



Compassion & Choices
Chief Financial & Compliance Officer
Portland, OR, or Washington, DC or remote

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About Compassion & Choices

Compassion & Choices is the nation's oldest, largest and most active nonprofit working to improve care, expand options and empower everyone to chart their end-of-life journey. Since 1980, we have united over 450,000 supporters nationwide to become the preeminent leader of the end-of-life options movement.

Compassion & Choices is leading the way in transforming our "one-size-fits-all" healthcare system, which allows so much needless pain and suffering, into one that puts people in charge of their own end-of-life care. We envision a patient-driven system that honors an individual's values, religious views and spiritual beliefs. We are working toward an America that respects everyone's right to make their own end-of-life care decisions, in consultation with doctors and loved ones. We advocate for the range of options to ensure everyone can die in peace and with dignity.

Across the nation, Compassion & Choices works to create a society that affirms life and accepts the inevitability of death, embraces expanded options for compassionate dying, and empowers everyone to choose end-of-life care that reflects their values, priorities and beliefs. To make this vision a reality, Compassion & Choices improves care, expands options and empowers everyone to chart their end-of-life journey.

For more information on Compassion & Choices, please visit its [website](#).

The Opportunity

Reporting to the President & CEO, the Chief Financial & Compliance Officer (CFCO) serves as an integral member of the senior leadership team. This position must ensure the financial health and integrity of an \$18 million annual revenue and \$18 million cash and investment portfolio and growing 501(c)(3)/501(c)(4) organization. As a leader within the organization, this position will expertly execute all financial, accounting and compliance functions while aligning these areas with C&C's Strategic Plan and building upon strategic business initiatives. Candidate must have the expertise, leadership and judgement to inspire confidence in the President/CEO, senior team and the board.

The CFCO manages a team that is ultimately accountable for the overall financial health of the organization. This includes financial planning, record keeping, financial reporting, payroll, contract administration, investments, insurance, charitable gift annuity investments, reporting compliance for state and federal tax, lobbying compliance, business registrations, solicitation registrations, and risk management. The CFCO must have proven expertise in federal and state election reporting and be able to ensure that the organization(s) are operating in a manner consistent with all laws. Expertise in setting up and maintaining C4s, PACs, ballot committees is essential.

The CFCO works with all leaders across the organization, external partners, and the board of directors to deliver financial results as well as strategic projects that are aligned with the organization's strategic plan, operational goals, and mission. The CFCO works at all times to demonstrate and champion C&C's organizational health. This includes exhibiting C&C's core values of: compassion, respect, courage,

credibility and resilience as well as their four cultures: leadership excellence; diversity, equity and inclusion; gratitude and philanthropy. Candidate must have a commitment to realizing a diverse and inclusive workforce.

The core responsibilities of the Chief Financial and Compliance Officer will include:

Organizational Leader and Manager

- Communicate, engage and interact directly with the President/CEO, COO, Board of Directors, Senior Leadership Team, and Department Directors to operate the end-to-end accounting and compliance functions of the organization.
- Serve as the liaison to the Board of Directors Finance Committee, including designing and leading sessions at the quarterly board meetings; preparing and presenting all financial information; preparing periodic communications; and facilitating finance-related discussions at board meetings; and serving as the primary staff liaison to the finance committee.
- Have the expertise and authority to present accurate information on the organization's financials (e.g. status of current revenue, expenses, reserves, investments and changes to each dependent upon different scenarios presented) during meetings and calls.
- Actively engage as a senior-level member of the organization to maximize the effectiveness of C&C; bring the department into line with the President/CEO's and Board of Directors' plans and recommendations; adapt to a changing environment while delivering results as a team player; and exhibit impeccable judgement.
- Work with the programmatic team to conceptualize, establish and implement new entities (PAC, Ballot Committees, etc.) to support Compassion & Choice's programmatic work.
- Provide expert leadership and inspiring mentorship to staff in all areas of finance and compliance.
- Participate in pivotal decisions as they relate to strategic initiatives and operational models.
- Serve as a senior representative of the organization in public and professional forums.
- Provide leadership and overall management for the accounting staff, including coaching, development, support, performance management, morale, retention and recruiting of top talent.
- Demonstrates commitment to and active support of C&C's Diversity & Inclusion program.
- Support of all C&C efforts as requested; including, but not limited to, activities such as identifying prospects, briefing donors, alerting staff of fundraising opportunities, reaching out to donors, participating in phone-a-thons, etc.
- Demonstrate familiarity with and commitment to C&C's mission.
- Other duties as required.

Finance

- Lead investment logistics, reporting and collaboration with investment advisors regarding investment strategies and selection.
- Manage processes for financial forecasting and establishing and managing capital and expense budgets for combined \$18+-million 501(c)(3)/501(c)(4) organizations.
- Ensure that the physical, financial and intellectual assets are protected and prudently managed, ensuring that effective internal controls are in place to ensure auditable compliance applicable rules for financial and tax reporting, and data protection.
- Direct the work of the Accounting and Compliance Department including the management of accounting and accounting and compliance staff.
- Oversee development of budgets on an annual basis.
- Oversee accounting methods for reporting income over expenditures (budget to actual).

