



## **CHIEF FINANCIAL OFFICER**

### **THE ORGANIZATION**

The Albertina Kerr Centers had its beginnings in 1907. Headquartered in Portland, Oregon, Kerr has been caring for Oregon's most vulnerable citizens for 114 years. Albertina Kerr's services have evolved over time to meet the community's changing needs. The values of Albertina Kerr's caregivers remain constant: compassion, commitment, collaboration, and advocacy.

Albertina Kerr operates 54 neighborhood-based group homes for adolescents and adults with intellectual developmental disabilities (IDD), employment services for adults with IDD, and outpatient and inpatient mental health services for children and their families. Kerr empowers people with IDD, mental health challenges, and other social barriers to lead self-determined lives and reach their full potential.

### **PRIMARY SERVICES**

#### **Children's Mental Health Services**

Kerr offers a continuum of mental health services for children, adolescents, and their families, including short-term crisis stabilization, as well as clinic- and community-based outpatient care.

Their goal is to strengthen children and families, giving them the individualized support, they need to live, learn, and play.

**CRISIS PSYCHIATRIC CARE** offers short-term, safe, and secure residential placement for 5- to 17-year-olds who are experiencing an acute crisis. Services focus on mental health stabilization, psychiatric evaluation, and transitional planning.

**CLINIC-BASED OUTPATIENT SERVICES** for children and youth up to age 17 with behavioral and mental health challenges. Treatment can include individual and family therapy, skills training, and family support.

**INTENSIVE COMMUNITY-BASED OUTPATIENT SERVICES** are available for 3- to 17-year-olds who demonstrate an imminent safety risk to themselves or others. Treatment includes 24-hour crisis support, skills training, family support, and medication management.

**Residential & Enrichment Services for People With Intellectual and Developmental Disabilities (I/DD)**

Kerr provides a wide range of services designed to support individuals experiencing intellectual or developmental disabilities (I/DD), empowering them to lead full, self-determined lives.

**24-HOUR RESIDENTIAL SERVICES** support each individual's needs. Kerr's group homes provide opportunities for residents to develop the skills they need to live as independently as possible.

**EMPLOYMENT SERVICES** match community employers with employees who have I/DD and provide ongoing training and support to ensure a positive workforce experience.

## THE POSITION

The Chief Financial Officer (CFO) reports to the Chief Executive Officer (CEO) and is a member of the Executive Team and oversees the fiscal operations of Albertina Kerr Centers, including all accounting, budgeting, and reporting, both internal and external. The CFO ensures the integrity and sufficiency of Kerr's financial, business, and administrative systems. Kerr employs nearly 800 full-time diverse and committed professionals and has an operating budget of approximately **\$50** million.

The CFO serves as a strategic thought partner to the Chief Executive Officer and a dynamic, and experienced executive team providing leadership in financial planning, financial strategy, and sustainability. Moreover, the position plays a critical role in financial decision making and operations as Kerr continues to boost its strong financial health through high quality programming, and projected revenue enhancements to realize the agency's future growth.

Kerr takes great pride in its people and wants to enhance its standing as an employer of choice in the greater Portland community such as being "*One of Oregon's Most Admired Companies*" as recognized in 2020 by the Portland Business Journal. The CFO will be instrumental in building a team that reflects the values of Kerr and exemplifies customer service excellence.

The Chief Financial Officer is responsible for leading the organization through the planning, development, organization, implementation, and evaluation of processes, systems, and supports throughout the agency for all financial functions. This includes responsibility for Finance and the management of the Accounting and Revenue Cycle departments, their services to the organization, and their staff.

### Top Priorities for the Chief Financial Officer:

- Review and assess Kerr's current financial systems, operations, policies, staffing resources and develop a plan for ensuring financial stability that includes the development of forecasting models that enhance the traditional budgeting practices of Kerr.
- Evaluate the accounting systems, in conjunction with both external auditors and consultants to incorporate best practices that correct current audit exceptions and develop systems and controls that address potential audit irregularities in the future.
- Create and personally participate in a robust staff development program that ensures the appropriate training, development, and management of all finance department staff, including cross training and advancement opportunities.
- Partner with key operational department leaders, plus Human Resources and Information Technology to ascertain the best way to support all Kerr departments and ensure appropriate alignment to achieve both financial and agency goals.

- Review and become familiar with all existing agency contracts and compliance requirement needs.

