



# **12 Facility Planning Mistakes Every Charter School Makes**

**(and how to avoid them)**  
**Ohio Edition**

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



# Order of Events

1. **Why This Guy?**
2. **Team Task**
3. **12 Mistakes – 12 Fixes**

# Why this guy?



- HighMark School Development
  - ✓ Since 2005,  $\approx$  60 charter school facility projects in 15 states
  - ✓ \$600 million deployed as education facility developer
  - ✓ 3 million+ SF of school spaces = 69 acres
    - Nearly ALL charters
- 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



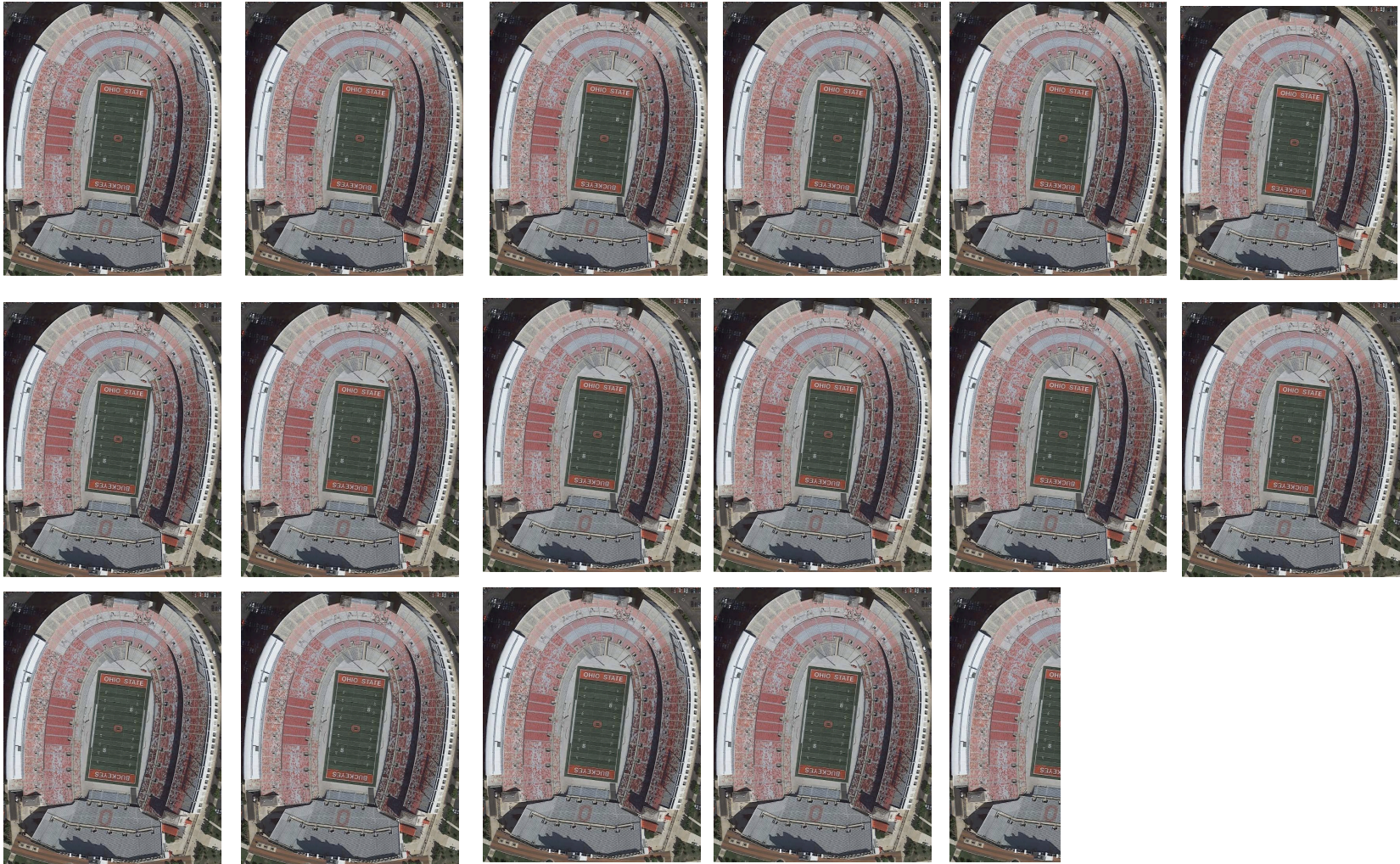


# Why this guy?

- Perspective . . .
  - Ohio Stadium = 12-acre footprint
  - 69 Acres (developer) + 128.5 Acres (builder) =
  - 197.5 acres of (almost exclusively) charter school spaces
- Not one man's opinion
  - ✓ Tactical, practical, real world
  - ✓ Facts, patterns, best practices, and norms



