

CEO/EXECUTIVE DIRECTOR * COO/DEPUTY DIRECTOR * CFO/FINANCE DIRECTOR

Nonprofit-sector senior executive specializing in T.A.C.T.™ - Troubleshooting, Analysis, Cleanup and Turnaround/Transformation of nonprofit organizations, small businesses, and business units. Deep experience, formal education, and lifelong learning bolster 35+ years in public and charter school education, information technology, communication systems, human resources, and for-profit and nonprofit accounting and financial reporting. A serial entrepreneur and intrapreneur, pet projects include helping entrepreneurs and artists find their voices, advocating for education and human services, and supporting community and economic development.

TECHNICAL SKILLS/COMPETENCIES

- Bank/Accounting Reconciliations
- Treasury/Cash Flow Management
- Accounting Policies & Procedures
- Audit Planning & Internal Controls
- Migrations, Conversions & Transitions
- Systems Development/Project Management
- Relationship Management
- Grants Management & Reporting
- Professional & Executive Coaching
- Comprehensive Budgeting & Forecasting
- GAAP/GAAS Accounting & Compliance
- General Ledger/Trial Balance Maintenance
- Public Speaking/Presentations
- Human Resources Management
- Payroll & Benefits Administration
- Leadership/Strategic Development
- Employee Recruitment & Retention
- Financial Statements & Board Reporting

PROFESSIONAL OVERVIEW

DIRECTOR OF FINANCE AND ADMINISTRATION

APR 2023 – PRESENT | WOMEN'S LAW PROJECT (WLP)

- [Sep 2024 – Feb 2025] Lead/oversee Philadelphia office following departure of Philadelphia-based co-Executive Director
- Establish formal accounting, financial reporting, HR, payroll, IT, and operational structures and internal controls
- Liaise with board of directors, prepare and distribute board meeting materials, and act as custodian of records
- Reduce annual audit turnaround from 10+ months to just 3 months following the fiscal year end, with no auditor adjustments
- Transitioned corporate credit cards from PNC Business Visa to BusinessOptions within first 90 days of hire

SENIOR ACCOUNTANT

APR 2019 – APR 2023 | PHILADELPHIA INDUSTRIAL DEVELOPMENT CORPORATION (PIDC)

- Reconciled 130+ monthly and quarterly financial reconciliations for multi-entity agency with c. \$100M revenue, \$200M net assets
- Cultivated strong relationships with City partners for multiple projects, e.g. Philadelphia Rebuild program
- Trained and coached staff accountant and temporary accounting and financial reporting personnel
- Reconciled 30+ quarterly financial statements in accordance with GAAP and GAAS compliance standards
- Led 30+ external audits, prepared nonprofit and corporate tax filing support, and liaised with multiple audit partner firms

ACCOUNTANT/ANALYST AND IT ADMINISTRATOR

DEC 2017 – OCT 2018 | PHILADELPHIA CHILDREN'S ALLIANCE (PCA)

In addition to duties performed as Accountant/Financial Analyst:

- Developed and maintained organization's first complete technology assets inventory and database
- Liaised between organization and outsourced IT services provider, advised management on key tech decisions
- Reviewed and interpreted IT management reports and communicated updates to all staff via email and staff meetings
- Identified line staff needs within context of organizational budget and strategic plan

ACCOUNTANT AND FINANCIAL ANALYST

APR 2015 – DEC 2017 | PHILADELPHIA CHILDREN'S ALLIANCE (PCA)

- Led 4 consecutive "no adjustments, no management letter" annual independent audits
- Built GAAP-compliant financial statements to accompany regular financial reporting to board of directors
- Remitted fiscal reports for public and private grants, including federal, state and local government agency reporting
- Designed and presented organization's first multi-year financial projections with key performance indicators
- Transitioned corporate credit card accounts from Wells Fargo Bank to PNC Bank (BusinessOptions) within first 90 days of hire

ACCOUNTING MANAGER

OCT 2012 - SEP 2014 | SCHOLAR ACADEMIES (MULTI-ENTITY/MULTI-SITE)

- Processed average of 400 payables with 100% accuracy on a monthly basis with as little as one-week turnaround
- Maintained general ledger of 5 entities with annual revenues totaling \$35M in private and public funding
- Assisted CEO and CFO with 5 independent nonprofit/charter school budgets and separate program budgets
- Organized special small- to midsize-group workshops and one-on-one assistance on new systems and processes
- Strengthened banking relationships in order to work more effectively with central office and school teams
- Transitioned corporate credit card accounts from TD Bank to PNC Bank (BusinessOptions) within first 90 days of hire