**The Chief Financial Officer's essential duties and responsibilities include:**

- Oversees and directs all financial operations including accounting, controls, financial planning and analysis, reporting, cash and revenue management, contract management, financial information systems, asset management, and other functions aimed at ensuring alignment of department operations and strategies to the agency's mission, strategic plan, and operating goals.
- Provides strategic financial input and leadership on decision making issues affecting the agency to achieve its mission in accordance with its values, as evidenced by participation in the Senior Leadership Team and other meetings, relevant Board of Directors meetings, and other planning forums.
- Establishes and maintains effective monthly financial reporting with Directors and Program Managers, to ensure they have the appropriate financial information to effectively manage their programs.
- Develops and maintains effective working relationships with all Kerr personnel and stakeholders, key community partners, vendors, suppliers, and others.
- Oversees and directs the Finance Staff to ensure proper staffing levels are maintained to meet all requirements on a timely basis for reporting to Public Contract Agencies and Private Grantors.
- Develops, implements, evaluates, and enforces policies and procedures related to the Finance function to meet the agency's strategic and operational goals and to best leverage its financial resources to advance its mission.
- Ensures compliance with all federal, state, and local laws and licensing or accreditation requirements related to the Finance function.
- Selects vendors and manages relationships to effectively meet the agency's needs related to Finance and acts as an advisor from a financial perspective on any contracts into which the agency may enter.
- Exhibits fiscal responsibility by managing department operations within budget guidelines.
- Publicly represents the agency within designated authority.
- Reflects and models organizational values, appropriate professional behavior and promotes the agency.
- Continually improves financial forecasting, modeling, and budgeting for all revenues and expenses related to departmental and organizational operations and capital investments.
- Develops and maintains procedural manuals, documentation systems, and ensures standardization of forms, procedures, and systems utilized by all programs relating to the Finance function.
- Oversees the preparation of the Kerr's Annual Budget for approval by the Board of Directors.
- Serves as Kerr's liaison with the outside auditing firm to perform the independent annual audit and financial statements and other required reports and tax filings.
- Establishes and maintains banking relationships.
- Ensures that all finance staffing decisions such as hiring, training, promotion, performance, and salary evaluations are performed with strict adherence with EEO guidelines and with the organization's goals for diversity and inclusion.
- Remains current in the field through participation in industry and professional groups, continuing education, and professional development activities.
- Performs other duties as assigned or required.

## **IDEAL CANDIDATE QUALIFICATIONS**

The Chief Financial Officer will provide sophisticated financial acumen in the core management functions of accounting & control, auditing, budgeting & forecasting, financial analysis & planning, debt & treasury management, and risk analysis. The ideal candidate should be a selfless leader who has a deep and granular understanding of all facets related to astute financial leadership in a complex nonprofit health and/or social services organization with multiple locations and a variety of cost recovery contracts.

Candidates must be visionary, mission driven and skilled at using sound judgement, to make thoughtful and practical recommendations to executive leadership and policy makers. In addition to being strategic and tactical, the CFO must be a leader with integrity, values, and humility. Of primary importance, Kerr is seeking a finance executive who embraces an authentic servant leadership style, possesses strong emotional intelligence, and understands and prioritizes the critical importance that people play in building a successful organization. Therefore, they must be a hands-on leader who excels at building and developing a team of finance and accounting staff members at all levels.

### ***Specific skills include:***

- Proven and inclusive people leader who is adept at assessing, recruiting, and retaining exceptional talent through motivating, coaching and mentoring team members in a manner that promotes collaboration, accountability, professional development, and growth.
- Possess exceptional listening skills and excellent written and verbal communication expertise.
- Experience working with line operating executives to provide sound financial advice supported by rigorous analysis and sound recommendations from complex financial and business information that enhances the financial well-being of Kerr.
- Strong presentation and interpersonal skills that demonstrate confidence and builds credibility and trust with various stakeholders including the CEO, Board Members, the Executive team, staff, partner agencies, external consultants, banking institutions, vendors, and other stakeholders.
- Advanced expertise in finance, fund accounting, budgeting & forecasting, cost reimbursement and fee for service contracts, and cost controls including Generally Accepted Accounting Principles; strong background in federal and state financial regulations, analytical methods, and financial management information systems and programs.
- Working knowledge of cash flow management, cost allocation, Medicaid and other third-party billing and cost recovery contracts.
- Some knowledge of capital project finance using various forms of tax credits and other programs and tools would be beneficial.
- Big picture understanding of general business and financial operations, more specifically; an innovative out of the box leader who will take appropriate risk and a creative thinker that identifies the possibilities for improving efficiencies and operational effectiveness throughout the Kerr organization.
- Committed to providing leadership in promoting diversity, equity, and inclusion; open to new ideas and approaches to building a stable and fiscally strong organization.

- Ability to lead and manage towards a common vision using a hands-on leadership style to motivate teams along with a willingness to coach, mentor and develop staff to produce quality work, develop new skills, assume added responsibility as growth opportunities and advancement with Kerr.
- Service minded, team oriented, mission driven, with a demonstrated commitment to valuing differences among individuals.

## EXPERIENCE & EDUCATION

### Experience:

The ideal CFO candidate will possess at least 10 years in financial management roles with 5 years of executive leadership experience at the CFO or other comparable level with a comparable nonprofit, public sector enterprise, healthcare organization or a closely related organization.

### Education:

BS in Finance or Accounting. CPA and/or advanced degree is preferred.

## COMPENSATION AND BENEFITS

Albertina Kerr offers a competitive salary and employment benefits package commensurate with qualifications and experience.

The Chief Financial Officer recruitment is being conducted on a national basis by The Hawkins Company. The position will remain open until filled. First consideration will be given to applications received by **June 4, 2021**. To apply for this outstanding opportunity, please electronically submit your resume and a cover letter of interest to The Hawkins Company, 8939 South Sepulveda Blvd. #110-216, Los Angeles, CA 90045: [ak.cfo@thehawkinscompany.com](mailto:ak.cfo@thehawkinscompany.com) . The letter of interest should outline why you are interested in joining Albertina Kerr and your relevant experience and accomplishments.

Confidential inquiries are encouraged and can be directed to: Cary Jordan, 718-753-4008, [cary@thehawkinscompany.com](mailto:cary@thehawkinscompany.com), Bill Hawkins, 310-348-8800, [bill@thehawkinscompany.com](mailto:bill@thehawkinscompany.com); or Yonnine Garr, 323-252-1655, [yonnine@thehawkinscompany.com](mailto:yonnine@thehawkinscompany.com) .

## EXECUTIVE RECRUITMENT

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