



AVOLON ACCOUNTING & CHARTER CFO SERVICES
(AABS LLC)

Your Partnership to Success

Proposal for

GA DOE

Charter School Governing Board Training

By Candy Yu

4/26/2019

(Valid until 4/26/2020)

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I. Company Background

Company Philosophy:

"A Successful business is the creation of satisfied customers."

About Us:

Avolon Accounting & Charter CFO Services (AABS LLC) was founded by Candy Yu in San Francisco, CA in January 2005. Currently our charter divisions have two offices: Atlanta GA and Charleston SC. Our SC office opened in 2019 in the expectation of SC growth, and we anticipate opening 3rd office in Birmingham AL in 2019.

We provide professional services on a virtual basis. We specialize in providing financial service to the under-served charter school market. We focus on establishing and maintaining comprehensive, cost-effective solutions for schools with limited financial resources, but have visions that require strategic financial assistance. We assist our Charter School clients by shaping and strengthening their financial infrastructure to ensure linear and vertical growth that will match their vision and mission. Our highly specialized accountants and CFOs will work with your current auditors and accounting staff if already in place.

All our staffs have either received the UGA GA Charter school financial management certifications or is currently undergoing the certification courses with the graduation date of 2020.

Charter Achievements:

- Two of our clients have received "Best Charter School of the Year 2014" and "Best innovative Charter School of the Year 2019"
- We have 100% audit passing rate with no findings in FY17-18
- Our successful track record in assisting GA Charter Schools -- including high-risk schools and high-risk Federal grant fiscal management -- continues to grow.
- We have currently served or serving more than 20 GA Charter schools for both State authorized and local authorized charter schools.

Please see more information about us on our website: www.chartercfo.org

II. Charter School Governing Board Training Experience & Reference

(See Attachment A for Training Experience Details)

REFERENCE

Client Reference # 1	
Company Name	Ga State Charter School Commission
Address	265 Jesse Hill Jr Dr
City, State, Zip Code	Atlanta, GA 30334
Primary Contract Person,	Terence Washington
Title	Finance Director
Phone Number	(404)656-2832
Email Address	terence.washington@scsc.georgia.gov
Contract Period	NA
Briefly Describe the Scope Provided/Nature of Work	
Provided as guest speaker for "Procurement" for 2015 SCSC Petition Bootcamp Program	

Client Reference # 2	
Company Name	The Main Street Academy
Address	2861 Lakeshore Dr
City, State, Zip Code	College Park, GA 30337
Primary Contract Person,	Virginia Smith
Title	Director of Business Operations
Phone Number	(404) 768-0081 Ext.1110
Email Address	virginia.smith@tmsa.org
Contract Period	05/2017 to now
Briefly Describe the Scope Provided/Nature of Work	
<p>Provided financial 101 training to both finance committee members and board members to help them understand their financial statements and its fiscal obligations.</p>	

Client Reference # 3	
Company Name	Leadership Preparatory Academy
Address	6400 Woodrow Rd
City, State, Zip Code	Lithonia, GA 30038
Primary Contract Person,	Lonnie Hall
Title	CEO
Phone Number	(678) 526-2578
Email Address	ldhall.keystone.lpa@gmail.com
Contract Period	02/2013 to Now
Briefly Describe the Scope Provided/Nature of Work	
<p>Provided financial 101 training to both finance committee members and board members to help them understand their financial statements and its fiscal obligations.</p>	

- Additional Reference Available Upon Request

III. Instructors' Qualifications

Candy Yu:

Candy Yu is the founder and president of Avolon Accounting & Charter CFO Services (AABS LLC). With Accounting as major, over the past 20 years she has built an impressive accounting resume that started from a bookkeeper to a multibillion corporation controller who expand its finance department from 4 staffs to over 50 staffs.

Her esteemed corporate accounting expertise spans coast-to-coast — taking her from California to Georgia. Voted into the Top 3 of the Chamber of Commerce's 2014 Top Young Professionals, Candy has a proven track record of implementing successful financial and accounting solutions in charter schools throughout Georgia.

