

Key Planning Considerations for Developing New Campus Facilities

Independent school administrators are often tasked with spearheading and coordinating the development of new school facilities including renovations and new construction projects. Effective planning calls for the timely coordination of a wide range of activities including: project scope, design and cost analysis; land use and entitlement review; construction contracting and permitting; capital fundraising and debt financing; and legal and transaction documentation. The session will describe the key issues to consider and some helpful guidance to assure an inclusive, thoughtful and comprehensive planning process. Heads of Schools and Chief Financial Officers of select Florida independent schools will present case studies of capital projects and financings completed by their schools.

Matt Bleakley, LEED AP+ BD+C, Senior Project Manager, The Whiting-Turner Contracting Company

Matt Bleakley is a Senior Project Manager with 19 years in the construction industry, all with Whiting-Turner. Matt has worked on a wide variety of projects including historic restoration, adaptive re-use, high-tech semiconductor fabrication, mission critical data centers and currently in themed entertainment. Matt has overseen projects ranging in size from \$1.5M - \$750M accumulating nearly \$4B in project oversight over the course of his career. Recently, Matt has been involved in multiple projects utilizing lean delivery methods including Target Value Design (TVD), Last Planner System (LPS/pull planning) and the implementation of large-scale live project dashboards for data visualization. Matt received his B.S. in Geoscience from Lehigh University in 2001.

David Mahler, Head of School, The Out-of-Door Academy

David Mahler is the Head of School at The Out-of-Door Academy and has served in this leadership role since 2004. David received his B.A. in history from Wesleyan University and Ed.M. in curriculum and instruction from the University of Virginia. David was elected to the Florida Council of Independent Schools Board of Directors in 2007 and has served FCIS in a variety of leadership roles as the Chair of the Accreditation Commission, Secretary, Vice-President, President and he currently serves as Immediate Past President. He serves on the National Association of Independent Schools Commission on Accreditation overseeing the accreditation process for thousands of schools across the United States, Canada and beyond. David volunteers for several non-profit organizations in the Sarasota community including serving on The Continuous Improvement Advisory Board for the College of Education at the University of South Florida Sarasota-Manatee (USFSM). He also co-teaches the Southern Association of Independent Schools' Institute for Strategic Leadership providing instruction and mentoring for aspiring leaders from across the country on strategy development and organizational change. Prior to his appointment as the Head at Out-of-Door, David was the Academic Dean at the Collegiate School in Richmond, VA. He also served as the Director of the Virginia Association of Independent Schools New Teacher Institute and founded and led the JRPO Academic Dean Benchmarking Group, bringing independent school leaders from across the country together to analyze academic performance, align curriculum and encourage program development. David has worked for over 25 years in every facet of independent education including serving as a teacher, coach, and administrator in both boarding and day school settings.

Michael Wiener, Partner, Holland & Knight

Mike Wiener has a dedicated practice in public finance and has worked as bond counsel, borrower's counsel and disclosure counsel for numerous bond offerings conduit non-profit borrowers (including private schools and colleges) and governments throughout the State of Florida. He also represents banks and their subsidiaries involving direct placements of debt, letters of credit and standby bond purchase agreements. Mike is a graduate of the Florida State University College of Law, J.D., magna cum laude as well as Binghamton University, B.S., Business Administration, magna cum laude. He has published numerous articles and is a frequent guest speaker on municipal finance issues.

Christopher Wienk, Principal, Wye River Group

A graduate of the University of Maryland (BS Finance, MBA), Mr. Wienk has 20 years of experience providing financial advisory services and has served as lead or co-lead advisor on over 300 tax-exempt and taxable bond financing for a wide array of non-profit and governmental clients around the country. He routinely provides financial modeling and credit analysis in support of the firm's financial advisory assignments and has extensive experience preparing debt capacity and affordability studies, finance plans, rating agency presentations and analyses of virtually any form of debt financing. Mr. Wienk co-leads the firm's competitive financing solicitation efforts and derivative advisory practice. He is a Registered Municipal Advisor (MSRB Series 50).

Additional Information

Participants will earn 1 CPE credit.

Field of Study: Finance

Prerequisites: Basic knowledge of independent school finances

Advanced Preparation: None

Program Level: Update

Delivery Method: Group Live