NANCY J KULBIDA

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**COMPETENCIES**

**Finance**

* Manage all aspects of the accounting cycle including payroll, accounts payable, accounts receivable, and reconciliations
* Financial and cost-benefit analyses
* Collecting, monitoring, interpreting and reporting key financial data and related variances
* Budget development
* Oversight of cash flow management
* Extensive knowledge of various accounting software packages (AccPac, Simply Accounting, and QuickBooks)
* Capital asset management
* Manage teams to develop tools to improve operational efficiency
  + Knowledge of Public Sector Accounting Standards

**Reporting**

* Preparation of year-end financial statements and notes for annual report
* Preparation and oversight of month-end financial statements, reports and analysis
* Development and preparation internal financial reports to assist in decision making and project management
* Preparation of financial statements and reports for various levels of management up to the Board of Directors
* Preparation government specific financial reports including summary and consolidated financial statements
* Data analysis, report development and presentation of results

**Audit**

* Internal Audit
  + Responsible for all aspects of the annual Saskatchewan Provincial Auditor’s Office audit
  + Responsible for all aspects of annual business reviews
  + Work closely with auditors from planning through execution
  + Achieved a perfect audit record; clean audits with no reported issues or managerial letters
* External Audit
  + Supervise and mentor junior staff
  + Develop and monitor budgets
  + Strong communication skills used to facilitate efficient audits
  + Manage change for clients for the transition to new accounting frameworks as required by the Accounting Standards Board, and new assurance guidelines and interpretation
  + Identify opportunities for operational efficiencies and provide assistance in developing framework to implement those efficiencies

**Risk Assessment and Policy Development**

* Development and implementation of a strong system of internal controls
* Development and implementation controls and processes to safeguard data and assets
* Review, and development, of organizational policies and procedures to identify areas of risk
* Improve administrative functions using Lean philosophy
* High level of leadership, vision and persistence resulting in client needs being successfully achieved in a timely manner

**ACCREDITATION and EDUCATION**

**Chartered Accountant Designation** 2013

Canadian Institute of Chartered Accountants

**Chartered Accountant School of Business** 2011 – 2013

Modules 1 – 5

Uniform Final Examination Module (Module 6)

**Bachelor of Commerce, major in Accounting** 2003 - 2011

School of Business, Athabasca University

**Business Administration Certificate** 1991 - 1995

University of Saskatchewan

**WORK EXPERIENCE**

**Financial Management Advisor** October 2014 – present

**Saskatchewan Health Authority** (Financial Planning and Business Advisory Services)

* Development of annual budgets in excess of $140M utilizing master rotations and ensuring compliance to Collective Bargaining Agreements
* Analyze departmental budgets, determining variances and communicate root causes and possible remediations
* Restructuring of Home Care, Client and Patient Services (CPAS) and Community Therapies required collaborative work with multiple departments including human resources, labour relations and payroll
* Collaboration with directors/managers to strategize on cost saving measures and resulting impact on clients and staff
* Development of financial structure to ensure reporting (internal/external) compliance with the Provincial Chart of Accounts (PCA) and Canadian Institute of Health Information Management Information System (CIHI MIS )
* Connected Community Care finance lead on the project team which included the development of the Market Mall Community Health Centre and restructuring of Primary Health
* Co-lead General Ledger and Cash Management on the provincial AIMS project (Administrative Information Management System – implementation of Oracle Cloud to replace 82 disparate administrative systems)
* Experienced working in an unionized environment
* Creation reporting templates for departmental expenses, sick time and overtime.
* Forecasting
* Financial reporting and completion of requests from the Ministry of Health
* Financial support to all levels of management and executive leadership team
* Development of training materials for non-finance personnel to understand and interpret financial statements

**Chief Accounting Officer** October 2013 – September 2014

**Acadia Construction / Integrated Engineering Inc.**

* Management of administrative team
* Oversight of financing strategies including facilitation of change to new financial institution
* Oversee the operations of the administration/accounting department, including the design of an organizational structure to achieve the company’s goals and objectives
* Monitor debt levels and compliance with debt covenants
* Developed benchmarks against which to measure the performance of company operations
* Provide financial analyses as needed, for capital investments, pricing decisions, and contract negotiations
* Financial reporting to partnership group

**Accountant** January 2011 – September 2013

**KPMG Saskatoon**

* Diverse experience ranging from financial statement compilations, reviews, and audits, preparation of tax returns, to client advisory work
* Clients across various industries including not-for-profit organizations, healthcare, hotels, mining, insurance and retail. Clients range in size and scope with funded revenues of over $1 billion to small community organizations and entrepreneurs.

**Accountant** February 2003 – August 2010

**Health Quality Council**, Saskatoon, SK

* Managed all aspects of accounting and accounting systems for the Health Quality Council; an organization with multi-million-dollar revenues and a staff of 50
* Responsible for all financial reporting to internal and external parties including the Board of Directors, Province of Saskatchewan Ministry of Health and the Provincial Auditor
* Mentorship of team leaders and managers in financial report interpretation and budget reconciliations
* Analyzed the accounting system, organizational needs and various new system options
* Responsible for accounting system conversion, implementation and validation
* Provided support to project management team to develop standardized rates for Microsoft Project and develop reporting for integration with accounting system
* Administered areas of human resources including group benefits, pension plan, and employee orientation

**President/CEO** 1995 - 2005

**Kajon Business Services**, Saskatoon, SK

* Provided a complete set of business services to clients including bookkeeping and office management
* Provided educational sessions on financial record maintenance and office management to business owners and their staff
* Contracted to a broad range of business sectors such as manufacturing, construction, property management, vehicle repair, retail and service industries
* Developed excellent time management and prioritization skills in order to be responsive to client needs
* Employee management including recruiting and hiring

**ADDITIONAL INFORMATION**

**Training**

* Project Management Foundation Principles and Techniques, EXP Consulting
* Toastmasters International, Competent Communicator level (partial completion)
* Meyers-Briggs Approach to Teamwork

**REFERENCES**

* Available upon request