



12 Facility Planning Mistakes Every Charter School Makes

(and how to avoid them)

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Or . . . the stuff other people
don't, won't, or can't tell you!

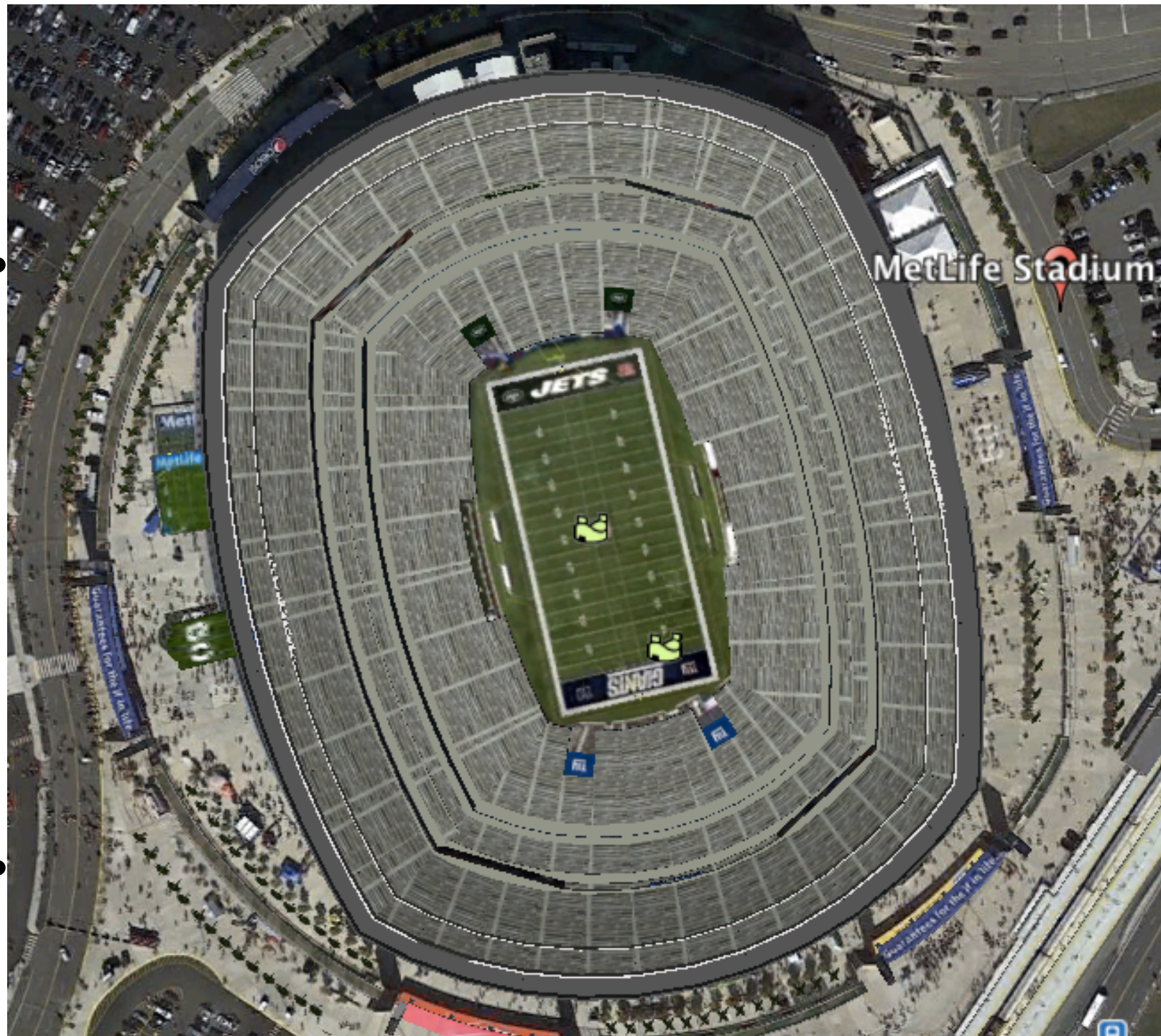


Order of Events

1. Why This Guy?
2. Small Team Task
3. Conversation
4. 12 Mistakes - 12 Fixes

Why this guy?

