



Florida Charter  
Institute



# Launch Year Training

For schools opening August 2025

**Dana Vignale**  
Charter Support Manager

**Christine Mentis**  
Governance Program Director

Florida Charter School Conference  
November \_\_, 2024

*Powered by Miami Dade College*

## The Presenters



**Dana Vignale**

Charter Support Manager  
Florida Charter Institute

Teacher  
School Principal  
Independent School Head of School  
Executive Director supporting charter schools  
Director of Finance & HR for a network of charter schools  
Financial analyst and budget guru for Building Hope



**Christine Mentis**

Governance Program Director  
Florida Charter Institute

Teacher  
School Principal  
Executive Director of network of charter schools  
Governance support for FCI



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## Today's Agenda

- Getting Started (5 minutes)
- Governance (15 minutes)
- The Business of School (15 minutes)
- Accounting & Finance (15 minutes)
- Marketing & Messaging (10 minutes)
- Student Enrollment (10 minutes)
- Administration and HR (20 minutes)
- Facilities (10 minutes)
- Q & A (20 minutes)

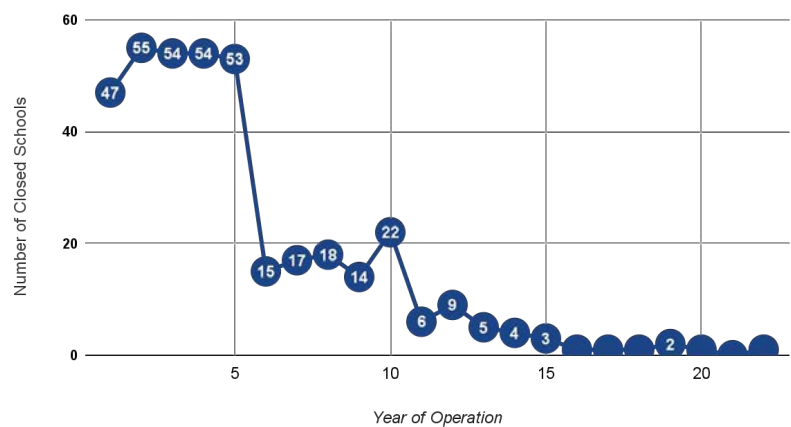
Let's make today interactive!



# Getting Started

**The early  
years are the  
most difficult**

Year Of Operation Charter Schools Closed



Source: State MSID Database data regarding closed public charter schools (October, 2019)

# Services for Schools

Having led charter schools ourselves, we recognize you might not have chosen this work because you love budgeting, facilities planning, or compliance. It all connects to student and school success, however, so understanding the administrative side of running a school is essential. Lean on the CSU to help you with an array of resources, services, and counsel — at no cost to your school.



**Planning & Launching**  
Thoughtful planning, before and after a school receives its charter, is key to a successful opening.



**Boards & Governance**  
New boards need to understand their responsibilities. Veterans need to plan for the school's future.



**Facilities Planning**  
Our experts can help you build the budget, establish expectations, and create an action plan.



**Finance & Budget**  
Whether it's the annual budget or a building project, we can help you maximize your resources.



**Compliance & Grant Administration**  
The CSU can help your school maximize your grant returns and ease the stress of compliance paperwork.



**School Operations**  
Resources and guidance to help charter schools run smoothly and safely.

## ... disclaimers ...

- We are not attorneys
- We are not your financial advisor
- We will collect the name of your school and the type of support provided for reporting our activities



QR Code to a shared resources concerning the topic & the Website to access it

# Slide Format

*"Anything in italics will be a direct quote of a statute or law."*

- Points of interest
- Points of interest
- **RED – Warning! Take Notice!**



QR Code to a webinar or training concerning the topic & the Website to access it

**Go In  
Eyes  
Wide  
Open**

**Opening A Charter**

**It is  
a long  
difficult  
road to  
opening**





### New School Checklist

<https://charter.support/resources/florida-new-school-checklist/>

# New School Checklist



“What’s next?”



