



**THE  
COLORADO  
TRUST**

*A Health Equity Foundation*

**Bridge  
Partners**

## **POSITION DESCRIPTION**

**POSITION TITLE:** Vice President & Chief Financial Officer  
**DEPARTMENT:** Finance & Operations  
**REPORTS TO:** President & Chief Executive Officer

### **The Organization**

The Colorado Trust (The Trust) is a health equity foundation dedicated to ending inequalities that affect racial, ethnic, low-income and other vulnerable populations. When the nonprofit PSL Healthcare Corporation was sold to a for-profit organization in 1985, the proceeds of the sale were used to create The Trust. Since then, The Trust has worked closely with communities and nonprofit organizations throughout the state to improve the health and well-being of Coloradans.

The Trust strives to maintain a diverse workforce that reflects the communities we serve.

### **Position Summary**

The Vice President & Chief Financial Officer has responsibility for The Trust's overall financial management, including investments, budgets, audit matters, tax matters, risk management, information technology and human resource management functions.

### **Key Responsibilities**

- Oversee and lead all financial, investment, risk and insurance management, and information technology planning and operations
- Supervise and manage the preparation and maintenance of all financial records, reports and systems
- Supervise and manage the preparation of capital and operating budgets and the multi-year grantmaking budget
- Ensure the timely availability of funds for operations and grantmaking activities
- Track and reconcile operating and grantmaking budget expenditures
- Ensure compliance by The Trust and The Trust's managers with the Internal Revenue Code and regulations thereunder
- Supervise and manage the preparation and timely filing of reports and returns required by government agencies and other oversight entities, including those required under the provisions of the Internal Revenue Code and regulations thereunder, and to pay any related taxes
- Supervise and manage the preparation for and supervision of all activities related to the annual audit by independent external accountants
- Actively monitor and evaluate the performance of The Trust's investment portfolio and its investment managers
- Carry out and ensure compliance with The Trust's Statement of Investment Policy
- Establish and maintain productive relationships with the investment consultant, the custodian of The Trust's funds, its banker(s), auditors, consultants and attorneys
- Convey timely and accurate information to the president and the Board of Trustees on all matters related to the financial management of The Trust
- Provide risk and insurance management activities that protect the resources of The Trust
- Provide for a comprehensive human resource management program that ensures compliance with applicable federal, state and local laws while at the same time providing

management with a system of organization and compensation that promotes employee performance and morale

- Provide leadership and supervision of the Finance & Operations staff
- Support and advance the professional development of the Finance & Operations staff
- Provide leadership in and manage the strategic development and deployment of information technology at The Trust
- Actively contribute to the development and execution of the strategic vision and plan of The Trust
- Be the primary staff representative to the Investment Committee, the Audit Committee and the Compensation Committee of the Board of Trustees
- Respond to requests for information by members of the Board of Trustees
- Represent The Trust in a variety of settings, including that of liaison to members of the business, financial and investment communities
- Represent The Trust in financial and investment matters to other members of the foundation and nonprofit communities locally, regionally and nationally
- Participate in staff trainings and other efforts intended to improve The Trust's alignment with our values of diversity, equity and inclusion
- Carry out such other duties as shall be assigned from time to time.

## **Candidate Profile**

### *Professional experience*

- Holds an undergraduate degree in accounting, finance and/or related fields from accredited colleges or universities
- Holds professional certification as a Certified Public Accountant with an active license to practice from a state (preferably Colorado) of the United States of America, and/or as a Certified Financial Analyst, and/or significant professional experience at the senior executive level in these areas
- Has the ability to manage professional staff and manage long-term and team projects in a multitasking environment
- Has the ability to maintain a cooperative, supportive and professional relationship with other members of The Trust's staff
- Possesses a comprehensive understanding of The Trust's legal environment and tax-exempt status
- Exhibits a facility for clear, concise, honest and forthright representation of The Trust through all forms of communication and in all forums, particularly the ability to communicate complex financial information
- Possesses a comprehensive understanding of The Trust's organizational structure and the interaction of the separate functional elements of the foundation (i.e., executive, program, finance & operations, research, evaluation & strategic learning, and communications)
- Understands the public policy dimensions of The Trust's work and can provide strong advocacy for The Trust's interests
- Possesses firsthand knowledge of financial operations management at all levels, and extensive experience in the management and oversight of budget, audit, risk management, tax and reporting activities
- Possesses substantive knowledge of investment management, including the understanding of capital markets, asset allocation and effective due-diligence strategies
- Possesses a comprehensive understanding of nonprofit accounting and tax-related laws
- Has knowledge of and experience in information systems and technology
- Has the ability to maintain and protect the confidential nature of business affairs of The Trust and those with whom it has relationships
- Is committed to The Trust's health equity vision and its mission of advancing the health and well-being of the people of Colorado.

### *Personal Attributes*

- Possesses demonstrated leadership skills so as to invite and sustain confidence of the Board of Trustees and staff of The Trust, and to promote the credibility and public image of The Trust in the community at large
- Has demonstrated experience in maintaining effective relationships with a wide variety of constituencies, including financial consultants and investment managers and advisors
- Has an appreciation for the “big picture” of the foundation’s work, including the ability to contribute to a vision for the future
- Has an optimistic and energetic spirit, a strong work ethic and duty concept, and a substantial personal ethical base, coupled with the desire to contribute to the fulfillment of the mission as well as the financial advancement of The Trust
- Possesses a well-developed analysis around equity, inclusion, power and systems of oppression
- Ability to command the respect and support the activities of a Board of Trustees with a strong financial orientation
- Strong analytical skills; experience interpreting strategic plans and changes in how services are delivered in a long-term sustainable operating model
- Outstanding business acumen, balancing financial strategy with day-to-day fiscal excellence
- A collaborative and flexible management style, with a strong service mentality
- Excellent relationship-building skills with an ability to communicate and work effectively with a variety of internal and external stakeholders
- Personal qualities of integrity, entrepreneurial spirit, voice of reason, striving for continuous improvement and a sense of humor are essential
- Knowledge of The Trust’s core services and passion for its mission.

The Trust seeks talented, team-oriented individuals, dedicated to our goal of advancing the health and well-being of the people of Colorado. Additionally, as an Equal Opportunity Employer, we welcome a diversity of perspectives and experiences among our staff. For more information, please visit [www.coloradotrust.org](http://www.coloradotrust.org).

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If you, or anyone you know, are interested in this opportunity, please email your résumé and cover letter to:

**Janet Albert**

Partner, Bridge Partners

[janet.albert@bridgepartnersllc.com](mailto:janet.albert@bridgepartnersllc.com)

**Larry Griffin**

Partner, Bridge Partners

[larry.griffin@bridgepartnersllc.com](mailto:larry.griffin@bridgepartnersllc.com)