



Chief Financial Officer Opportunity Guide





ABOUT THE NEW ORGANIZATION

[Envision Unlimited](#) and [United Cerebral Palsy Seguin of Greater Chicago](#) (UCP Seguin) are entering into a strategic partnership that will create a stronger advocate for people with intellectual or developmental disabilities and those with mental illness. Working together, they will be able to expand services, serve more people, and achieve greater effectiveness. To read the full announcement, including FAQs about the new partnership, please [click here](#).

This consolidation will bring together nearly 150 years of combined experience, building on each other's strengths, and filling in each other's gaps. Serving more than 4,000 individuals and families, programs include residential services, day supports, and employment for people with I/DD and serious mental illness. Additional programs include respite services for the I/DD population and specialized foster care for children with disabilities.

Jointly, they will be an even greater champion to improve the lives of those they serve. Their aim: to drive innovation that leads to better opportunities for members, creates collaborative systems, and promotes improved public policy. Their work enables people to live life without limits.

The two organizations will consolidate key aspects of their organizations into a third 501(c)(3) entity to enhance their overall efficiency and benefit their clients. Mostly, this means consolidating administrative functions such as accounting and finance, information technology, quality assurance, planning and strategy, facility management, as well as development, marketing, and communications, thereby providing additional support for the people they serve and for staff. It also means sharing a mission, name, brand, and strategy that will create positive impact on people with disabilities.

Envision and UCP Seguin will be partners, or "affiliates," of this new administrative entity. Within this federation structure, each organization will retain its 501(c)(3) nonprofit status and its board of directors. Each will continue to deliver the highest quality direct service possible while sharing a single mission, strategic direction, brand, and back office.

They have three overarching goals:

1. Achieve greater administrative efficiencies that will enable them to enhance their services.
2. Become more innovative to provide those they serve with more choice, independence, and opportunities to enjoy activities and be fully included within the larger society.
3. Leverage their larger size and efficiencies as benefits to funders and policymakers.

The vision for the new organization is for everyone with an intellectual or mental challenge to live a happy and fulfilling life without limits.

Its mission is to provide high-quality programs so that all people with disabilities, regardless of their ability, reach their full potential and achieve their greatest level of choice, independence, and inclusion in their communities.

As a multi-state organization, the main geographic area of focus is currently the Chicago Metropolitan area. However, the future of the organization(s) lies wherever individuals and families need services. Throughout their combined history, Envision Unlimited and UCP Seguin have promoted change and propelled innovation in the field. The new mission, currently under development, will incorporate values of maximum choice, independence, and inclusion for people with disabilities.



THE OPPORTUNITY: CHIEF FINANCIAL OFFICER

The impending consolidation of Envision Unlimited and UCP Seguin (hereafter called “new organization”) will require a savvy Chief Financial Officer (CFO) to lead all areas related to financial strategy and finance for this new organization. Professionals who have led financial strategy and implementation through a consolidation, merger, or significant organizational change are of particular interest for this role. The CFO will work directly with the CEO and executive leadership team to create, initiate, analyze, and recommend changes in the areas of organizational revenue and expenses.

Further, the CFO will design, recommend, and implement overarching strategies and processes to the CEO and Board of Directors for the purpose of ensuring that the organization’s mission, goals, and objectives are achieved, including integration of the two founding agencies, exploration of future merger and acquisition (M&A) activity, and development of analysis and strategy to ensure complex and blended funding streams are maximized.

Between the two founding agencies, one finance team currently is in-house, and one has select staff with most functions being outsourced; a study is currently being done to determine the relative benefits of these two models. This new executive role will select and supervise (i.e., orient, train, schedule, evaluate, discipline, commend, and direct activities) the Finance Department staff and/or outsourced services, utilizing measurable performance evaluation criteria for the purpose of providing opportunity for staff growth and development based on organizational needs in conjunction with individual interests. The CFO will ensure that performance standards of individuals, as well as those of the new organization, meet or exceed the needs and wants of persons and families served, in manners consistent with and supportive of the mission, goals, and services of the organization. The CFO will provide consistent support, oversight, and consultation/collaboration to members of the finance team and collaborate with other organizational executive and leadership staff members toward achieving organizational goals.



PERFORMANCE OBJECTIVES

Strategy and Organizational Leadership

- Work closely with the Board of Directors, CEO, Chief of Staff, and Chief Diversity and Inclusion Officer, as well as with member organizations' Board Treasurers and Executive Directors, to ensure the development of the federation structure's annual budget and to provide input, information, and assistance as needed, prior to the beginning of each fiscal year.
- Serve as primary staff support to the Finance Committee.
- Effectively provide support and guidance to the organization's leadership team to inspire the attainment and achievement of financial organizational goals and objectives.
- Strategically approach organizational financial planning and forecasting. Make data-driven suggestions and decisions related to finance that support the mission and values of the new organization. Make recommendations and decisions related to strategic financial planning, for the purpose of ensuring long-term sustainability.
- Ensure effective leadership to the organization's Finance Department, including assuming direct supervision of the team and making final determinations on in-house or outsourcing functions. Current team members include: Directors of Finance, Revenue Managers, Director of Payroll, and other staff as deemed appropriate or necessary.
- Lead, develop, motivate, supervise, and maintain a highly effective, productive, and cohesive staff with both professional/technical expertise and operational talent with an approach of support and service to the rest of the organization.
- Provide collaborative leadership in maintaining a positive and productive working relationship among the Board of Directors, membership, partner organizations, and volunteers.
- Review and analyze data with the CEO and Chief of Staff to make recommendations for total compensation throughout the organization in accordance with current and newly adopted human resource policies, Collective Bargaining Agreements, and budgets approved by the organization's Board of Directors.
- Collaborate with the CEO and Board of Directors on investment strategies by considering cash and liquidity risks.
- Recognize, analyze, and evaluate the short- and long-range impact of financial decisions, actions, and plans, and identify when/if/what specific additional action or information is needed.
- Take initiative in preparing reliable current and forecasting financial reports, and make recommendations based in fact, alongside professional expertise.
- Remain informed of the financial climate of government, philanthropy, and other private sector markets.