Lists of things to be completed for starting a new school



Broken down by phases and topics



Narrative with details



A reference for things to think about



Work in Progress



### New School Checklist Webinar

<https://charter.support/webinar/new-schools-check-list-webinar/>

# Project Management

Managing your project is essential

Starting a school is not a one-person job

Use a task management software/site:

- What do you need?
- Collaborative
- Document storage
- Gantt charts
- Email reminders
- Chat / commenting
- Scheduling
- Mobile access
- Recurring tasks
- Repeatable templates



# Governance



## Onboarding New Board Members

### Onboarding Tasks

- Resume on File
- Complete Fingerprinting/Background Check
- Complete Initial Governing Board Training (4hr)
- Provided Governing Board Manual
- Completed Conflict of Interest Form
- Completed Financial Disclosure Form

### Governing Board Manual

- School Overview: Mission, Vision, Strategic Plan, History
- Calendars: Board Meetings, School, Special Events
- Charter School Contract
- Complete Policy Handbook
- Board Bylaws
- Most Recent Independent Financial Audit
- Annual Budget
- Accreditation Report, School Reviews, etc.
  
- Develop a clear system for organizing and managing documents



**New Governing Board Member Checklist**  
<https://csu.li/new-board-member-checklist>





<http://csu.li/3>

# Governance Training

- 4-hours required.
- Must be completed within 90-days of appointment
- 2-hour refresher every three years
- *Separate from the New Operator Training required at least 30-days prior to opening (Typically in May)*



## Governance Development



**CSU Annual Governance Conference:** This annual hybrid event focuses on serving the needs of Charter School Governing Board Members throughout the state of Florida.

- [Identifying Schools in Early Distress](#)
- [Biggest Legal Mistakes Charter Schools Make](#)
- [Strategies to Support Your Facility Plan](#)
- [Bond Financing: Post-Issuance Compliance & Reporting](#)
- [Creating Data Dashboards](#)
- [Crafting Policies that Prevent the Worst](#)
- [Developing a Powerhouse IT Strategy](#)
- [Effective Governing Board Meetings](#)
- [Setting Up Financial Systems for Success](#)
- [Ethical Considerations for Governing Boards & School Leadership](#)
- [Evaluating a Principal or ED](#)
- [Governing Boards & Compliance](#)
- [How Can the Board Ensure the School is Following ESE Requirements](#)
- [Increasing Community Presence](#)
- [Legislative Updates](#)
- [Risk Management & Insurance](#)
- [Secrets of Strategic Planning Every Board Member Should Know](#)
- [Understanding the Role of the Board with Authorizers & Accountability](#)



**Governance Conference 2024 Presentations**  
<https://flcharterinstitute.org/2024/09/14/2024govconf/>





## Is It Sunny Yet?



Governance in the Sunshine Webinar

<https://charter.support/webinar/governance-in-the-sunshine-part-1/>

The intention of the sunshine requirement is to “provide a right of access to the decision making process of Boards”

- Government in the Sunshine
- Once your contract is signed
- Meetings must be posted
- Communication must be in the sunshine

## Basic Things To Remember

- All official acts must be taken at a public meeting
- No two board members may discuss anything that could potentially come before the Board outside of a public meeting
- Unilateral communication is okay, discussion is not
- Advisory committees are also subject to the sunshine laws
- Cannot use liaisons to circumvent the requirements
- Executive Shade - recommend to only use when attorney tells you to do so

# What Is Quorum?

- Minimum number of people required to make decisions
- Not defined in statute
- Usually defined in ByLaws
- CSP requirements are more than 50%
- Government in the Sunshine manual says quorum must be present in person unless the meeting is following CMT regulations

## Communication Media Technology



• ... Members of the governing board may attend in person or by means of communications media technology used in accordance with rules adopted by the Administration Commission under s. 120.54(5).

- Must provide a physical “access point”
- If technical issues prevent communication, meeting must stop
- Notice must include:
  - Address of all access points (which are open to public?)
  - Contact info for additional information
  - Contact info for sharing written evidence

# Remember Public Records

*“includes all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other materials, regardless of physical form, characteristics or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.”*

- **Must be made available if requested**
- Personnel records are public (*although some exceptions do exist*)
- Board member emails about school issues are public
- Be sure to post on your site who the custodian is
- Develop clear policy on who and how record requests will be handled



Develop an annual board schedule with topics relevant to that time of the year



Develop a process for sending materials to members



Develop a regular template for board minutes



Set timelines and try to stick to them



Sample Annual Board Meeting Schedule  
<https://charter.support/document/general-annual-board-schedule/>

# Agenda

## Opening Session

- Roll Call, Agendas, etc.