- Ensure policies are followed for reporting financial activity internally and externally.
- Analyze organization risks and procure adequate insurance protection.
- Direct the development and administration of the organization's overall audit program (including a timely and accurate budget preparation process).
- In partnership with other leaders, work to ensure data-driven decision making by providing accurate and timely financial data and analysis.
- Evaluate and give strategic guidance on insurance coverage for the organization.

Compliance

- Manage all compliance functions of the organization.
- Review, process and manage all contracts awarded by the organization.
- Ensure organizational compliance with all reporting requirements including IRS, state solicitation registrations.
- Ensure organizational compliance with all state and federal lobbying activities and state/local business registrations.
- Ensure all programs remain in compliance with applicable laws.
- Ensure the organization remains in compliance with all administrative policies and rules including timely and accurate completion of related reports (such as corporate credit card statement (PCard), performance reviews, time cards, etc.).
- Manage the organization's published document retention and destruction policy.
- Manage the education and process of C3/C4 for the organization including filing, documentation, regulatory compliance, etc.

Supervisory Responsibilities

Directly supervises the National Director of Finance and indirectly the accounting staff. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities include interviewing, hiring, and training employees; planning, assigning and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

Values

Must be energized by the idea of working at an organization with the following values:

- **Compassionate** in Compassion & Choice's conviction that dying patients should be free of unwanted treatment, suffering or outside interference.
- **Respectful** of the autonomy of individuals to decide what end-of-life options are best for them and their family.
- **Courageous** in Compassion & Choice's willingness to confront the toughest end-of-life health challenges, disrupt the broken status quo and protect an individual's right to self-determination.
- **Credible** in all of Compassion & Choice's education, advocacy and partnerships — C&C's efforts are grounded in objective research and demonstrable facts.
- **Resilient** in Compassion & Choice's capacity to respond to opportunities and threats in the movement so that C&C can achieve their vision as quickly as possible.

Candidate Profile

Strong candidates will bring exceptional financial, compliance, and management skills, including an understanding of the complexities of in 501(c)(3)/501(c)(4) advocacy and lobbying organizations. In addition to deep technical expertise, candidates will have the ability to serve as effective members of a highly collaborative senior leadership team and strong managers to the team they directly lead.

The ideal candidate will also have the following qualifications, skills, and characteristics:

- CPA license required.
- 15+ years' experience in the nonprofit sector, required experience in 501(c)(3)/501(c)(4), advocacy and lobbying.
- 10+ years of management experience in positions of increasing responsibility. Prior experience serving as a CFO for a similar size organization preferred.
- Proven experience managing the financial health of a substantial and growing 501(c)(3)/501(c)(4) organization with annual revenue and cash of \$18 million dollars.
- Proven expertise and familiarity with establishing new political entities (e.g. PACS, Ballot Committees) on the national and state level to support programmatic work including working expertise in the purpose, structure and what's allowable with each type of entity.
- Significant experience in or knowledge of social sector organization accounting is preferred, including compliance, and reporting in an organization with significant total assets.
- The ability to assess and improve internal systems through application of best practices and innovation
- Experience with and proficiency in the use of software programs for accounting, word processing, databases, spreadsheets, email and internet.
- Knowledge of all aspects of GAAP and the rules governing nonprofit entities.
- Experience leading accounting and compliance teams.
- Strong and experienced executive leader with experience reporting directly to a President/CEO and impeccable judgement.
- History of substantially building the capacity, effectiveness and leadership of a nonprofit organization.
- Experience successfully serving as the primary liaison to a national nonprofit board of directors.
- Track record of managing director-level staff, experience leading remote teams a plus.
- Strong team management skills with the ability to effectively direct, manage and delegate tasks in addition to effectively handling some tasks on their own.
- Significant experience inspiring diverse teams to execute well and continually innovate.
- Demonstrated ability to build, develop and foster relationships internally and externally.
- Excellent communication skills, verbal and written.
- Excellent presentation skills and ability to interact with high-level individuals and groups as well as all levels across the organization.
- Excellent project management skills, including influencing, leading, negotiating and delegating abilities.
- Exemplary professional and ethical standards demonstrated by the highest degree of objectivity, competence, due care, honesty, integrity, judgement and confidentiality.
- Strong leadership, emotional intelligence and interpersonal skills, and the ability to translate these through an executive presence that earns credibility and respect among internal and external constituents.

Contact

Koya Leadership Partners, the executive search firm that specializes in mission-driven search, has been exclusively retained for this engagement. Molly Brennan, Founding Partner, and Shelby Woods, Consultant, are leading this search. To make recommendations or to express your interest in this role please visit this link [here](#) or email compassionandchoicesfinance@koyapartners.com. All nominations, inquiries, and discussions will be considered strictly confidential.

Compassion & Choices is an equal opportunity employer and strongly encourages applications from people of color, persons with disabilities, women, and LGBTQ+, and other underrepresented applicants.

About Koya Leadership Partners

Koya Leadership Partners, a member of the Diversified Search Group, is a leading executive search and strategic advising firm dedicated to connecting exceptionally talented people with mission-driven clients. Our founding philosophy—**The Right Person in the Right Place Can Change the World**—guides our work as we partner with nonprofits & NGOs, institutions of higher education, responsible businesses, and social enterprises in local communities and around the world.

For more information about Koya Leadership Partners, visit www.koyapartners.com.