

CHIEF FINANCIAL OFFICER

THREE PILLARS SENIOR LIVING COMMUNITIES

DOUSMAN, WISCONSIN



Three Pillars Mission: To meet the social, physical, and spiritual needs of older adults through high-quality housing and services.

Three Pillars has partnered with Spano Pratt Executive Search to identify their new Chief Financial Officer. For a confidential conversation and to learn more about this opportunity, please contact Lindsey Kriete or Andy Hillig.

Spano Pratt Executive Search

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ORGANIZATION

Since 1905, Three Pillars has served thousands upon thousands of families and residents. Its rich history of mission-based services exists as strongly today as it did in 1905. As a not-for-profit organization, Three Pillars looks at its mission first. Proceeds are reinvested into the organization, not distributed to shareholders. It measures success by the satisfaction of its residents, not the size of its bottom line. They value their staff as individuals, recognizing the important role they play in providing residents with a quality lifestyle. However, most importantly, they are always guided by what is right, not by what is profitable.

Three Pillars Senior Living Communities is a senior living community in Dousman, Wisconsin. Based on resident and family surveys, for the past three years U.S. News has rated it as Wisconsin's only Best Continuing Care Retirement Community (CCRC). CCRCs provide multiple levels of care at a single location, allowing residents to age in place as their needs change over time.

Three Pillars attained Great Place To Work® certification for 2023-24. This certification is a direct result of its culture, teamwork, work ethic, and commitment to its mission of providing the very best for all who call Three Pillars home.



Care Services

Life at Three Pillars means residents, families and visitors have choices. It is a community that offers options to live the lifestyle you choose. Independent living, assisted living, skilled nursing, memory care and rehab - it covers a full continuum of care.

Activities & Other Services

Three Pillars Senior Living Communities offer a wide variety of activities and services. Daily activities and events are offered with all living options. Transportation is also provided for appointments, grocery shopping and more.

Dining Services

Three Pillars Senior Living Communities provides dining services from two and/or three meals per day. Top notch chefs and dieticians serve decadent and customized meals.

Community Amenities

Three Pillars Senior Living Communities takes pride in being an inclusive community organization. Its sprawling, 300-acre campus features walking/biking trails and hosts several public events annually.

WHAT THREE PILLARS IS EMBARKING UPON:

The demand for active adult living continues to increase. This next generation wants choices, freedom, and independence. To address this, Three Pillars started a nearly \$125M expansion. What they are doing does not exist in Lake Country, Southeast Wisconsin, or the state.

Three Pillars is investing in the next generation of active adult living in a neighborhood setting. The next phase of this new setting takes place on almost 70 of the 190 acres of land acquired to build a downtown destination, lofts, garden homes, and much more to meet the needs of the next generations. From a supper club, pub, and performing arts center, to art studios and wellness, Three Pillars is positioning itself to lead this next generation of active adult living in Lake Country and Wisconsin.



POSITION OVERVIEW

The Chief Financial Officer (CFO) will guide Three Pillars' financial strength with an analytic approach to operations and strategy. The role will suit an experienced CFO who has a track record in corporate finance, executing growth strategies and ensuring robust processes are in place. Three Pillars is currently in a growth phase with Blue Sky sales efforts led by the CFO.

As an integral member of the CEO Team, key indicators will be identified and reviewed. The CFO will assist in process improvement plan development. This position will include management of outside relationships such as contracted Information Technology Services, legal, and commercial insurance brokers. In addition, this person will serve as liaison with external stakeholders, including the Board of Directors, lenders, auditors and regulatory authorities, fostering positive relationships and transparent communication.

We are looking for a leader with humility that embraces the five organizational values of respect, commitment, fulfillment, empathy, and fun, and who has leadership skills that are focused on people first strategies.



CORE RESPONSIBILITIES

Executive Leadership:

- Participate in CEO Team and strategic planning meetings.
- Participate in Board of Director, Finance and Audit Committee meetings. Serve as a Principal & Officer (Secretary/Treasurer) for the organization, as appointed by the CEO.
- Make data-informed decisions based on factual information and logical conclusions. Consider alternate courses of action and consequences before acting.