Over the years, Candy has been recognized for transforming charter schools through her comprehensive, personalized high-quality back office support & CFO model. She was in the first graduation class to receive the GA Charter Schools Financial Management Certification. She also taught Charter school budget and petition budget 101 courses on behalf of GCSA. She was the guest speaker on procurement on behalf of GA State Charter School Commission at their petition boot camp.

Her unrivaled skills and in-depth understanding of academic institutions' financial and accounting structures make her a trusted and sought-after partner among charter schools.

Lisa McDonalds:

Mrs. McDonald serves as Brighten Academy's Executive Director and Principal. Mrs. McDonald bring over 20 years of public-school experience, with ten years in charter demonstration. Mrs. McDonald was named Georgia Charter School Principal of the Year in 2015.

Brighten Academy is a K-8 locally approved independent charter school that was started in Douglas County, GA. In 2014, Brighten Academy was recognized as the "Best Charter School of the Year". Under Mrs. McDonald's leadership, the school has earned top 1% academic rankings in the state, secured over \$10M in bond financing, and was selected to become a partner school in Expeditionary learning.

In addition to be the original founder of Brighten Academy, she also serves as a mentor to charter leaders throughout the GA. He has served as instructor for GCSA's Charter leader program. She is also an active member of the Advocacy Committee through GCSA and has been invited to give presentation to the Governor's Reform Commission on charter school funding, accountability and access to facilities. She is currently working with the Governor's office of Student Accountability to take a close look at the data gained from the Beating the Odds Analysis and its impact on charters.

Gerda Louizi:

Mrs. Louizi brings over 20 years of experience as an educator with expertise in program Development, strategic planning, and grant management. She has held leadership positions at numerous community-based organizations.

As executive director of federal programs and student services, she developed and managed all state and federal grant programs including Title I, II, III and SIG. Mrs. Louizi served as liaison between the district, state and federal agencies interpreting state and federal grant laws and regulations for the school board, superintendent and staff.

As a non-profit community leader, she assisted nonprofit organizations with fundraising, donor relations, strategic planning, leadership development and trainings.

Mrs. Louizi holds a Specialist and master's degree from Lesley University and a Bachelor's degree from Daemen college. She holds various industry certifications in education leadership, charter school financial management, nonprofit fundraising and nonprofit program management

IV. TRAINING COURSES & SYLLABUS

(See Attachment B for Training Experience Details)

Participant Evaluations

We did not document the participant response for all past trainings, we will create online survey going forward to start to document these response going forward.

V. HYPOTHETICAL Q&As

Hypothetical #1 – You are working with Charter School XYZ's founding board that is comprised of mostly parents. The school is in its first year of operation. The board has hired a principal and the principal has hired a staff. The school is located in a wealthy part of town and does not provide transportation. As a result, the students are majority high income. The board has issues with the way that the teachers are trained and onboarded onto the staff. The board also has concerns that their Principal is not handling carpool well. Some teachers are complaining that the principal is too strict. Lastly, the facility has had many issues and concerns including a leaky roof. As a result of all of these things, the board is meeting today to consider firing the principal. Also, one board member is related to a teacher.

- How would you advise this board in terms of duties, roles and responsibilities, and next steps?
- What are some considerations moving forward to avoid these conflicts?

Answers:

1. It is NOT a best practice to have a majority of parents on the board. While having a single parent representative on the board may provide parents with a necessary outlet for board governance, having multiple parents or a majority of parents often works against the need for unbiased governance. The board should consider working with a governance consultant to diversify the board's representation to lower the number of parents while increasing representation in underrepresented areas like legal, financial etc...

