Healthcare Facility Hub • Field Briefs

17-City Hospital Design Demand Quick Sheet (Free Condensed Summary)

Current version — Oct 31, 2026
Update history: healthcarefacilityhub.org/designer-demand-briefs/

THE NATIONAL FRAME: WHAT'S ACTUALLY BEING RENOVATED IN AMERICA'S HOSPITALS

Most hospital construction occurs inside facilities that cannot close. Across all 17 markets, six structural drivers dominate: (1) **Above-ceiling MEP renewal** (air handlers, medical gas, plumbing, electrical) replacing 1950s–70s infrastructure; (2) **Technology turnover** requiring full gut-rebuilds of imaging suites (hybrid ORs, robotic cath labs, MRI crane-ins); (3) **Behavioral health build-outs** (ED pods, ligature-resistant inpatient conversions); (4) **Decanting care** to outpatient surgery centers and retail/office adaptive reuse; (5) **Climate & grid hardening** (flood gates, rooftop mechanicals, 4-day off-grid generation); and (6) **Single-bed private room conversions** to flex acuity. "*The mix is national; the emphasis is local.*"

MARKET / PROFILE	WHAT IS BEING RENOVATED / BUILT	WHAT IS DRIVING IT	WHERE THE DESIGN WORK SITS
Boston, MA MEGAPROJECTS	**Mass General Ragon:** 1.8–2.0M sq ft, 482 singles replacing doubles, 23 CV ORs ($1.9B–$3.1B). **Dana-Farber:** 14 stories, 300 beds ($1.675B). **Brigham Braunwald:** 564-bed tower replacement.	27 MA hospitals at >90% occupancy; MGB AMCs at "capacity disaster" 95% of time (102 ED boarders/day). Steward bankruptcy reshuffle. DoN gate: $27,668,903.99 + 5% CHI.	Decant & swing space on packed Longwood blocks; double-to-single conversions; coastal flood elevation +2ft freeboard; 4-day off-grid power.
Charlotte, NC BEHAVIORAL HUB	**Atrium University City / Mallard Creek:** Converting commercial building into 168-bed psych hospital (net +102 beds). $340M 5-year program adds behavioral ED & crisis unit.	Behavioral ED visits up 13% over 6 yrs; pediatrics = 26% in 2025. Renovation buys 12–18 months over new ground-up construction.	Ligature-resistant hardware, anti-barricade door swings, anchor-point elimination; sight lines & zoned progression; existing shell survey.
Columbus, OH SHELLED & BACKFILL	**OSU Wexner:** 26-story, 1.9M sq ft, 820 rooms ($1.9B; moved 425 patients in <8 hrs). James Cancer backfill (+148 beds). **Dublin:** Mount Carmel ($273M) & Dublin Methodist tower ($250M).	Regional boom from New Albany data centers & semiconductor fabs. Aging population over 65 in Dublin. 4 systems expanding simultaneously.	Activation & decant planning; backfill reuse of vacated towers; shelled-space planning for phased fit-out; tail MEP fire & chiller renewal.
