Job Description - Director of Finance & Operations

Duties & Responsibilities

- Driving the strategic planning process related to operations, compliance, and finance
- Developing systems to scale efficient and effective operations from campus to campus
- Overseeing financial operations, such as:
    - long-term budget planning in alignment with strategic plan
    - financing strategies and activities, including banking relationships
    - cash flow planning and ensuring availability of funds as needed
    - the budget planning process in collaboration with the Principal and Board of Directors
    - the creation of monthly financial board reports to monitor adherence to budget
    - the creation of quarterly financial reports to communicate financial position to stakeholders
    - maintenance of accurate records of all financial transactions to ensure compliance with state and federal guidelines
    - financial and accounting systems, processes, tools and control systems
- Overseeing data quality at the school- and district-level, such as:
    - ensuring compliance with attendance procedures
    - ensuring the proper coding of students in special populations, including—but not limited to—free and reduced lunch, LEP, SPED, G/T, etc.
- Coordinating all report submissions to the state (both student and business)
- Overseeing the HR process, such as:
    - the processing of new hires and the maintenance of all employee records
    - employee benefit programs, including health insurance and TRS
- Coordinating general operations of the school, such as:
    - managing third-party contracts and staff, including custodial staff
    - managing food services by coordinating with service providers and overseeing deliveries
    - maintaining all school technology assets and coordinating repair when necessary
    - purchasing processes and procedures and maintaining ongoing inventory
- Driving ongoing facilities' development, such as:
    - engaging with civil engineers, architects, and contractors to develop the required facilities, including an addition to our temporary facility as well as our permanent facility
- Ensuring compliance with all state and federal regulations, including the development of annual timelines and related systems

Requirements & Qualifications

- Undergraduate Degree in Accounting or other Business Function
- Masters Degree in Business or CPA
- Experience managing and driving a team toward outcomes, required
- Experience interacting with diverse stakeholders, required
- Excellent written and oral communication skills
- At least five years of experience in non---profit management, preferred
- K-12 school experience, preferred
- Ability to multitask, including prioritizing time for strategic planning while simultaneously responding to urgent and important demands

JAMES JAY FULTON

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EXPERIENCE:

Chief Financial and Operating Officer, July 2007 – Present
Choice Foundation, Inc., New Orleans, LA

- Serves as chief finance/operations officer for a not-for-profit charter school management organization.
- Oversees all non-academic functions including accounting, budgeting, facilities, grant writing and management, security, student transportation, food services, human resources, payroll, and information technology.
- Develops policies and procedures for organization on an ongoing basis.
- Manages all fiscal functions of the organization including financial statement preparation, auditor relations and cash flow management.
- Develops and manages an annual operating budget of $22 Million.
- Meets with several board sub-committees on a monthly basis.
- Reports to full charter school board of directors on a monthly basis.
- Reports to grant funding foundations and governmental agencies as required by funders.
- Coordinates all activities related to Federal, state, local and foundation grants.
- Directly supervises a staff of 25 individuals.
- Represents the charter school on a variety of fiscal and administrative issues with local, state, federal and other outside agencies.
- Oversees all construction projects and safety/security functions for all facilities.

Financial Reporting Manger, August 2006 – July 2007
Adams & Reese, LLP, Attorneys at Law, New Orleans, LA

- Served as a key player in managing and analyzing the company's financial database and being proactive in evaluating and providing information to Partners & senior management for use in assessment of operations.
- Served as primary contact on financial reporting matters.
- Responsible for analysis and review of monthly and quarterly financial results.
- Assisted in preparation and consolidation of quarterly plans and actual results.
- Responsible for monthly and quarterly reporting including actuals, plans and various analyses to Partners & senior management.
- Responsible for communicating with other departments on financial reporting and accounting issues.
- Prepared presentations for Partners and senior management.
- Assisted in consolidation and analytic review of Consolidated Financial Statements.
- Handled special projects, as assigned.

Chief Financial Officer, August 2005 – August 2006
Second Harvest Food Bank, New Orleans, LA

- Served as chief finance/operations officer for a not-for-profit food distribution organization.
- Oversaw administrative functions including accounting, budgeting, inventory management, human resources, payroll, and information technology.
- Developed policies and procedures for organization on an ongoing basis.
- Managed all fiscal functions of the organization including financial statement preparation, auditor relations and cash flow management.
- Developed and managed an annual operating budget of $10 Million.
- Met with several board sub-committees on a monthly basis.
- Reported to full charter school board of directors on a monthly basis.
- Reported to grant funding foundations and governmental agencies as required by funders.
- Coordinated all activities related to Federal, state, local and foundation grants.
- Directly supervised a staff of 15 individuals.
- Represented the organization on a variety of fiscal and administrative issues with local, state, federal and other outside agencies.