2. The board needs to work with their authorizers (local and GA DOE) to:

a) see what recommendations they have to increase diversity within the student population of the school. The board should enter those meetings with ideas of how to address such lack of diversity such as implementing a weighted lottery for future student growth or providing transportation.

b) discuss teacher training / on-boarding / professional development / Title II funds to determine if such training is appropriate and beneficial for staff of the charter. This also provides insights on the performance of the principal

3. With the board questioning the performance of duties by the principal, the board must document and provide corrective actions for the principal to explain and/or address within a certain period of time. This allows the board the time to properly evaluate the principal's performance and ability to adjust to concerns.

4. with the school being locally authorized:

a) discuss with the finance committee of the board to see about addressing the roof concerns

b) if school has a district owned property (per HB555) the district should work with the charter to address the roof leaks.

c) if the school is not district owned, the district may still be able to assist in some capacity... a conversation needs to be had.

d) a call to the DOE charter office to determine eligibility and timing for state's competitive charter school facilities fund.

e) with the addition of dedicated facility dollars in the 2020 budget, there may be enough funds to address the issue

5. Governing board should strongly consider additional board governance training to better understand roles and responsibilities of the board vs management. This additional training may only be temporary, but it would set a strong foundation for the board for future years.

As part of our training, we will share with the board the best practice board structures and provide guidance on how the board should select their board members. At the same time, our training will also address the board's positions and its responsibilities as well as review their policies. One of the topics that we will be discussing during our training is the personnel and its evaluation, that will be very helpful in this case.

Hypothetical #2 – A well-established charter school has recently come under public scrutiny for not reflecting the diversity of the community served by the charter school. The school has decent student achievement data and has been in existence for over ten years. The board does not believe that there is anything it can do to diversify. It also believes that it does not need to diversify. The board is about half parents and half other community members.

- What would you do with this board and why?
- What are the issues here?

Answers:

1. It is NOT a best practice to have a majority of parents on the board. While having a single parent representative on the board may provide parents with a necessary outlet for board governance, having multiple parents or a majority of parents often works against the need for unbiased governance. The board should consider working with a governance consultant to diversify the board's representation to lower the number of parents while increasing representation in underrepresented areas like legal, financial etc...

2. The board needs to work with their authorizers (local and GA DOE) to see what recommendations they have to increase diversity within the student population of the school. The board should enter those meetings with ideas of how to address such lack of diversity such as implementing a weighted lottery for future student growth or providing transportation.

3. The board needs to do some self-evaluation to see if their lack of diversity on the board plays a role in the lack of diversity at the school. There may be a need to be deliberate in identifying future board members who are representative of the committees not being served.

As part of our training, we will ensure the board to understand what the best practice operational standards is and provide guidance for the board that currently has these issues. With our optional course, we can also provide more in-depth training on this particular issues and address it.

Hypothetical #3 – An established charter school is having some serious board turnover in a way that is unprecedented. You are the board's trainer. You attend a board meeting and notice that there is not any real discussion. The items pass without any questions or comments. There is not time for public comment. The principal's report is sparse and does not include any academic data. Additionally, the CFO was unable to answer questions about the financial documents. When asked questions, the principal spoke up to answer questions about the financial statements. Several board members seem to have a very friendly demeanor with the principal. • What are your thoughts on this?

- What are some suggestions you would make to the board?
- How would you incorporate this into the training?

Answers:

There are several issues here that need to be addressed head on:

1. Open discussion about the board turn over is must. The have clear understanding why the board members are leaving is critical to address this issue and prevent it from repeat in the future. A board exit interview is often a good idea to have, that will allow the exiting board member to share the reason why they are leaving. Then I will follow up to check with this board to ensure that this is been implemented.
2. It is not best practice not to have any public comment section within the open board meeting. The charter school is a public entity and all times it must demonstrate and provide the 100% transparency during its public meetings such as board meetings. I would recommend the board to revise its standing meeting agenda to ensure that public comment section is included. Then I will follow up to check with this board to ensure that this is been implemented.
3. The principal's report is the overview report that will allow the board to have the transparency on what's going on operational, academic. Missing the important details about this information is not acceptable during the board meeting. I will recommend the board to create a template of the reports if the principal has issue creating it then enforce the template to ensure all necessary information are been reported on monthly basis.
4. The principal speaks on behalf of the CFO. First of all, I will try to figure out why CFO is not presenting the report. Was it due to overbearing principal or lack of experience? Once you are able to identify the issue, then the board will need to address it head one. If CFO is lack of the presentation experience, then CFO's job performance will need to be re-evaluated to make sure that this person is the right fit for the job. This should be done with board's direction to Principal and finance committee. If the principal is overbearing, then the board needs to help the principal to understand the segregation of duties and emphasis that the CFO needs to be the one to present as they are the one who is familiar with the reports.