Dallas–Fort Worth, TX NO-CON BOOM	**Moody Children's:** $5B pediatric campus, 5M+ sq ft, 552 beds, 96 NICU, 90 ED. **Parkland:** $54M build-out of 2 shelled floors (112 beds). **JPS:** $1.5B replacement. **Methodist Celina:** 51 to 300+ beds.	+123,557 people/year (metro 8.48M). No CON law since 1985. Post-Uri water failure memory; ERCOT 91GW peak demand stress.	Shell fit-out inside operating public hospitals; expandable campuses; water continuity, dual feeds, 45,000-gal diesel fuel storage specs.
Denver, CO SHELLED SHELLS	**Parker:** $300M tower (60 beds; floors 5–7 shelled to 329 beds). Shelled floors at St. Anthony North & Swedish labs. **Broomfield race:** UCHealth North (367k sq ft) vs AdventHealth 43 acres.	No CON gate (CDPHE / FGI conformity). AdventHealth–Intermountain 8-hospital JV. Douglas County up 11.35%, Weld up 14.2%. Marshall Fire & hail.	Standing pipeline of shelled floors delivered in operating hospitals; entitlement speed in site-plan races; smoke-load HVAC & hail resilience.
Houston, TX FLOOD BASTION	**TMC Flood Hardening:** Submarine gates, elevated vaults, ride-out plant. **Harris Health:** $2.5B bond ($2.9B program) centering on $1.6B 12-story LBJ hospital (390 beds + 60 shelled).	Allison (2001) & Harvey (2017; 50"+ rain); TMC district subsidence >3.5 ft. Public hospitals 30+ yrs old needing modernization & trauma decentralization.	Building must operate through disaster, not reopen after; elevation & pump engineering on subsiding land; phased build in dense medical center.
King County, WA DISTRICT LEVIES	**EvergreenHealth Kirkland:** $170M 2-Silver expansion (7 ORs, 6 cath, 1 hybrid in 73k sq ft shell). **Valley Medical Renton:** $60M cancer center. **Snoqualmie Valley:** $147M hub (4 ORs).	Public hospital district voter levy lifts (Evergreen 60.8%, Valley 57.5%). DOH Construction Review Services + Clean Buildings deadlines.	Occupied hospital surgical builds (ICU above, ED below); public works GC/CM procurement; shell-to-clinical rooftop MEP integration.
Los Angeles, CA 2030 SEISMIC	**Harbor-UCLA:** $1.806B 9-story tower (347 beds, psych ED) for 2028 Olympics. **LA General:** $118.7M seismic retrofit. **Cedars-Sinai:** 9-story swing tower (203 beds) & Marina del Rey.	Jan 1, 2030 acute care seismic mandate ($9B–$39B county compliance cost; AB 869 excludes large systems). Overcrowded EDs despite -3.2% population. Fires.	The decant as product: swing towers and footprint subtraction to keep hospitals licensed during retrofit; HCAI filing strategy; wildfire smoke HVAC.
Nashville, TN CON SUNSET	**Vanderbilt Jim Ayers:** $500M 495k sq ft tower (180 beds + shelled). **TriStar Skyline:** $133.6M tower. **Clarksville rush:** VUMC $600M acquisition; TriStar ($286M) & Saint Thomas ($148.5M).	VUH at >90% capacity year-round; metro +8.7% population. CON sunsets: July 2028 (satellite ED & cath) and July 2030 (acute care). 2010 flood memory.	Floor-by-floor phased occupancy inside live campuses; preparing for post-2028 satellite ED speed races; flood-protected MEP above 2010 levels.