INDEPENDENT CONTROLLER/CFO

APR 2011 - SEP 2012 | VARIOUS FOR-PROFIT AND NONPROFIT ENTERPRISES; PHILADELPHIA, PA

- **Just Cookies:** new enterprise startup, professional coaching, budgeting and forecasting, business and marketing planning
- **Friends of the Free Library:** audit adjustment implementation, bookkeeper training, best practices, trial balance reconciliations
- **Gathered Dreamz:** nonprofit startup, budgeting and forecasting, business and marketing planning, accounting system consultation
- **Miss Puerto Rico Pennsylvania Pageant:** business and marketing planning, financial advice, marketing strategy implementation
- **Neil Heilman Construction:** Quickbooks desktop/online migration, general ledger cleanup, bookkeeper training, consultation
- **Derek's Automotive:** Quickbooks online setup, trial balance reconciliations, bookkeeper training, general consultation
- **JFoster Cabinetry (formerly Trim Upgrades):** Migration to Quickbooks, trial balance reconciliations, bookkeeper training

IT/FINANCE MANAGER

JUN 2004 - MAY 2011 | ASPIRA, INC. OF PENNSYLVANIA (MULTI-ENTITY/MULTI-SITE)

Jun 2004 – May 2008 IT Manager; Jan 2008 – May 2011 Finance Manager

Jul – Aug 2007 & 2008 Summer Camp Instructor

- Posted on average 1,000 monthly general ledger entries for 5 entities with annual revenues of \$20M
- Concurrently managed 5 general ledgers, payrolls, financial reporting, and internal audits for nonprofit and schools
- Reporting to CFO, hired, trained, and supervised finance clerk, payroll administrator, payroll assistant, and interns
- Accelerated month-end closing process from as much as 45 days to 7 days, reviewed closing and adjusting entries
- Supported executive team by optimizing board-requested organizational strategic plan into concise timeline

CITY NEWS DESK EDITOR

NOV 1999 – DEC 2000 | AL DÍA NEWSPAPER; PHILADELPHIA, PA

COMPUTER NETWORK ADMINISTRATOR

SEP 1998 – JUN 2004 | ROBERTO CLEMENTE MIDDLE SCHOOL (PHILA SCHOOL DISTRICT)

EDUCATION

- Bachelor of Science in Business Administration, University of the People, January 2024
- Business Administration/Public Policy, Community College of Philadelphia, May 2009

ACADEMIC ACHIEVEMENTS

- University of the People
 - Entrepreneurship Certificate (Sep 2022)
 - Strategy Certificate (Sep 2022)
 - Finance Certificate (Jun 2022)
 - Accounting Certificate (Apr 2022)
 - Marketing Certificate (Feb 2022)
- Intuit Quickbooks Certified ProAdvisor
- Nonprofit Management Certificate Program, Temple University
- Manager Training Series, United Way of Southeastern Pennsylvania

PROFESSIONAL QUALITIES/TRAITS

- Well-balanced independence and collaboration/co-elevation
- Informed perspective – people, process and product
- Self-motivated, self-directed (growth mindset)
- Strong verbal/nonverbal communication
- Expert/critical/strategic/systems thinking
- Relationship maintenance/cultivation
- Transformational coaching/leadership
- Resourceful decision making
- Creative problem solving

SYSTEMS/SOFTWARE

- Sage Intacct/Bill.com
- Microsoft Dynamics SL
- Salesforce (Cloud databases)
- Microsoft Office 365/OneDrive
- FileMaker Pro/Claris (Database)
- Laserfiche (File archival/retrieval)
- Python 3 (Programming language)
- Engagedly (Performance appraisal)
- Intuit Quickbooks Desktop & Online
- ADP/Paychex/PayUSA/Intuit Payroll
- SharePoint/Converge/Huddle/Basecamp
- Free Open Source Software (FOSS) applications
- Web development: WordPress, Elementor, Gutenberg
- Windows, MacOS, iPadOS, iOS, Android, GNU Linux/Debian

LEADERSHIP, VOLUNTEER & PRIOR PROFESSIONAL EXPERIENCE

- Member, Society for Human Resource Management (SHRM)
- Member, Board of Directors, Intercommunity Action
- Member, Philly Non-Profit Finance Group
- Presenter/Sponsor, Career Day (Multiple schools)
- Organizer/Curator, Organized Chaos Art Exhibit
- Secretary/Treasurer, Friends of McPherson Square Library
- Member, Hunting Park/Kensington Stakeholders
- After-School Program Instructor, Iglesia del Barrio
- Advisor, Young Dream Stars (Volunteer Group)
- Trustee, Miss Puerto Rico Pennsylvania Pageant
- Regional Manager, Attain Learning (Multi-site)
- Controller & Business Advisor, Del Val Services, Inc.
- Controller & Business Advisor, Cintron & Santini Construction, Inc.
- Founder & Recruiter, NF Magazine (Online Publication)
- Volunteer, Latino Partnership Institute (Latino Leadership Institute)
- Volunteer, Police-Barrio Relations Project
- Secretary, Anti-Violence Anti-Drug Task Force
- Secretary, Board of Directors, Centro Pedro Claver & Centro Juan Antonio Corretjer
- Course Author & Instructor, Creative Writers After School Program (CWASP)
- Freelance Journalist, El Enfoque/Focus Newspaper (Bilingual Community News Publication)