



## **St. Francis Convent/Franciscan Shore – Job Posting**

**Position:** Chief Financial Officer (CFO)

**We are looking for an experienced CFO to join our team! If you would enjoy working for an organization that makes a positive impact on the lives of seniors and values its employees, then this is the opportunity for you!**

**Organization Info.:**

- Assisted living facility located on Lake Drive in St. Francis, Wis.
- Non-profit organization
- Size: 100-115 employees, 80 resident beds
- Resident population: Sisters and lay people

**We promote the Franciscan Values that are integral to the Mission of the Sisters of St. Francis of Assisi, namely, building a caring community, showing compassion, peacemaking and reverencing all creation.**

**Position Summary:** The Chief Financial Officer will direct and oversee the financial activities of the congregation, convent, and Franciscan Shore. The CFO will direct the preparation of current financial reports and summaries and create forecasts predicting future growth.

**Requirements:**

- Bachelor's degree in business, with a major in accounting or finance or equivalent experience. Master's degree in business with an emphasis in accounting, finance preferred. A minimum of ten years of financial management and strategic management experience, preferably in both for profit and non-profit environments. Experience in dealing with multiple entities and consolidations, negotiating and interpreting contracts to be submitted to the Board of Directors, financial audit experience and supervisory experience are preferred.
- Strong leadership abilities, organizational and time management skills.
- Strong financial acumen and ability to develop and execute complex, strategic business plans.
- Knowledge of management, financial statements and controls, marketing, risk management, and best practices in senior living communities.
- Proficient in Microsoft Office suite.
- Ability to work collaboratively and to make independent decisions as appropriate.
- Ability to work in a fast-paced environment and to prioritize, organize and manage multiple priorities.
- Ability to teach/train others effectively.
- Must be able to maintain confidentiality and a commitment to business ethics and integrity.
- Strong commitment to diversity and inclusivity in the workplace.
- Must be able to meet deadlines and work well under pressure.



- Excellent written and verbal communication skills and ability to convey information to various levels of staff and management.
- Strong presentation skills.
- Experience in supporting Boards of Directors and Board Committees.

### **Responsibilities:**

- Support and promote Franciscan values along with the OSF Leadership Team to ensure that members and residents receive high quality services.
- In collaboration with the OSF Leadership Team, to implement strategic plans, based on data-driven analytics, projections, and financials that optimize the financial performance of the Congregation, Convent and Franciscan Shore.
- Create and manage the organizations' budgets and ensure that they are financially viable, sustainable organizations with the resources to meet current and projected growth.
- Provide updates on financials, operations, and progress towards goals for areas of responsibility to the OSF Leadership Team.
- Assist Franciscan Shore's Executive Director with preparing agendas and presenting reports at regularly scheduled Board of Director meetings.
- Convenes the trustees of the Ongoing Community Support Trust and oversees the congregation's investments.
- Prepares and presents relevant reports at Congregation meetings, finance committee and the Ongoing Community Support Trust meetings.
- Ensures that the organizations follow relevant state and federal laws, regulations, and standard accounting procedures.
- Establish payroll accounting methods, including special accounting functions required by any employee benefit or retirement plan etc.
- Responsible for real estate management – sales and purchases of land and buildings.
- Works with individual Sisters regarding financial and retirement planning as needed (both religious and non-religious funds). Coordinates the execution of needed legal papers for professed Sisters (Cession Documents, Wills, Loans, etc.).
- Maintains professional affiliations to enhance professional growth and remain current with trends in planning for the future of religious congregations and senior living communities.
- Generate reports and appropriate correspondence as required by established practice, as needed or requested.
- Mentor, guide, and direct management in the operational and financial accountabilities of each department, including financial presentations at monthly leadership meetings.
- Maintain a full understanding of licensure and regulatory requirements and assists departments in achieving and maintaining licensure and accreditation.
- Facilitate positive relationships with each of the OSF Leadership Team members and co-workers.
- Assist with the annual selection of the employee benefit plan.
- Serve as Plan Administrator for the convent's sponsored 403(b) plan. Ensure all fiduciary duties requirements are met.



**Details:**

**Shift:** 1<sup>st</sup> shift, Monday – Friday, Full-time (40 hours per week)

**Salary:** \$130,000-\$150,000