



Financial Sustainability Manager

Position Description

Position: Financial Sustainability Manager	Date: 02.19.19
Reports To: CHC Sustainability Director	FLSA Status: Exempt
Supervision: N/A	Pay Type: Salary
Hours: 1.0 FTE	

Approved By: Joan Watson-Patko, Executive Director

Date _____

▪ **Primary Purpose**

The Financial Sustainability Manager contributes substantial subject matter and project management expertise to the development and implementation of technical assistance and training on health center financial sustainability and transformation. In partnership with the Policy Director, CHC Sustainability Director, Network Development Senior Director and APM Manager, this position monitors federal and state changes to the CHC payment and regulatory environment, provides direct assistance to health centers in implementation of sustainable financial practices, and manages the implementation of health center opt-in and onboarding to the Alternative Payment and Advanced Care Model (APCM) program.

▪ **Essential Duties and Responsibilities (~80% of time)**

Technical Assistance (TA) and Training Program Management

- In partnership with the CHC Sustainability and Transformation Directors, contributes to the development and successful completion of team processes for aligning, coordinating and integrating financial sustainability priorities into the team’s work plan, driven by the membership needs, OPCA strategic plan, funded commitments and resource availability.
- Provides daily program management for delegated bodies of work within the Sustainability focused components of the TA and Training work plan to achieve effective support for members relating to financial sustainability, such as:
 - Under the oversight of the Network Development Senior Director and the APM Manager, implement the opt-in onboarding process for new health centers to the APCM model, including managing the rate-setting process, in order to ensure effective and efficient training, technical assistance, and financial model implementation for new program members
 - Lead the strategic direction and implementation of the Health Center CFO Peer Network
 - Lead in change of scope negotiations in partnership with CHC
 - Providing direct technical assistance and training to members in evolving operational expectations for CHC financial, billing, coding approaches, systems and regulations
 - Support members in the financial sustainability of 340B programs including bridging from policy decisions to financial and operational implications

- Provide onboarding for new CHC fiscal directors
- Host additional trainings and webinars as appropriate with other financial staff (e.g., billing and coding, pharmacy as it relates to 340 B, etc.).
- Manage the deployment of specific technical assistance and training grants and/or projects in order to advance team priorities, including monitoring and responding to deadlines, scheduling internal and external meetings, preparing agendas and tracking action items to advance projects, and providing direct technical assistance and training to OPCA members in quality improvement of relevant program areas.
- Act as a thought partner on new program strategy and design in order to promote alignment, coordination and integration across programs, and ensure effectiveness of implementation plans and advancement of organizational priorities.

Member and Partner Engagement

- Builds and maintains partnerships with key stakeholders at the state, regional and national level to advance health center financial sustainability priorities.
- In partnership with CHC Sustainability and Transformation Directors, develop and distribute program communication pertaining to delegated bodies of work; contribute to coordination and integration of external communication regarding department work in order to improve program effectiveness and promote member engagement.
- Contributes to the development and maintenance of member relations and knowledge management tools in order to improve program evaluation, internal documentation and tracking of member information, and external communication of program-related materials.
- Travel to relevant conferences and meetings in order to maintain knowledge of landscape, build partnerships and promote brand awareness within work area.

Program and Resource Tracking, Evaluation and Reporting

- Partner with CHC Sustainability and Transformation Directors to develop and implement program activity tracking tools in order to ensure program deliverables are met, and demonstrate activities, outcomes and impacts within pertinent program area.
- As delegated, contribute to or lead preparation of funder-required program reports to manage completion of OPCA grant cycles, partner relationships and program close-out.
- In partnership with the CHC Sustainability and Transformation Directors, contributes to team development and successful implementation of TA and Training program evaluation and communication of results with key stakeholders to demonstrate program impact and value.
- **Essential Strategic & Leadership Responsibilities (~10% of time)**
 - May or may not supervise staff with an emphasis on supporting team collaboration and individual mentorship and success.
 - In partnership with CHC Sustainability and Transformation Directors, contributes to development and management of resources for program area.
 - May be involved with one or more internal OPCA committees.
 - Involvement with Board of Directors
- **Other Duties and Responsibilities (~10% of time)**

- Conducts individual administrative duties (e.g. scheduling, time sheets, internal organization communications, etc.)
- **Knowledge, Skills, and Abilities**
 - Demonstrate excellence in internal and external customer service.
 - Ability to work and prioritize heavy email volume and with extensive web-based research.
 - Ability to work effectively with very sensitive and confidential information, and develop trust.
 - Ability to adapt to and work with frequent changes in priorities, and within tight timelines.
 - Ability to communicate effectively with governmental agencies, managed care organizations, health care administrators, CHC management, providers, and organizations.
 - Excellent written and oral communications skills. Presentation and facilitation skills are a key part of this position.
 - Project management experience.
 - Knowledge of governmental and health care fiscal regulations and reporting requirements.
 - Ability to accumulate, research, organize and develop information from a wide variety of sources, including a large amount developed “from scratch” for the first time.
 - Ability to research and interpret complex rule sets and to develop and suggest revisions and changes to state and CHCs.
 - Ability to identify trends and needs in order to disseminate targeted information, resources, and/or training programs.
 - Broad knowledge and understanding of CHCs and their/our mission.
 - Experience in researching models and concepts, tracking workflows, and sharing written information.
 - Ability to think strategically and deliver technically.
 - Knowledge, skill and ability to establish and maintain effective working relationships with a wide variety of personalities and organizations.
 - Ability to work well in a professional yet fun team environment, including respect for different styles and personalities; enthusiasm for collaboration, communication, and celebration.
 - Ability to work with diverse partners and leverage areas of expertise.
 - Excellent interpersonal, oral and written communication and organizational skills.
 - Some marketing skills.
 - Ability to self-direct with a high degree of organization.
 - An ability to work with people who think, act, look, and/or live in a manner different from one’s self.
 - Effectively represent OPCA in a wide variety of settings
 - Knowledge of computer systems, spreadsheets and financial system programs and applications. Strong computer skills, including thorough knowledge of Word, Excel, Power Point, etc.
- **Minimum Qualifications and Experience**
 - Professional with advanced level of proficiency. Generally requires a Bachelor's degree and/or 3-5 years' experience or equivalent education.
 - Fluency in written and spoken English required.

