



NISN FACILITIES PROGRAM

Facilities Planning Steps Checklist

Background

This worksheet is part of a learning module for facility planning. This module is designed to help school leaders who are planning for their first school site or evaluating a new site for relocation or expansion. It includes tools to assess the programmatic and financial viability of potential locations for your school to assist in site selection.

Instructions

This specific tool, a Facilities Planning Steps Checklist, will help school leaders understand the process of establishing a school location and track progress over time. This checklist should be the first tool started in the facilities planning module and should be revisited and updated regularly. It is designed to be flexible for different situations, from leasing an already built space to constructing a new school. Steps will refer to other module tools and third-party planning resources. Other module tools include:

- ❖ [Facility Needs Assessment Worksheet](#)
How much space will my school need at inception? What about space needed at full enrollment? What types of spaces do I need to fulfill my educational program?
- ❖ [School Site Assessment Worksheet](#)
Does the site meet educational requirements? Does it provide a safe environment, that also nurtures student growth? Does my school community approve of the selected site?
- ❖ [Facility Affordability Worksheet](#)
Are the shorter and longer-term costs associated with the selected facility sustainable for my school?

Important Note

Educational requirements, school facility codes, and building codes vary by jurisdiction. You will need to consult the relevant authorities to ensure you understand all local compliance requirements that your school will be subject to, prior to selecting your facility. These include public sector departments overseeing educational facilities, building safety codes, and Tribal entities if your school is located on Tribal lands.

About this Document

This was produced as part of the NISN Facilities Training Program, an effort funded by the U.S. Department of Education Charter Schools Program (Award #U282T180018). Awarded to the NACA Inspired Schools Network (NISN), the program supports expansion of opportunities for Native American and other underserved students to attend high-performing, innovative, and culturally responsive charter schools. Work includes technical assistance to schools in three states and documentation and dissemination of information, resources, and tools for facilities needs assessment, planning, and funding.

Facilities Planning Checklist

The following checklist outlines steps you will want to follow to develop facilities planning capacity, determine school facility needs, identify the best location, explore financial sustainability, and guide project permitting and compliance.

Complete?	Activity	Progress Notes
Preparatory Actions		
<input type="checkbox"/>	We have identified individuals whom we can rely on for expertise and support including persons who may serve on our “Facilities Team.” <i>This might include school staff, school Governing Council members, community members with real estate development expertise, and expert professionals interested in supporting your school.</i>	
<input type="checkbox"/>	We have formed a “Facilities Team” and a regular meeting schedule.	
<input type="checkbox"/>	We have identified relevant facilities authorities (State, District, Tribal) affecting our site selection, requirements, planning, and use.	
<input type="checkbox"/>	We have introduced ourselves to relevant Facilities authorities and identified key contacts for future work with within those agencies.	
<input type="checkbox"/>	We have reviewed the facilities needs and application documentation requirements in our charter school application.	
<input type="checkbox"/>	We have completed the Facilities Needs Assessment Worksheet for our school.	
Exploration of Options		
<input type="checkbox"/>	We have contacted relevant State, District, and/or Tribal departments to identify school facilities and resources that may be available for our use (e.g., buildings, properties, portables, loan funds).	
<input type="checkbox"/>	We have contacted relevant State, District, and/or Tribal departments to identify additional resources that may be available (e.g., planning tools, loan funds, grants).	
<input type="checkbox"/>	We have identified at least three potential school site locations.	
<input type="checkbox"/>	We have visited and completed a School Site Assessment Worksheet for at least three potential locations.	
<input type="checkbox"/>	We have determined one or more sites that appear viable for more thorough analysis and consideration. <i>If not, repeat steps for site identification and initial assessment.</i>	
Site Feasibility Assessment		
<input type="checkbox"/>	We have completed the Facility Affordability Worksheet .	
<input type="checkbox"/>	If the site entails major renovations or repairs, we have completed the LISC Sources and Uses Template.	
<input type="checkbox"/>	Our Facilities team has reviewed options and collected feedback from school stakeholders (staff, Governing Council, parents, students)	
Site Selection and Development (these steps may have different order depending on project needs)		
<input type="checkbox"/>	We have selected our school site/facility.	

Complete?	Activity	Progress Notes
<input type="checkbox"/>	If applicable, we have completed architectural concept design	
<input type="checkbox"/>	We have executed relevant leases and contracts (e.g., land/building lease, architectural, construction contractors).	
<input type="checkbox"/>	If applicable, we have completed architectural working/construction drawings.	
<input type="checkbox"/>	We have secured relevant permits.	
<input type="checkbox"/>	We have completed construction and/or renovations and required inspections needed for occupancy.	
<input type="checkbox"/>	We have completed a Facilities Master Plan.	