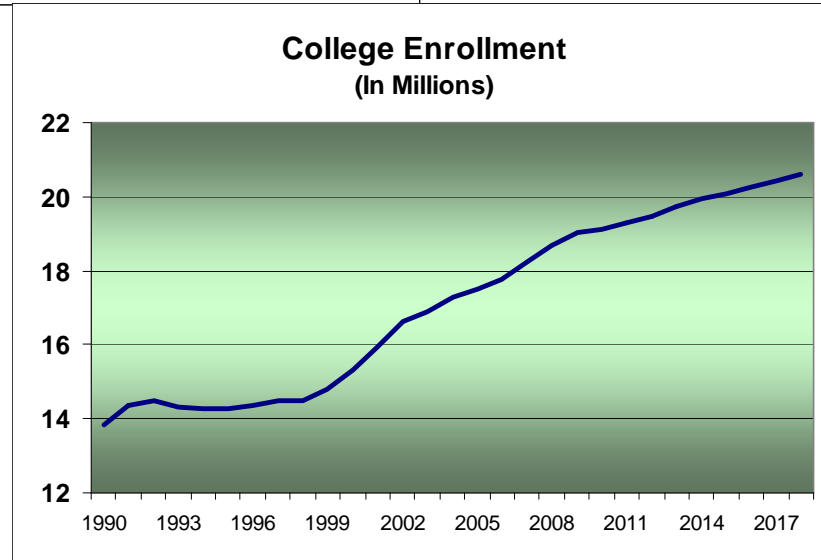
- The close tie between the fiscal health of states and school budgets is causing a lot of pain for the nation's school systems, particularly as we enter a second year of this recession.
- State budgets are already under severe duress; in FY 2009, **46 states are suffering budget shortfalls** to the tune of a combined **\$99 billion**.
- The Center on Budget and Policy Priorities, however, expects conditions to worsen as the **deficits deteriorate to \$145 billion in FY2010 and \$180 billion in FY2011**.