## Reports

- Just to ask questions from written reports

## Consent Agenda

- Approved with the agenda
- Items can be "pulled" by Board members
- No discussion except on "pulled" items

## Board Discussion / Action

- Sometimes broken into Old / New Business
- This is where most of the Board's time should be.
- Recommended to have Strategic Planning item at every meeting



### Sample Board Meeting Agenda

<https://charter.support/document/board-meeting-agenda/>



I. Opening Session

A. Call to Order / Roll Call

Called to order at 12:11 pm

### Roll Call:

- **Board Members Present:** Miguel Briceno, Julio I
- **Board Members Participating Electronically:** Ja
- **Non-Board Members:** Curtis Fuller, Richard Mor Gustavo Rosas

B. Agenda - Approval of Agenda

Moved to approve the agenda, moved by Mr. Cesepe  
Approved unanimously.

II. Reports

A. School Progress Report

See attached

B. Financial Report

Explained that Building Hope has not yet started managing report is available.

III. Consent Agenda

This is just a sample, not a required format

### Directly From Agenda

Small gray text is what was on the agenda

### Larger Bold Text are motions and actions taken

I encourage having the motions in writing if they are complicated, so that the language is clear.

### Larger unbolded text summarizes conversations

Be sure to attach relevant and supporting documents if they are needed to explain discussion.

# The Business of School

## You Are A Business!

What guides your governance and operations?

- Charter Contract
- Applicable Statutes
- Corporate Documents
- Tax Statutes

What business practices do you need to establish?

- Policies & Procedures Manual
  - Board
  - Employment
  - Business
  - HR management
  - Student/Parent Handbook
  - Records Retention



# The Charter Contract

- An essential document directing your operation
- Extremely important you understand the contract
- “Negotiations” are complicated.




Know Your Charter Contract Webinar  
[charter.support/webinar/know-your-charter-contract/](https://charter.support/webinar/know-your-charter-contract/)





[charter.support/reference/attorney-contacts/](https://charter.support/reference/attorney-contacts/)

## Charter Contract Recommendations

Carefully read and understand everything before agreeing

 Contract will restate statute, and further restrict operations

 Attorney - expensive but worth it

 Remember you will live with the terms for the next 5 years

# Understanding Statutes



## Florida Statutes

<http://www.leg.state.fl.us/Statutes/>



## Charter Support Unit Legal Handbook

<https://charter.support/resources/florida-charter-school-legal-handbook/>



## Government in the Sunshine manual

<http://www.myfloridalegal.com/sun.nsf/sunmanual>



## DOE School Choice Charter Schools Office

<http://www.fldoe.org/schools/school-choice/charter-schools/>

# Corporate Documents

- **Articles of Incorporation** (*Establishes the organization*)
- **ByLaws** (*Defines (in broad strokes) the way the Board operates*)
- **Policies** (*The Board's directions to staff members & others*)
- **Charter Contract** (*Your agreement / obligations to the district*)
- **Annual Budget** (*The Board's directions on how money is to be spent*)







## Tax Exempt Status

Three Unique Statuses:

- Not For Profit Corporation
- Sales Tax Exemption
- 501(c)(3) Public Charity



FL Department of Revenue Website  
[http://dor.myflorida.com/Pages/forms\\_index.aspx](http://dor.myflorida.com/Pages/forms_index.aspx)

