

Brian Kates

Experience

ZATA Consulting

Chicago, IL

2015 – Present

Founder

- Founder of consulting practice that provides strategic planning, financial modeling, facility project planning, facility financing, and data analysis services to education and mission driven organizations.
- Specializes in strategic support and consulting services for startup and expanding charter school operators and charter management organizations.
- Consulting project range includes: turnaround management, alignment of organizational strategy to facility project, development of financial model, systems implementation, and analyzing student achievement data.

Intrinsic Schools

Chicago, IL

2012 – 2014

Director of Finance and Operations

- Work with CEO to develop strategic plan for a five school, 4,500 student charter management organization.
- Build systems and infrastructure for operational and financial activities of startup charter school.
- Lead facility acquisition, development, and financing activities.
- Manage day to day financial activities, including accounting, accounts payable, payroll, and cash management.
- Ensure financial sustainability through long-term strategic planning and financial modeling.

Achievement School District

Nashville, TN

2012 – 2013

Director of Budget and Finance

- Led finance team and built financial infrastructure for state-wide startup school district.
- Built and managed budgets for three directly run schools and central office as well as providing financial oversight to three charter schools, with a total district budget of \$31 million.
- Led project team for selecting and implementing a new Enterprise Resource Planning solution.
- Ensured financial compliance across the district, including the U.S. DOE Race to the Top grant.

Charter School Growth Fund

Broomfield, CO

2006 – 2012

Senior Investment Associate

2009 – 2012

- Managed relationships across up to \$24.0 million in portfolio investments, including providing ongoing strategic support and ensuring performance against investment targets.
- Led due diligence and provided support developing strategic business plans and financial models on seven investment opportunities: \$6.3 million in investments, approximately \$9.0 million pending.
- Assisted in the development and implementation of CSGF's \$7.5 million facility financing fund: \$4.3 million in investments, approximately \$2.0 million pending.
- Assisted in the development of organization's first regional fund in Tennessee: \$14.0 million in government and private funding secured, first investment made June 2011.
- Worked with new CEO and existing staff to develop organization's five-year strategic business plan for a \$155 million core fund: launched in fall 2010, \$100 million raised as of June 2011, five investments executed.

Associate, Analytics Team Manager

2008 – 2009

- Managed analytics team that produced all quantitative analysis for due diligence on 11 potential investments and portfolio management for 17 active investments.
- Developed and managed process for constructing and populating organization's first portfolio scorecard: analyzed performance against annual academic, financial, and growth milestones.
- Led and supported due diligence and strategic planning efforts: \$29.5 million in investments.
- Worked closely with Director of Quality Assessment to develop internal database for storing academic, financial, and operational data across the entire portfolio.

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Analyst

2006 – 2008

- Worked as organization's first analyst during initial launch of an \$87.0 million fund.
- Developed tools for assessing financial health, sustainability, and academic quality of charter operators.
- Supported due diligence and business planning efforts: \$31.7 million in investments.

Wells Fargo Business Credit, Inc. Denver, CO

2004 – 2005

Business Analyst

- Trained across all operational areas as organizations first intern, transitioning into business analyst role.
- Analyzed financials to ensure proper financial reporting and performed assessments against loan covenants.
- Constructed new projection model to analyze pro forma financials.

Other Experience

2001 – 2005

- Controller and baker at startup bakery
- Executive Assistant at startup grocery store
- Intern to CFO at grocery store chain

Education

University of Denver

Denver, CO

August 2005

- M.S. Finance

University of Denver

Denver, CO

June 2004

- B.S. Business Administration and Finance with a minor in Leadership
- Honors Program and Pioneer Leadership Program
- Graduated Magna Cum laude with Honors

Skills

Finance

- Extensive experience building financial models for charter management organizations.
- Worked with over 40 charter operators to develop financial models for long-term growth.
- Analyzed financial health of over 40 charter operators nation-wide at various stages of maturity.

Analysis

- Extensive experience analyzing academic, financial, and operational performance of charter management organizations and single school operators.
- Experience developing databases and maintaining stored data for the purposes of data analysis.
- Extremely proficient in use of Excel as an analytics tool.

Strategic Planning

- Experience working with organization's in turnaround situations.
- Provided strategic and technical support to over 50 charter operators expanding or considering expansion.

Outside of Work

- Board Member: Great Lakes Academy
- Distance Running: Road races to trail runs, 5K to Half Marathon
- Hiking: Colorado to New Zealand
- Volleyball: Sand and Grass
- Guitar: Rhythm only
- Singing: From rock bands to karaoke
- World Travel: Third-world to first-world