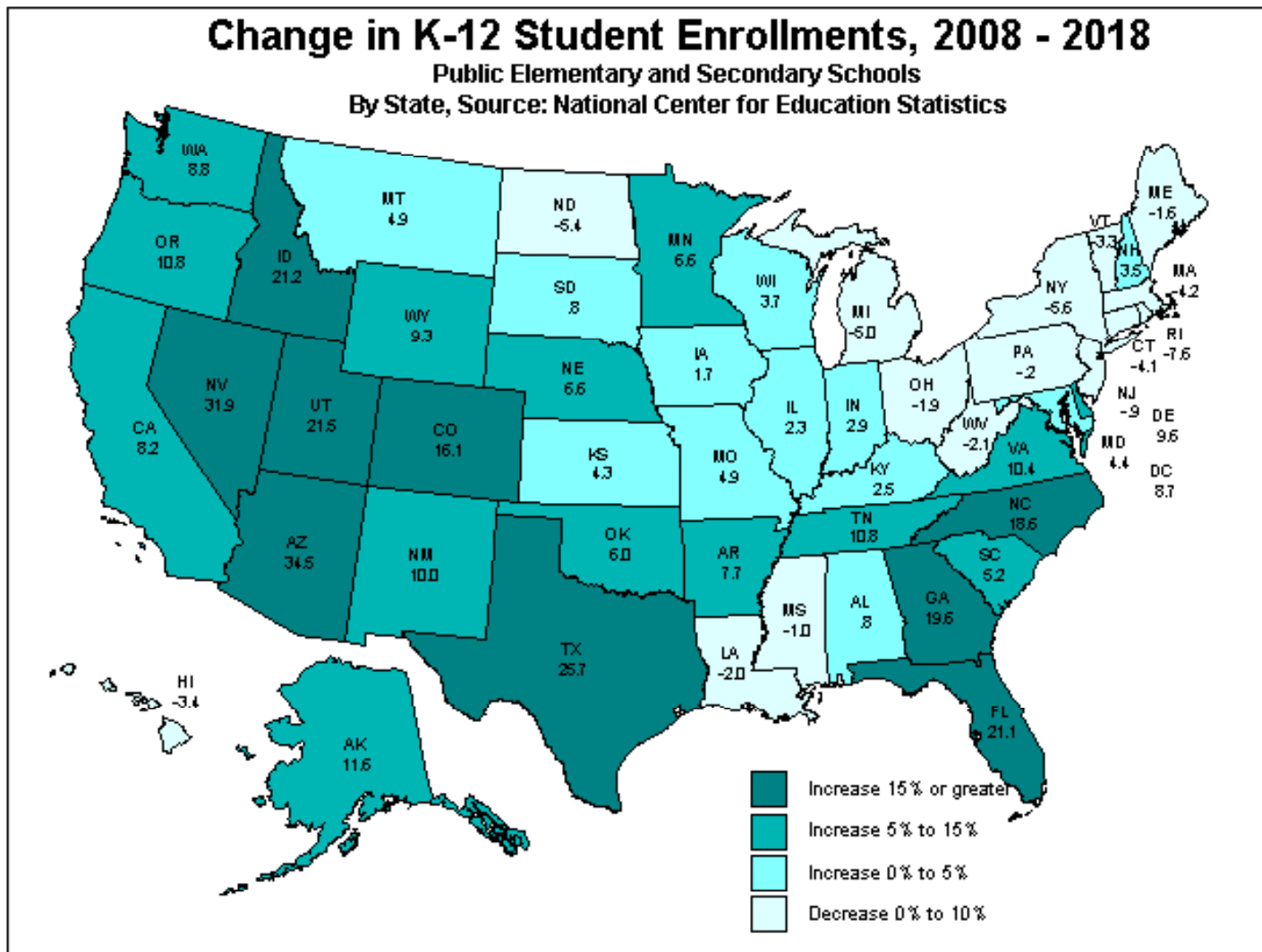
Growing Enrollments Drive U.S. Building



Source: National Center for Education Statistics



Enrollment Growth Differs by State



Source: National Center for Education Statistics

Bright Spots

Several tax cuts within the stimulus measure have also been targeted at school construction.

- The first provides \$22 billion in a new tax credit for school construction bonds; another provides \$2.8 billion in bonds for schools working with businesses.
- While these measures pale in comparison the \$20 billion in direct construction spending in the original (House) version of the bill, they will provide at least a basis of financial support for education construction over the next few years.
- The stimulus legislation authorizes an impressive \$40.6 billion to stabilize state education budgets. In a final compromise with Senator Collins, the ARRA allows these funds to be used for school modernization.