# Florida Sales Tax Exemption



Can be completed as soon as you have a charter contract



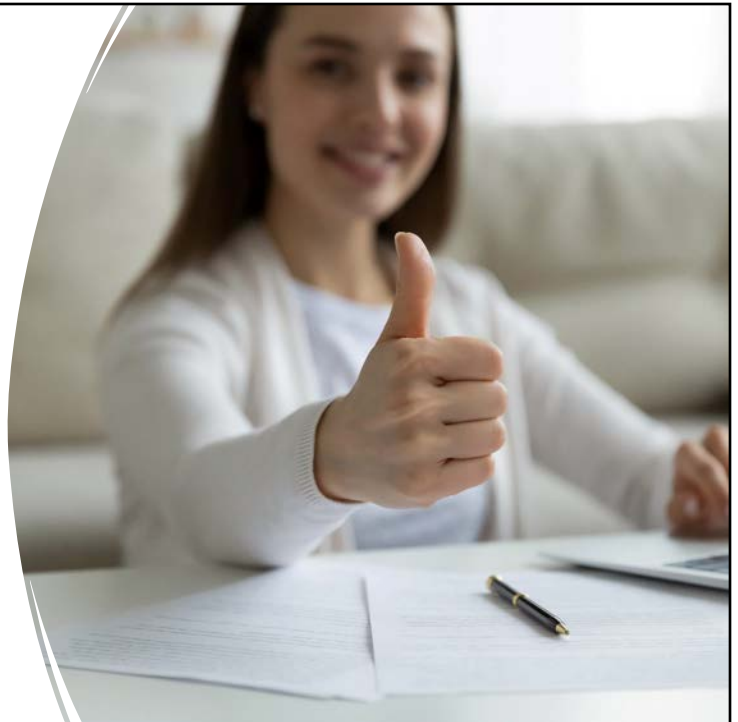
Florida Dept of Revenue Form: DR-5



[https://floridarevenue.com/Forms\\_library/current/dr5.pdf](https://floridarevenue.com/Forms_library/current/dr5.pdf)

# 501(c)(3) Application

- IRS Form 1023 – Filed electronically - <https://www.pay.gov/public/form/start/704509645>
- **Recommend** using the Charter School Guide Sheet
- Biggest holdup: Management Companies
- Be prepared with: *Articles of Incorporation, Amendments to Articles, ByLaws, Nondiscrimination Policy, Budget, Charter Application / Contract, Board member resumes, Procurement Policy, Segregation of Duties Policy*
- Fee: \$850
- Waiting Period: 180 days



## Policies & Procedures Manual

- Policies: The Board's direction to staff on operations
- Having a 'policy' protects the school and staff, especially from helicopter parents
- Organize a structure to keep any/all policies approved



Complete Sample Policy Manual  
<https://charter.support/document/policy-manual/>

# Initial Policies to Consider

## General

- Non Discrimination
- Anti-harassment
- Volunteer

## Board

- Public Comments
- Establishing Agendas
- Conflict of Interest

## Employment

- Compensation
- Evaluations
- Holidays
- Discipline
- Conduct Expectations

## Student

- Attendance
- Behavior
- Dress Code
- Grades/Homework
- Acceptable Use

## Business

- Purchasing
- Handling Cash
- Retention
- Capital Policy
- Audits

## Electronic Documents & Storage

- Think about process and tools
- Email, Document Sharing, Collaboration
- Google, Microsoft, Others?
- Be sure you investigate archival systems
- Other Tools:
  - Dropbox, Evernote, Boomerang, Monday.com, Others?

Records retention  
webinar and doc



# Accounting & Finance



## Financial Reporting & Monitoring

- New schools must report monthly
- Monthly reports start when contract is approved
- State requires that all schools use the state format
- Your contract may require additional formats
- The required format is not helpful for operations
- Try to automate the process for creating reports

SETTING UP FINANCIAL SYSTEMS FOR SUCCESS

<https://flcharterinstitute.org/session/setting-up-financial-systems-for-success/>



## Financial Policies and Procedures



- Segregation of Duties
- Checks and Balances/Internal Controls
- Banking Policies
- Accounting Processes
- Proper Coding of Revenues and Expenditures
- Purchasing and Procurement
- Payables and Receivable Processes
- Inventory
- Payroll Processes
- Auditor Selection Process
- Prepare and close Financial Reports
- Maintaining Fixed Asset Schedules



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## Record Keeping

- Financial Mismanagement is the #1 cause of school closures!
- Starts the moment you receive your charter
- Keep detailed records: Digital or paper?
- Spreadsheet might suffice now
- Start Understanding Redbook Basics:  
FUND-FUNCTION-OBJECT
- Establish a Chart of Accounts that will be used in your ledger AND your budget.