PERFORMANCE OBJECTIVES

Financial Management

- Lead and set the parameters for the preparation and development of organizational budgets, including setting and tracking the new organization's financial goals and objectives. Develop and maintain up-to-date systems and procedures for financial operations in accordance with organization and regulatory policies, goals, best practices, and mandates to ensure a clean annual Audit, addressing all issues raised in a timely manner.
- Analyze financial data to ensure its accuracy, organizing such information into reports and maintaining thorough and easy to understand financial dashboards.
- Assess financial risks and opportunities and identify those that will have/may have either positive or negative impact on the organization, including the overall financial health of the new organization.
- Advise the CEO on the total operational expenses and revenue streams of the federated structure to determine financial requirements on an ongoing basis.
- Master intricacies of governmental funding partnerships to ensure that billing systems are in place to capture all legitimate third-party revenue and expand revenue wherever possible.
- Assure all legal and regulatory documents are filed and monitor compliance with laws and regulations.
- Work cooperatively to support program operations.
- Develop and prepare clear and effective reports to executive staff and board members, both written and verbal.

Asset Management

- Ensure, as part of the consolidation process, a comprehensive inventory of all assets is created, maintained, and utilized as a tool for strategic planning.
- Create/implement policies on acquisition, maintenance, performance, and disposal to support the approved business and operating plans.
- Develop and analyze existing financial models with the ability to create new analytics to assure assets are performing.

External Affairs

- Communicate the new organization's purpose, programs, and activities to public/private entities and the community at large to enhance community support in all possible settings.
- Work directly with the CEO and Chief External Affairs Officer to control and evaluate the organization's fundraising plans and capital.
- Ensure solid financial and capital plans are in place to support all donor and investor communications.
- Manage relationships with vendors including auditors, bank executives/representatives, attorneys, and brokerage firms/representatives, and keep the charitable intent and philanthropic purposes of the new organization at the forefront of all interactions.
- Assure programs are funded through appropriate revenue streams to remain profitable and fully support the new organization's mission and vision.

THE QUALIFIED CANDIDATE



Envision Unlimited and UCP Seguin seek an experienced Chief Financial Officer to lead the newly formed federated entity through the ongoing consolidation and beyond. The successful candidate will bring strong experience navigating complex organizational changes, preferably steering an organization through an era of significant change such as a consolidation/merger or organic growth. Candidates must have served an organizational leadership team and carried responsibility for all areas of finance in an organization with an operating budget of \$100,000,000 or more.

Specific Requirements Include:

- Full support of the organization's vision and values, as well as a demonstrated commitment to the mission of providing high quality programs so that all people with disabilities, regardless of their ability, reach their full potential and achieve their greatest level of choice, independence, and inclusion in their community.
- Proven experience in executive leadership as a CFO or equivalent role in a nonprofit or healthcare organization is preferred.
- Strong financial and accounting background, including an understanding of profit and loss, balance sheet, cash flow management, advanced cost allocation, GAAP, Medicaid and other third-party billing, and general finance and budgeting.
- Knowledge of:
 - o Financial planning and strategy
 - o Financial risk management
 - o Managing profitability
 - o Budget design, creation, and development
 - o Data analysis and forecasting methods
 - o Financial laws, regulations, and risk management practices
- Track record in financial management, stewardship, and developing strategies to successfully improve the bottom line and enhance return on investment.
- Proven success in building strong and productive work teams with a focus on mentoring and nurturing staff development.
- Strong analytic and strategic-thinking skills, with a demonstrated ability to create, implement, and monitor complex plans and translate those plans into goals and concrete strategies.
- Career track record that shows stability with an organization and capacity to develop and nurture relationships culminating in overall success.
- Minimum of 10 years in managerial/leadership roles in Financial Administration.
- Master's Degree in Business Administration or Finance required; CPA preferred.



HOW TO APPLY

To assure confidential tracking of all applicants, no applications will be accepted via email. All inquiries will be held in strict confidence. This position offers a competitive salary at + / - \$170,000 with strong benefits.

The new organization is an equal opportunity employer and does not discriminate on the basis of race, color, gender, religion, age, sexual orientation, national or ethnic origin, disability, marital status, veteran status, or any other occupationally irrelevant criteria.

This search is being managed by Heather Eddy, President and CEO, and Kiana Martin, Project Coordinator of KEES. Questions may be addressed to kmartin@kees2success.com.

APPLY NOW

About KEES

KEES (formerly Alford Executive Search) is a nonprofit executive search firm that builds transformative teams and leaders. A woman owned and operated firm, KEES offers a full array of nonprofit consulting services including executive search, leadership development, interim staffing, and HR support. For more information, please visit www.kees2success.com.