Financial Leadership:

- Monitor cash, bond covenants and investments.
- Oversee budget development and direct preparation of monthly financial statements. Hold department staff accountable for operating within budget.
- Perform financial projections and feasibility studies.
- Direct sales efforts and manage ongoing bond compliance for a successful expansion.
- Negotiate, update and file all contracts. Manage legal issues.
- Perform risk management functions and ensure that Three Pillars maintains proper risk management policies and coverages.

Technology Leadership:

- Direct, monitor and evaluate the effectiveness of the technology that drives financial, operational and care delivery systems.
- Oversee corporate HIPPA compliance.



QUALIFICATIONS & EXPERIENCE

Education

- Bachelor's degree in accounting or finance, Master's degree preferred.
- CPA preferred.

Experience

- Working knowledge of budgetary controls and government reporting requirements.
- Able to analyze financial statements and budget performance.
- Proven experience in senior finance roles with significant experience in financial management, planning and analysis, preferably in the healthcare industry.
- Strong leadership skills with a track record of building and leading high-performing finance teams.

COMPETENCIES

- Analytical mindset - Focus on attention to detail and accuracy, combined with the ability to think creatively and problem-solve in a dynamic environment.
- Inspirational Leadership - Excellent communication and interpersonal skills, with the ability to interact effectively with all stakeholders. Exhibits confidence in self and others; motivates others to perform well; gives appropriate recognition; displays passion, optimism and humility; inspires respect and trust.
- Change Management - Develops workable implementation plans; effectively communicates changes; builds commitment; overcomes resistance; prepares and supports those affected by change; monitors transition and evaluates results.

- Strategic Thinking - Ability to translate financial data into actionable insights and recommendations for business growth and optimization. Develops strategies to achieve organizational goals; understands organization's strengths & weaknesses; analyzes market and competition; identifies external threats and opportunities; adapts strategy to changing conditions; works to establish and articulate vision; shows creativity when defining solutions.
- Managing People - Includes staff in planning and decision-making; takes responsibility for subordinates' activities; offers open-door and approachable environment; gives and accepts regular performance feedback; develops employee skills and encourages growth; encourages and authorizes independent work; sets expectations; monitors delegated activities.



PERSONAL QUALITIES

The ideal candidate is an emotionally intelligent leader and people manager, who has a passion for the Three Pillars mission, for the people it serves, and services it offers, along with an affinity for an aging population. The candidate should possess a track record of inspired leadership that develops talent, embraces change, and contributes to a collaborative work environment.

COMPENSATION

Compensation includes a hiring range of \$190,000 - \$220,000 and a competitive benefits package. The position is based in Dousman, Wisconsin.

LOCATION

Three Pillars is located about 35 miles west of Milwaukee in Waukesha County's "Lake Country." An informal name, northwestern Waukesha County's Lake Country encompasses over twenty lakes and their surrounding region. Lake Country region is a picturesque place to live, work and relax in the beautiful Kettle Moraine area of southeastern Wisconsin. It is a growing community with a mix of multigenerational families and new arrivals.

Many of the region's smaller lakes, ponds, and streams are in and around Three Pillars. The 70-mile Bark River passes through Three Pillars campus, where residents and guests come to fish or stroll on campus paths.

Residents can access abundant recreational opportunities, with parks and trails, and boating, fishing and other water activities on the lakes and ponds; the 52-mile Glacial Drumlin Trail also runs adjacent to Three Pillars.



To learn more about Three Pillars:

- Company website: <https://www.threepillars.org/>
- Three Pillars Memory Care: <https://youtu.be/jDgcqZWLrOE>
- Three Pillars Lifestyle: <https://www.youtube.com/watch?v=p7MXqkK4viU>
- Wellness at Three Pillars: <https://youtu.be/HvMNxfMU5Go?si=avqckfq4KK0bish7>
- The Fields construction project 2024: <https://www.youtube.com/watch?v=v9helXrqnUw>



This position is not just a job; it's an opportunity to be part of Three Pillars legacy.

To be considered for this opportunity, please submit a cover letter, and resume to:

Andy Hillig, Executive Search Consultant -OR- Lindsey Kriete, Practice Director
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www.spanopratt.com