



12 Facility Planning Mistakes Every Charter School Makes

(and how to avoid them)

New Mexico Edition

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



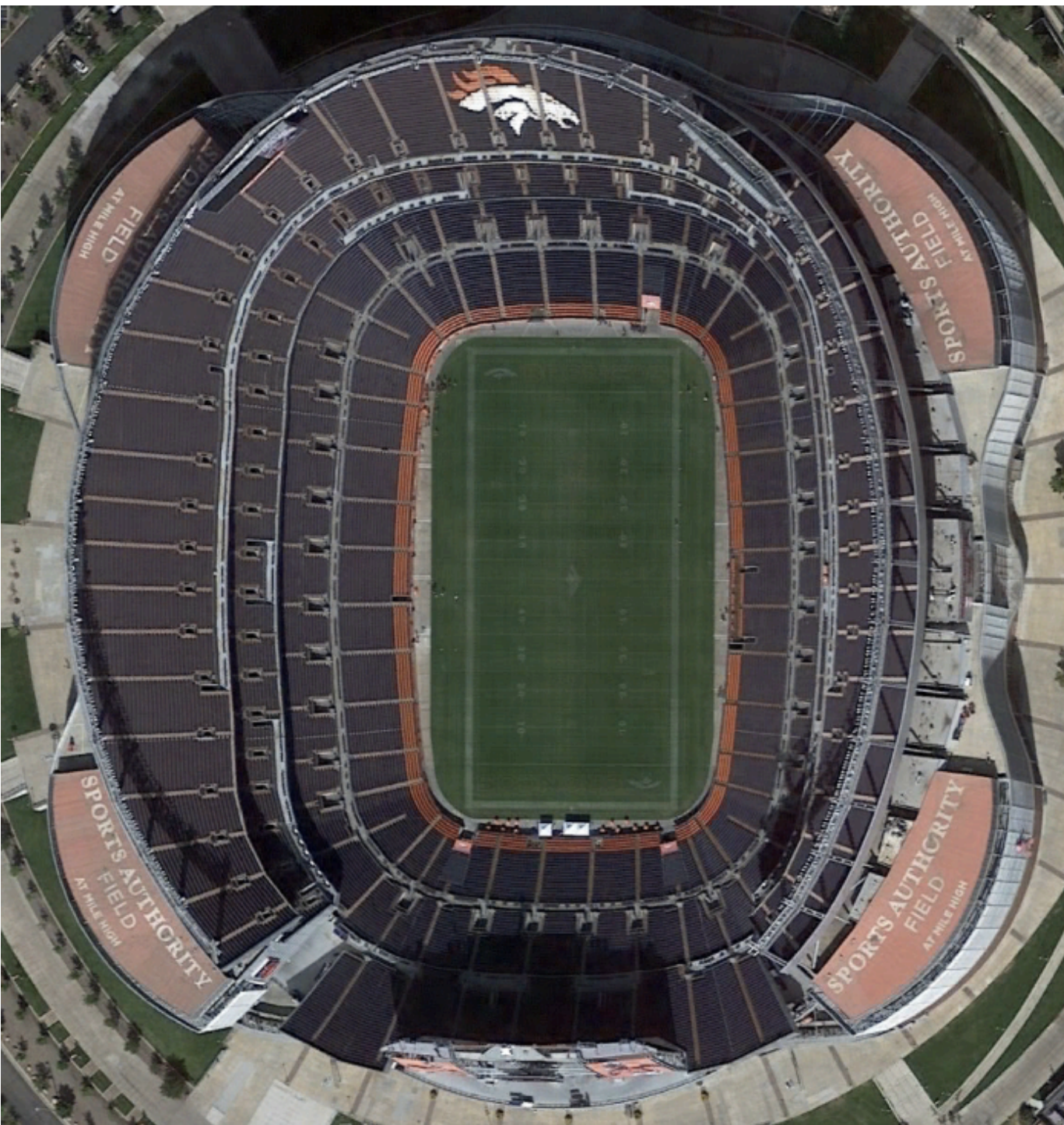
Order of Events

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

Why this guy?



