

Amit Gautam, CPA
3809 Oak Creek Drive
Dayton, Ohio 45440
September 8, 2024

Bellbrook-Sugarcreek Local School District
3757 Upper Bellbrook Road
Dayton, Ohio 45305

To whomever it may concern:

I am submitting my resume and letter of intent for your consideration for the position of Treasurer. I have three years of experience as assistant treasurer for Dayton City School District and over nineteen years of experience with Ohio Auditor of State. The following is a brief description of some of my accomplishments with the Dayton City School District and the Ohio Auditor of State that will demonstrate that I have the requisite skills, knowledge and experience you are looking to fill in the position of Treasurer.

1. I manage the treasury department with 19 employees reporting to me. Under my current role, I oversee the budgetary, grants, accounts payable, accounts receivable, payroll and purchasing departments.
2. I am responsible for preparing the monthly financial statements for the finance committee and the board of education.
3. I am responsible for presenting the monthly financial statements to the finance committee.
4. I have directly presented to the board of education on various matters pertaining to the treasury.
5. I have extensive experience in performing analysis over various laws, regulations, union and financial matters to help the board, treasurer and superintendent understand the impact on Dayton City School District.
6. I have been part of all twelve (12) bargaining union contract negotiations and worked collaboratively with the district lawyers and HR department.
7. I have also worked with the district's legal team and HR department to resolve union grievances.
8. I have established good working relationships with union representatives where I help them resolve treasury issues.
9. I have drafted numerous written internal and external communications for the employees, board members and news media.
10. I have represented the treasury at the board meetings, board committees and superintendent's cabinet.
11. I have been responsible for preparing the district's annual comprehensive financial report (ACFR). The ACFR has won awards from GFOA and ASBO for the last three years. The district was also awarded Auditor of State award with distinction for last three years.
12. I have extensive knowledge of School reporting and compliance requirements. My role as a Senior Audit Manager required me to work with various Schools around the Dayton area and help them with any accounting/ compliance questions they may have.
13. I have a detailed understanding of Uniform School Accounting System (USAS) used by Ohio School Districts.
14. I have a thorough knowledge of state and federal grants awarded to school districts and associated compliance requirements.
15. I have an extensive knowledge of budgetary, contract, debt and reporting compliance requirements as applicable to the Ohio School Districts.
16. I have strong information technology (IT) skills and I was selected as the TeamMate Champion for the West Region. As a TeamMate Champion, I was part of the selection committee to pick the paperless audit software and train Auditor of State employees. After successful implementation of TeamMate, I was the first line of contact to answer TeamMate questions for the West Region. In my current position, I have used my strong excel skills to review and analyze the district's financial information.
17. I have strong research skills and regularly use Checkpoint as a research tool for accounting /auditing issues and Ohio Revised Code/ Administrative Code for compliance issues. I have good understanding of federal websites as it relates to grant compliance for School Districts.
18. I have extensive experience in helping local governments reconcile their bank balances.

19. I have a strong understanding of controls and how they are necessary for the proper functioning of an organization.

I am looking forward to discussing this opportunity in person with you. I hope to hear from you shortly.

Sincerely,

Amit Gautam

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AMIT GAUTAM, CPA

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Dayton Ohio 45440

Cell: (937) 671-1174

gautam.buckeye@gmail.com

Meticulous, detailed oriented professional with experience in governmental accounting, reporting and compliance with Dayton City School District and the Ohio Auditor of State. Experience includes managing the Treasurer's office for the largest school district in Dayton metro area. Audit portfolio included the largest clients audited by the West Region of the office. Proficient in Microsoft Word, Excel and PowerPoint. Also has a working knowledge of Access database. Knowledgeable of federal and state compliance requirements, Government Accounting Standards Board (GASB) reporting requirements and Government Finance Officers Association (GFOA) Annual Comprehensive Financial Report (CAFR) requirements. Strong teamwork and multi-tasking skills allowed me to successfully complete projects within time and budget constraints.

Experience

2021 – Present

Dayton City School District

Assistant Treasurer, September 2021 – Present

Responsibilities:

- Daily management of the 20-member Treasury team covering accounts payable, accounts receivable, budgetary, payroll and purchasing departments.
- Responsible for hirings, promotions and annual evaluations in the treasury.
- Working with the treasurer, superintendent, business manager and various departments to meet the financial needs of the district.
- Responsible for the preparation of the monthly financial reports and presenting them to the finance committee and the board of education.
- Responsible for the preparation of the annual comprehensive financial report (ACFR).
- Part of the District's negotiation team working with the twelve (12) bargaining units on new union contracts.
- Working with the district's lawyers on various union and other legal issues related to finance.
- Working with district's HR team on employee benefits.
- Working with district's agent on liability insurance renewals.
- Mentoring treasury employees and training district employees.
- Responsible for drafting, communicating, and presenting to the board, district employees and public.

