



**THE 360 GROUP**  
— EXPECT THE UNEXPECTED —

# Sierra Health Foundation

## Chief Operations and Financial Officer

### Position Description & Candidate Profile

# Chief Operations and Financial Officer

## Location

Sacramento, CA (3 days/week physical in-office presence required)

## Reports to

President and CEO

## Our Client

Sierra Health Foundation (SHF) is a private philanthropy that forges new paths to promote health, racial equity, and racial justice in partnership with communities, organizations, and leaders in 26 counties in Northern California. SHF is committed to reducing health disparities through convening, educating, and strategic grantmaking. SHF's mission is to invest in and serve as a catalyst for ideas, partnerships, and programs that improve health and quality of life in Northern California. Sierra Health Foundation was born from a health conversion foundation in 1985, and went on to create The Center in 2012, an intermediary to provide resources to community organizations that enable better health and well-being outcomes.

After fifteen years of explosive growth, SHF's administrative responsibilities have become increasingly complex due to the volume of high-quality community relationships it maintains, the partnerships it cultivates with donors and government, and the sheer growth of needs that must be addressed to support healthy, thriving communities. Throughout the COVID-19 pandemic, SHF grew its resources and doubled its headcount, accelerating its community partnership work to respond more quickly to expanded needs – especially targeting BIPOC communities, who suffer disproportionately. In light of this growth, operations and financial oversight require strategic and day-to-day administrative management that is astute, culturally sensitive and forward-looking. The notion that relationships, innovation and trust are cultural touchstones at SHF requires all senior leaders to demonstrate and model those values.

SHF has two offices: headquarters in Sacramento and the other in Fresno. The Chief Operations and Financial Officer works both inside and outside the organization, engaging with community and funders to leverage the institutional infrastructure and enable administrative levers to ensure intended outcomes. This leader will also manage oversight mechanisms, internal staff, and operations to meet organizational and partner needs.

Learn more about Sierra Health Foundation at <https://www.sierrahealth.org/> !

## Position Responsibilities

The Chief Operations and Financial Officer will play a pivotal role in the overall operations, financial oversight, and sustainability of SHF. The Chief Operations and Financial Officer will be responsible for maintaining and improving systems, developing new partnerships, and developing relationships representing the exciting and rapid changes in the region. SHF's deep relationships with leaders, non-profit organizations, and government officials position it well to convene philanthropic forces and engage civic partners in the community to address, mitigate, and solve regional problems. The opportunity and the challenge for SHF is to bring all of these players together to promote an even more thriving – and equitable – region, working collaboratively with other parts of the state to identify long-overdue solutions. This position will also interact with SHF's Board of Directors, senior management, other staff, and external constituents.

Specifically, the Chief Operations and Financial Officer will be responsible for:

### *Executive Leadership*

- Serve as a collaborative member of the three-person executive management team responsible for organizational policy development and planning, including the President and CEO and the Senior VP Programs & President of The Center
- Develop and monitor the Foundation's and Center's annual operating budgets
- Provide mentorship and leadership for the professional growth of the finance and operations team
- Remain current and knowledgeable about legal, accounting, tax, and public policy matters related to foundations and philanthropy
- Evaluate partnerships in accordance with SHF's policies and the ability of SHF to administer partnerships appropriately
- Partner with the CEO and the President of The Center to determine and implement organizational strategy
- Lead data analysis and information sharing throughout the organization to aid in decision-making and strategic direction, including supporting long-range planning and business modeling with financial and economic insights

### *Finance and Administration*

- Lead development of operational policies and practices for SHF's and The Center's finance and operations team

- Manage costs and profitability, making sure expenditures are consistent with the organization's budget, goals, and mission
- Oversee all members of the finance and operations team in their management of all aspects of accounting, financial, operations, investment management, grants and contracts, and information technology
- Work with SHF's relevant Board Committees to keep them well-informed and leverage their collective expertise to assess the organization's financial condition, appropriate reporting, compliance with applicable regulation

#### *Compliance*

- Comply with all state and federal reporting requirements
- Oversee preparation of annual financial statements in compliance with generally accepted financial principles and coordination of annual independent financial statement audit

### **Profile of the Successful Candidate**

SHF is committed to supporting an energetic, cohesive culture that values equity, diversity and inclusion, and seeks to continue to build a diverse and inclusive workforce to promote effective partnerships with all communities and population groups in the region. SHF seeks a leader with a demonstrated track record of resource deployment; commitment to the power of philanthropy and the common good; strong curiosity and the desire to continue learning; a collegial work style; a sense of humor; and the dedication to work hard toward the foundation's mission of promoting community-based solutions and improving the quality of life in the region.

Within this framework, SHF seeks a Chief Operations and Financial Officer with the following attributes:

- Minimum of ten years senior-level management experience in a finance and operations function; non-profit and/or foundation experience preferred
- Strong financial acumen and judgment, combined with a passion for philanthropy
- Demonstrated facility with business modeling and analysis
- Well-honed ability to listen to executives, program leaders, and professional advisors and respond to their needs
- Ability to work collaboratively with colleagues, providing encouragement to team members and support of others in the performance of their responsibilities
- Strong operational and implementation experience

- Facility with finance and accounting software systems and the ability to adopt new systems easily in accordance with evolving needs and requirements
- Highly developed skills and savvy in relationship and culture building
- Excellent written, verbal, and presentation skills
- Ability to multi-task, prioritizing work to ensure consistent, high quality service in a competitive external environment

## Start Timeframe

We seek to have someone in place in Fall 2023.

## Compensation

This position offers a competitive salary with a range of \$250,000 to \$290,000 and includes a comprehensive benefits package. We actively welcome all candidates from a wide range of backgrounds who have the skills to fulfill this role – regardless of compensation history.

## To Apply

All applications are held in strict confidence. Please submit your credentials and a letter of interest through our private applicant portal to The 360 Group at:

<https://the360group.us/portal/>

Applications should be directed to the attention of Monica Rodgers, Senior Consultant or Melissa Ulum, Of Counsel. Applications will be reviewed on a rolling basis. Earlier applicants may receive priority consideration. To be considered, The 360 Group encourages all interested candidates to submit their applications promptly, via the confidential applicant portal linked above.

*At The 360 Group, we know that a richly diverse mix of professionals makes organizations more effective. Using that principle as our “North Star,” we make diversity a hallmark of our firm, and all of our search engagements.*

**Learn more about The 360 Group at [the360group.us](https://the360group.us).**