- HighMark School Development
 - ✓ Since 2005, \approx 60 charter school facility projects in 15 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 400 new-builds & renovation; \approx \$650 million in construction; 20 states
 - ✓ 5.6 million SF of charter school spaces = 128.5 acres

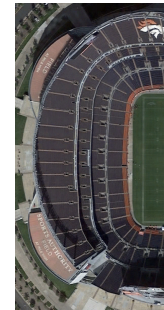
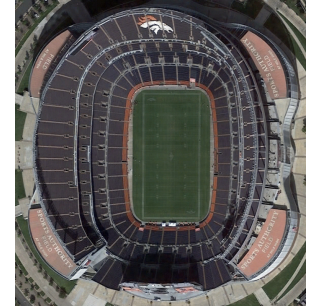
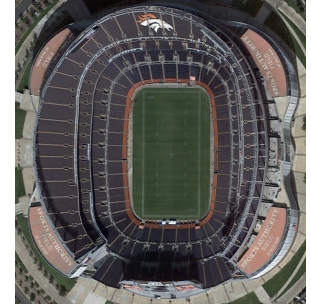


Why this guy?



- Not one man's opinion
 - ✓ Tactical, practical, real world
 - ✓ Facts, patterns, best practices, and norms
- Perspective . . .
 - Mile-High Stadium in Denver = 13-acre footprint
60 Acres (developer) + 128.5 Acres (builder)
of charter school spaces =

14.5 X Mile-High Stadium Footprint In New and Renovated Charter School Spaces



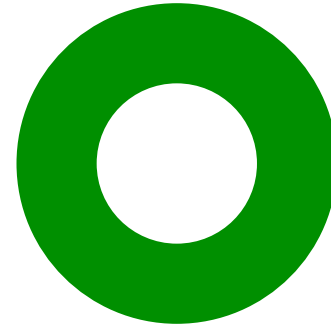
Team Task



1. Wrong Language



Using the word
“estimates”

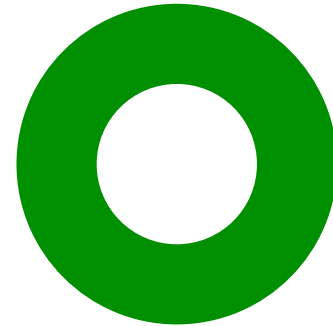


Discuss “targets.”
They demonstrate
intention. Early
estimates are
irresponsible.

2. Flawed Thinking



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

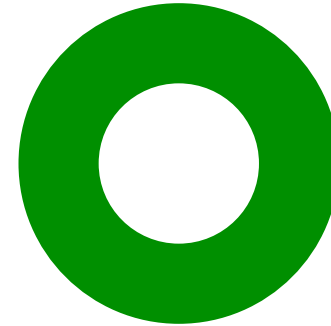


**Think like a
business.
Don't fear
the profit.**

3. Wrong Sizing



**Under
budgeting
rent &
Over sizing
spaces**



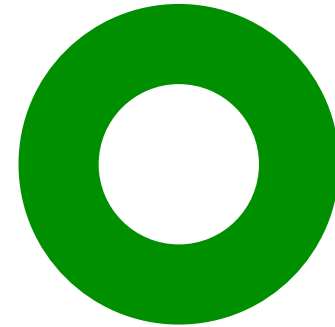
**Target 15-20%
for rent.**

**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

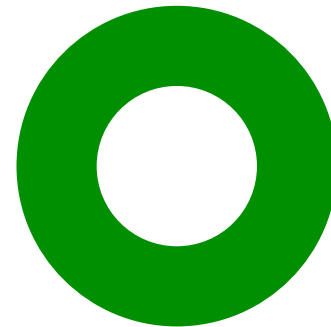


Unknown
things become
known over
time.
Facts cost \$\$\$.

6. Control Assumptions



**Thinking you
call all the
shots**

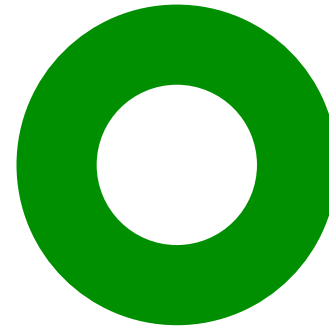


**Other
stakeholders
matter.**

7. Wrong People – Wrong Order



Talking to . . .
Wrong people
Wrong order
Wrong stuff

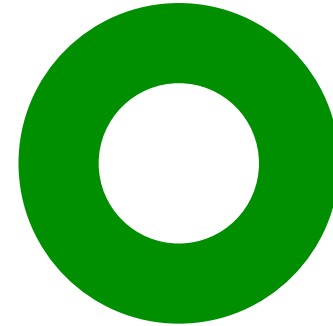


- 1. Funding**
- 2. Budget**
- 3. Real Estate**
- 4. Needs/Wants**
- 5. Builder**
- 6. Architect**

