



**Position Title:** Director, Financial Planning & Analysis  
**Reports To:** Chief Financial Officer  
**Division:** Shared Services  
**Department:** Finance  
**Classification:** Exempt  
**Revision Date:** June 12, 2019

### **Position Summary:**

Equality Health is an Arizona-based population healthcare company focused on improving care delivery for underserved populations through culturally-sensitive programs that improve access, quality, and patient trust. Our mission is to ensure diverse populations receive quality healthcare that improves and enriches their lives. We have developed our product portfolio around centralized technology, services and network designs intended to organize a better healthcare delivery system for cultures that have struggle with integrating into the tradition one-size-fits-all U.S. healthcare system.

The Director, Financial Planning & Analysis, is primarily responsible for providing financial and operational business forecasting data to support business leaders to enable data-driven decisions, strategic planning, and Board-level reporting. This individual will act as the analytical engine of the company in providing insights and supporting the most important business decisions and will be a key asset in the ongoing growth of the company.

### **Responsibilities:**

- Develop complex financial forecasting models and analyses to support Board-level reporting and evaluation of strategic initiatives
- Produce monthly, quarterly and annual financial and operating reports
- Analyze current and past trends in key performance indicators including all areas of revenue, expenses, and capital expenditures
- Monitor performance indicators, highlighting trends and analyzing variances from the annual operating plan
- Provide financial consulting, reporting and analyses in support of key strategic, M&A and operational initiatives
- Oversee and manage the continued development of budgeting, financial forecasting, operating plan and modeling tools
- Analyze complex financial information and reports to provide accurate and timely financial recommendations to support management decision-making.
- Prepare presentations for Leadership team and Board of Directors
- Implement and analyze real time job cost tracking vs. budgeted direct cost and margin targets
- Assist business units with revenue and margin tracking and analysis reports including both project calendar and pipeline vs. budget.
- Conduct key project and report analysis to Leadership teams for review



**Required Knowledge, Education & Experience:**

- Bachelor's degree in Finance, Accounting, or a directly related field of study
- Minimum seven (7) years of work experience in financial planning, forecasting, and/or budgeting; experience should include progressive responsibilities in leadership and people-management
- Demonstrated record of accomplishment and delivery against objectives
- Successful record of managing multiple projects with demonstrated ability to work independently in rapidly-changing environments
- Proficiency with Microsoft Office applications and web-based technologies; superior knowledge of Excel
- Proven ability to manage highly confidential and sensitive information, especially in the areas of payroll and financial data

**Highly Preferred Skills, Abilities & Qualifications:**

- Previous private equity or investment banking experience is highly desired
- Healthcare industry experience
- Knowledge and familiarity with business intelligence or analytics software
- CPA certification
- Excellent verbal, written and interpersonal communication skills; highly collaborative team approach to work
- Strong problem-solving skills, including the ability to systematically analyze problems, draw relevant conclusions and devise appropriate courses of action
- Able to convey complex or technical information in a manner that others can understand and understand and interpret complex information from others