- HighMark School Development
 - ✓ Since 2005, \approx 50+ charter school facilities in 16 states
 - ✓ \$500+ million deployed as facility developer
 - ✓ 2.3 million SF of charter school space = 60 acres
- Prior: Largest charter school builder in the US
 - ✓ \approx 350+ new-builds & renovation; \approx \$650 million in construction; 20 states
 - ✓ 5.6 million SF of charter school spaces = 128.5 acres



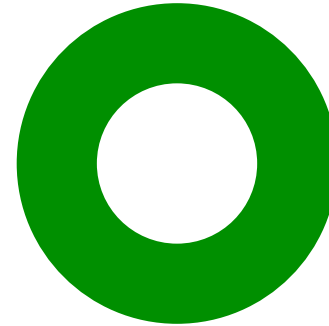
Why this guy?

- Perspective . . . MetLife Stadium: 17-acre footprint.
 - ✓ 60 Acres + 128.5 Acres of charter school spaces
 - ✓ **3.5X + 7.5X** MetLife Stadium Footprints
 - ✓ **= 11X MetLife Stadium Footprint**
- Not one man's opinion
 - ✓ Tactical, practical, real world
 - ✓ Facts, patterns, best practices, and norms

1. Wrong Language



Using the word
“estimates”

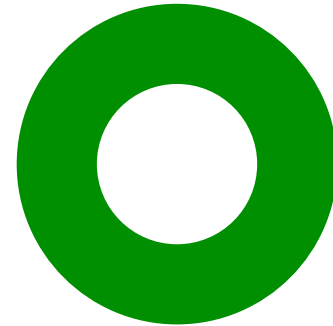


Discuss “targets.”
They demonstrate
intention. Early
estimates are
irresponsible.

2. Flawed Thinking



**Thinking like
a charity or a
traditional
district**

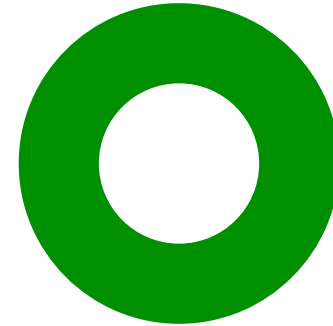


**Think like a
business.
Don't fear
the profit.**

3. Wrong Sizing



**Under
budgeting
rent &
Over sizing
spaces**



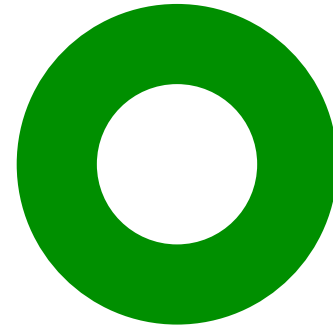
**Target 15-20%
for rent.**

**Target 65-75
SF/student.**

4. Occupancy Assumptions



**Assuming
occupancy
rights**



**Understand
that zoning
and codes
matter.**

5. Expectation Errors



Expecting
known things
too early or
free, accurate
answers

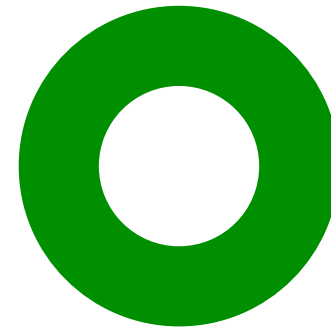


Unknown
things become
known over
time.
Facts cost \$\$\$.

6. Control Assumptions



**Thinking you
call all the
shots**

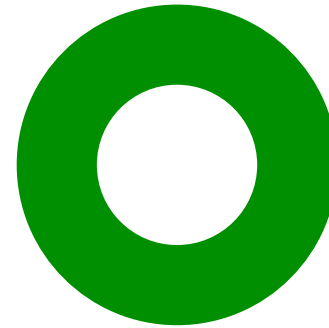


**Other
stakeholders
matter.**

7. Wrong People – Wrong Order



Talking to . . .
Wrong people
Wrong order
Wrong stuff

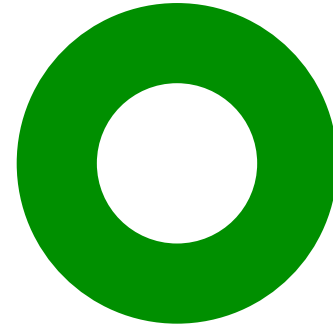


- 1. Funding**
- 2. Budget**
- 3. Property**
- 4. Needs**
- 5. Builder**
- 6. Architect**