8. Attorney Engagement



**Improper use
of an attorney**

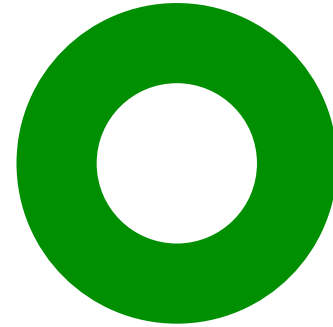


**You make the
business
decisions.
Attorneys
advise on
compliance.**

9. No Reference Checks



**Failing to check
references**

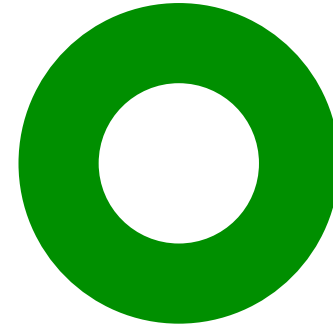


**Call, visit sites,
interview with
past clients,
review
documents, dig
deeply.**

10. Wrong Questions



**Failing to ask
the right
questions**

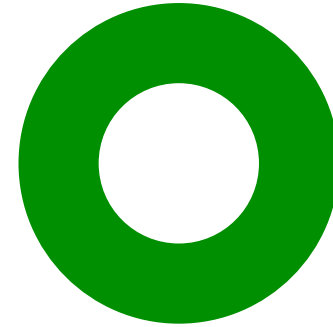


**Use
Beausoleil's
tactical and
practical 4C's
question
sheet.**

11. Denial – Presumed Malice



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

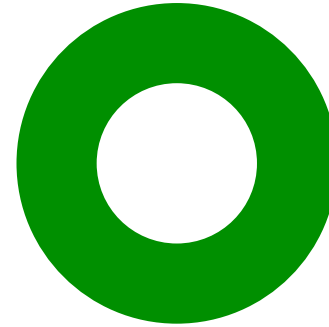


**Information is
neutral.
Assume no
malice. Shift
targets.**

12. No Backup Plan



**Failing to have a
backup plan**



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

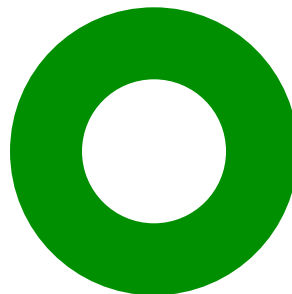
The 12 Mistakes

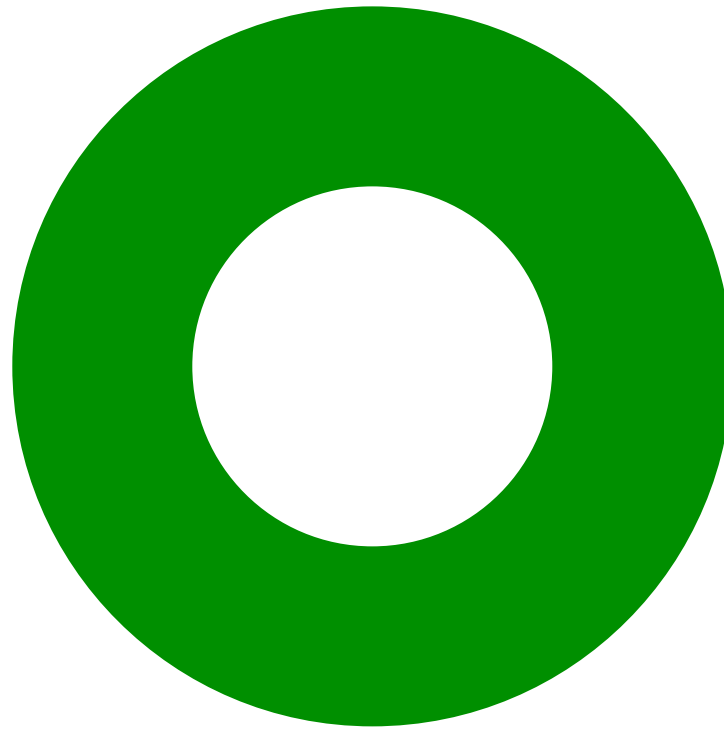
1. Wrong Language
2. Flawed Thinking
3. Wrong Sizing
4. Occupancy Assumptions
5. Expectation Errors
6. Control Assumptions
7. Wrong People & Order
8. Attorney Engagement
9. No Reference Checks
10. Wrong Questions
11. Denial – Presumed Malice
12. No Backup Plan



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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