As part of our training, we will provide templates for meeting agenda and board exit interview checklist. At the same time, we will also be training on the clear segregation of duties and best practice organizational chart that help the board to ensure the accountability for each management positions and their obligation to board reports.

VI. NEPOTISM ASSURANCE AGREEMENT

(See Attachment C)

VIII. ATTACHMENTS

- Attachment A – Training Experiences
- Attachment B – Training Courses and Syllabus
- Attachment C – Nepotism Assurance Agreements

ATTACHMENT A

Training Experiences				
Training Topic	Training Date	Delivery Methods	Charter School	Participant
Budget 101	3/15/2019	In Person	Brighten Academy	New board members
Quickbooks for Charter Bookkeeping	11/19/2018	In Person	Dekalb Preparatory Academy	CFO, Bookkeeper
Charter Financial 101	11/30/2018	In Person	Dekalb Preparatory Academy	CFO and Board Treasurer
Financial 101	11/7/2018	In Person	Tapestry Charter School	Fiance Committee members, Board Members & Principal
Grant Managemetn Training	10/9/2018	Webinar	Cirrus Acdemy	Superintendant, Principal, Grant managers and HR manager
Accounting Procedure And Policies Training	9/14/2018	In Person	Tapestry Charter	Principal, Business Manager, Nutrition Director
Financial 101	4/24/2018	In Person	The Main Street Academy	Full board members, principal and business operatoin director
Financial Strategic Planning for SC Charters	11/6/2017	In Person	SC State Charter School Conference Break Out Session	This is part of the break out section from it's conference, do not have participant list
Financial 101	10/24/2017	In Person	Leadership Preportary Academy	Full board members, principal and CEO
Budget 101	6/24/2017	In Person	Graduation Achievement Charter High School	Full board members & Department Chairs
Financial 101	2/14/2017	In Person	Cirrus Academy	Board members
Financial 101	1/21/2017	In Person	Leadership Preportary Academy	Board members
Accounting Procedure And Policies Training	9/22/2016	In Person	Cirrus Academy	Superintendant, Principal, Grant managers and HR manager
Expense Reimburement & Travel Expense Procedure	8/19/2016	In Person	Graduation Achievement Charter High School	Full 80 staffs and management
State Charter School Petition Bootcamp	In 2015	In Person	SCSC	Program is part of the SCSC petition bootcamp, do not have participant list
Financial 101	10/14/2015	In Person	Ivy Prep Acadmies	Full Board members
Pcard Procedure and Policy Training	4/2/2015	In Person	Graduation Achievement Charter High School	All Pcard holders and department chairs
Budget 101	7/21/2014	In Person	Kennesaw Charter Schools/ GCSA	All Board members
<i>This only contain Candy Yu's Training Experience, for other instructors' experience are available per request</i>				