Business manager boot camp

## Budgeting Best Practices

- School site leadership should be involved in this process, too.
- Be based on *actual* enrollment projections
- Created in Spring for the upcoming school year

- Utilize a format that is easy for all to understand and monitor
- Amend during the course of the year to reallocate resources to best serve students
- Balance against at least a 5% reserve



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	Sample School 6-12 2024-2025
Students (wFTE)	1,500
State Sources	\$ 12,634,495
Federal through State and Local	\$ 67,844
Local Sources	\$ 4,430,782
<b>TOTAL REVENUE</b>	<b>\$ 17,133,121</b>
<b>EXPENSES</b>	
5100 Instruction	\$ 6,902,068
5200 ESE Instruction	\$ 334,484
6100 Student Support Services	\$ 523,589
6400 Professional Development	\$ 31,000
7100 School Board	\$ 71,600
7100 School Board	\$ 38,605
7300 School Administration	\$ 1,067,743
7400 Facility & Acquisition	\$ -
7500 Fiscal Services	\$ 358,635
7600 Food Service	\$ -
7800 Transportation	\$ 57,482
7900 Operation of Plant	\$ 1,340,267
8100 Maintenance of Plant	\$ 153,000
8200 Technology Services	\$ 57,500
9100 Community Services	\$ 48,856
9200 Debt Service	\$ 2,979,600
<b>TOTAL EXPENSES</b>	<b>\$ 13,964,430</b>
<b>Net Change in Fund Balance</b>	<b>\$ 3,168,691</b>
<b>Committed Funds</b>	
Operating Reserve (3%)	\$ 379,035
Capital Reserve (2%)	\$ 252,690
<b>TOTAL COMMITTED FUNDS</b>	<b>\$ 631,725</b>
<b>Uncommitted Fund Balance</b>	<b>\$ 2,536,966</b>

## Sample Budget Template

Utilize a format that is easy for all to understand and monitor.

Utilize a working template to prepare a variety of scenarios.

[Sample Budget Template](#)



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# Budget Timeline

## Begin Draft Budget

*School Site Leadership*

- Project revenue
- Project recurring expenses based on last year's actuals and this year's trend
- Gather needs & wants from departments (curriculum, plat, technology, student services)
- Gather quotes for aforementioned need & wants and items like insurance
- Plug in to template

## Finance Committee Review

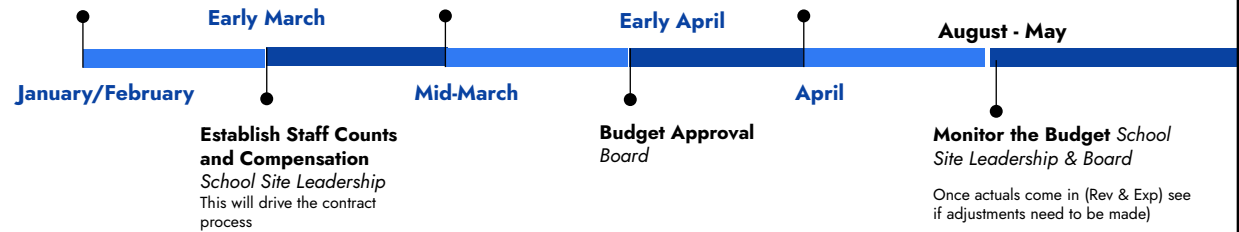
*Board & School Site Leadership*

Budget is reviewed and discussed.  
Revisions made if needed

## Staff & Faculty Contracts Out

*School Site Leadership*

Don't lose great faculty and staff. Get those contracts out



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# Startup Costs

- No guaranteed/reliable sources of funding exist
- Private funding
- Loans - Be sure you are documenting!
- CSP Grants





# Revenue Sources

## Federal



- Title I
- Title II
- IDEA?
- ESSER (*sunsets 9/30/24*)

## State



- FEFP (*Actual not hope!*)
- Capital Outlay - State
- Transportation
- Advanced Academics (*IB, AP, AICE*)
- School Lunch

## Local



- Capital Outlay
- LCI
- Millage
- Sale Tax
- Referendum
- After School Program/Summer Camp/Private PK



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# Classifying Expenses



Document: CSU Chart of Account  
<https://charter.support/resources/chart-of-accounts/>



Document: FDOE Red Book  
[https://www.fldoe.org/core/fileparse.php/7507/urlt/R\\_EDBK.pdf](https://www.fldoe.org/core/fileparse.php/7507/urlt/R_EDBK.pdf)

