Job Description

Harbor Health Services, Inc.
Chief Financial Officer

The Opportunity

Harbor Health Services, Inc. (HHSI), a community health agency recognized both locally and nationally for the high quality and wide range of its services, is seeking a new CFO to join its executive team. HHSI is committed to providing exceptional, accessible, and affordable health care in several diverse communities in Boston, the South Shore and Cape Cod. Harbor’s new CEO, Chuck Jones, is looking for, “a strategic leader with deep financial expertise, whose passion for inspiring exceptional performance and teamwork will be key to taking advantage of the myriad opportunities we face.”

Currently, Harbor Health, like other providers, is facing both daunting challenges and exciting opportunities. A talented CFO is needed to work closely with the CEO, Board of Directors, senior team and staff to review, refine and implement the agency’s strategic direction and ensure its long-term financial health. The new CFO will have primary responsibility for the fiscal stewardship of HHSI’s resources; will oversee and manage all financial administration, business planning and budgeting; and will upgrade and modernize systems to improve reporting and increase efficiencies, enabling HHSI to better serve its clients.

The ideal candidate will have strong business acumen, a pragmatic approach, and deep knowledge of the health care landscape. They will have proven success in a financial leadership role for a multifaceted organization with complex financial, operational and technological demands. A big picture thinker, they will also be willing to dig into the details. Expertise with large-scale process improvement efforts, system upgrades and change management will be important, as will the ability to develop and support highly motivated, high performing teams.

Organizational Overview

Harbor Health Services, Inc. is a non-profit, community health agency committed to providing quality, comprehensive health care in Dorchester, the South Shore, and Cape Cod communities. HHSI provides a wide array of healthcare services to meet the needs of its patients.

Harbor Health owns and operates five federally qualified community health centers: Geiger Gibson Community Health Center, Harbor Community Health Center-Hyannis, Harbor Community Health Center-Plymouth, Daniel Driscoll-Neposset Health Center and the Ellen Jones Community Dental Center. In addition, Harbor Health administers the Elder Service Plan, a Program of All-Inclusive Care for the Elderly (PACE), providing care to frail elders in their place of residence. The Elder
Service Program has historically operated out of a Mattapan office but in September will begin seeing new patients at a second, newly renovated 28,000 square foot facility in Brockton. HHSI also operates three Women, Infants, and Children (WIC) Nutrition Programs (at Neponset Health Center, Codman CHC and Dorchester House).

Combined, Harbor Health’s community health centers are the Medical Home for more than 29,000 patients and the “family dentist” to 10,000 patients. The Elder Service Plan cares for more than 460 members and Women, Infant, and Children Nutrition Program serves more than 3,000 women and their children. HHSI is governed by a community Board of Directors, 51% of whom are patients of HHSI.

Harbor Health employs over 500 staff and in 2017 has a budget of over $70 million. The current revenue breakdown is 45% from CHC services and 55% from the Elder Service Plan.

As HHSI embarks on its next chapter, its mission and commitment to serve diverse and vulnerable populations remains steadfast. It is a vibrant organization recognized, both locally and nationally, for its wide range of services, the quality of care it provides, its broad cultural competencies, and its dedicated staff. Over the next several years it is poised to take advantage of numerous opportunities and is clearly a valuable resource and an important asset to the Commonwealth.

**Challenges and Opportunities**

Harbor Health Services, like all health care organizations, is operating in an environment of rapid change and unpredictability, which presents both challenges and opportunities – internally and externally. Trends that may impact the agency include, among others, demographic changes, evolving public and private payment structures, and political and economic forces. To remain sound and competitive, HHSI must ensure that it has the technology and systems infrastructure, financial model, and staffing and services to continue to be responsive to the needs of its patients. The new CFO will work closely with the CEO to monitor and analyze emerging trends and needs to ensure that HHSI remains responsive and highly adaptive.

**The CFO Role: Scope and Responsibilities**

The new CFO’s responsibilities will extend beyond those of a traditional CFO. Reporting to, and working closely with, the President and CEO, the CFO has primary responsibility for the fiscal stewardship of HHSI resources. Additionally, they will serve as a true thought partner and leader, working closely with the CEO and staff to determine how best to navigate these unpredictable times, so that HHSI continues to thrive.

The CFO supervises the Director of Finance (who oversees accounting, accounts payable, budgeting and payroll staff); the Director of Patient Accounts; and the Director of Information Technology. They will be responsible for management oversight and strategic direction of the agency’s finances; will plan, direct, coordinate and communicate all financial activities; and will lead and manage both its Finance and IT departments. They will develop, review and refine policies and procedures related to accounting, budgeting and financial planning, financial controls, investments and underwriting practices; and develop, maintain and enhance relationships with
regulators, financial institutions, payers and other stakeholders. The CFO will cultivate the leadership and functional abilities of staff, building and maintaining a high-performing, adaptable and customer-oriented team.