ATTACHMENT B

CHARTER SCHOOL GOVERNING BOARD TRAINING COURSE

Training Provider	Avolon Accounting & Charter CFO Services (AABS LLC)	Submission Date	4/26/2019
Course Title	Existing Governing Boards Training Required Course Existing Governing Boards Training Option Course New Governing Boards Training Required Course New Governing Boards Training Option Course	Instructors	1A - Candy Yu & Gerda Louizi 1B - Lisa McDonalds 1C - Lisa McDonalds & Candy Yu 1D - Lisa McDonalds & Candy Yu * Gerda Louize (Depends on topic) 2A - Candy Yu 2B - Lisa McDonalds 2C - Candy Yu & Gerda Louizi 2D - Lisa McDonalds & Candy Yu * Gerda Louize (Depends on topic)
Course Description	To utilize each trainer's practical real life experience working within local authorized charter schools to apply those knowledges in trainings <u>Existing Governing Boards Training Required Course</u> 1A Effective Financial Governance Training (3 Hours) 1B Best Practice Board Team Training (3 Hours) 1C Strategic Planning & Workforce Development (3 Hours) <u>Existing Governing Boards Training Option Course</u> Customized Target Topic Training (Option 3 Hours) Through evaluation from the three prior training, help the school to identify problematic areas and then target those areas by providing customized training to address these areas. Such as federal grant managements, academy program design, 1D etc. <u>New Governing Boards Training Required Course</u> 2A Charter School Finance & Budget 101 (3 Hours) 2B Best Practice Board Team Training (3 Hours) 2C Effective Financial Governance Training (3 Hours) <u>New Governing Boards Training Option Course</u> Customized Target Training (Option 3 Hours): Through evaluation from the three prior training, help the school to identify problematic areas and then target those areas by providing customized training to address these areas. Such a Federal grant budget planning, facility cost analysis, teacher 2D recruitment, etc.	Delivery Method	In Person Virtual - Webinars Small Group 2 - 15 Participants Large Group 15 + Participants Others per request
Alignment to Standards	<u>Existing Governing Boards Training Required Course</u> 1A Effective Financial Governance Training : Domain VII 1B Best Practice Board Team Training: Domain I, IV, V, VII, VIII 1C VI <u>Existing Governing Boards Training Option Course</u> 1D Variance depends on the targeted areas <u>New Governing Boards Training Required Course</u> 2A Charter School Finance & Budget 101: Domain I C, IV, VII, 2B Best Practice Board Team Training: Domain I, IV, V, VII, VIII 2C Effective Financial Governance Training: Domain VII <u>New Governing Boards Training Option Course</u> 2D Variance depends on the targeted areas	Proposed Fee	Existing Governing Boards Training Required Course: \$1500 Existing Governing Boards Training Option Course: \$750 New Governing Boards Training Required Course: \$2000 New Governing Boards Training Option Course: \$750
Proposed Location	Flexible, it can be at school location, Avolon downtown office and/or any other locations per school's request	Length of Course	Both training are 9 hours exclude 3 hours option training. The 3 hours option training is available but not required to completed.
Overall Course Objective	Enable all board members understand fully its responsibilities to meet requirements of 20-2-2072 and learn demonstrated practical solutions on how to achieve these standards.	Type of Charter School	Petition, Start Up & Existing Local Authorized Charter Schools, Conversion schools and Charter Systems
Submitted by	Candy Yu	Date Submitted	4/26/2019

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 1A**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Existing Governing Boards Training Required Course
1A: Effective Financial Governance Training

CONTACT: Candy Yu
President & CFO Consultant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on standard Domain VII, provide overview on what's the best practice fiscal management.

OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Provide brief overview on Domain VII requirements. Review cases from failed fiscal management to best practice fiscal management system. Through the review, create interactive discussion about each school's unique challenges.

TRAINING GOALS/OBJECTIVES: By end of training, each board members will have clear understand their fiscal responsibilities and how to oversight to ensure a sound fiscal management.

