

## **JONATHAN F. CASEY**

### **PROFILE**

*Business professional known for the ability to manage, audit, improve and design/build systems and processes; skilled in accounting, audit, budget, planning, development, analysis, contract negotiation and change management; experienced in staff and management roles in corporate, outsourced, non-profit and entrepreneurial settings.*

### **PROFESSIONAL EXPERIENCE**

**Front Porch Communities and Service (Formerly Covia Communities)** *July 2007 - Present*

**Chief Financial Officer (CFO)/VP of Finance** for Affordable Housing in a multi-tiered community-housing corporation

- Manage staff and all financial aspects for 8 Communities with net assets of over 100 million. Communities consist of Independent Living Retirement Apartments, Assisted Living Apartments, Below-Market Rate Apartments and also multiple Resource Service Coordinators across more than 30 contracted communities, serving thousands of residents in Northern and Southern California
- Plan and create strategies for new programs and developments (Pro-Forma Costing, Compliance, Capital Planning, Construction, and Operations). Support Life-Plan obligated group on special projects.
- Manage subsidy payments, contract negotiations and budget-based increases with the United States Department of Housing and Urban Development (“HUD”)
- Negotiate with state and local governments on various issues including deed restrictions and regulatory agreements
- Ensure compliance with multiple bond issues totaling more than \$20 million, adherence to various loan covenants and California tax credit programs for facility renovation and development
- Refinance of debt to lower company expense and positioning
- Manage annual audits and tax reporting for 10 separate entities including HUD Complaint OMB Audits
- Manage charitable remainder unitrust and investment funds of over \$15 million

**SAINT ANDREW'S EPISCOPAL CHURCH**

*September 2005 – July 2007*

**Chief Financial Officer (CFO)** for this multi-million dollar organization

- Manage all financial aspects for this robust and growing community using fund and cost accounting
- Create guidelines and policy to ensure compliance with State and Federal regulations
- Work with teams on multi-million dollar construction project including bond financing
- Develop capital campaign fundraising package for future construction projects
- Manage endowments, bank accounts, other investment accounts

**A T & T**

*August 1995-November 2004*

Progressed from member of acquired technology firm to manager supporting the national rollout of a \$1.2 billion business, until the company withdrew from the consumer market due to FCC deregulation

**Senior Local Product Manager/Specialist (2000-2004)**

Senior Local Product Manager/Specialist for this business delivering local and long-distance phone service

- Managed up to 30 people on sales, billing and training projects
- Manage billing system budget of over \$500 million
- Helped lead growth from the New York market to \$1.2 billion revenues in 50 states
- Managed budget and accounting functions as well as outsourced systems
- Performed product lifecycle analysis and negotiated contracts with State agencies
- Reduced the backlog of unbilled calls and potential fraud by \$27 million
- Modified financial booking process to reduce billing production costs by \$3 million
- Improved bill detail presentation, reducing service and write-off costs by \$6 million
- Streamlined several billing processes to reduce costs by \$4 million

**Local Program Manager (1999-2000)**

Local Program Manager for pilot program to provide a new way to sell local phone services to consumers

- Developed products and pricing for Chicago market, prior to national roll-out
- Analyzed alternative methods to deliver and support local voice services
- Created alternatives to traditional interfaces with LEC (Local Exchange Companies)

**AT&T Multiquest Manager (1995-1999)**

External Billing/Facilities/Company Liaison Manager for business with \$450 million in annual revenues from "pay per use" calls

- Managed 5 telephone utility experts supporting consumer programs across the US
- Managed contracts and related issues with Service Bureaus and LECs
- Led the development and maintenance of billing and accounting systems
- Led the development and operation of a 200-person service center,
- Helped to manage the integration of former employer after its acquisition by AT&T

**INTEGRETEL/VRS BILLING SERVICES**

*January 1990 -August 1995*

Progressed from analyst to management roles in a firm and its spin-off that developed an industry-leading billing system, and was subsequently acquired by AT&T

**Finance-Settlement Manager (1993-1995)**

Negotiated and managed implementation of financial settlements with LEC customers

- Planned and executed audits of customer accounts, facilitating receivable collection
- Managed outsourced professional services, including legal, tax and accounting, trained successors
- Planned and executed negotiation strategies to resolve collection of \$8 million

**LEC Compliance-Services Manager (1990-1993)**

Improved financial position while the business grew from \$30 to \$50 million in revenues

- Led the development and implementation of optical scanning to allocate bad debt
- Reduced bad debt (including potential fraud) by \$3 to \$5 million annually
- Maintained business relationships and local compliance with LECs & customers
- Managed up to 20 direct reports

**Senior Analyst (1990)**

- Learned about customer and operational needs of the telecommunications industry
- Re-designed reports to better address client requirements, promoted to management within 7 months

**KAISER ELECTRONICS**

*March 1980-January 1990*

Progressed from logistics to engineering roles at this manufacturer of cockpit displays for military aircraft, while completing undergrad college education

**Maintainability/Reliability Engineer (1987-1990)**

- Participated in reviews, proposals and negotiations of contract terms
- Assisted in design, development and meeting 'ease of maintenance' requirements

**Logistics Analyst to Sen. Expediter (1980-1987)**

- Completed a wide range of analysis, planning and training tasks

**EDUCATION**

Saint Mary's College, M.B.A. Graduated with Honors	2008
Six Sigma: Completed company-sponsored training (Green Belt)	2004
Saint Mary's College, B.A. Business Management Graduated with Honors – 3.8 GPA and Dean's List	1990

**OTHER QUALIFICATIONS**

- Presented at various State and National Conferences
- Strong software and systems skills, including implementation of \$1M ERP system, details upon request
- Board and Treasurer roles in community organizations, details upon request
- Available for business travel and, selectively, for relocation
- Non-smoker in excellent health, with references and compensation history upon request