Accomplishments:

- *ACFRs were awarded Certificate of Achievement for Excellence in Financial Reporting by GFOA and Certificate of Excellence in Financial Reporting by ASBO.*
- *Recipient of Auditor of State Award with Distinction for past three years.*
- *Breakfast of Champions award winner.*

2002 – 2021

Ohio Auditor of State

West Region

Senior Audit Manager, July 2011 – September 2021

Audit Manager, December 2008 - July 2011

Assistant Auditor, April 2002- December 2008

Responsibilities:

- Managing various local audits including Counties, Cities and School Districts in and around Dayton area.
- Managing staff and audit schedule to match the best available resources with the audit requirements.
- Researching and answering compliance and audit questions from clients and staff.
- Working with Center for Audit Excellence (CFAE) on research of complex accounting/auditing issues.
- Reviewing and drafting audit reports released by the Auditor of State.
- Managing staff and approving their payroll.
- Reviewing and helping various local governments with reconciliation issues.
- Working on largest ACFRs in West Region, reviewing reports, proposing and reviewing adjustments to ensure financial statements are properly stated.
- Managing workflow to ensure there is adequate work for the staff while meeting all client deadlines and Auditor of State's backlog requirements.
- Reviewing client contracts including union contracts to verify compliance.
- Reviewing applicable rules, regulations and policies for applicability and working with the Auditor of State's legal division for proper reporting.
- Member of Auditor of State's paperless audit software committee to help select a new audit software.
- Presenting internal trainings throughout the state and external trainings to client regarding new accounting and compliance requirements.

Accomplishments

- 2013 and 2005 distinguished award winner.
- Developed County Job and Family Services federal testing requirements that were distributed statewide as guidance.
- Champion for Auditor of State's paperless audit software (TeamMate). Involved in the selection, implementation and training of new audit software.

License

Certified Public Accountant (CPA)
Ohio Treasurer's License - applied.

Education

University of Phoenix

School Treasurer Classes

GPA 4.0/4.0

Wright State University, Dayton, Ohio

Masters in Accountancy

GPA 4.0/4.0

Bachelor of Science in Accounting with minor in MIS, 2002

Summa Cum Laude

Member Golden Key, International Honor Society

2002 IMA National Case Competition Runner-up

Sinclair Community College, Dayton, Ohio

Associate of Science in Business Administration, 2000

Summa Cum Laude

Member Phi Theta Kappa, International Honor Society

Skills

Proficient in Microsoft Word, Excell and PowerPoint

Working knowledge of Microsoft Access

Proficient in Power School Business Plus

Proficient in Time Clock Plus time management software

Proficient in Government Accountaing Standards Board (GASB) financial reporting requirements

Knowledgeable of Auditor of State's Web GAAP system used for financial reporting

In depth knowledge of property tax laws governing Ohio school districts

References

Mr. Keith Thomas

Treasurer, Midwest Regional ESC

(937) 541-1421

kthomas@mresc.org

I worked with Keith at Ohio Auditor of State and we have kept in touch since

Mr. David Stevens

Treasurer, Tipp City Exempted Village School District

(937) 546-1588

dstevens@tippcity.k12.oh.us

Dave and I went to Wright State together and then worked at the Ohio Auditor of State. We have kept in touch since

Mr. Andrew Machan

Budget Director, Dayton City School District

(513) 519-0521

amachan@daytonpublic.com

Andrew worked with me at Ohio Auditor of State and then came to work at Dayton City Schools.

TREASURER/CFO CANDIDATE - SCREENING INFORMATION

Instructions: Please download this form to your computer and save it. Then in the space provided answer the question. If you do not have experience with one or more of the subject areas respond by placing **NA** for those which are not applicable. Then re-save the document, reattach it to your email and resend it to the K-12 search consultant or fax it to 614-656-7526.

Candidate Name : _____ Mobile Phone: _____ Date: _____

School Treasurer Experience: Y or N ADM of largest district Served: _____

Latest Experience in what district? _____ How Long? _____

On what terms was your service with that district ended? _____

Explain briefly why are you interested in this position?

Have you prepared monthly financial reports for a Board of Education and administration? If yes briefly discuss your experience in preparing reports:

Have you worked with administration to prepare building and department budgets and the Annual Appropriation Resolution for a school district? If yes, what was your most recent experience and your role:

Have you prepared financial reports related to school construction funds and budgets? If yes, please discuss the type of reports you have prepared for the administration and Board.