# 16.5 X Ohio Stadium Footprint



# Team Task

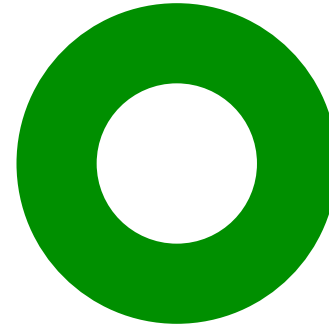




# 1. Wrong Language



**Using the word  
“estimates”**

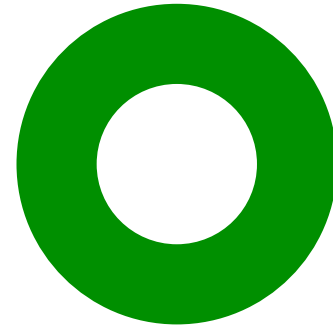


**Discuss “targets.”  
They demonstrate  
intention. Early  
estimates are  
irresponsible.**

## 2. Flawed Thinking



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

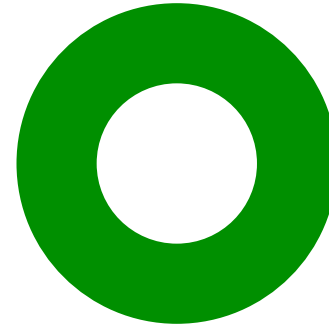


**Think like a  
business.  
Don't fear  
the profit.**

### 3. Wrong Sizing



**Under  
budgeting  
rent & over  
sizing spaces**



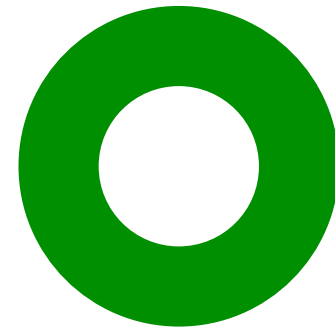
***Target 15-20%  
for rent.***

***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**



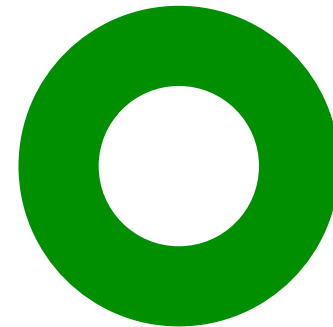
**Unknown**  
**things become**  
**known over**  
**time.**  
**Facts cost \$\$\$.**



## 6. Control Assumptions



**Thinking you  
call all the  
shots**

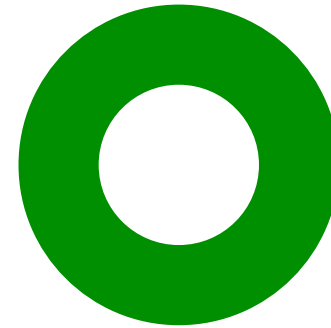


**Other  
stakeholders  
matter.**

# 7. Inappropriate Process



**Talking to . . .**  
**Wrong people**  
**in the**  
**Wrong order**  
**about the**  
**Wrong stuff**

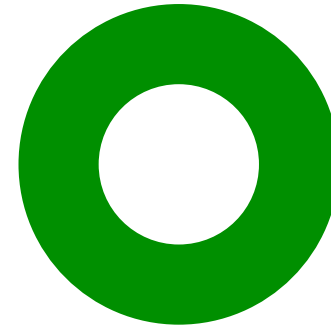


- 1. Funding**
- 2. Rent/Dev. Budget**
- 3. Real Estate**
- 4. Needs & Wants**
- 5. Builder**
- 6. Architect**

