

# Marcia N. Saulo, CPA

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Senior financial leader in nonprofit education with proven history of successful accountability for complex and growing organizations with multi-million-dollar budgets. Expertise in financial accounting and reporting, budgeting, audit management, purchasing, payroll, human resources, benefits, legal review, risk management, and customer service. Strong strategic planner, problem solver, communicator and cross-departmental collaborator.

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## Professional Experience

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### **Controller**

Gulf Coast Community Foundation – Venice, FL

10/2018 to present

Operational leader for the day-to-day financial and accounting services of this growing foundation with assets in excess of \$300 million. Charged with improving cross-functional communications and workflow to ensure stakeholders receive timely and transparent information. Project leader for transition to a new fully-integrated charitable operations management and accounting platform.

### **Chief Financial Officer**

Lighthouse Academies, Inc. – Wesley Chapel, FL

6/2015 to 9/2018

Turn-around financial leader for \$80 million non-profit charter school network. Critical partner on executive team in strategic and tactical decision making. Responsible for accounting, finance, payroll, benefits, risk management, budgeting and audits. Developed and secured board approval of investment policy for New York schools.

- Instituted new financial reporting for board, providing accurate, detailed fiscal picture not previously provided.
- Launched switch to new accounting and purchasing systems. Implemented procure-to-pay AP automation.
- Improved teamwork and performance of finance department through cross training and collaboration.
- Oversaw open enrollment process and development/communication of employee benefits package.
- Secured clean audits and improved 990 presentation, despite disarray of financial statements prior to tenure.
- Established monitoring and forecasting of cash flow that kept the company in operation.
- Revised and improved transparency of budgeting process for national office and network.

### **Director of Finance**

School District of DeSoto County – Arcadia, FL

10/2013 to 6/2015

Financial leader for \$60 million school district. Directed budgeting, accounting, financial reporting, accounts payable, accounts receivable, payroll, fixed assets, internal accounts, purchasing and audit process. Ensured accurate governmental accounting and effective internal controls. Served on bargaining team and physical plant visioning team.

- Increased grant revenue through cross-departmental process improving completeness/timeliness of expenditures.
- Revised all district financial policies and procedures, meeting deadlines of NEOLA policy review.
- Enhanced monthly financial reports for board as well as internal report tracking district financial condition.
- Revised fixed asset disposition report to provide more relevant information.
- Established budget calendar that improved department collaboration while meeting statutory deadlines.
- Gave budget presentation to board that members proclaimed as best given in years.

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## Professional Experience (continued)

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### Region Finance Director

Imagine Schools Non-Profit, Inc. – Bradenton, FL

4/2008 to 08/2013

Financial leader for \$25 million region. Supervised cohesive team in accounting, compliance, human resources, payroll and internal control procedures. Directed school budget process and prepared monthly governmental accounting reports for CEO/CFO, boards and school districts. Ensured accurate, timely closings for eight sets of books. Reviewed/reconciled accounts payable, accounts receivable, cash management, bank accounts and general ledger activity. Primary liaison to external auditors.

- Key member of team that grew region from one school to six in one year.
- Headed corrective action plan team to ward off financial emergency declaration for three schools.
- Presented Florida Charter School Conference breakout sessions on “Building Quality Budgets” in 2011 and 2012.
- Improved handling of grant funds and budgets. Rescued long overdue “1st year” grant dollars for third yearschool.

### President

S’Platters Pottery Painting Place – Sarasota, FL

5/2000 to 2/2009

Founded retail business targeting affluent women and their children. Complete P&L responsibility; managed operations, accounting, purchasing, inventory, POS system, payroll, customer service and marketing. Ensured quality production of handmade art in service-intensive environment. Chamber Small Business of the Year.

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## Education

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**Master of Business Administration**, Drexel University

**Bachelor of Science, Accounting**, University of South Florida, Sarasota-Manatee

**Bachelor of Arts, Fine Arts**, The College of William and Mary in Virginia

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## Accreditations and Affiliations

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**CPA** (licensed in Florida)

**CGMA** (Chartered Global Management Accountant)

**SFO** (Certified Administrator of School Finance and Operations, retired)

**FLMI** (Fellow, Life Management Institute (insurance industry))

Member: **FICPA, AICPA**

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## Technology Summary

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FIMS • iPhi • QuickBooks • Sage MAS500 • MS Dynamics Retail Management • Skyward • AvidXchange

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