Specific Georgia Construction Activity

Project Name	Bid Date	Project Type	Action Stage	Location	Valuation
*Atlanta Public Schools - SPLOST III - Master Report Dodge Report No:200700677232 Zip:30318-4015	Version:v5	Middle/Senior High School Publish Date:05/21/2010 Owner:Atlanta Public Schools	Pre-Design Address:1891 Johnson Rd NW	GA(Fulton) City:Atlanta	\$496,051,963 State:GA
*Habersham County Schools Facilities - Master Report Dodge Report No:200700823932 Zip:30523-	Version:v8 Designer:Southern A & E LLC Architects and Engineers	Primary School Publish Date:05/28/2010 Owner:Habersham County Board of Education	Design Development Address:Sites to be announced	GA(Habersham) City:Clarksville	\$80,000,000 State:GA
*RFQ/AE: 2010 Capital Improvement Projects (Renov/Add & New) Dodge Report No:201000555990 Zip:31201	06/10/2010 Version:v3	Middle/Senior High School Publish Date:06/11/2010 Owner:Bibb County Board of Education	Pre-Design Address:County-wide	GA(Bibb) City:Macon	\$50,000,000 State:GA
*Troup County School System SPLOST III - MASTER REPORT Dodge Report No:200800612188 Zip:30240-	Version:v8 Designer:Southern A & E LLC Architects and Engineers	Middle/Senior High School Publish Date:05/28/2010 Owner:Troup County Board of Education	Design Development Address:Various City:Troup County Schools	GA(Troup) City:Troup County	\$45,130,000 State:GA
*Clarke County Schools - SPLOST 2 & 3 (Master Report) Dodge Report No:200700706036 Zip:30601-1347	Version:v9 Designer:Clarke County Board of Education	Middle/Senior High School Publish Date:05/21/2010 Owner:Clarke County Board of Education	Design Development Address:400 Fowler Dr	GA(Clarke) City:Athens	\$35,000,000 State:GA
*George Washington Carver High School Dodge Report No:201000436015 Zip:31906-3303	03/08/2010 Version:v6 Designer:Gardner Spencer Smith Tench & Jarbeau	Middle/Senior High School Publish Date:05/26/2010 Owner:Muscogee County School District	Planning Schematics Address:3100 8TH ST	GA(Muscogee) City:Columbus	\$32,250,000 State:GA
*Hampton High School Dodge Report No:200800862003 Zip:30228-	Version:v5 Designer:Manley Spangler Smith Architects	Middle/Senior High School Publish Date:06/02/2010 Owner:Henry County Board of Education	Planning Schematics Address:Site to be announced	GA(Henry) City:Hampton	\$30,000,000 State:GA
*RFQ/CM : High School (2451 Little Neck Rd) Dodge Report No:200400688217	Version:v13	Middle/Senior High School Publish Date:05/21/2010	GC Bidding / Planning Schematics Address:2451 Little Neck Rd	GA(Chatham) City:Savannah	\$25,000,000 State:GA

NEW

Large K-12 new construction in the planning stages

Dodge has reported on 38 NEW construction projects in the GA K-12 market in the last 30 days

Middle/Senior High School	Design Development	GA(Spalding)	\$19,000,000	
Griffin High School (Addition/Renovations) Dodge Report no: 200800862002 v7 Publish date: 06/02/2010 Action stage: Design Development City: Griffin State: GA Address: 1617 W Poplar St Zip: 30224-2038 Designer: Manley Spangler Smith Architects Owner: Griffin-Spalding County Board of Education				
