



## Market Needs and Strategic Master Facility Planning

### Facilitators:

- Ann King, Partner, BKD CPA's and Advisors
- Brian Haapala, Senior Underwriter, Dougherty Mortgage
- Bryan Eubank, Preconstruction Manager, The Neenan Company
- Charles Ervin, senior Vice President, Dougherty Mortgage
- Eric Lopata, Director, BKD CPA's and Advisors
- Joe Ashcraft, Project Architect, The Neenan Company
- Michael Curtis, VP Healthcare, The Neenan Company
- Whitney Churchill, Project Architect, The Neenan Company

**Thursday, September 7, 2017**

### Boards of Cooperative Educational Services, (BOCES) 665 N. Tyler, Pinedale

01:00 PM	Introductions	Michael
01:45 PM	Overview of the 3-day Planning Event	Michael
02:00 PM	Overview of National Healthcare Market Trends	Ann & Brian
02:30 PM	Overview of Past Studies	Brian
03:00 PM	Break	Participants
03:15 PM	Introduce Guiding Principles and Conditions of Satisfaction	Michael
03:30 PM	Small group GP and COS huddle and report out	Participants
04:30 PM	Service area definition, demographics, market needs and capture	Brian
05:15 PM	Check – out and Plus Delta	Michael



## Market Needs and Strategic Master Facility Planning

Friday, September 8, 2017

### Boards of Cooperative Educational Services, (BOCES) 665 N. Tyler, Pinedale

08:00 AM	Introductions	Michael
08:30 AM	Overview of GP, COS, Market Demographics, and Overview of Today and Tomorrow	Brian
08:50 AM	Small Group Market Capture Strategies	Participants
10:00 AM	Break	Participants
10:15 AM	Teams Report out Market Capture Results	Participants
11:00 AM	Introduce Site Assessments – Choosing by Advantage	Bryan
11:45 AM	Report out on Site Assessments	Participants
12:15 AM	Lunch	Participants
01:00 PM	Introduce Financial Forecast	Ann & Eric
01:45 PM	Department Space Needs Program and Adjacency intro	Whitney
02:00 PM	Department Adjacency Game	Participants
03:00 PM	Break	Participants
03:15 PM	Report out on Departmental Adjacencies	Participants
03:45 PM	Project Cost Assumptions and Benchmarking	Bryan & Michael
04:15 PM	Teams Report out on Target Budget	Participants
04:45 PM	Break	Participants
05:00 PM	Financing Options	Brian
05:30 PM	Check – out and Plus Delta	Michael



## Market Needs and Strategic Master Facility Planning

Saturday, September 9, 2017

### The Marbleton Senior Center, 111 Rakestraw Ave., Marbleton

08:30 AM	Introductions	Michael
09:15 AM	Overview of Market Strategies, Departmental Program, Departmental Adjacencies, Project Costs, Financing, and the Day	Whitney, Brian & Bryan
09:45 AM	Branding and Aesthetics Game Intro	Whitney
09:30 AM	Small Group Branding and Aesthetic	Participants
10:30 AM	Break	Participants
10:45 AM	Report out on Brand/Aesthetics	Participants
11:15 AM	Pull Planning Schedule Intro	Bryan
12:00 PM	Lunch	Participants
1:00 PM	Report out on Schedules	Participants
1:30 PM	Market Capture, Financial Model, and Financing Assumptions	Ann, Eric & Brian
2:15 PM	Next steps	Michael
2:45 PM	Check – out and Plus Delta	Michael