TARGE AUDIENCE: Existing Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 1B**

SUBMITTING AGENCY:	Avolon Accounting & Charter CFO Services (AABS LLC)
COURSE TITLE:	Exsiting Governing Boards Training Required Course 1B: Best Practice Board Team Training
CONTACT:	Candy Yu President & CFO Consulant 235 Peachtree Street, #400 Atlanta, GA 30303 Email: candy@avolonabs.com Office: 678-391-8566 Cell: 678-462-1197
COURSE DESCRIPTION:	Based on standard Domain I, IV, V, VII, VIII to provide overview on what's best practice board looks like and how they manage on governance, policy development, conduct board meetings and ethics standards, etc.
# OF CONTACT HOURS:	3 Hours
MAJOR ACTIVITIES:	Provide brief overview on domain requirements for overall board standards. Review case study from a best practice charter school board (Brighten Acadmey as sample) to demonstrate how each of these standards are met. Discuss with the board on their current challenges.
TRAINING GOALS/OBJECTIVES:	By end of training, each board members will have clear understand their overall board responsibilites and how to oversight to ensure a sound operation and academy management.
TARGE AUDIENCE:	Exsisting Local Authorized Charter Schools, Conversion schools and Charter Systems
TRAINING TIMES:	TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 1C**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Exsiting Governing Boards Training Required Course
1C: Stratgic Planning & Workforce Development

CONTACT: Candy Yu
President & CFO Consulant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on standard Domain II, III, VI to provide overview on how best practice charter school mets these standards such as how to be stratgic about school growth, expansion etc by understanding the board and community relations and understand the workforce recuritment, retention and development

OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Provide brief overview on domain requirements for overall board standards. Review case study from a best practice charter school board (Brighten Acadmey as sample) to demonstrate how each of these standards are met. Discuss with the board on their current challenges.

TRAINING GOALS/OBJECTIVES: By end of training, each board members will have clear understand the steps that are needed to create a sound strategic planning process and practice.

TARGE AUDIENCE: Exsisting Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 1D**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Exsiting Governing Boards Training Required Course
1D: Customized Target Topic Training

CONTACT: Candy Yu
President & CFO Consulant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on the evaluation through prior three trainings, trainers will identify each school's unquie area of challenges among the board. Thus to provide customized target training to address these unique challenges and provide guidance on how to resolve these issues.

OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Have a more in depth discussion with the board on the targeted issues and utlize interactive discussion to address these issues and provide gudience on their solutions.

TRAINING GOALS/OBJECTIVES: By end of training, the board members will have a clear action plan on how to address these unquie issues and challenges.

TARGE AUDIENCE: Exsisting Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 2A**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Existing Governing Boards Training Required Course
2A: Charter School Finance & Budget 101

CONTACT: Candy Yu
President & CFO Consultant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on standard Domain VII, provide overview understanding about the board's fiscal responsibilities by learning introduction on financials reports and budget basis.

OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Provide brief overview on Domain VII requirements. Review the board's fiscal responsibility and involvement, help board members to understand the financial statements and budgets basis so they can effectively oversight the fiscal management. Also share with the board the best practice financial ratios as template of measurements.

TRAINING GOALS/OBJECTIVES: By end of training, each board members will have clear understand their fiscal responsibilities and how to oversight to ensure a sound fiscal management.

TARGE AUDIENCE: Petition and/or Start up Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 2B**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Exsiting Governing Boards Training Required Course
2B: Best Practice Board Team Training

CONTACT: Candy Yu
President & CFO Consulant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on standard Domain I, IV, V, VII, VIII to provide overview on what's best practice board looks like and how they manage on governance, policy development, conduct board meetings and ethics standards, etc.

OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Provide brief overview on domain requirements for overall board standards. Review case study from a best practice charter school board (Brighten Acadmey as sample) to demonstrate how each of these standards are met. Discuss with the board on their current challenges.

TRAINING GOALS/OBJECTIVES: By end of training, each board members will have clear understand their overall board responsibilites and how to oversight to ensure a sound operation and academy management.

TARGE AUDIENCE: Peition and/or Start up Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 2C**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Existing Governing Boards Training Required Course
2C: Effective Financial Governance Training

CONTACT: Candy Yu
President & CFO Consultant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on standard Domain VII, provide overview on what's the best practice fiscal management.

OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Provide brief overview on Domain VII requirements. Review cases from failed fiscal management to best practice fiscal management system. Through the review, create interactive discussion about each school's unique challenges.

