

# Alice Phinizy

Nonprofit Finance & Operations Leader

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## PROFESSIONAL SUMMARY

An accomplished nonprofit leader with over 16 years of experience overseeing operations and finances at domestic and international organizations. Respected as a pragmatic, creative, and ethical leader with a deep understanding of strategic, financial, and operational dynamics. Proven track record in managing organizational growth leading to more effective planning and increased value for money.

## AREAS OF EXPERTISE

### *Professional Skills*

Strategic Planning | Board Management | Financial Forecasting, Modeling, & Reporting | Donor Relations | Fund Accounting & Grants Management | Audit & 990 Oversight | Budget Development & Cash Flow Management | Systems Overhaul | Global Human Resources | Vendor & Contract Management | Internal Controls | Change Management | Risk Management | Operations & Organizational Management | Fiscal, IT, and Legal Compliance | Domestic & International Grants Administration | Organizational Policy Development | Payroll | Accounts Payable & Receivable | Insurance

### *Technical Skills*

Advanced Excel | Salesforce | NetSuite | QuickBooks Online & Desktop | Monday | Blackbaud GIFTS | WizeHive Grants Management | Expensify

## PROFESSIONAL EXPERIENCE

### **Finance & Operations Consultant, Self-Employed, September 2024 - Present**

- Support clients with short-term and long-term financial management, including coaching, analysis of financial reports, strategic budgeting and forecasting, and preparing for audit and tax filings.
- Provide guidance and coaching on operational and strategic matters and support with systems & tech selection and setup, process improvement, and strategic planning.

### **Director of Finance, Project HOPE - Health Affairs, June 2023 – August 2024**

- Oversaw financial operations of *Health Affairs* journal, including accounting, budgeting, grants management, and analysis.
- Presented monthly, quarterly, and annual financial reports to internal stakeholders, including redesigning templates to ensure digestibility by non-finance people and to support more effective strategic planning.
- Lead analysis of journal business model and develop plans for scaling products and maximizing revenue.
- Created and managed annual budget, working closely with senior management on oversight of revenue and expenses.
- Chaired Employee Benefits Committee, a board-chartered committee mandated to monitor retirement and pension benefits performance.

### **Director of Finance & Operations/Chief Finance & Operations Officer, January 2019 – June 2023**

#### **Finance & Operations Manager, December 2016 – January 2019**

##### *Disability Rights Fund and Disability Rights Advocacy Fund*

- As a member of the executive team, developed and executed organizational strategic and scenario plans during times of substantial growth.
- Oversaw fully remote, global, cross-cultural team operations of 20 full-time employees and contractors, including direct supervision of 3 finance and administration staff.

- Oversaw financial health of 501c3 and 501c4 organizations with combined revenues >\$10M, including development of short- and long-term investments.
- Designed models to better analyze organizational financial health, leading to improved planning.
- Led risk management team, including oversight of due diligence, compliance, mitigation & prevention measures, internal controls, and ongoing capacity building.
- Collaborated with grants management, technical assistance, programs, and external stakeholders to develop finance and compliance capacity building initiatives.
- Oversaw international human resources, including policy development, and hired the first dedicated human resources manager.
- Led financial reporting and compliance to government and private foundation donors; facilitated the operations of international grantmaking including enhanced grantee budget review, reporting, and compliance.
- Managed global IT systems and cybersecurity; oversaw deployment of MS 365 and migration of email.
- Overhauled internal controls, including developing extensive risk management oversight, to support organizations during significant growth.
- Created the organization's first investment and operating reserve strategies and structure.
- Facilitated the operations of international grantmaking including enhanced grantee budget review, reporting, and compliance.

**Business Manager, Trillium Brewing Company, May 2015 – December 2016**

- As a member of the executive team, oversaw operations as brewery quadrupled in size, with an increase in income from \$3m to \$12m.
- Developed processes to streamline accounting, procurement, and analytics.
- Worked closely with other management team members to develop analytical tools to assist with monthly, quarterly, and annual income and production projections.
- Managed organizational human resources, including supervision of accountant and retail team.

**Manager of Finance & Operations, Third Sector Capital Partners, Inc., September 2014 – May 2015**

- As a member of the executive team, scaled operations as the firm doubled in size, with increase in budget from \$1.5 to \$4m.
- Designed and developed the finance and operations functions to support the rapidly growing organization; hired and supervised finance and operations staff.
- Rapidly brought organization into compliance for federal grants and served as external resource to organizations seeking federal funding.
- Developed financial reporting and analysis and presented to Board.

**Senior Finance & Administration Manager, January 2014 – August 2014**

**Finance Manager, February 2010 – January 2014**

*Women's Institute for Housing & Economic Development*

- As member of executive team, oversaw finance and operations department and housing projects with budgets up to \$50m, including tracking expenses across multiple funding sources, monthly/quarterly reporting, forecasting, and budget analysis.
- Implemented in-house back-office asset management program.
- Streamlined internal operations to create efficient and effective processes.
- Presented financial metrics to Board and made recommendations for more effective spending.
- Oversaw project budgets, including proposal development and donor reporting.
- Reduced turnaround time for project funding from 5-6 weeks to 2-3 weeks by revamping fund requisitioning process.

**Manager of Records & Gift Processing, Bentley University, 2009 – 2010**

**Business Analyst, John Hancock, 2006 – 2008**

**Associate Information Technology Auditor, State Street Corporation, 2004 – 2005**

## **LEADERSHIP & GOVERNANCE**

**Board Treasurer**, *International Funders for Indigenous Peoples*, 2019 – Present

**Board Treasurer**, *Official Liverpool Supporters Club of Boston*, 2020 – Present

**Finance Committee**, *ZUMIX*, 2020 – 2022

## **EDUCATION & PROFESSIONAL DEVELOPMENT**

**Master of Business Administration**, *International Business and Organizational Management*

Bentley University McCallum Graduate School of Business, 2009

**Bachelor of Science**, *Computer Information Systems*

Bentley University, 2004

**Certificate**, *Forensic Accounting & Fraud Examination*

West Virginia University, Coursera, 2024

**Certificate (In progress)**, *Nonprofit Law*

University of Pennsylvania, Coursera, 2025

**Certificate**, *Fighting Fraud & Prevention*

Humentum, 2018

**Certificate**, *Innovation Management*

Grenoble École de Management, 2009