

## CSBM's Training Workshops on Best Business Management Practices

### General Financial Management

1. **Grasping Key Financial Terms** – Build your financial vocabulary with real-life examples in layperson's terms and increase your financial literacy.
2. **Budgeting Best Practices** – Helps attendees create sound budgets based on reasonable assumptions and in alignment with their charters.
3. **Understanding Revenue Streams and Cash Flows** – Learn how the different types of funding work in your state/district, including which deliverables trigger payments to schools, when they are due and when the money arrives.
4. **The Numbers Don't Lie - Foolproof Financial Reporting, Forecasting & Analysis** – Learn how to create and analyze meaningful financial reports, projections and ratios that help schools make sound decisions and predict the future.
5. **Leading a Rapidly Expanding, Multi-Million Dollar Business** – Understand the best practices of maturing from founding a theoretical organization on paper to building, leading and inspiring a team to work harder than they've ever worked before, at a near-impossible rate of growth each year.
6. **Less Work, More Funding: Development Best Practices** – Charter school leaders will learn how to structure school operations and leverage their boards for fundraising success.
7. **The CSBM Binder System: How to Keep your Financial Documentation Ultra-Organized** – Learn how to organize and manage financial documents throughout the year to set your school up for a self-service financial audit.
8. **50 Ways to Boost Revenues, Cut Costs & Save Time** - Is your budget really tight? Do you wish money really grew on trees? Although charter schools are well-intentioned, valuable time and money may be lost by operating inefficiently and not taking a critical look in the mirror. Participants will learn ways to create the room in school budgets sorely needed to better serve students and staff.

## Prevention & Planning

1. **The Top Financial Faux Pas & Preventing them in the First Place** – Understand the main mistakes charter schools make with finance and operations and learn how to prevent them from happening.
2. **Developing the Most Important Committee on your Board: The Finance Committee** – Delves into the key role that the finance committee plays and teaches you how to assess whether it is functioning at an optimal level.
3. **Preventing Burnout & Creating a Successful Succession Plan** – Keep your best staff by understanding the top reasons for burnout, gain suggestions to prevent or slow it from occurring and understand the basic components of a succession plan.
4. **Risk Management: Unearthing and Understanding the Unknown** – Learn how to identify and avoid risks that are often lost in the mix and become proactive and strategic instead of constantly staying in the reactive, firefighting mode.
5. **Don't Reinvent the Wheel: Implement Long Lasting Lessons into your Operations** – Learn from the sometimes harmless and sometimes disastrous mistakes of other charter schools. Understand how to ask the right questions in a crisis and the appropriate steps to take to address them.

## The Life Cycle of Schools

1. **Surviving Start-up** – Explains the numerous non-academic steps required between the day you receive a charter and the first day of school.
2. **The Business Department's True Test: Successful Audit Preparation** – Explains what is involved with the annual financial audit and why auditors ask for various items. You will also learn how to prepare for audits throughout the year instead of only during the summer once the fiscal year has ended.
3. **School Closure Wake-up Call** – Describes the financial and operational aspects and realities of school closure and what may be involved (since different authorizers' closure policies differ).

## Growth & Sustainability

1. **Optimal Structuring of the Finance & Operations Departments from Start-up through Full-Growth** – Plan accordingly by understanding the various structuring options for the front and back office and how positions shift from multi-talented generalists to highly-focused specialists over time.
2. **Are You Ready to Replicate or Expand?** – Understand the most critical financial, academic and governance challenges that many charter schools face during either replication and/or expansion.
3. **Separation Anxiety: Parting ways with your EMO/CMO/ESP and Learning How to Independently Manage your Finances** – Shares the signs of when it is time to part ways with your management company and demystifies the financial aspects of moving on without their support.