TRAINING GOALS/OBJECTIVES: By end of training, each board members will have clear understand their fiscal responsibilities and how to oversight to ensure a sound fiscal management.

TARGE AUDIENCE: Petition and/or Start up Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.

**CHARTER SCHOOL GOVERNING BOARD TRAINING PROPOSAL
SYLLABUS - 2D**

SUBMITTING AGENCY: Avolon Accounting & Charter CFO Services (AABS LLC)

COURSE TITLE: Exsiting Governing Boards Training Required Course
2D: Customized Target Topic Training

CONTACT: Candy Yu
President & CFO Consulant
235 Peachtree Street, #400
Atlanta, GA 30303
Email: candy@avolonabs.com
Office: 678-391-8566
Cell: 678-462-1197

COURSE DESCRIPTION: Based on the evaluation through prior three trainings, trainers will identify each school's unquie area of challenges among the board. Thus to provide customized target training to address these unique challenges and provide guidance on how to resolve these issues.

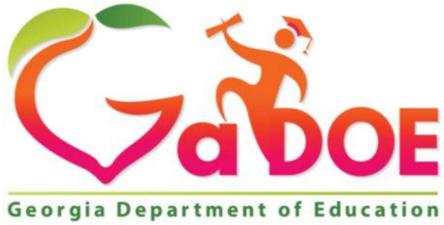
OF CONTACT HOURS: 3 Hours

MAJOR ACTIVITIES: Have a more in depth discussion with the board on the targeted issues and utlize interactive discussion to address these issues and provide gudience on their solutions. Such as facility funding issue, federal grant budget set up etc.

TRAINING GOALS/OBJECTIVES: By end of training, the board members will have a clear action plan on how to address these unquie issues and challenges.

TARGE AUDIENCE: Peition and/or Start up Local Authorized Charter Schools, Conversion schools and Charter Systems

TRAINING TIMES: TBD By Board Chair and School Leader. Sat training available.



Richard Woods, Georgia's School Superintendent
"Educating Georgia's Future"

Charter School Governing Board Training

Nepotism Assurance Agreement

As an instructor/trainer for AABS LLC, I will not provide charter school governance training to charter school governing board members who are immediate members of my family without obtaining prior approval from the Associate Superintendent for Policy and Charter Schools or his designee. For the purpose of this assurance, immediate family members shall include a spouse, child, sibling, parent or the spouse of a child, sibling or parent.

Signature

Candy Yu

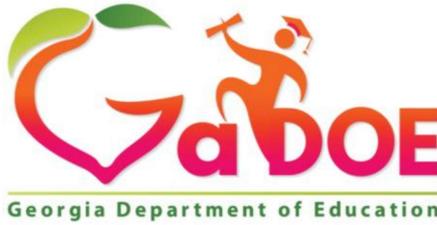
Name [printed]

Apr 26 2019

Date

AABS LLC

Organization



Richard Woods, Georgia's School Superintendent
"Educating Georgia's Future"

Charter School Governing Board Training

Nepotism Assurance Agreement

As an instructor/trainer for AABS LLC, I will not provide charter school governance training to charter school governing board members who are immediate members of my family without obtaining prior approval from the Associate Superintendent for Policy and Charter Schools or his designee. For the purpose of this assurance, immediate family members shall include a spouse, child, sibling, parent or the spouse of a child, sibling or parent.

Lisa McDonald

Signature

Lisa McDonald

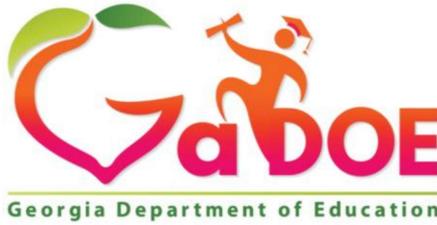
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Gerda Louizi

Signature

Gerda Louizi

Name [printed]

Apr 26 2019

Date

Avolon Accounting & CFO Services (AABS LLC)

Organization