Middle/Senior High School	Planning Schematics	GA(Cobb)	\$16,199,200	
Lassiter High School- Theater Addition/Modifications Dodge Report no: 201000563616 v1 Publish date: 05/21/2010 Action stage: Planning Schematics City: Marietta State: GA Address: 2601 SHALLOWFORD RD Zip: 30066-3038 Designer: Chapman Griffin Lanier Sussenbach Archs (CGLS) Owner: Cobb County School District				
Middle/Senior High School	Planning Schematics	GA(Cobb)	\$15,431,418	
Simpson Middle School (Addition/Modifications) Dodge Report no: 201000580970 v1 Publish date: 06/11/2010 Action stage: Planning Schematics City: Marietta State: GA Address: 3340 TRICKUM RD NE Zip: 30066-4663 Designer: Foreman Seeley Fountain Architects Inc Owner: Cobb County School District				
Middle/Senior High School	Planning Schematics	GA(Cobb)	\$15,045,864	
McCleskey Middle School (Addition/Modifications) Dodge Report no: 201000581004 v1 Publish date: 06/11/2010 Action stage: Planning Schematics City: Marietta State: GA Address: 4080 Maybreeze Rd Zip: 30066-2734 Designer: JEA Architects Owner: Cobb County School District				
06/01/2010	Middle/Senior High School	Design Development	GA(White)	\$15,000,000
White County Middle School (Replacement) Dodge Report no: 201000552584 v4 Publish date: 06/10/2010 Action stage: Design Development City: Cleveland State: GA Address: Old Blairsville Highway Zip: 30528 Designer: Robertson Loia Roof Owner: White County Board of Education				
06/10/2010	Primary School	Sub Bidding / Construction Documents	GA(Chatham)	\$14,000,000
Butler Elementary School (Replacement) Dodge Report no: 200400688356 v21 Publish date: 06/07/2010 Action stage: Sub Bidding / Construction Documents City: Savannah State: GA Address: 1909 Cynthia St Zip: 31415-7894 Designer: Hansen Architects Owner: Savannah Chatham County Public Schools 📍Target lead: Carpet, Carpet - Domco/ Tarkett, Carpet - Shaw				
Middle/Senior High School	Planning Schematics	GA(Cobb)	\$11,891,230	
Garrett Middle School (Addition/Modifications) Dodge Report no: 201000580985 v1 Publish date: 06/11/2010 Action stage: Planning Schematics City: Austell State: GA Address: 5235 Austell Powder Springs Rd Zip: 30106-3128 Designer: Perkins & Will Architects Inc Owner: Cobb County School District				
Middle/Senior High School	Planning Schematics	GA(De Kalb)	\$11,700,000	
Lakeside High School (Addition) - Phase 2 Dodge Report no: 200900532025 v4 Publish date: 06/02/2010 Action stage: Planning Schematics City: Atlanta State: GA Address: 3801 Briarcliff Rd NE Zip: 30345-3856 Designer: Manley Spangler Smith Architects Owner: DeKalb Co Board of Education/Sam Moss Service Ctr				
Middle/Senior High School	Planning Schematics	GA(Liberty)	\$10,000,000	
High School Facilities (Phased Project) Dodge Report no: 201000427775 v6 Publish date: 05/19/2010 Action stage: Planning Schematics City: Hinesville State: GA Address: Liberty County Zip: 31313 Designer: BRPH Architects-Engineers Inc Owner: Liberty County Board of Education				

