CHARTER IMPACT

OUTSOURCED FINANCE & OPERATIONS FOR MISSION-DRIVEN ORGANIZATIONS

Board of Directors

Board Meeting · FY2026 Business Review

DEMONSTRATION MATERIAL

How This Sample Deck Was Built

1

Purpose

A sample board deck created for demonstration only. It is not an official document of Charter Impact, was not produced, reviewed, or endorsed by the company, and must not be relied upon for any decision.

2

How it was built

Generated by an AI assistant (Claude) from publicly available information. Structure follows common board-review best practice; layout and charts were produced programmatically.

3

Data & figures

Company facts are from public sources; all financial figures are illustrative planning estimates and are not audited.

4

No warranty

Provided as-is with no representation as to accuracy or completeness. Any resemblance to actual internal reporting is coincidental.

AGENDA

FY2026 Business Review · Board Meeting

SECTION 01 · OPENING

Key Messages to the Board

Durable model

Charter Impact provides outsourced back-office and financial-operations services — accounting, financial management, compliance reporting, and related administrative support — to charter schools, nonprofits, and other mission-driven organizations that lack in-house finance capacity and must meet specialized regulatory and funder requirements.

Recurring core

Recurring subscription/advisory anchors the revenue base, with expansion and data upside layered on top.

Instrumented business

Performance is tracked against a defined set of metrics and deliverables spanning multiple functions and altitudes — provided as separate companion files.

Clear priorities

Strategic priorities are set to compound the recurring core and de-risk the model.

Charter Impact

Charter Impact provides outsourced back-office and financial-operations services — accounting, financial management, compliance reporting, and related administrative support — to charter schools, nonprofits, and other mission-driven organizations that lack in-house finance capacity and must meet specialized regulatory and funder requirements. Revenue is largely recurring.

