

Services for the Private School Industry



We are proud to provide financial leadership and business office expertise to private schools throughout California. Our extensive experience in understanding the specific needs of schools has provided both heads of schools and board members the tools needed to perform optimally.

The PBO Advisory team will provide an evaluation of your school's administrative departments for effectiveness and efficiency, review current processes and procedures, and/or provide a team of professionals to perform the daily, monthly, and annual support needed to keep your school running smoothly.

CONSULTING SERVICES

Evaluation, recommendations, and implementation of

- Best practices
- Roles and responsibilities
- Allocation of resources and duties
- Compliance with regulations
- Risk management
- Governance- board of trustees and head of school

OUTSOURCED ACCOUNTING SERVICES

- Financial reporting, analysis, and metrics
- Audit prep
- Budget and cash forecasting
- Investment guidance
- Tuition analysis
- GAAP standards
- Internal controls
- Day-to-day financial office support

OUTSOURCED HUMAN RESOURCES SERVICES

Assessment of processes and advise on best practices:

- Setup and use of current HRIS/payroll systems
- Utilization of technology for HR management
- Onboarding/offboarding of employees
- Job descriptions
- Talent acquisition/recruiting
- Employee handbooks/policies
- Leave of absences
- Performance management/corrective action
- Compensation/benefits/open enrollment
- Review safety/workers' compensation policy
- Independent contractors (1099) vs. employees (W2)
- Annual performance review process
- Teacher/admin annual contract review and preparation

We help with many of the complex issues facing private schools, freeing you to focus on running your school and educating tomorrow's leaders.



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