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Northern Virginia OFFICE ADAPTIVE	**Inova Alexandria:** $2.5B program: Landmark Mall replacement (1.1M sq ft, 192 beds) & Franconia-Springfield (110 beds). **ExxonMobil Campus:** 4 office buildings into wet labs & cancer clinics.	Replacing 1962 hospital. Loudoun County hyper-growth; Inova Loudoun inpatient volumes exceeded licensed capacity in 2025. Suburban office vacancy.	Conversion design: threading 30 specialty hospital systems into commercial office structures; corporate security to public access conversion; 2028 activation.
Phoenix, AZ EXTREME HEAT	**Mayo Clinic Phoenix:** $1.9B expansion (1.2M sq ft, +60% clinical space, 11 ORs, 48 beds). **Valleywise:** 673k sq ft replacement ($935M bond) + $898M Prop 409 (behavioral & clinic pipeline).	Maricopa population growth. Heat emergency: 31 consecutive days ≥110°F (July 2023 avg 102.7°F). Funded bond pipelines (2014 bond + Prop 409).	MEP cooling plant redundancy under peak grid stress (cooling never sheds load); envelope/shading as clinical infrastructure; water reuse on Colorado River.
Portland, OR STAFFING RATIOS	**OHSU Vista Pavilion:** $650M cancer tower (128 beds + 56 shelled). **Kaiser Sunnyside:** $1.66B 308-bed all-electric hospital (LEED Gold). **Providence Portland:** 96 shelled beds fit-out.	Staffed-bed shortage (129 empty beds at Legacy); HB 2697 1:4 med-surg ratios ($10k/day fine). 2021 heat (116°F), AQI 509 smoke; low seismic trigger ($386k).	Space planning for phased unit openings as staff hired; all-private acuity-flex rooms; dual-state regulation (OR 2018 FGI vs WA code across river).
San Jose, CA COUNTY REBUILD	**Santa Clara Valley:** 50 active projects ($719M) with lease revenue bonds. **Regional Medical Center:** Acquired for $150M; restoring Level II trauma, stroke, STEMI, ED, maternity.	2030 seismic deadlines (drawings submitted March 2026, compliance by Feb 2030). County public reinvestment; amenity competition against tech employers.	Structural surgery on live hospital buildings; service line restoration inside active hospital; amenity spaces (cafes, retail, respite) treated as serviced programs.
Seattle, WA TRAUMA ANCHOR	**Harborview:** $1.74B voter bond slipping to 2032 / $2.25B (new tower, 360 single rooms, Center Tower retrofit). **Seattle Children's:** 1.1M+ sq ft research & GMP cell therapy.	Chronically overcrowded 4-state trauma anchor (WA, AK, ID, MT). Severe seismic risk ("seismic story wearing capacity clothes"). Bond inflation gap.	Phasing inside live 24/7 Level I trauma center; GMP cleanroom manufacturing planning; scope and program re-planning under bond funding gaps.
Skagit County, WA DECANT STRATEGY	**Skagit Valley Hospital:** $23.4M surgery center decant (4 ORs, 3 endo; converting to 5th OR). Main hospital: 1950s kitchen renovation & roof-panel crane-in for Siemens 1.5T MRI.	In-hospital OR cost >$1,200/sq ft before infection risk; 6 main ORs over capacity. Mount Vernon flood code (critical facilities +3ft above BFE); Category D1 seismic.	Decanting high-risk surgery to preserve hospital capacity; phased back-of-house MEP (temporary kitchens, roof panels); surgery center gas/boom upgrades.
Snohomish County, WA NON-TOUCHING BUILD	**EvergreenHealth Monroe:** $382.6M application for 190k sq ft replacement hospital (26 to 48 beds, 6 ORs, behavioral ED). Swedish Edmonds: Infusion & behavioral doubled.	Accretion of older additions; only hospital between Everett & Wenatchee. WA 60% bond threshold (55.6% in Aug 2026; re-vote Nov 2026). Split landlord-tenant leases.	Non-touching replacement design beside active 24/7 hospital with same-day move cutover; design scope following split lease boundaries; behavioral drop-offs.
Whatcom County, WA SINGLE-HOSPITAL COUNTY	**PeaceHealth St. Joseph:** $401M Peter Paulsen Pavilion (Turner/Savely; 6 stories, 80 singles, unified ED, rooftop helipad). 6-OR ASC ($12.5M). Lummi Nation 16-bed crisis center.	No hospital district; beds fixed at 207 for 20 yrs; midnight occupancy 10–18% above target; ORs at 118%. Next hospital 64 miles away. Philanthropy funding ($74M).	Occupied trauma site logistics (33 ED stalls closed for stormwater, cafeteria fire egress, noise mitigation); direct elevator from rooftop helipad to ED; tribal design.

1. Regulatory Gate Split
In CON states (MA, WA, NC), projects require statutory justification and capital threshold filings (e.g. MA $27.67M + 5% CHI). In no-CON states (TX, CO), design firms win on speed-to-market, site planning, and entitlement hearings.

2. Shelled Space is the Revenue Pipeline
Denver, Dallas, Columbus, and Portland build massive shelled capacity on day one (e.g., Parker floors 5–7, Parkland 112 beds). The real design revenue sits in the second-wave, phased clinical fit-out contracts.

3. Climate Hardening is Non-Negotiable
Resilience cannot be value-engineered: Houston submarine flood gates, Boston +2ft freeboard and 4-day off-grid generation, Dallas Uri water storage, Phoenix extreme heat cooling redundancy, and California 2030 seismic mandates.