



## The Opportunity

We are seeking a **Chief Financial Officer (CFO)** to direct and lead the team that carries out Calgary Health Trust's (the Trust) finance, accounting, treasury and investment, risk management, audit, legal, privacy and regulatory compliance activities.

This position will be a key member of the Trust's executive team and participate in the business and strategic planning process.

The Chief Financial Officer will report to and work closely with our President & CEO, and will directly support the work of the Trust's Finance and Audit Committee assisting the work of the Board.

## About Calgary Health Trust

**Calgary Health Trust** is a Calgary-based charity focused on fundraising that will transform health care in Alberta. The incredible generosity of our donors has helped to raise more than \$427 million for health care since 1996. Funds raised benefit Foothills Medical Centre, Peter Lougheed Centre, Rockyview General Hospital, South Health Campus, many community health programs and 12 Carewest care centres in our community.

In 1996, philanthropists involved with the Calgary Health region and several of Calgary's health foundations saw a unique opportunity to coordinate the efforts of the existing health care foundations, by creating one cohesive organization to efficiently and effectively raise funds for excellence in health care.

The Trust employs 25 dedicated professionals who work closely with the AHS and community partners to identify key priorities where philanthropic supporters will ensure excellence.

## Key Responsibilities:

### Management & Planning:

- Manage and provide ongoing leadership and oversight to the Finance team including providing recruitment, training, direction, support, coaching, mentorship, and personal development to the team to ensure delivery of organizational requirements, superior results, and service excellence.
- Oversee the Finance team in liaising with the Trust's fund managers and custodian of investments as required.
- As it relates to Finance and Gift Processing, develop and direct the implementation of operational plans, provide input into the development of the strategic plan, and lead the team in executing on the relevant areas of the strategic plan.
- Ensure appropriate banking arrangements and terms.

### Financial Reporting:

- Coordinate the preparation and review of the financial statements, financial reports, special analysis and information reports that are used by staff, Board and sub committees of the Board. Prepare and/or coordinate accompanying data, variance and strategic analyses.
- Oversee the Finance team in the preparation and distribution of the Trust's Funding Model.
- Prepare and/or coordinate supplementary financial reports as requested by the President & CEO, VP, Directors, Finance & Audit Committee, or the Board.
- Oversee the preparation of the annual Charity Information Return (T3010) to Canada Revenue Agency.
- Coordinate and facilitate the annual audit including the review of the audit working paper file and financial statements. Present draft financial statements to the Finance & Audit Committee and the Board.
- Ensure compliance with Provincial and Federal reporting requirements.

### Budgeting:

- Oversee the Finance team in the annual budgeting process for the Trust. Assist departments with revenue and expenditure forecasting and drafting of departmental budgets.
- Lead the Finance team in their role as the liaison with Strategic Partnerships in the preparation of funding requests to ensure that the Trust's donor needs, as well as the Trust's cash flow concerns, are addressed.

### Internal Controls:

- Ensure the integrity of financial information within Raiser's Edge and Financial Edge and that records systems are maintained in accordance with generally accepted accounting principles and Canada Revenue Agency requirements. Ensure integrity of financial information within the Financial Edge software system.
- Develop, document, implement and monitor appropriate internal control safeguards.
- Collaborate with IT/Database Administrator to plan computer hardware and software upgrades for the Finance Department.

**Tax Receipting:**

- Working closely with the gift processors, review third party fundraising agreements, meet with the Fund Development team as required, and provide guidance on tax receipt eligibility in accordance with the CRA's tax receipting guidelines and the Trust's tax receipting policy.

**Core Competencies:****Leadership**

Provide the coaching, support, encouragement and direction required to engage and empower employees in the accomplishment of personal, departmental, and organizational goals and objectives. Model positive leadership behaviors and maintain professionalism under pressure and uncertainty. Provide timely feedback and guidance to employees, ensuring their development and success is supported.

**Results Orientation**

Focus on the achievement of desired outcomes, continuously working to meet or exceed organizational or departmental goals; accountable for both the quality and timeliness of personal and team objectives. Demonstrate persistence and respond positively to adversity.

**Strategic Thinking**

Analyze and interpret the strategic direction of the Trust, ensuring goals, responsibilities and initiatives are aligned. Identify current and future opportunities, challenges, and risks through the analysis of the internal and external environment; analyze past experience, organizational practices and processes, in order to determine the best course of action.

**Accountability**

Assignments and commitments are completed as promised, taking ownership of errors and resolution of issues. Independent action is initiated in order to accomplish tasks and projects with a demonstrated transparency in both actions and behaviors.

**Commitment**

Actions go above and beyond in order to assist donors & colleagues. Readily seek and assume additional responsibilities, providing support for initiatives outside of job scope. Information presented on programs, initiatives and services is accurate. Exhibit the values and mission of the Trust.

**Excellence**

Produce high quality work with attention to detail and accuracy while demonstrating an understanding of job requirements, available tools and processes associated with the position, department, and organization. Identify ways to streamline, simplify, and improve results; seeks clarification in order to meet requirements; brings forward new ideas.

## **Knowledge, Skills, Abilities:**

- As CFO, a minimum of 10 years post qualification experience in progressive financial management positions, including at least 5 years as a Chief Financial Officer or equivalent.
- Must be a designated professional accountant (CA, CPA, CMA, CGA)
- Highly organized, to effectively manage multiple priorities at one time.
- Have a solid understanding of privacy legislation.
- Ability to maintain a high degree of professionalism and confidentiality.
- A passion for the work and contribution of non-profit organizations.
- Forward looking, big picture, strategic thinker and planner.
- Strong leadership and management abilities in a team environment (including the ability to lead from beside or behind).
- Excellent judgment.
- Ethical, diplomatic and resourceful.
- Extensive knowledge of the business, financial, legal and taxation issues affecting charities.
- Effective verbal, written, presentation and listening skills.
- Intuitive and creative with problem identification and solutions.
- Ability to identify and capitalize on trends and opportunities.
- Proven ability to work with senior volunteers.
- Project management experience.
- Strong analytical skills.
- Proven negotiation skills.
- Conflict resolution skills.
- The ability to effectively mentor.
- Broad understanding of IT and systems.

We are committed to building strong partnerships with donors, volunteers and health professionals that are characterized by integrity, accountability, creativity and results. We believe strongly in matching donor interests with health care priorities, ultimately making a difference and improving the quality of life for our community. We believe that every donor has a story, every gift has a vision and every patient's life can be changed.

**For more information, please contact or submit a resume to:**

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