- **Preferred Qualifications and Experience**
 - Knowledge of CHC and general health care finance and related areas with an emphasis on new opportunities and the effects of program changes preferred.

- **Specific Job Attributes**
 - **Job Complexity:** An experienced professional with a full understanding of area of specialization; resolves a wide range of issues in creative ways. This job is the fully qualified, career- oriented position. Works on delegated problems of diverse scope where analysis of data requires evaluation of identifiable factors. Demonstrates good judgment in selecting methods and techniques for obtaining solutions. Applies problem-solving skills gained through past experiences to company guidelines.
 - **Impact:** Failure to achieve objectives will have an impact on unit and the organization.
 - **Degree of Work Direction & Project Management:** Moderate supervision with latitude to make decisions to achieve defined goals. Proposes methods and procedures on new assignments. Contributes to team objectives and outcomes as guided.
 - **Responsibilities as a Team Member:** Contributes to team objectives and outcomes in line with organizational outcomes as guided. Consults with upper management on highly complex projects. Partner with upper management to set objectives for assigned unit/area.
 - **Internal & External Contacts & Communication:** Builds productive internal/external working relationships. May serve as an external spokesperson for the organization within their work area.
 - **Leadership & Supervision of Others:** Generally manages processes and activities of functional area or team, may or may not provide reporting supervision to members of the team. May provide mentorship on area of expertise.
 - **Innovation & Quality Improvement:** Leads improvement in program area and may develop innovative programs in area of expertise to improve health center and/or OPCA value. Builds and maintains partnerships with CHC leaders, partners and other key stakeholders to support innovation and improvement.
 - **Responsibility for Administrative Work:** Responsible for project management of individual work, including monitoring and responding to deadlines, scheduling internal and external meetings, preparing agendas and tracking action items to advance projects, distributing relevant communications, and managing personal administrative needs, such as travel planning and expense reimbursement reports. May seek administrative support for team and program needs from program specialists and coordinators, based on needs and priorities for the organization and availability of team resources.
 - **Budgetary & Fiscal Responsibility:** Contributes to developing and managing program budgets in partnership with upper management. Responsible for following financial policies and procedures for any organizational expenditures, purchases or reimbursements.

- **Travel Required**
 - In and out-of-state travel may be required for this position. If using a vehicle for work related travel, must possess valid Oregon driver license, provide proof of insurance and annual Motor Vehicle Record if using own vehicle, or be insurable if renting. Must be able to drive a motor vehicle safely and use a seat belt when in operation. Mileage and travel expenses are reimbursed per OPCA policy.

- **Work Environment**
 - OPCA is a team-oriented organization; a tight-knit group of professionals committed to both the mission and to enjoying their jobs. Respectful interpersonal relationships, a fun team dynamic, and a passion for advancing the cause of community health clinics are equally critical components of the work environment.
 - As a subject matter expert, employees are expected to partner as needed for communications & marketing needs to develop messages, objectives and/or communications tools to reach OPCA's members and other target audiences.
 - Duties will be performed in both an office setting and out in Community Health Clinics.

- **Physical Demands**
 - The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit behind and use a computer, talk, hear, and be able to operate general office equipment. This individual is also required to stand, walk, and reach during events.

Statement of OPCA Practices: OPCA is committed to continuous internal quality improvement practices. We work in a fast moving, ever changing environment in which management and staff strive to create constantly improving quality. OPCA is a smoke free, drug free workplace. We are an equal opportunity employer. We do not discriminate on the basis of race, religion, color, gender, age, sexual orientation, national origin or disability. OPCA expects employees to be culturally competent, with the ability to interact positively with people who do not look like, talk like, think like, believe like, act like, and live like they do.

General Statement: Oregon Primary Care Association (OPCA) is a private, 501(c)(3)-membership organization of Oregon's "safety-net" primary care providers. Our mission is to lead the transformation of primary care to achieve health equity for all. Our membership primarily includes the federally qualified Community Health Centers (CHCs) and Look-Alikes as well as Rural Health Clinics, Indian Health Centers, and community clinics with similar missions and governance.

REQUIRED SIGNATURES

I acknowledge that I have reviewed the above job description and understand my job responsibilities and requirements.

Employee _____ Date _____

Supervisor _____ Date _____

****Changes must go through HR Generalist for standardization and Operations & Finance Director for review.***