Type of Purchase	Fund	Function	Object
Classroom supplies (i.e. crayons, paper, glue) for a general education classroom.	100 General Fund	5100 Basic Instruction	510 Supplies
Janitorial supplies (i.e. mop, Lysol, toilet paper and soap for bathrooms).	100 General Fund	7900 Operation Of Plant	510 Supplies
Exterminator service charge	100 General Fund	7900 Operation Of Plant	390 Non-Prof Services
Paying registration fee for a teacher to attend a conference	100 General Fund	6400 Staff Training	730 Dues and Fees
Materials for the ESE Classroom (such as manipulatives, therapy putty, etc.)	100 General Fund	5200 Exceptional Education	510 Supplies
Substitute Teacher to cover for a teacher out sick (part time sub)	100 General Fund	5100 Basic Instruction	750 Other Personnel
Substitute Teacher to cover for a teacher attending a conference (part time Sub)	100 General Fund	6400 Staff Training	750 Other Personnel
Purchasing Pizza for a class as a result of reaching a fund raising goal	791 Internal Fund	5100 Basic Instruction	510 Supplies
Computers as part of a federal planning grant	420 Fed Program	6400 Instructional Tech	643 Cap. Comp. Hardware

# Marketing & Messaging



## Enrollment is Essential

- Funding is per student
- Meeting your enrollment targets is difficult
- Most charters open with less than expected
- Average 1st year Charter Schools enroll 203 students

*\* Each student receives different funding based on the district, special education, grade levels, etc.*



## Marketing Tips and Tricks

- What is your message/brand?
- Develop talking points/elevator pitch (30s, 60s, 3-5min)
- What makes your school unique?
- Why will parents choose your school over others?



Webinar: If We Build It, They Will Come – Or Will They?  
[charter.support/webinar/charter-school-marketing-10/](http://charter.support/webinar/charter-school-marketing-10/)



Sample Style Guide  
<http://bit.ly/csu-style>

## Get The Message Out



Developing your Brand



Consider: Colors, Fonts, Designs



Being consistent increases professionalism and recognition



Decide how you want to message:

Word of mouth, website, Social Media  
Paid ads, Open Houses

# Website Requirements

Use it as a tool for communication & compliance

- School's grade and academic performance
- Names of governing board members
- Programs at the school
- Any management companies, service providers, or education management corporations associated with the school
- School's annual budget
- Annual independent fiscal audit
- Minutes – on a quarterly basis – of governing board meetings
- Parent liaison name and contact must be posted prominently on the charter school's website
- Fortify FL
- Grade Level Capacity – updated every 12 weeks
- Seat Availability – updated every 12 weeks
- Out-of-Field teachers listed within 30 days before the beginning of each semester
- Online educational service PII Information. This notice must include a link to the online educational service's terms of service and privacy policy, if publicly available.
- Special Magistrate Process\*
- Custodian of public records is for the school and how to contact that person \*\*



## Website Requirement Checklist

<https://charter.support/document/charter-school-website-checklist/>

# Website Tips

- Make a good first impression
- Ease of Management versus Cost
- Decide on the purpose
- Be sure design matches purpose
- Use your branding
- Keep it current
- Accessibility



Webinar: Effective Website Design  
[https://charter.support/webinar/web\\_design/](https://charter.support/webinar/web_design/)

# Student Enrollment



## When are Families Looking?

- When does your district have open enrollment?
- When are families “shopping”?
- Be sure you’re visible during those times
- January is a statistically high time to push for enrollment
- Track your applications on a weekly basis with your marketing efforts



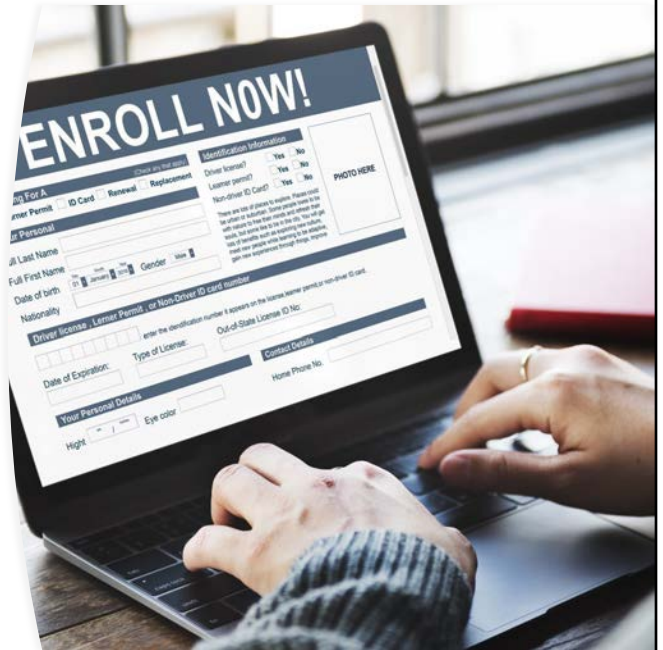


# Develop an Enrollment Timeline

- Develop timelines for when marketing will start, lotteries held & parents notified
- Florida Statute 1002.33(10)(b):
  - The charter school shall enroll an eligible student who submits a timely application, unless the number of applications exceeds the capacity of a program, class, grade level, or building. In such case, all applicants shall have an equal chance of being admitted through a random selection process.

