

Modern Healthcare

2010 CONSTRUCTION AND DESIGN SURVEY

TOP DESIGN/BUILD COMPANIES ranked by 2009 dollar volume

Company	Dollar volume ¹ (in thousands)			Square feet ¹ (in thousands)			Firm fees (thousands)	No. of FTEs ²	No. of states ³	No. of years ⁴	Percent work ⁵
	2009	2008	Percent change	2009	2008	Percent change					
Haskell	\$332,191.4	\$178,102.0	86.5%	1,592.4	1,504.0	5.9%	\$11,626.7	711	5	27	21.5%
HBE Corp.	319,400.0	255,600.0	25.0	1,703.7	1,361.9	25.1	–	400	20	50	100.0
Erdman	280,581.0	349,199.5	(19.7)	1,143.7	1,415.4	(19.2)	20,202.0	429	20	58	100.0
BBL Medical Facilities	107,650.0	117,940.0	(8.7)	507.4	726.6	(30.2)	–	38	13	36	100.0
McShane Cos.	98,990.4	24,235.1	308.5	740.0	263.4	180.9	–	275	4	21	20.0
Neenan Co.	46,000.0	53,000.0	(13.2)	330.1	250.5	31.8	–	198	6	21	40.0
Cooper Medical Buildings	42,449.1	39,995.4	6.1	148.5	173.7	(14.5)	2,253.7	26	3	14	100.0
Monitor Builders	32,000.0	35,000.0	(8.6)	125.0	110.0	13.6	3,900.0	8	4	20	100.0
H&H Design-Build	29,827.2	10,289.5	189.9	145.7	38.9	274.4	2,123.0	23	14	37	100.0
GMK Associates	11,608.6	25,989.0	(55.3)	120.5	155.1	(22.3)	–	96	3	43	72.0
Beck Group	10,431.9	27,221.4	(61.7)	149.0	220.7	(32.5)	3,900.3	474	4	60	6.0
Category totals (all respondents, in millions)	\$1,311.1	\$1,116.6	17.4%	6.7	6.2	7.8%					

All figures rounded. ¹Figures reflect completed construction projects only. ²Number of full-time-equivalent employees.

³Number of states the company held healthcare construction projects in 2009. ⁴Number of years firm has been involved in healthcare projects.

⁵Percentage of firm's total work that involved healthcare projects.

Source: Modern Healthcare's 2010 Construction & Design Survey

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PROJECTS by construction phase in 2009

	COMPLETED			BROKE GROUND			DESIGNED		
	Number of projects	Number of beds ¹	Construction cost ²	Number of projects	Number of beds ¹	Construction cost ²	Number of projects	Number of beds ¹	Construction cost ²
Entire acute-care hospitals	164	10,794	\$8,486.2	163	17,016	\$16,363.4	241	28,622	\$28,356.5
Acute-care expansions	324	9,284	8,237.6	267	8,333	8,136.1	355	12,263	12,637.5
Acute-care renovations	1,065	5,861	3,769.0	516	3,551	2,291.6	950	10,029	5,737.9
Entire rehabilitation hospitals	46	566	142.4	25	2,273	849.5	56	1,845	1,800.6
Rehabilitation expansions	13	114	31.3	3	72	28.0	10	174	77.3
Rehabilitation renovations	18	209	30.9	8	22	12.9	37	466	122.7
Entire specialty hospitals	67	3,173	1,538.2	56	2,209	1,545.1	61	14,100	3,073.1
Specialty expansions	21	270	191.7	19	351	179.8	56	997	644.6
Specialty renovations	81	539	416.3	46	467	493.0	67	2,031	471.6
Entire nursing homes	9	730	123.1	10	1,105	546.7	29	3,958	900.8
Nursing home expansions	5	0	5.8	7	329	51.2	20	521	131.6
Nursing home renovations	15	1,085	70.7	12	743	85.0	29	868	215.6
Assisted-living facilities	16	1,807	469.9	15	1,211	297.7	48	5,280	1,403.9
Assisted-living expansions	9	466	144.0	2	0	2.0	6	132	80.2
Assisted-living renovations	17	297	44.1	2	0	4.3	4	75	2.9
Free-standing outpatient facilities ³	207	34	2,358.1	135	22	1,599.1	232	162	2,816.2
Free-standing outpatient expansions ³	110	9	641.5	95	52	856.1	122	0	746.2
Free-standing outpatient renovations ³	183	36	514.9	116	10	417.2	174	0	648.6
Medical office buildings	141	—	1,538.0	82	—	941.2	139	—	1,535.7
Medical office building expansions	29	—	172.9	17	—	112.9	42	—	148.1
Medical office building renovations	198	—	238.4	110	—	126.2	165	—	282.3
Research facilities	107	—	3,056.7	85	—	3,037.9	143	—	3,386.0
Parking garages	62	—	644.7	50	—	492.4	71	—	873.4
Other	36	220	223.6	23	179	251.7	29	100	399.5
Category totals	2,944	35,494	\$33,089.9	1,864	37,936	\$38,720.8	3,086	81,623	\$66,492.7

