

Objective

Seasonal Contract or Consulting Position utilizing my diverse work portfolio which encompasses **Financial Management, Program Development, Fundraising** and **Development Coordination**, as well as **For Profit and Nonprofit Financial Reporting**

Education

B.S. Management Science, State University of New York at Binghamton

Relevant Areas of Experience

Financial Management—Deep Experience in Accounting, Financial Management, and Financial Reporting Gained Through Experience as an External Auditor and Operational Finance Manager

Financial Reporting — Presentation Skills Combine Knowledge of Traditional Financial Reporting with Outcome Data and Visual Display For Effective Communication to Management and Boards

Financial Training — Trained Professional Assistants and Students in Accounting Procedures and Processes; Documented all Procedures and Processes in Formal Training Manuals

Program Development—Student Experiential Internship Program

Program Development — Student Global Experience Program

Grant Writer, including Monitoring of and Reporting on Program Outcomes

Coordinator of Annual Fund Student Telethon Campaign

Donor Database Conversion and Development

Business Plan Development and Presentation

Positions Held

September, 2012 – November, 2013 – Financial & Reporting Accountant and Office Manager

Geneva Historical Society, Geneva, New York

Reporting to the Executive Director and Board Treasurer, responsible for all financial reporting for Unrestricted, Board Restricted, and Permanently Restricted Endowment Funds. Developed reporting tools including Budget to Actual Comparison Reports and Twelve Month Cash Projections for multiple operating museums. Managed 2012 external audit including the redesign of audited financial statements to clearly present Unrestricted, Temporarily Restricted and Permanently Restricted Funds. Redesigned accounting structure to reduce number of Quick Books companies (Operating and Designated/Restricted Funds). Also, provided development support for Annual Appeal, Membership, and Memorial Donations, as well as for the tracking and monitoring in-kind donations for various special events held during the year.

April, 2007– September, 2012 – Finance and Special Projects Manager

DeSales High School, Geneva, New York

Reporting to Principal, Development Committee and Board of Trustees, developed reporting for both tuition and development revenue streams, managed financial aid program, completed development software conversion, coordinated Annual Fund canvas of alumni, wrote and secured grants, created development and recruitment brochures, and created major donor communications, including a formal business plan. In the spring of 2012, created and executed a fundraising plan for the *DeSales Global Connections Program*, affording nine participants the opportunity to embark on an educational tour of Spain in June, 2012.

Also responsible for all phases of accounting, historical financial reporting, and forecast reporting to Principal and Board of Trustees. In this process, mentored and trained financial assistants in the daily operational accounting for the school. Accepted increased responsibility in a period of uncertainty related to the school's sustainability.

527 South Main Street
Apartment B
Geneva, New York 14456

Phone: (315) 418-8453

E-mail:
susan.i.jones12@gmail.com

2006— 2007 – Not For Profit Consultant (Self-Employed)

Projects: Cornell Cooperative Extension of Monroe County, Rochester, New York

Sojourner Hall For Women, Rochester, New York

Threshold Center For Youth Services, Rochester, New York

Provided services to social service agencies and local community research association in Rochester, New York. Focus of projects included cash flow improvement resulting from government and grant funding, external audit management, development of process documentation, reconstruction of management reporting systems, transitional training for finance directors, controllers and staff, and mentoring of interns and employees.

Prior to 2006

Financial Administrator – All financial reporting for church undergoing major building campaign

Division Controller – Financial official for optics manufacturer in Western, New York

Financial Consultant – Banks, public accounting firms and nonprofit concerns

Financial Reporting Manager – Publicly reported and multi-national companies

Audit Manager – Price Waterhouse (now PW-Coopers), a national audit/consulting firm

Chronological Summary of Finance Related Positions Available Upon Request

Professional References

S. Ford Weiskittel, Board Treasurer, Geneva Historical Society – (315) 789-7716

Gerald Macaluso, Retired Principal, DeSales High School – (315) 651-0984

Additional References Available Upon Request

Educational Conferences and Training

Center For Courage and Renewal

Training to be a retreat facilitator for employees in the helping professions including educators and nonprofit professionals in communities throughout the Finger Lakes region.

Foundation Center, Cleveland, Ohio and New York, New York

- ◆ *Foundation Fundraising*, November, 2012
- ◆ *Proposal Writing Seminar*, October, 2012
- ◆ *Cultivating Grantmaker Relationships*, November, 2012
- ◆ *Building A Sustainable Nonprofit Organization*, November, 2012

Software Proficiency

Microsoft Office, including **Excel, Word, Access, PowerPoint** and **Publisher**

Results Plus for Fundraising and **Filemaker Pro** (Relational Databases)

Accounting Software Packages including **Peachtree** and **Quick Books**

Mail Chimp Software For E-Mail Newsletter Production and Distribution