

Charter Impact

<https://www.charterimpact.com/contact-2>

15760 VENTURA BLVD., SUITE 960

ENCINO, CA 91436

PHONE: 888.474.0322

CONTACT: Spencer Styles, sstyles@charterimpact.com

Phone conference 9/25/19 at 2PM

Rec'd proposal 9/25/19

Notes from phone conversation on 9/25/19:

- They did their research on us.
- Yes they can meet all of our needs.
- Would have 24 hours access to all documentation electronically.
- 99% paperless
- Payroll done in house at their firm
- Electronic employee system to view pay stubs, w-2's, time keeping, onsite approval of timesheets b/f processing
- Can support Aeries if needed
- Will provide separate fee schedules for business management, payroll and data, try to customize package to what customer needs so they are not charging for things the customer does not need/use
- Customer service mindset and partnership perspective
- Payroll team reviews new contracts to ensure they meet Ed code
- They can attend board meetings in person and would want to do that if that is what had been happening historically
- Want to work with schools regarding goals and targets
- Asked for date of transition, goal Nov 1 or Dec 1?
- Have a linkedin page