

429 Racite Road
Alburtis, PA 18011

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PROFESSIONAL SUMMARY

- MBA with layered experience in financial, operational, and personnel management across diverse settings and industries
- Skilled manager of diverse executive and stakeholder relationships with ability to coordinate multiple business units
- Organizational and financial control leader with regard to design and implementation measures
- Adept at due diligence reporting for acquisitions and other financing along with budget preparation, maintenance, and review
- Excellent oral and written communicator with an extensive record coaching both professionals and students

Professional Experience

PA SMALL BUSINESS DEVELOPMENT LEAD OFFICE

October 2020-Present

Associate State Director of Financial Management

- Responsible for the management and allocation of a \$13M dollar budget derived from both Federal and State funds
- Responsible for overseeing the financial management of 16 state SBDC throughout the state of PA
- Responsible for auditing the policies and procedures and financial management of the 16 state SBDC offices
- Responsible for quarterly submissions for reimbursement to both the Federal Government as well as the State Government, in addition to all other grant funded revenue
- Responsible for the close out of all consumed grants

SEVENGENERATIONS CHARTER SCHOOL

January 2018 – October 2020

Business Manager

- Responsible for all financial activity of the school utilizing QuickBooks
- Responsible for the development of a \$4.5M annual budget
- Responsible for processing bi-monthly payroll
- Responsible for following state established chart of accounts
- Serve as HR representative for the school, responsible for benefit management, PSER funding, etc.

GRANDVIEW HOSPITAL

March 2017 – July 2017

Budget Consultant (Contract Position)

- Assisted client with the development of internal zero based budget of \$200M
- Collaborated with department managers to assist them with forecasting new year spend
- Assembled the data by entity and developed the worksheets in the Kaufman-Hall, Enuff Budget software

LEHIGH UNIVERSITY

November 2013 – March 2017

Business Manager, College of Education

- Directed all financial aspects to include development of annual expense of \$500K and salary budgets of \$2M, accounts payable along with establishment of new indexes for the college
- Monitored grant funded indexes for various faculty members and tracked balances on all operating indexes
- Created all new employees in the payroll system inclusive of students and faculty

READING SCHOOL DISTRICT

October 2012 – October 2013

Budget Director

- Coordinated and organized the annual district budget of \$255M
- Monitored actual spending vs budgeted spending and ensured all accounts aligned with the state Auditor General's Office as well as for filing the AFR and 2028 each year
- Assigned all new employee individual payroll account numbers and worked with HR on position control

ST. LUKES HOSPITAL
Network Senior Cost Analyst

October 2008 – October 2012

- Established and maintained a costing system for the St. Luke's Health Network
- Collaborated with various departments to establish standards for certain procedures and services
- Developed and reviewed departmental profit and loss statements

WARREN HOSPITAL
Assistant Controller

October 2003 – October 2008

- Led all financial aspects of the hospital and hospital foundation, including annual budget, A/P and A/R, monthly closings and reconciliation, weekly and monthly financials, as well as capital expenditure tracking

SAPUTO CHEESE
Plant Controller

September 2001 – October 2003

- Directed all financial aspects of the plant, including annual budget, A/P and A/R, monthly inventories and reconciliation, weekly and monthly financials, as well as capital expenditure tracking
- Also responsible for IT and some aspects of Human Resources

AGERE SYSTEMS
Cost Accountant, Team Leader

February 2000 – August 2001

- Established costing of several manufacturing unit's products and reported changes in monthly inventory balances
- Reported manufacturing variances and inventory trends and interacted with shop staff and senior management
- Assisted in the implementation of a new ORACLE based inventory and accounting reporting system

EASTERN PA HEALTH NETWORK (St. Luke's Hospital)
Director of Accounting

December 1995 – February 2000

- Delivered all aspects of the corporation accounting functions, including A/R, A/P, monthly closing, financial statements and analysis, reports to senior management, and the preparation of yearly filings
- Served on the Medical Management Committee as the Financial Representative tasked with establishing subcommittees and serving as chairman for each of the subcommittees
- Served as the liaison to TPA for all customer complaints

SACRED HEART HOSPITAL
Cost Accountant

Allentown, PA
March 1992 – December 1995

- Developed and maintained all standard costs of hospital services including new product costing and development
- Assisted with year-end cost report preparation and yearly budget preparation, as well as all AS400 query report development and monthly reports to senior management

J.T. BAKER, INC.
Plant Accountant

Phillipsburg, NJ
January 1989 – March 1992

- Established product costing, year-end physical inventories, month end closing, and reporting to management
- Directed the new product standard costs and development, and the supervision of two accounting clerks

MERIDIAN BANCORP
Profitability Analyst

Reading, PA
August 1987 – January 1989

- Analyzed all bank services for profitability and efficiency and developed all bank related services standard costs
- Maintained the cost system and reporting of monthly findings to senior management
- Served as a member of the Pricing Task Forces
- Earned promotions to assistant financial officer and financial officer

ARMSTRONG WORLD INDUSTRIES

Plant Accountant

Lancaster, PA

June 1986 – August 1987

- Supervised one division of the largest manufacturing plant which included developing and maintaining all standard costs for the division, developing the division annual budget, monthly closing and forecasts, and monthly reporting to senior management while supervising two accounting clerks

Education

Lehigh University

Bethlehem, PA

Master of Business Administration

Class of 1992

The Pennsylvania State University

University Park, PA

The Smeal College of Business – Bachelor of Science Accounting

Class of 1986

Skills

GE AS400 Mainframe System, ORACLE GL and Inventory System as well as Microsoft Works and related products

Familiar with PC and Mainframe Cost Accounting Packages