



# Enabling Charter Renewal Planning and Assistance to Support Growth

## CLIENT BACKGROUND

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Our client is a charter school that was established in 2004 and serves 450+ students in pre-k through 8th grade with about 60 staff members. The school's mission is to be an outstanding center for teaching and learning for children and their families that recognizes and nurtures the potential of every child, provides a foundation for a college education, and educates scholars to be creative and critical thinkers and responsible citizens in school, at home, and in the larger community. The client had been partnered with Quattro for several years on their Finance and Accounting work when a new challenge arose in their organization.

## THE CHALLENGES

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The Covid-19 pandemic posed unprecedented challenges to the school, students, faculty, and board chair. The client was looking for a partner to lead the work on strengthening operational systems, strategic planning, and laying the groundwork for charter renewal.

- For charter renewal, the client needed to meet at least 80% of compliance deadlines with their authorizer on an annual basis. In the two years prior, the client's compliance results were 62% and 52%.
- The Board of Directors had only one functioning committee, and the Board chair was not able to meet all needs on his own.
- The organization lacked a clear vision to align the larger team to, and there was no regular annual or strategic planning taking place.
- Data systems either did not exist or were not well maintained to adequately support their charter renewal needs.
- There was no fundraising plan strategy or identified team to support fundraising efforts.
- There was not a well-defined leadership team. The school's principal was leading most of the organization on her own.
- Due to changes in organizational structure over time, there was a lack of clear ownership of roles on the school's leadership team and Board of Directors.

## OUR SOLUTION

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After conversations about how Quattro could also support them in these new areas of challenge, the client made the decision to partner further with Quattro in this area of their organization. We worked with them to outline the right solution to address their specific challenges and provide support in their journey to strengthen their operation and strategically plan their compliance renewal.

**Over the next 12-18 months, we enabled the client in the following ways:**

- Learned the existing SIS, HRIS, Board management and Donor management data systems then created and implemented systems where they were needed but not currently in place.
- Cleansed the data currently in the systems and trained the team to keep the data reliable going forward.
- Enabled regular communication flow between the Board and school leadership.
- Outlined a schedule to ensure Board members complete required annual training.
- Organized Board committees (finance, development, strategic planning, and governance committees) to ensure accountability and focus for carrying out these specific areas of their plan.
- Outlined a Board member succession plan and documented expectations for the Board member role.

- Outlined a sustainable strategic planning process that includes all stakeholders to bring more transparency and alignment throughout the process.
- Helped establish regular communication between Board members and organizational staff between scheduled Board meetings to ensure completion of action items.

## KEY SERVICES



Compliance correction and monitoring



Board management and development



Strategic planning and annual planning



Charter renewal planning and assistance

## THE IMPACT

- Improved compliance from the 50–60% they had been achieving to 81% in just five months.
- Created professional development in the area of strategic planning for the Board of Directors, Leadership team, and school staff.
- Created an action plan to support annual and strategic planning on an ongoing basis.
- Led a board retreat (attended by 90% of board members) to help build relationships and take time to focus on strategic vision.
- Worked with the school to update their school website to help improve student enrollment, staff recruitment, and fundraising efforts.

## ABOUT US

Quattro is a tech-enabled outsourcing firm, with over 25+ years of specialized experience, that's changing the way companies think about finance, accounting, and technology services. You get world-class teams combined with highly personalized services, and a portal that lets you see and manage everything online – all of which is rooted in our **Get More to Go On** strategy. It's how our clients around the world are able to see further, scale smarter, and stand stronger.

### Our Service Offerings:



Finance & Accounting



Human Resource Services



Technology Services

### How We Give You More to Go On:



**Our People:**  
Smart Sourcing & Trusted Advisor Approach



**Our Process:**  
A 3-fold approach we follow of Lift & Shift, Standardization & Optimization, & Transformation



**Our Technology:**  
We are platform agnostic – we can work on your platform or bring you onto ours.

We'd love to help you **gear up for your tomorrow.**

Reach out to us: [connect@quattrobs.com](mailto:connect@quattrobs.com) | Call: 866-622-7011

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