## Sample Enrollment Timeline

- Jan. 1 – Registration Packet Available
- Apr. 1 – Applications due for Lottery #1
- Apr. 3 – Lottery #1 Conducted
- Apr. 8 – Parents notified of lottery results
- May 13 – Applications due for Lottery #2
- May 15 – Lottery #2 Conducted
- May 20 – Parents notified of lottery results
- June 10 – Family enrollment packets available



# Student Enrollment Considerations

- Develop Processes
- How will you accept applications?
- How will you run the lottery?
- How will you notify parents?
- How will you track students?
- How will you monitor your enrollment?



**Enrollment Tracker**

<https://charter.support/document/enrollment-tracker/>

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## Maintain Relationships

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- You're asking families to put a lot of trust in you
- Maintain communication
- Keep families engaged
- Use Social Media



Webinar: Strategic Family Engagement Tools to Boost Student Recruitment and Retention  
[https://charter.support/webinar/family\\_engagement/](https://charter.support/webinar/family_engagement/)



# Administration & HR



# HR Policies & Procedures



Compensation – salary scale



Select a Payroll Company or Employee Leasing Companies



10 vs 12 months



Evaluations



Policies

## Finding Your School Leader

- Your School Leader can make or break you!
- Ensure their beliefs align with your mission and vision
- Are they self-motivated
- Do they believe that all students can achieve
- Are they experienced?
- Check their references
- Interview multiple times



Presentation: Finding the Right School Leader  
<https://vimeo.com/864072152?share=copy>



# Planning Your Hiring

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1

Start early –  
April/May

2

Hire with  
your mission  
in mind

3

Do not  
overhire

4

If possible,  
meet in July  
to “bond”

5

Remember  
you will need  
subs too!

## Hiring Teachers & Staff

### Develop Accurate Projections

- Be sure you know how many teachers you need
- Possibly wait to offer the position until enrollment supports
- Completely understand your budget prior to hiring
- Develop a competitive compensation package (salary, benefits, retirement, etc.)



# Hiring Teachers & Staff

## Develop a Hiring Process

- Where to post
- Tiered approach to screening and interviewing
- Developing questions and a rubric
- Understand certification requirements
- Present Offer Letter and Contract
- **Understand FLDOE Hiring Practices**
  - Conduct Level 2 background Screening
  - Conduct Employment History Checks
  - Screen Candidates Using FLDOE's 3 Screening Tools
    - The Teacher Certification Database (BEC-PASS)
    - Professional Practices' Database of Disciplinary Actions Against Educators
    - The Disqualification List



# Hiring Teachers & Staff

## Develop an Onboarding Process

- Collect payroll documents and develop employee file
- Websites for employment and benefit information
- Orientation for new employees
  - Overview of handbook
  - Tour of facility
  - Introductions to key staff
  - Trainings for online systems
  - Trainings for processes and procedures



# Evaluations

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- School Leadership
- Instructional Staff

Succession Planning Guide for Charter Schools  
<https://charter.support/document/succession-planning-guide/>

# Succession Planning

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- Administrator turnover is common in the first few years of a charter school
- Be prepared for how you will handle a turnover
  - Groom new leaders
  - Ensure you have a comprehensive policy manual
  - Ensure all tasks can be completed by more than one employee
  - Checklist for when an employee leaves
  - Process in place if you need to hire a new administrator



Succession Planning Guide for Charter Schools  
<https://charter.support/document/succession-planning-guide/>

# Facilities

A photograph showing architectural blueprints spread out on a surface. A red and black calculator is placed on the blueprints, and a black pencil lies across them. The blueprints contain various technical drawings, lines, and numbers.