## 8. Attorney Engagement



**Improper use of  
an attorney**

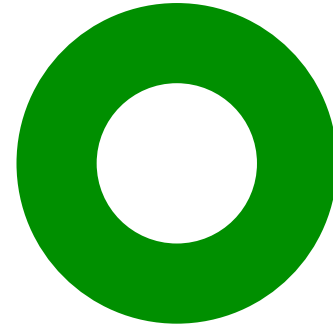


**The board  
makes business  
decisions.  
Attorneys  
advise on  
compliance.**

## 9. No Reference Checks



**Failing to check  
references**

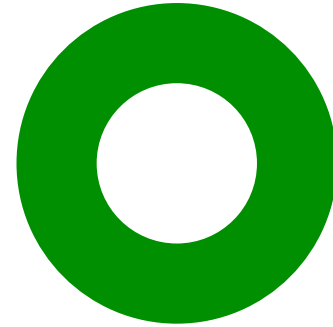


**Call, visit sites,  
interview with  
past clients,  
review  
documents, dig  
deeply.**

## 10. Wrong Questions



**Failing to ask  
the right  
questions**



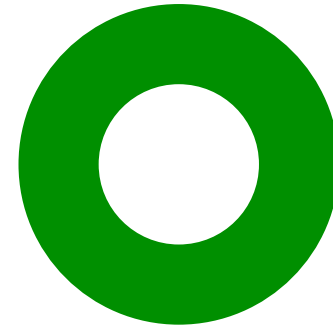
**Use  
Beausoleil's  
tactical and  
practical 4C's  
question  
sheet.**



# 11. Denial – Presumed Malice



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

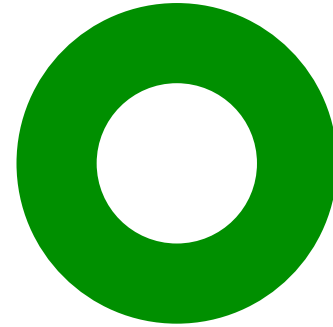


**Information is  
neutral.  
Assume no  
malice. Shift  
targets.**

## 12. No Backup Plan



**Failing to have a  
backup plan**



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

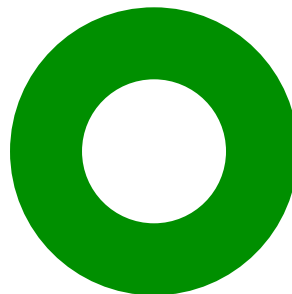
# The 12 Mistakes

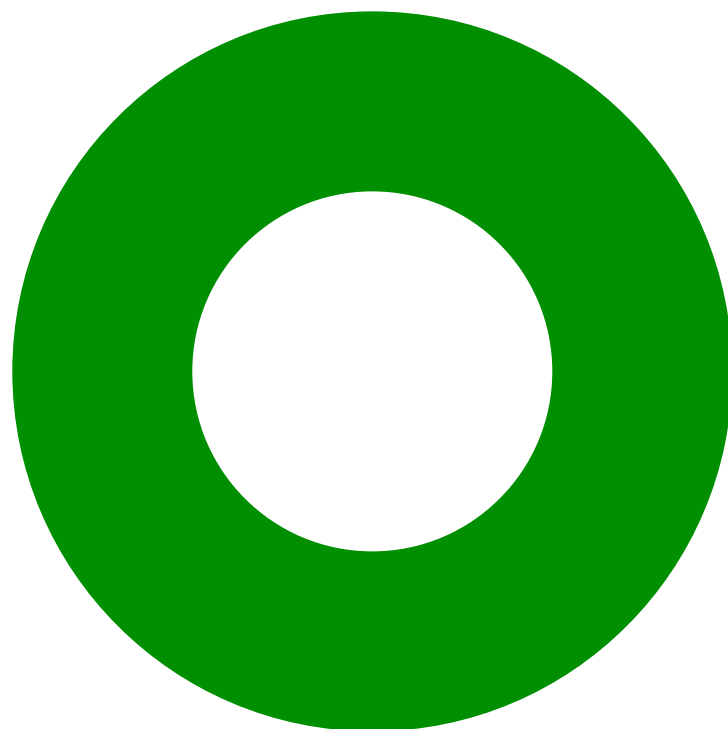
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2. Flawed Thinking
3. Wrong Sizing
4. Occupancy Assumptions
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6. Control Assumptions
7. Inappropriate Process
8. Attorney Engagement
9. No Reference Checks
10. Wrong Questions
11. Denial – Presumed 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 proper 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**