**Specific Responsibilities:**

*Strategically lead and manage HHSI’s financial and technological operations; update and develop related infrastructure.*

- **Oversee:**
  - Development and preparation of long-range financial models and financing strategies that advance the Center’s strategic goals and priorities
  - Financial operations, including: accounting, disbursement, payroll, auditing, treasury and credit and collections functions; establish budgetary controls and procedures; and ensure proper maintenance of financial records
  - Annual and other financial audits and direct the preparation of all internal and external financial reports
  - Continued updating and improving of HHSI’s financial, administrative and IT systems to support HHSI’s work by improving efficiency and adapting for growth in a shifting landscape

- **Responsible for all federal and state grant and contract administration and regulatory compliance.**
- **Manage external relationships with capital providers, including bondholders, banks, and legal and audit firms.**
- **Ensure compliance with all required federal, state and local financial reporting and regulatory requirements including those designated for Federally Qualified Health Centers and those for PACE programs**
- **Ensure that HHSI has appropriate property, liability and other insurance coverage as well as risk sharing and risk management practices**
- **Invest both time and resources in staff development in order to create high performing, collaborative teams throughout the organization**

*Work in close partnership with the President and CEO, leadership team and Board on strategic planning, operations and evaluation processes.*

- **Evaluate and advise on the impact of long-range planning, introduction of new programs and strategies, and regulatory action**
- **Lead the development of dashboards and other metrics and tools to assess performance, design improvements and enhance decision-making**
  - Analyze revenue trends and expenses
  - Develop projections, annual budgets and forecasts
  - Identify and create cost management and revenue enhancement opportunities
- **Be a strategic advisor, providing input and leadership on important decisions such as potential alliances, business challenges, investments, etc.**
- **Work closely with the Board and its Finance and Audit Committees, and ensure the availability of accurate and timely information to support their decision-making**
Contribute to, and lead where appropriate, HHSI’s relationships with its clients, partners, providers, government agencies and others.

- Establish, cultivate and optimize relationships with appropriate government entities and the financial community
- Lead and/or participate in negotiations with a broad range of partners and stakeholders, including providers, payers, donors and others important to HHSI’s success
- Ensure compliance with all local, state and federal government and other agency regulations
- Build relationships and become engaged with the communities that HHSI serves

Initial Priorities and Expectations

In the first 6–12 months, the CFO will be expected to:

- Listen and learn: develop an understanding of HHSI and its working culture
- Maintain high performance standards, service quality and financial and regulatory integrity
- Build and cultivate internal and external relationships: develop a partnership with the President and CEO, and gain the confidence of the Board, staff and key external partners and stakeholders
- Assess organizational capacity and capabilities, including financial controls
- Review the recently completed evaluation of administrative, financial, clinical and management technology systems and develop a strategy for implementation
- Focus on establishing long-term financial sustainability while maintaining short-term financial stability
- Communicate frequently and clearly; be accessible
- Demonstrate proactive commitment to and development of HHSI’s culture

Qualifications

Experience

- Demonstrated executive health care finance leadership and management experience in a multi-faceted, multi-payer organization with complex business, technical and regulatory demands
- Deep commitment to, and belief in, community-based health care delivery
- Expertise in multi-payer financing and deep understanding of the health care marketplace, including:
  - Trends in payment methodologies and models such as AQC and ACO
  - Funding mechanisms for special populations such as PACE
  - Implications of potential federal and state changes to publicly financed health care
  - State and federal regulatory requirements, specifically around Federal Tort Claims Act coverage, PACE program requirements, 340b program requirements and FQHC requirements
- Skilled at:
  - Healthcare operations and capital budgeting including yearly budgets, monthly reporting, variance analysis and problem solving
- Healthcare reimbursements including fee for service, capitation, total medical budgeting and alternative payment methodologies
- Developing business intelligence tools, using data analytics, modeling and dashboards to enhance decision making
- Debt capacity analysis and negotiation of capital financing
- Grants management and reporting
- Federal and state compliance regulations procurement and financial management policy development including CHCs, PACE and 340B drug purchasing program policies

- Understanding of, and insight into, the broader health care landscape, its challenges and opportunities; able to anticipate and advise on changes that will affect HHSI
- Proven ability to build and nurture relationships across business functions and externally
- Significant expertise in evaluating, developing, integrating and updating financial, administrative and IT systems
- Pragmatic, with strong business and financial acumen; able to balance a commitment to the mission with a financially viable business model
- Proven ability to diversify and strengthen revenue streams through the introduction of innovative programs, policies and approaches
- Master’s degree in business, CPA or other relevant degree preferred

Skills and Attributes
- Commitment to health equity, the mission of community health centers, and excellence
- Highly respected and credible financial leader with impeccable integrity
- Track record of supporting and building initiatives that promote diversity, access and inclusion.
- Strategic; able to see the big picture, but also willing to roll up sleeves and dig into the details when necessary
- Strong and effective communication and presentation skills
- Highly effective relationship builder and team player
- Track record of developing staff, creating teams, fostering a culture that embraces service excellence and innovation, and celebrating and recognizing staff successes
- Creative and forward thinking with a pragmatic approach based on strong business and financial acumen
- Skillful at leading change and invigorated by the challenges of the times; optimistic while realistic, with a sense of humor
- Open, approachable and adaptable, with a willingness to listen and a balanced approach to decision making

E. Catlin Donnelly & Associates is conducting the search. Please do not apply directly to HHSI.

To nominate a candidate, or to apply, forward resume and cover letter in confidence to:
E. Catlin Donnelly & Associates at hsicfo@ecdonnelly.com

Harbor Health Services, Inc. is an Equal Opportunity Employer.