**Facilities: the #1  
cause for  
opening late**

# Realistic Expectations

- Most charters are not able to open in their permanent location
- What do you need now?
- Have a goal for future needs
- Renting versus buying



## Starting Your Search

- You're already running late
- Determine your target neighborhood
- Build your team (*realtor, ESP, etc.*)
- Determine your requirements
- Classrooms, size, price, etc.



Webinar: Charter School Facilities 101  
[charter.support/webinar/charter-school-facilities-101/](https://charter.support/webinar/charter-school-facilities-101/)

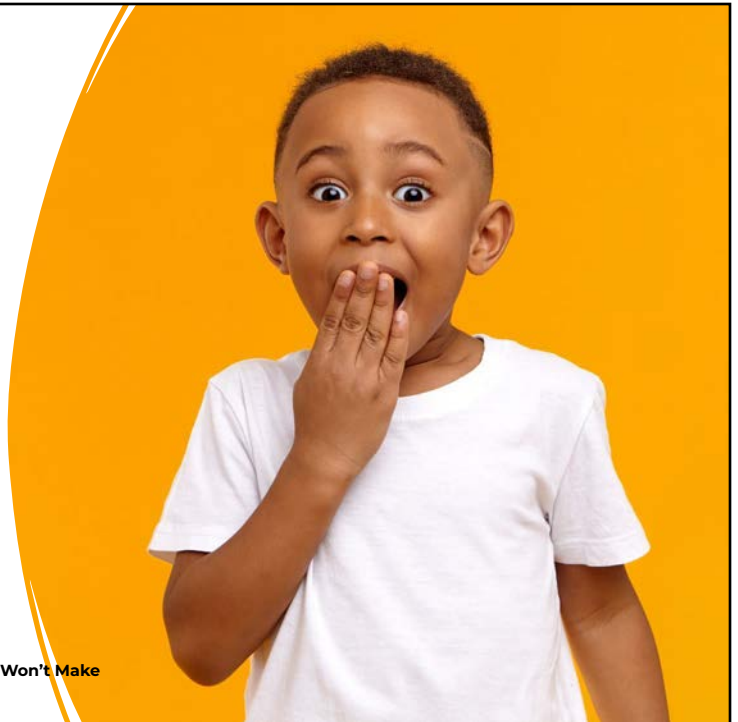


# Mistakes To Avoid

- Wrong People & Order
- Wrong Sizing
- Flawed Thinking
- Expectation Errors
- Occupancy Assumptions
- Control Assumptions
- Attorney Engagement
- No Backup Plan
- No Reference Checks
- Wrong Questions
- Denial - Presumed Malice



Webinar: 12 Facilities Planning Mistakes... That You Won't Make  
<http://csu.li/4>



## Pricing



Look for & beware of escalations



Cost Factors Year 1-5



Target: \$1,000 per student(ish)



# Facilities Funding

- Nothing specifically for new school facilities
- Capital Outlay does not start until year 3
  - Criteria:
    - Been in operation for 2 or more years\*
    - Clean annual audit
    - Satisfactory student achievement
    - Receive sponsor approval
    - Serve students in non-district facilities
  - Estimated at approximately \$580 per student



**FLDOE Capital Outlay Website**

<https://www.fl DOE.org/schools/school-choice/charter-schools/business-finance-accounting/capital-outlay-funding.stm>



# Financing

- Turn-key lease
- Sources of financing
- Current versus Future Needs



**Webinar: Finding and Planning for Facilities**

[charter.support/webinar/finding-and-planning-for-facilities](https://charter.support/webinar/finding-and-planning-for-facilities)



# Additional Training & Resources



## Additional Training Available!

- **Launch Year** training is a series of Florida-specific trainings provided for free to school leaders:  
<https://charter.support/all-trainings/csu-courses/new-school-institute/>
- Webinars available at:  
<https://charter.support/all-trainings/webinars/>





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## FCI Support

- **Newsletter**
- **eMail blasts**
- **Governance Board Program**
  - **Governance Conference**



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## Contact Us

We are Florida's premier hub for charter excellence and insight by providing research-based best practices, resources, and support. If there is anything we can do to help, please contact us:



**[\(123\) 456-7890](tel:(123)456-7890)**



**[info@flcharterinstitute.org](mailto:info@flcharterinstitute.org)**



**[www.flcharterinstitute.org](http://www.flcharterinstitute.org)**



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