Have you prepared a five-year forecast for a school system? Y or N

If yes what was the date of most recent five-year forecast you prepared and for what school district:

Roughly how many staff negotiations have you been involved in and what school district was your most recent negotiations experience in and briefly discuss your role?

Roughly how many levies and types have you been involved in and what was your role?

Have you been involved in a school construction program? Y or N Was it OSFC? Y or N

Discuss your involvement if you answered yes to either of the two previous questions related to construction?

Have you made financial presentations to your Board, administration and/or community? Y or N

If you answered yes to the previous question how would you rate your presentation skills and ability to react quickly on your feet to questions and why?

How would you rate your written communication, and have you ever contributed articles on finance in a district wide newsletter or similar publication? Please explain:

How would you implement changes in this district if you saw the need and how would you engage others?

Have you restructured a treasurer's department including writing or refreshing job descriptions and aligning or changing job duties of existing staff? Please Explain:

Please explain how often you evaluate your current staff and briefly describe the process you use and how important it is to you to provide feedback to your staff:

What five things would you do as Treasurer in first 6 months if you were selected for this job?

In the space provided briefly explain why the Board of Education should consider you for this position and what unique talents you would bring to the district:

When would you be available to start?

What base salary expectation would you have?

Please return this information to the K-12 consultant or fax it to
614-656-7526. Thank you for helping us get to know you better!

OHIO STATE BOARD OF EDUCATION
5 Year School Treasurer School Treasurer License

AMIT GAUTAM

THIS LICENSE AWARDED TO

OH3507678

EDUCATOR STATE ID

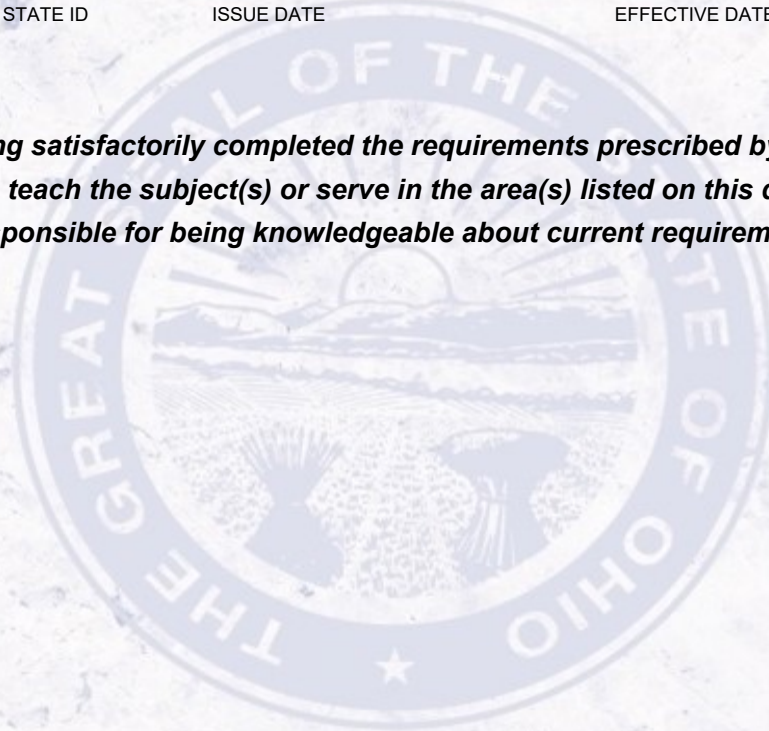
09/11/2024

ISSUE DATE

07/01/2024 to 06/30/2029

EFFECTIVE DATES

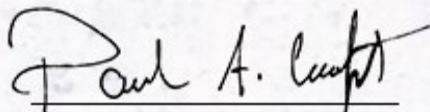
The holder of this credential, having satisfactorily completed the requirements prescribed by The State Board of Education and the laws of Ohio, is authorized to teach the subject(s) or serve in the area(s) listed on this document for the period specified. The holder of this credential is responsible for being knowledgeable about current requirements for maintaining the credential.



This official document was created by the State Board of Education and represents a true copy of a legal educator license as referenced in Ohio Revised Code Section 3319.36.

Credential # 22549719

Employers may verify this credential by going to Educator Profile on sboe.ohio.gov and ensuring that the unique credential number appearing on this credential matches the person's records in Educator Profile, which is the official record of educator credential history.


Superintendent of Public Instruction