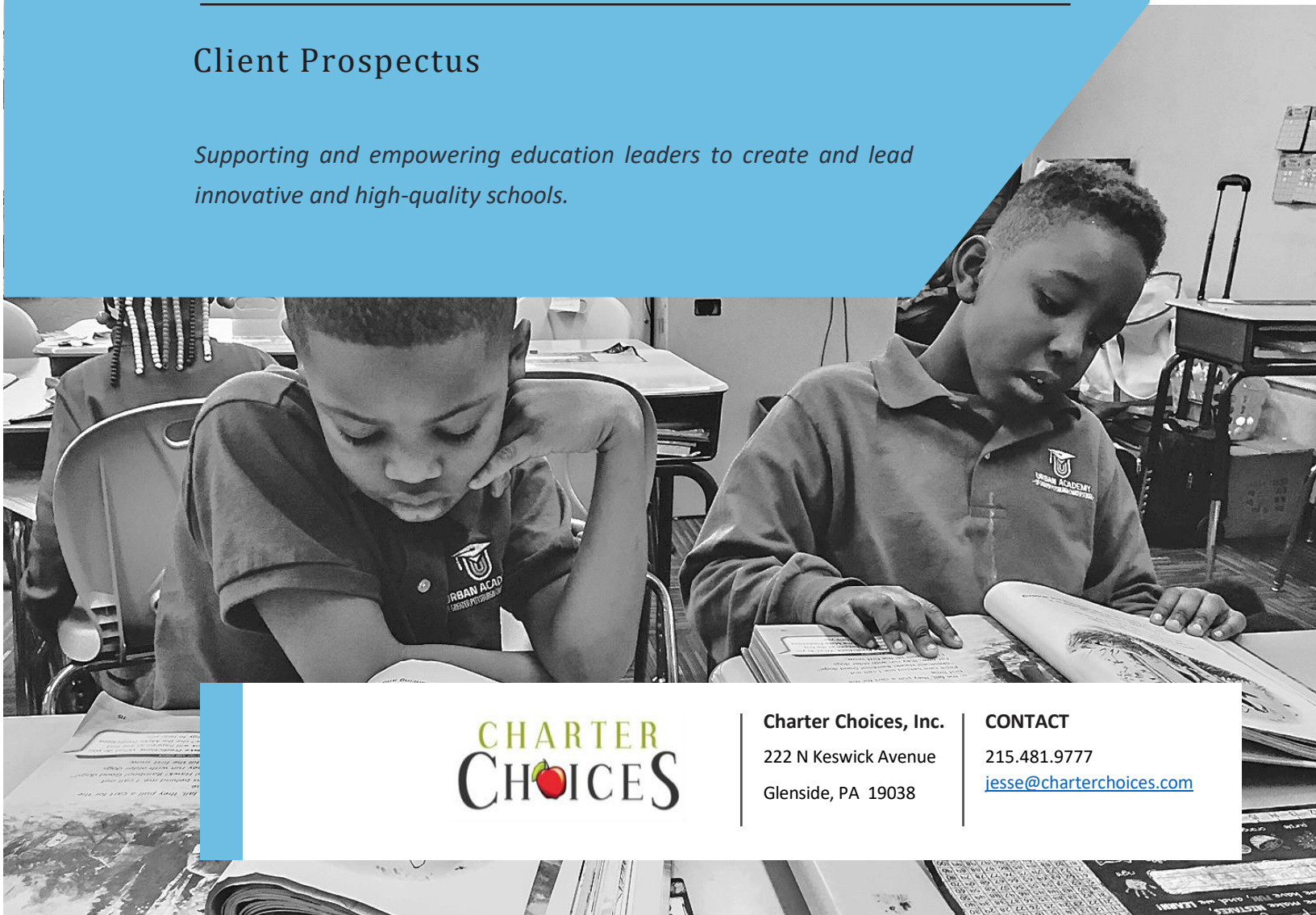




Strategic Consulting

Client Prospectus

Supporting and empowering education leaders to create and lead innovative and high-quality schools.



Charter Choices, Inc.
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Glenside, PA 19038

CONTACT
215.481.9777
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Our Firm



Charter Choices is an independent educational consulting firm offering back office, administrative, and accounting support for K-12 schools. We are visionary choice advocates, accountants, analysts, billing gurus, designers, forward thinkers, backward thinkers, never-ending learners, former teachers and forever students.