8. Attorney Engagement



**Improper use
of an attorney**

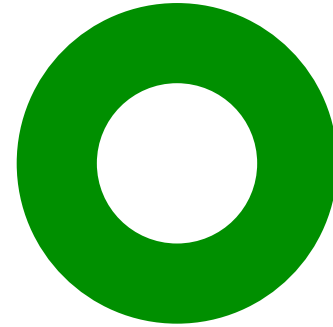


**You make the
business
decisions.
Attorneys
advise on
compliance.**

9. No Reference Checks



**Failing to check
references**

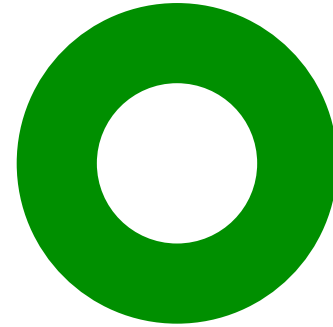


**Call, visit sites,
interview with
past clients,
review
documents, dig
deeply.**

10. Wrong Questions



**Failing to ask
the right
questions**

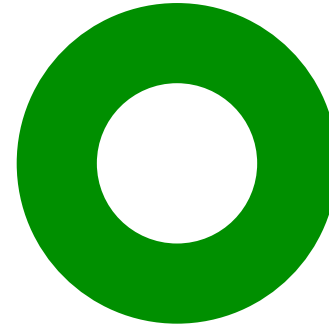


**Use
Beausoleil's
tactical and
practical 4C's
question
sheet.**

11. Denial – Presumed Malice



**Failing to
deal with or
deliver bad
news**

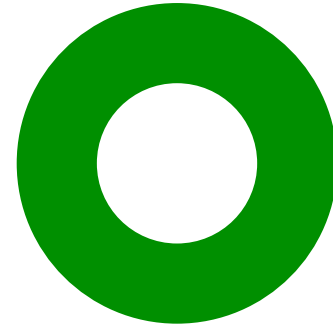


**Information is
neutral.
Assume no
malice. Shift
targets.**

12. No Backup Plan



**Failing to have a
backup plan**



**Keep a
contingency
plan until you
have a
guaranteed
move-in date.**

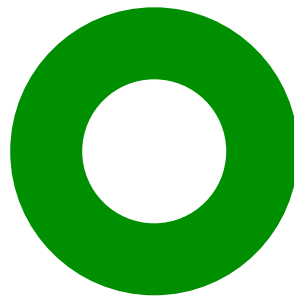
The 12 Mistakes

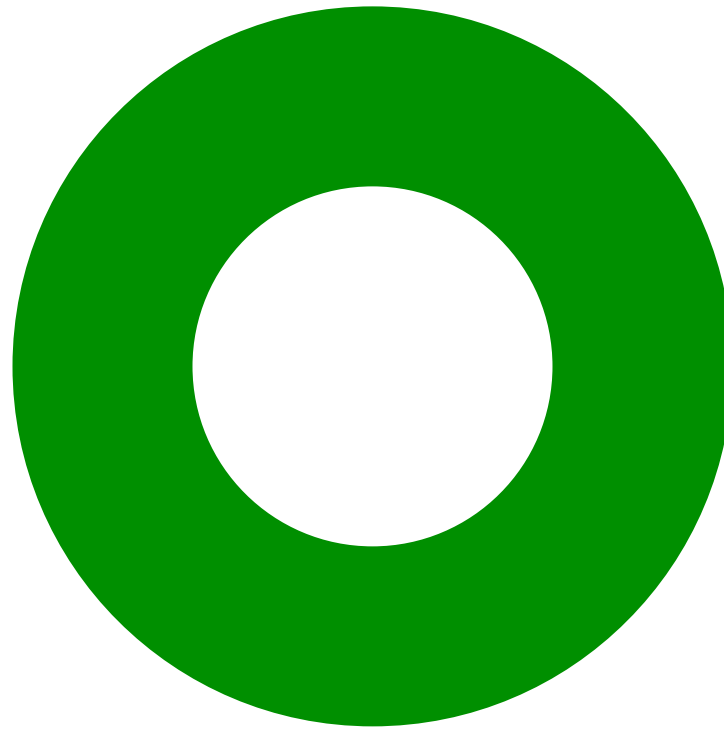
1. Wrong Language
2. Flawed Thinking
3. Wrong Sizing
4. Occupancy Assumptions
5. Expectation Errors
6. Control Assumptions
7. Wrong People & Order
8. Attorney Engagement
9. No Reference Checks
10. Wrong Questions
11. Denial – Presumed Malice
12. No Backup Plan



The 12 Fixes

1. Targets not estimates
2. Think like a business
3. 65-75 SF; 15-20%
4. Zoning matters
5. Facts cost \$\$, take time
6. Others exert control
7. Follow the right order
8. Use lawyers properly
9. Check references
10. Ask the right questions
11. Deal with reality
12. Have a backup plan





12 Facility Planning Mistakes . . . That You Won't Make

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