Additions Renovations

Large K-12 renovation & addition projects in the planning stages

Dodge has reported on 62 renovation & addition projects in the GA K-12 market in the last 30 days.

Abandoned Delayed

K-12 Projects that have halted construction and/or planning.

Dodge has reported on 10 abandoned or delayed projects in the GA K-12 market in the last 30 days; this number was 9 a year ago.

Project title	Bid date	Project type	Action stage	Location	Valuation
Middle/Senior High School NC General Const Projects (MATOC) (Design/Build) Dodge Report no: 200900574208 v30 Publish date: 06/02/2010 Action stage: Abandoned State: NC Address: South Atlantic Division Zip: 28307- Owner: U S Army Corps of Engineers Contractor: Hensel Phelps Construction Company Special conditions: MATOC			Abandoned	NC(Cumberland)	\$499,000,000
Middle/Senior High School Decatur High, Renfroe Middle & 5th Ave Academy Schools Dodge Report no: 201000477915 v5 Publish date: 06/07/2010 Action stage: Abandoned City: Decatur State: GA Address: 310 N MCDONOUGH ST Zip: 30030-3339 Owner: City Schools of Decatur			Abandoned	GA(De Kalb)	\$13,400,000
Primary School Union Elementary School (Renovations) - DUPLICATE REPORT Dodge Report no: 199900856914 v20 Publish date: 05/17/2010 Action stage: Abandoned City: Macon State: GA Address: 4831 Mamie Carter Dr Zip: 31210-5650 Owner: Bibb County Board of Education			Abandoned	GA(Bibb)	\$4,272,000
Middle/Senior High School Sandy Creek High School (Additions & Renovations) Dodge Report no: 200400717862 v16 Publish date: 06/02/2010 Action stage: Delayed City: Tyrone State: GA Address: 360 Jenkins Rd Zip: 30290-1614 Designer: Manley Spangler Smith Architects Owner: Fayette County Board of Education			Delayed	GA(Fayette)	\$2,000,000
NDS Middle/Senior High School Lowndes High School (Renovations) Dodge Report no: 200900677905 v8 Publish date: 05/27/2010 Action stage: Delayed City: Valdosta State: GA Address: 1606 Norman Dr Zip: 31601-3519 Designer: Altman + Barrett Architects Owner: Lowndes County Board of Education			Delayed	GA(Lowndes)	\$1,640,000
Middle/Senior High School McIntosh High School (Renovations) Dodge Report no: 200400722140 v16 Publish date: 06/02/2010 Action stage: Delayed City: Peachtree City State: GA Address: 201 Walt Banks Rd Zip: 30269-1383 Designer: Manley Spangler Smith Architects Owner: Fayette County Board of Education			Delayed	GA(Fayette)	\$1,190,000
Middle/Senior High School Fayetteville Intermediate School (Renovations) Dodge Report no: 200400717849 v16 Publish date: 06/02/2010 Action stage: Delayed City: Fayetteville State: GA Address: 440 Hood Ave Zip: 30214-1119 Designer: Manley Spangler Smith Architects Owner: Fayette County Board of Education			Delayed	GA(Fayette)	\$695,000
Middle/Senior High School Whitewater Middle School (Renovations) Dodge Report no: 200400717799 v15 Publish date: 06/02/2010 Action stage: Delayed City: Fayetteville State: GA Address: 1533 Highway 85 S Zip: 30215-7608 Designer: Manley Spangler Smith Architects Owner: Fayette County Board of Education			Delayed	GA(Fayette)	\$500,000
Middle/Senior High School Flat Rock Middle School (Renovations) Dodge Report no: 200400717858 v15 Publish date: 06/02/2010 Action stage: Delayed City: Tyrone State: GA Address: 325 Jenkins Rd Zip: 30290-1618 Designer: Manley Spangler Smith Architects Owner: Fayette County Board of Education			Delayed	GA(Fayette)	\$500,000
Primary School St George Elementary School (Addition) Dodge Report no: 200200849672 v24 Publish date: 05/27/2010 Action stage: Abandoned City: Folkston State: GA Address: Florida Ave Zip: 31537-9999 Designer: Southern A & E LLC Architects and Engineers Owner: Charlton County Board of Education			Abandoned	GA(Charlton)	\$350,000

LEED Activity

- Total number of new construction, K-12 projects that are currently in the design phase across the U.S. is 567 (within last month)
- 7.2% of those projects; 41 projects are LEED intended or will be seeking LEED accreditation
- Only 3 LEED “tagged” projects on the boards for GA. All are in Fulton Co.

Project title	Bid date	Project type	Action stage	Location	Valuation
Benjamin E Mays High School (Renovations) Dodge Report no: 200900710549 v4 Publish date: 05/13/2010 Action stage: Start City: Atlanta State: GA Address: 3450 Benjamin E Mays Dr SW Zip: 30331-1906 Designer: Perkins & Will Architects Inc Owner: Atlanta Public Schools Special conditions: LEED Intended		Middle/Senior High School	Start	GA(Fulton)	\$25,365,175
Continental Colony Elementary School (renov/modifications) Dodge Report no: 201000459854 v5 Publish date: 04/30/2010 Action stage: Design Development City: Atlanta State: GA Address: 3183 Hogan Rd SW Zip: 30331-2803 Designer: Goode Van Slyke Architects Owner: Atlanta Public Schools Facilities Service Special conditions: LEED Intended Target lead: Carpet, Carpet - Interface, Carpet - Shaw		Primary School	Design Development	GA(Fulton)	\$8,344,730
Sarah Smith Primary School- Phase 2 (addition) Dodge Report no: 201000509544 v6 Publish date: 06/15/2010 Action stage: Start City: Atlanta State: GA Address: 4141 Wieuca Rd NE Zip: 30342-3812 Designer: Cooper Carry & Associates Inc Owner: Atlanta Public Schools Facilities Service Contractor: The Winter Construction Company Special conditions: LEED Intended Silver Target lead: Carpet, Carpet - Domco/ Tarkett	05/06/2010	Primary School	Start	GA(Fulton)	\$2,000,000

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