Charter
Core vertical

Recurring
Ongoing engagements

Compliance
Specialized domain

Nonprofit
Adjacent segment

What the Business Sells

Finance & Accounting

Outsourced accounting and financial management — the recurring core

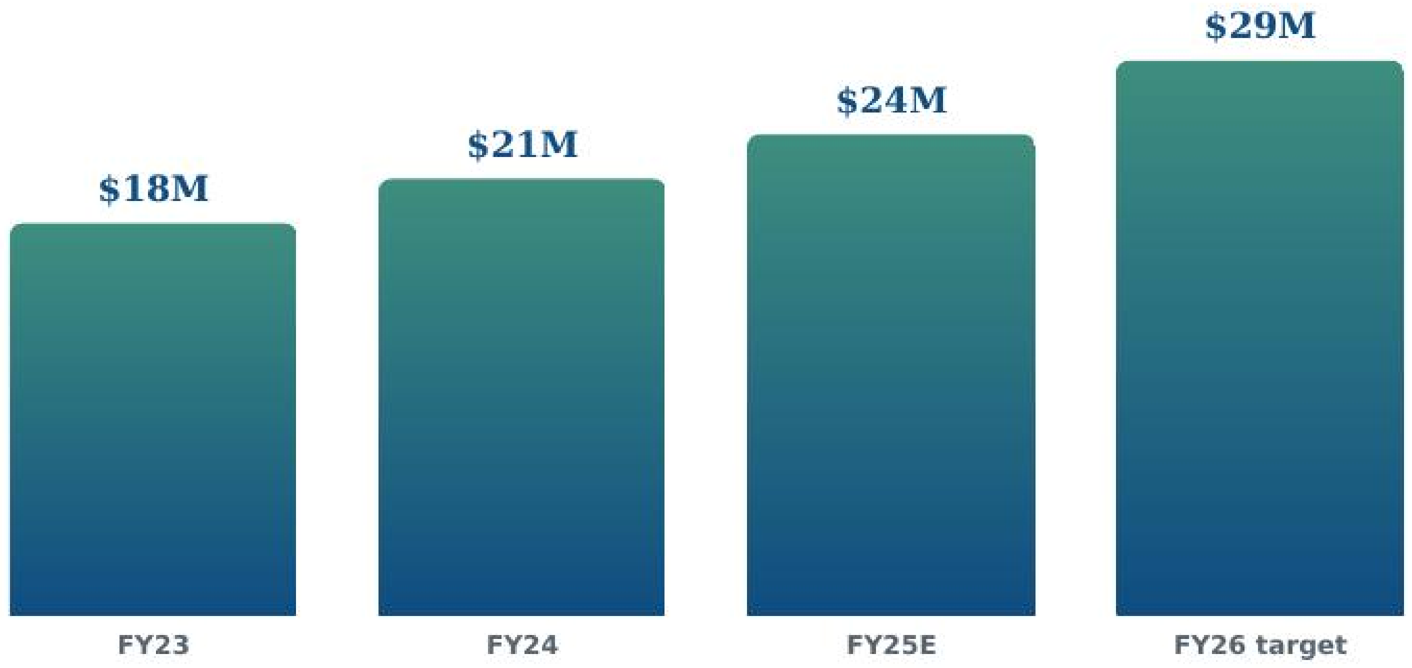
Compliance Reporting

Funder, regulatory and audit reporting for charters/nonprofits

HR & Payroll Support

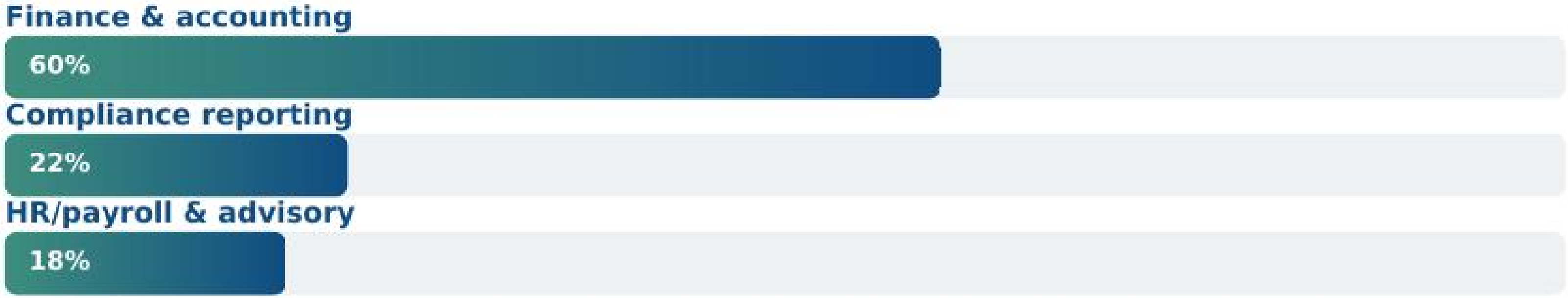
Administrative operations and advisory

Illustrative Revenue Trajectory ($M)



Illustrative estimates — a recurring core plus expansion and data/products drives the trajectory.

Illustrative Revenue Mix



Illustrative estimates. Mix shift toward recurring and data/products is the value-creation direction.

Strategic Priorities — FY2026

1 **Consolidate fragmented regional providers**

2 **Standardize and automate delivery for margin**

3 **Cross-sell service lines within accounts**

4 **Extend into adjacent nonprofit verticals**

SECTION 04 · STRATEGY

Illustrative Scenarios

BEAR

Flat

Cyclical or category pressure slows growth; retreat to the recurring core.

BASE

Steady growth

Recurring core compounds with modest expansion and mix shift.

Illustrative only — not guidance.

BULL

Accelerating

Enterprise Risk Register

Risk	Rating	Description / mitigation
Policy exposure	High	Charter authorization and public-education funding shifts affect the client base.
Labor intensity	Med	Utilization-driven margins cap operating leverage without automation.
Client concentration	Med	Mission-driven segment with constrained budgets.
Transferability	Med	Key-person and delivery-transferability risk in a services model.

Board Scorecard — FY2026

Metric	Current	Status
Logo churn	Low	● Green
Delivery scalability	Developing	● Amber
Process documentation	~70%	● Amber
Education-funding exposure	Sensitive	● Red
Cross-sell penetration	Growing	● Green
Client tenure	Long	● Green

Decisions Requested of the Board

✓ **Approve FY2026 operating plan**
Endorse recurring-growth, standardization and cross-sell targets.

✓ **Fund technology enablement**
Approve investment to automate and standardize delivery.

✓ **Endorse roll-up strategy**
Approve consolidation of regional back-office providers.

✓ **Oversee policy-risk monitoring**
Confirm tracking of charter-authorization and funding shifts.

APPENDIX

Sources & Methodology

Company facts drawn from public sources on Charter Impact (outsourced back-office and financial operations for charter schools and nonprofits). Financial figures are illustrative estimates.

- Company facts are drawn from publicly available sources; structure follows common board-review best practice.
- Metrics, deliverables and OKRs for this company are provided as separate companion files.
- All financial figures are illustrative planning estimates. This company does not necessarily disclose audited financials.

CHARTER IMPACT

Thank you · Questions & Discussion