

JOAN REILLY, MBA

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Finance Executive with a strong record of achievement in not for profit and high-tech settings. Guide periods of major change via expert project management and process realignment. Strategically restructure corporate functions to support and strengthen overall business strategy. Team player with adaptability to both hands-on role and leadership as circumstances require. Strategic business sense and ability to develop creative solutions to complex business problems. Effective communicator and strong relationship builder with colleagues, staff members, Board, and committee members.

EXPERIENCE

- 2017-Present **VOICES FOR CHILDREN** San Diego, CA
Chief Financial Officer
- Provide oversight and management of all financial operations of the organization, reporting to the President/CEO.
 - Areas of responsibility include finance, accounting, strategic planning & analysis, budgeting, forecasting and ad hoc analysis, taxes, reporting, human resources, office management, and information technology.
- 2014-2017 **MINGEI INTERNATIONAL MUSEUM** San Diego, CA
Chief Financial Officer
- Provide oversight and management of all financial and operations functions of the organization, reporting to the Museum's Director.
 - Areas of responsibility include finance, accounting, strategic planning & analysis, budgeting, forecasting & ad hoc analysis, governance, taxes and tax planning, reporting, human resources, training, information technology, security and facilities, and oversight of UBIT coffee shop.
- 2010-2014 **MULTIPLE CLIENTS** San Diego, CA
Finance, Accounting & HR Consultant
- Consulted with clients to maximize efficiency on broad range of operations, ranging from Accounting and HR process design to self-service applications and enabling technologies.
 - Developed and planned objectives with CEO/CFO and staff including short and long range accounting programs in budgeting, profit analysis, accounting systems.
 - Performed financial analysis for clients to evaluate new projects/businesses, including forecasting, and profitability modeling.
 - Established accounting operations – Bookkeeping, AP, AR, Month and Quarter end closings, Journal Entry reviews, GL reconciliations, Cash management, Contracts administration, and Vendor relationship management.
 - Established internal controls, financial controls, audit processes and procedures, and procurement processes.
 - Supported preparation of consolidated financial statements.
 - Established financial metrics, KPI dashboards and variance analysis models.
 - Provided Human Resources consulting on benefits administration, payroll administration, employee relations/manager coaching, and recruiting.
 - Established Stock Option Plans, and Employee Share Purchase Plan.
 - Established compliance procedures.
- 2004-2010 **ORACLE CORPORATION (Acquired Sophoi, Inc.)** Los Angeles, CA
2009–2010: Accounting Manager (Sophoi)
- Subsequent to sale to Oracle, supported Sophoi integration with Oracle for all Accounting and Human Resources related transactions for US and International entities.
- SOPHOI, INC. (Acquired by Oracle Corp.)** Los Angeles, CA
2004-2009: Director of Finance & HR
- Reported to the CEO; managed a team of six resources.
 - Streamlined all accounting operations – Bookkeeping, AP, AR, Month-end closings, Vendor relationship management.
 - Established and managed multi-discipline infrastructure, internal controls, HR processes, financial controls, audit processes and procedures, and procurement processes for multi-national operations in Technology start-up.
 - Managed preparation of consolidated financial statements across US and international entities.
 - Managed financial audit with external auditors evaluating a five year look back of company records.

- Managed resources and audit deliverables across all disciplines (Research & Development, IT, HR, Accounting, Corporate Contracts), and international locations.
- Managed data entry project to bring accounting system up to date by correctly entering and classifying over four years of accounting transactions. Completed project within 3 months of start, 3 months early which allowed company to proceed with audit.
- Managed contracts and ensured customers were invoiced correctly and at appropriate times based on contracts and/or maintenance agreements.
- Assisted executive management with annual planning, business performance review.
- Provided executive management with financial analysis including key performance indicators, variance analysis and trending analysis.
- Supported investor relationship program as one of two primary contacts.
- Led senior management through headcount evaluation, and needs and gap analysis.
- Developed recruiting plan, and managed recruiting processes towards successfully meeting annual recruiting targets within eight months, resulting in 100% increase in headcount in Professional Services, and Research & Development organizations.
- Led overhaul of employee benefit plans from needs assessment, vendor evaluation, plan setup, employee communication and subsequent enrollment.
- Maintained voluntary annualized attrition rates below 5%.
- Led and managed entire project life cycle for corporate, human resources and financial due diligence project for a successful asset sale to Oracle Corporation.
- Directed and managed due diligence processes for successful strategic investment transaction by Oracle Corporation (which took place two years prior to eventual asset sale to Oracle).

1996-2003

BURNTSAND INC. (Acquired Primix Solutions, Inc.)

Boston, MA

2001-2003: U.S. Human Resources Manager

- Created and managed a scalable Human Resources infrastructure capable of supporting five U.S. locations.
- Evaluated employee benefits across all U.S. locations, and consolidated employee benefits for all U.S. offices resulting in 10% annual cost savings.
- Managed compensation across all locations, including merit increases, bonus accruals and payouts. Worked closely with managers to allocate all compensation changes while staying within budget for each location.
- Consolidated HR activities throughout five offices to one centralized location.
- Reported to the SVP of HR; managed a team of 2 onsite HR Assistants, and 3 remote administrative assistants.

PRIMIX SOLUTIONS, INC. (Acquired by Burtsand, Inc.)

Boston, MA

1996-2001: Regional HR Business Partner

- Member of the Integration & Acquisition team that managed the acquisition of five service companies.
- Participated in HR due diligence processes, and worked closely with management to evaluate oncoming staff and appropriately slot acquired staff into organization at correct levels.
- Assisted CFO in external reporting per SEC regulations as related to all stock plans.
- Managed annual and quarterly performance review process.
- Administered all aspects of employee benefits plans including 401(k) administration, health/dental/vision/life/ADD plan (including plan evaluation, open enrollment, COBRA administration).
- Administered compensation plans including bonus tracking, payouts, and employee communications.
- Worked closely with managers to allocate annual merit increases to employees while staying within budget.
- Worked closely with Learning Director to develop job descriptions for all roles across organization.
- Administered all aspects of company Stock Option Plans, and Employee Share Purchase Plan.
- Successfully led and managed HRIS implementation from vendor evaluation and selection through implementation, and education/training of HR teammates.

EDUCATION

- 2010 Master of Business Administration (MBA), UCLA Anderson School of Management, L.A.
- 1994 Graduate Diploma in Computing, University of Limerick, Ireland.
- 1992 Bachelor of Commerce, National University of Ireland (Galway), Ireland. (Accounting major).

TOOLS & TECHNOLOGIES

MS Excel, PowerPoint, Visio, SharePoint, Quickbooks Enterprise for Not for Profits, QuickBooks Pro, Macola/Progression, Financial Edge, Raiser's Edge, PeopleSoft, HRIS-Pro, Transcendive Equity Suite (fka CMS Express Options)