

ERIKA B. DONALDS, CPA, CGMA

Naples, Florida 34119

PROFILE

- Finance executive with extensive experience in budgeting; financial management, reporting, & analysis; contract negotiation & management; compliance & regulatory oversight; audit & tax; and maximizing operational efficiency.
- Former elected school board member; Appointed member of Florida's Constitution Revision Commission and Local Government Committee Chairman; Appointed member Gubernatorial Transition Advisory Committee on Education and Workforce Development; Public charter school founder; School board coalition leader.

PROFESSIONAL EXPERIENCE

The Optima Foundation, Inc., Naples, Florida

2017 to present

Founder; President & Chief Executive Officer

- Founded a non-profit 501(c)(3) to provide financial, regulatory, strategic, and operational support to tuition-free public charter schools across Florida, with the goal of ensuring maximum resource efficiency for the benefit of students.
- Responsible for the successful execution of all school start-up planning, project management, and implementation.
- Identifies, cultivates, solicits, and stewards donors and prospects for fundraising, major gifts, and philanthropic loans.
- Handles marketing, public relations, government affairs, and relationships with key strategic partners.
- Manages school facility planning, design, financing, and construction oversight.

DGHM, Naples, Florida

2002 to 2018

Chief Financial Officer/Chief Compliance Officer, Senior Vice President, Partner

2015 to 2018

- Member of the firm's four-person executive management team involved with all strategic decision-making, policy, and governance.
- Responsible for all aspects of financial management and reporting, including consolidation with a publicly-held parent company, reporting and presentation of financials to the board of directors, and accountability for adherence to budget.
- Employed a line item budget analysis process which saves the firm tens of thousands of dollars each year, and consistently achieved low-single-digit budget-to-actual expense variance percentages through carefully refined cost forecasting.
- Managed Operations, Finance, Human Resources, Accounting, and Compliance departments and oversees procedural & compliance aspects of Trading, Portfolio Management and Marketing departments.
- Established and chaired Brokerage committee to evaluate trading best practices, broker relationships, soft dollars, and best execution to ensure maximum value of trading strategies for the firm's clients.
- Implemented compliance software program to automate personal securities trade reporting, employee attestations for policies & procedures and code of ethics, and updating of internal processes in response to changing regulations.
- Revamped firm's Code of Ethics, implemented a formal training program for all employees.
- Responsible for business continuity plans, cybersecurity, and technology; ensured firm readiness through quarterly testing of the BCP and consistent monitoring of IT systems. Created cybersecurity policies and protocols and facilitated successful cyber audits.
- Implemented vendor management program including vendor risk assessment & risk management, vendor due diligence, and contingency planning in the event of vendor failure.

Controller, Vice President, Partner

2006 to 2015

- Worked in tandem with CFO/CCO on all financial and compliance matters.
- Managed the Operations and Accounting departments.
- Responsible for all financial policies, procedures, controls, and reporting.
- Served as the point person for all external audits, tax work, compliance reviews, and regulatory inquiries.
- Prepared budget and strategic plan, and performed cost monitoring and contract negotiation & management.
- Managed expenses through the recession and fractional revenues to maintain service levels and avoid layoffs.
- Implemented controls and procedures for compliance with Sarbanes Oxley, conducted testing, engaged outside auditors to perform SOX audits; no material issues reported.
- Created efficiencies in nearly all aspects of the firm's Operations and back office processes, saving time and resources while increasing the quality of service to clients. Examples include software upgrades, automation, improved electronic communications, and better integration between existing functions/programs.

PUBLIC SERVICE

DeSantis Transition - Advisory Committee on Education and Workforce Development, Member 2018 to 2019

- Appointed by Governor-Elect Ron DeSantis
- Provided strategic advice to the gubernatorial transition team concerning education and workforce development policy.

Florida Constitution Revision Commission, Commissioner 2017 to 2018

- Appointed by the Speaker of the Florida House of Representatives, Richard Corcoran
- Local Government Committee, Chair
- Declaration of Rights Committee, Member
- Education Committee, Member
- Rules and Administration Committee, Member
- Successfully advocated for and passed two education proposals to appear on the November 2018 ballot.

Collier County Public Schools, School Board Member 2014 to 2018

- Vice Chair, 2016-2017
- Member of the Internal Audit Risk Assessment Review Committee, 2017-2018
- Member of the Collier County Value Adjustment Board, 2014-2016
- Advocated for and implemented an internal audit process of the district's \$1B+ budget and operations.
- Increased Superintendent accountability for academic results from 2.5% of evaluation score to 30%.

Treasure Coast Classical Academy, Founding Board Chair/CEO 2017 to 2018

- Led the founding of a public charter school in partnership with the Hillsdale College Barney Charter School Initiative.
- Successfully achieved first-try charter application approval; negotiated charter contract with Martin County District.
- Transitioned to Chief Executive Officer to manage the entire start-up project under a local board of directors.
- Responsible for student recruitment, hiring, financing, facility, compliance, budgeting, and business management.

OTHER SERVICE & AWARDS

- School Choice Movement, Founding Board Chairman, 2019 to present
- Florida Consortium of Public Charter Schools, Charter School Champion, 2018
- Florida Coalition of School Board Members, Founding Director, Past President, 2015 to 2018
- Mason Classical Academy, Founding Advisory Board Member, Director of Operations, 2012 to 2014
- Gulfshore Business 40-Under-40 Award Winner, 2014
- Living Word Family Church, Youth Leader, 2003 to 2019
- Land O Sunshine Camp Cherith, Board Member, 2007 to 2011

EDUCATION & CERTIFICATIONS

- Bachelor of Science – Accounting, Magna Cum Laude – Florida State University, 2002
- Master of Accountancy – Florida Atlantic University, 2006
- Certified Public Accountant, 2006
- Chartered Global Management Accountant, 2012