

Daniel Kaiser  
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937-776-5940

September 13, 2024

Dear Members of the Hiring Committee,

I am writing to express my interest in the Treasurer/CFO position with the Bellbrook-Sugarcreek School District as advertised. With a solid background in accounting, a valid Ohio Treasurer's license, and extensive experience in both auditing and school district financial management, I am excited about the opportunity to contribute to your district's financial operations and strategic planning.

In my current role as Senior Accountant at Tecumseh Local School District, I oversee daily financial transactions, reconcile bank statements, manage cash flow, and prepare comprehensive financial reports. My responsibilities also include coordinating with building leadership and staff, ensuring proper fund allocation, and maintaining compliance with state and federal regulations. These experiences have honed my ability to manage complex financial operations and contribute to the district's overall financial stability.

My previous role as an Assistant Auditor with the Ohio Auditor of State provided me with a deep understanding of financial reporting standards and internal control evaluations. I developed and communicated audit plans, collaborated with clients to address exceptions, and managed work schedules, which equipped me with a meticulous attention to detail and the ability to handle financial data with accuracy.

The qualifications outlined for the Treasurer/CFO position align perfectly with my background. I possess strong financial reporting skills, an ability to facilitate educational discussions through a financial lens, and excellent interpersonal communication skills. My familiarity with Ohio's funding issues and public school regulations, combined with my experience in process management and leadership, positions me well to lead the district's financial operations effectively.

I am particularly drawn to this role because of the opportunity to contribute to the district's strategic planning and program development while providing leadership in finance and human resource functions. My commitment to maintaining integrity and high ethical standards in all financial matters aligns with the values of the Bellbrook-Sugarcreek School District.

Thank you for considering my application. I look forward to the possibility of discussing how my skills and experiences align with the needs of your district. I am excited about the opportunity to contribute to your team and support the educational mission of the Bellbrook-Sugarcreek School District.

Sincerely,

Daniel Kaiser

# Daniel Kaiser

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## OBJECTIVE

To secure the position of Treasurer/CFO where I can leverage my extensive accounting and auditing experience, along with my Ohio Treasurer's license, to oversee the district's financial operations, enhance strategic planning, and contribute to the district's educational mission with integrity and high ethical standards.

## WORK EXPERIENCE

### **Tecumseh Local School District — New Carlisle, Ohio** **Senior Accountant — October 2023 to Present**

- Oversee daily posting of receipts and disbursements, ensuring accuracy and timeliness in financial transactions.
- Reconcile bank statements and assist management of cash flow to maintain financial stability.
- Prepare and review monthly financial statements, budget reports, and variance analyses to support informed decision-making.
- Coordinate with building leadership and staff to streamline financial processes, manage budgets, and address financial inquiries.
- Collaborate with various departments to ensure proper allocation of funds and adherence to financial policies.
- Monitor and manage accounts payable and receivable, ensuring timely processing and accurate record-keeping.
- Assist in preparing financial reports for internal use and external audits, ensuring compliance with state and federal regulations.
- Develop and implement internal control procedures to safeguard district assets and improve financial efficiency.
- Provide training and support to district staff on financial systems and reporting practices.
- Lead initiatives to enhance financial reporting and transparency, facilitating educational decisions through a financial lens.

### **Ohio Auditor of State — Dayton, Ohio** **Assistant Auditor — July 2016 to October 2023**

- Performed audits and agreed-upon procedures in accordance with GAGAS and Ohio Auditor of State standards.
- Completed compliance testing per the Uniform Guidance.
- Identified, documented, and evaluated the effectiveness of internal controls.
- Developed expectations and conducted analytics, identifying deviations and implementing appropriate audit responses.

- Planned engagements using a risk-based approach, determining materiality, and establishing work plans.
- Collaborated closely with clients to develop key relationships, communicate exceptions, and discuss necessary corrections.
- Managed work plan schedules in coordination with Audit Manager and Senior Audit Manager.
- Facilitated discussions with clients to enhance understanding of financial reporting and compliance issues.

## **Skills**

- Professional behavior and strong attention to detail
- Excellent multitasking and organizational abilities
- Proficient in Microsoft Office (Excel, Word, Access, PowerPoint, Outlook) and Google Workspace (Sheets, Docs, Forms, Slides, Gmail)
- Extensive experience with Ohio's Uniform School Accounting System
- Expertise in developing, communicating, and managing business office procedures
- Strong leadership and interpersonal skills
- In-depth knowledge of state and local funding issues, Ohio laws, and public school regulations
- Treasurer's license, issued by the Ohio Department of Education and Workforce

Kevin Liming  
Treasurer of Bellbrook-Sugarcreek LSD - former client from AoS  
937-238-0056  
Kevin.Liming@bss.k12.oh.us

Denise Robinson  
Treasurer - Tecumseh LSD - Current supervisor  
937-244-6466  
Denise.Robinson@tecumsehlocal.org

David Falkner  
Former Audit Manager at AoS  
859-410-2383  
DFalkner@blueandco.com

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

**DANIEL KAISER**

THIS LICENSE AWARDED TO

**OH3458088**

EDUCATOR STATE ID

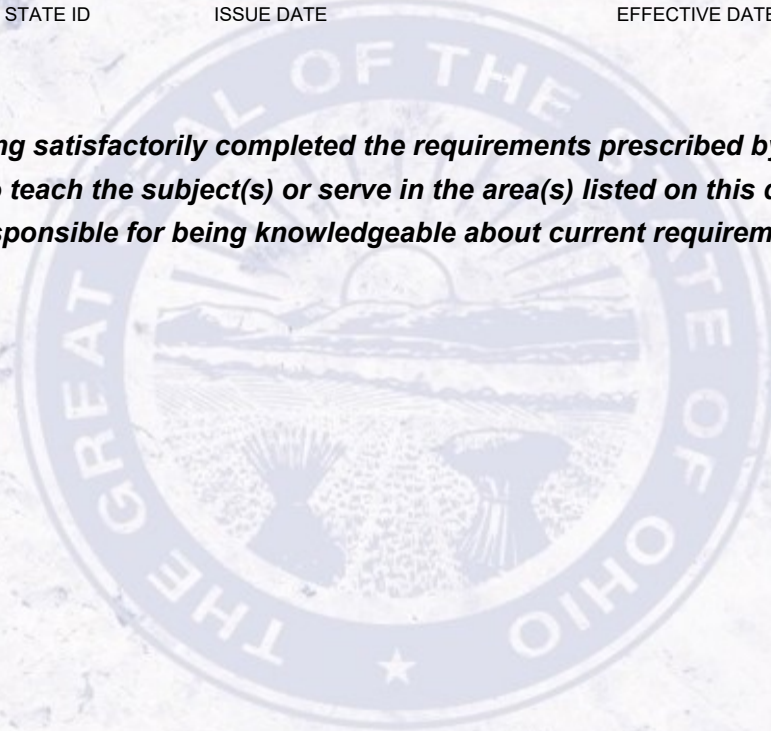
**12/11/2023**

ISSUE DATE

**07/01/2023 to 06/30/2028**

EFFECTIVE DATES

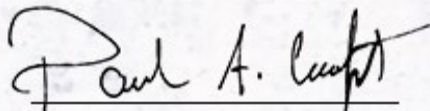
*The holder of this credential, having satisfactorily completed the requirements prescribed by The State Board of Education and the laws of Ohio, is authorized to teach the subject(s) or serve in the area(s) listed on this document for the period specified. The holder of this credential is responsible 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 # 22397752**

Employers may verify this credential by going to Educator Profile on [sboe.ohio.gov](http://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

## **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!

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