Dean of Finance & Administration, June 2003 – August 2005
Louisiana Technical College – Greater New Orleans Area District

- Administered and developed a budget in excess of $50 Million for a 5-campus district.
- Advised the District Vice-Chancellor & Provost regarding fiscal and budgetary matters.
- Directly supervised the Director of Human Resource, Director of Accounting, Director of Grants & Contracts and the Director of Facilities & Safety.
- Developed and maintained the college's administrative operating procedures.
- Prepared regular financial and administrative reports for college planning and decision-making.
- Represented the college on a variety of fiscal and administrative issues with the district office and outside agencies.
- Responsible for all fiscal, administrative and facility-related activities for 5-Campus District Southeastern Louisiana.
- Served as 2nd in Charge in a 5-campus district.

Associate Comptroller
For Budget, Financial Analysis and Grants & Contracts, September 2002 – June 2003
Louisiana Technical College – Greater New Orleans Area District

- Supervised staff of Grant Coordinators and Accountants.
- Managed over $10 Million in Grant Funding.
- Kept District Dean of Finance and Administration informed and advised of financial status.
- Monitored all expenditures related to grants and or contracts for authorized expenditure.
- Made appropriate budget adjustments as needed keeping District Dean of Finance and Administration informed and advised of financial status and condition of all grants and contracts.
- Ensured reimbursements/payments are requested from appropriate agencies on a timely basis.
- Ensured financial management of grants and contracts and adherence to grant and or contract stipulations.
- Performed accounting functions related to all grants and or contracts.

People Soft Budget Analyst, September 2001 - September 2002
University of New Orleans; New Orleans, LA

- Monitored General Fund's Budget for overspending.
- Made budget adjustments to transfer funds to under funded budget accounts.
- Analyzed Personnel Action Forms with PeopleSoft Human Resources Module.
- Analyzed General Fund's Budget within the PeopleSoft Financials Module.
- Developed and maintained Financial Services Department Web Site.

Staff Accountant, November 1999 – September 2001
Malcolm M. Dienes & Company; New Orleans, LA

- Audited financial statements of wholesalers, manufactures and retailers.
- Prepared financial statements with full footnote disclosures.
- Issued recommendations to improve internal controls.
- Prepared Individual and Business Tax Returns.
- Researched current tax issues.

Tax Development Specialist, July 1996 – November 1999
Tax & Accounting Software Corporation; Tulsa, OK

- Quality Assurance testing of state tax programs.
- Debugged DOS and Windows-based tax programs.
- Implemented software enhancements in accordance with state laws and user requests.
- Worked with programmers to fix theoretical and cosmetic bugs.
- Supported nationally used tax software – "The Professional Tax System"

NON-PROFIT/CIVIC ENGAGEMENT

Founder & Executive Director, May 2013 – Present
Spottswood Community Development Corporation, Inc., Metairie, LA

- Serves as chief executive officer for a grass roots non-profit agency whose mission is to enrich the lives of Americans by providing quality community development and economic development initiatives.
- Ensures ongoing programmatic excellence, rigorous program evaluation, and consistent quality of finance and administration, fundraising, communications, and systems.
- Actively engages and energizes volunteers, board members, event committees, alumni, partnering organizations, and funders.
- Develops, maintains, and supports a strong Board of Directors; serve as ex-officio of each committee; seek and build board involvement with strategic direction.
- Expands revenue generating and fundraising activities to support existing program operations.

EDUCATION:

***Master of Business Administration (MBA),* May 2003**
University of New Orleans, New Orleans, LA.

Bachelor of Science in Accounting, July 1996,
Pittsburg State University, Pittsburg, KS.

COMPUTER/ SOFTWARE SKILLS:

Micro Soft Office Suite – Word, Excel, Access, Outlook, FrontPage, Project, Power Point
People Soft – Financial Module, Human Resources Module, Query, Crystal Reports, NVision Reports
Accounting Systems – Black Baud's Financial Edge, MAS90, Great Plains, Peachtree, QuickBooks, Intuit
Other – HTML, Graphics Program, Tax Preparation Software, Black Baud's Raiser's Edge Software

PROFESSIONAL REFERENCES:

- **Dr. Toya Barnes-Teamer**, Vice President for Student Success, Dillard University, 1555 Poydras Street, 12th Floor - New Orleans, LA 70112, Phone: (504) 939-3029
- **Sean Favre, MBA, CPA**, Chief Financial Officer, Martin Luther King Charter School, 1617 Caffin Avenue, New Orleans, LA 70117, Phone: (504) 940-2243
- **Tiffany Gilmore-Soublet**, Associate Comptroller, University of New Orleans, 2000 Lakeshore Drive, New Orleans, LA 70148, (504) 280-6000