Our Strategic Consulting Group works directly with charter school boards and CEOs to provide strategic planning, financial modeling, governance training and ongoing executive coaching to help your organization reach its full potential. Comprised of CEOs, MBAs, CPAs and experienced advisors, our team works collaboratively so you can achieve goals and meet challenges head-on.

"As CEO of the Urban Academy, I prefer to work with vendors and consultants who are professional and take pride and put effort into the work they do on behalf of the Urban Academy. Charter Choices does just that and they do it well. The Strategic Planning Team was quick and effective, which in turn allowed us to move quickly in the implementation phases."

Current & Proposed Projects Include:

- ❖ Strategic Plan & Financial Modeling (K-5 School, Western PA)
- ❖ New Charter Application & Budget (K-5 School, Pocono Region)
- ❖ Governance Retreat & Strategic Plan (K-12 School, Chester County)
- ❖ Financing & Pre-Construction Owner's Representation (K-6 School, Capitol Region)
- ❖ School Evaluation & Risk Assessment (Major Bank's Public Finance Division)
- ❖ Development/Fundraising Strategic Advising (9-12 School, Philadelphia)

Our Core Services

CHARTER CHOICES STRATEGIC CONSULTING GROUP



FINANCIAL MODELING

We build effective, user-friendly 5-year models based on two decades of managing finances for K-12 schools.



EXECUTIVE COACHING

We work with you on implementation and metrics so your strategic plan gathers momentum rather than collect dust.



GOVERNANCE TRAINING

We provide customized board trainings and retreats on a range of topics relevant to school governors.



STRATEGIC PLANNING

We quarterback a multi-stage process involving all of your stakeholders and prepare a living document that will help make your dream a reality.

Sample Training Topics:

- ❖ Expansion & Facilities Planning
- ❖ Board Members' Roles & Responsibilities
- ❖ Creating Effective Board Committees
- ❖ Measuring Impact & Success

Strategic Consulting Group

Jesse Bean, Ed.M

Background: 20-year Career in Education (Teacher, Principal, CEO), National Faculty Member with the Buck Institute of Education, Degrees from Swarthmore College (BA) and Harvard University (Ed.M).

Areas of Expertise: School Leadership, Project Based Learning, Governance-Management, Strategic Planning.

Kevin Corcoran, MBA

Background: Kevin is a native Philadelphian who brings more than 20 years of financial, accounting and management experience, including 10 years in leadership roles (CFO, CEO) at one of the largest charter schools in the state. He has also served in client service and consulting organizations with an emphasis on operations management, procurement and contracts. Kevin earned degrees from Duke University (MBA) and Villanova University (B.S.).

Areas of Expertise: School finance; benchmarking and best practices, competitive strategy; Board-executive communications; labor relations; government affairs.

Joseph Martin, MPA

Background: MPA with a concentration in finance. Joe has spent the last ten years consulting city and state governments as well as charter schools to help them find innovative solutions to solve financial problems and to reach organizational goals.

Areas of Expertise: Capital finance and facilities planning, data tool development and solutions, multi-year financial projections, strategic planning, labor relations, board relations, government affairs

Ryan Schumm, Founder & Executive Officer

Background: After being the first person placed for student teaching at a charter school in North Carolina, Ryan enjoyed 3 years in a charter school classroom teaching math and science. Ryan has spent the last 15 years as a fiscal consultant for charter schools in multiple states. Ryan is a shareholder at Charter Choices and is passionate about assisting charter boards and operators with creating and sustaining quality educational options.

Areas of Expertise: Charter School Start-Up and Authorization, Governance, Federal Programs, Facilities Planning

Michael Whisman, Founder & Executive Officer

Background: Certified Public Accountant working with charter schools since 1997, Dedicated career to charter schools and to looking for alternative methods of educating students, Founder of the first bilingual cyber charter school in the nation.

Areas of Expertise: K-12 Accounting, Finance and Investment, State Compliance, Operations and Leadership



References (contact details available upon request)

Boys Latin of Philadelphia Charter School
Chester Charter School for the Arts
Achievement House Cyber Charter School
Pennsylvania Coalition of Public Charter Schools
Urban Academy of Greater Pittsburgh Charter School