¹New or replacement. ²In millions.

³Facilities may be on- or off-campus. If on-campus, may be independent or physically connected to main hospital.

Note: Seven respondents did/could not provide data for this table. Figures are from projects reported by architecture and design/build firms only, representing 107 companies. Projects reported by construction management firms, general contractors and development firms are excluded to avoid duplication.

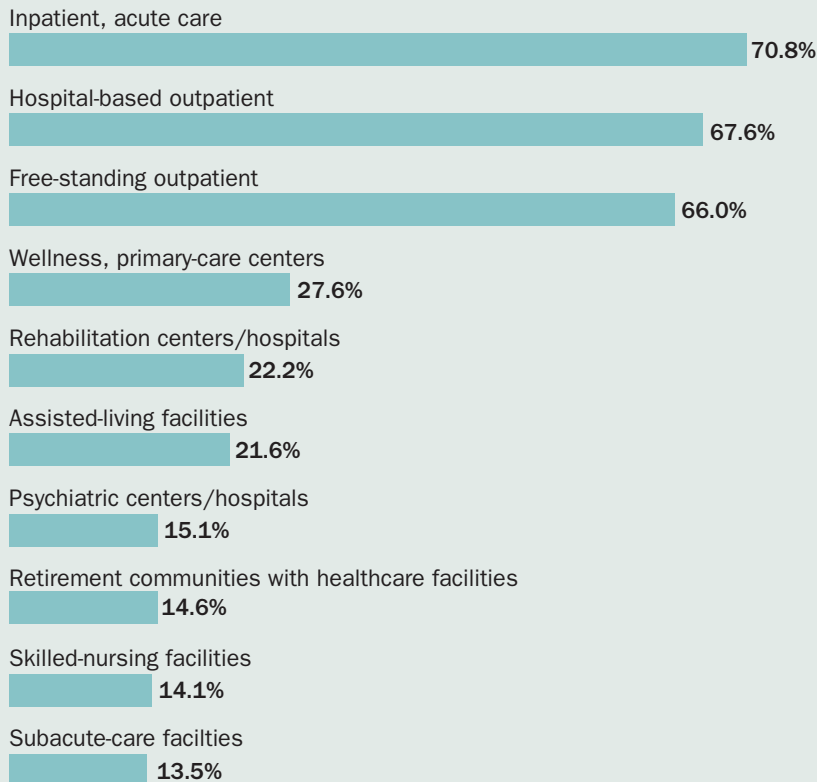
Source: Modern Healthcare's 2010 Construction & Design Survey

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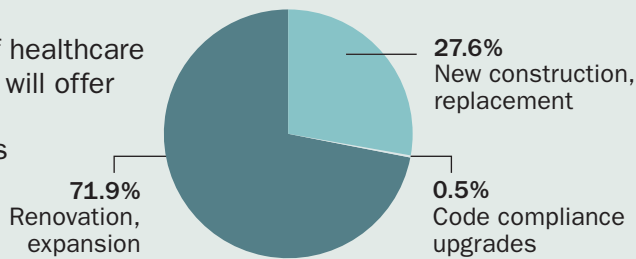
2010 CONSTRUCTION AND DESIGN SURVEY

EMPHASIS ON THE HOSPITAL

What sector of healthcare construction will offer the biggest opportunities in 2010?



What type of healthcare construction will offer the biggest opportunities in 2010?



Based on responses from 185 participating companies. Respondents could choose more than one