



POSITION PROFILE



Search for Chief Financial Officer



Doran Leadership
PARTNERS



ORGANIZATION OVERVIEW

Lifeworks Services, Inc.: Introduction

As a trusted partner in disability services since 1965, Lifeworks Services Inc. is working to make disability inclusion the standard, not the exception. From grassroots beginnings, Lifeworks has evolved alongside people with disabilities and their families, supporting over 9,000 people annually. Lifeworks provides straightforward solutions that help people connect with the support and resources they need at home, at work, and in the community. In collaboration with employers, organizations, and government agencies, Lifeworks is creating communities that are more inclusive of people with disabilities.

The organization operates four Lifeworks Centers for Disability Inclusion locations in Apple Valley, New Hope, Mankato, and Richfield. Its reach extends to 69 of Minnesota's counties, partnering with a network of over 450 businesses, nonprofits, and community organizations.

Through its core services, more than 540 people receive Employment support, over 260 people connect with their communities through Day Support, and 2,780+ Minnesotans self-direct their in-home care through Lifeworks. In 2024, Lifeworks began offering disability inclusion and consulting services, educating over 9,300 individuals since launch.

As an advocate for disability inclusion, Lifeworks is resolutely committed to self-determined support, careers with competitive wages and developing innovative opportunities that enhance everyday lives. The Lifeworks leadership team and employees embrace a common set of core values to guide their work:

You Lead the Way. We Listen. We honor choice and pursue opportunities with community at the heart of our work.

Together, We Break Down Barriers. We seek diverse perspectives, advance accessibility, and encourage a sense of belonging for all.

We Focus on Impact. We hold ourselves to the highest standards. We share expertise and collaborate to find solutions that address the whole picture.

We Reinvent What's Possible. We take chances and welcome the unknown. We learn from the past and lean into the future.

The 2025 - 2028 Lifeworks Strategic Plan focuses on the following key areas:

- Continuous Improvement Culture: Foster an inclusive and high-performing culture
- Scalable Infrastructure: Modernize physical assets, service delivery, and IT systems
- Advancing Universal Disability Inclusion: Champion disability inclusion across communities, workplaces, and policies
- Access and Expansion: Expand to underserved geographies and populations

Please visit www.lifeworks.org for more detail and information.





POSITION SUMMARY

Chief Financial Officer

Reporting to the CEO, the Chief Financial Officer (CFO) is a key member of the Senior Executive Team and a strategic partner to the CEO, Board of Directors and Audit Committee, responsible for providing enterprise-wide financial leadership while helping Lifeworks navigate a highly regulated and rapidly evolving environment.

The CFO leads the continued transformation of the Finance function, strengthening operational infrastructure, enhancing financial planning and decision-making capabilities and helping position the organization for sustainable growth.

Lifeworks Services, Inc., Chief Financial Officer	
Reports to	Chief Executive Officer
Direct Reports	Controller Director of Payroll
Other Key Relationships	Chief People Officer Chief Growth Officer Chief Advancement Officer Business Administrator Legal
Position Location	Richfield, MN Hybrid; requiring a minimum of one onsite day per week plus additional in-office time aligned to team goals and business priorities
Compensation	Base salary range \$210,000 - \$225,000 plus up to 20% bonus potential; best-in-class benefits package; 403(b) plan employer contribution up to 7%; generous PTO



POSITION SUMMARY

KEY RESPONSIBILITIES

Enterprise Strategic Leadership

- As a key member of the executive leadership team, partner with peers to shape and execute Lifeworks' long-term strategy, enterprise priorities and annual goals.
- Serve as a strategic advisor to the CEO, Senior Executive Team, Board of Directors and Audit Committee.
- Provide an enterprise-wide perspective on financial sustainability, growth, and risk, ensuring alignment between mission impact and economic viability.
- Evaluate growth opportunities, service line performance, margin enhancement opportunities and organizational investments.
- Ensure the organization balances growth ambitions with financial discipline, helping leaders determine when to accelerate initiatives and when to pause or adjust.
- Partner with executive leadership to develop and execute long-range financial and organizational strategies.

Team Leadership & Development

- Assess team capabilities, organizational structure and leadership effectiveness to ensure the Finance function is scalable, high-performing and aligned with long-term enterprise priorities.
- Create greater clarity, accountability, engagement and professional development opportunities across the team.
- Ensure team members see the connection between their roles and Lifeworks' mission and values and help them embrace change and persevere in times of uncertainty.
- Build a culture of continuous improvement, collaboration and service excellence.

Financial Management & Stewardship

- Lead all aspects of financial management, including accounting, financial reporting, budgeting, forecasting, treasury, cash management, investments and internal controls.
- Provide executive oversight of payroll operations, ensuring accuracy, timeliness and compliance with complex regulatory, funding and workforce requirements.
- Ensure accuracy, integrity and timeliness of financial reporting and organizational performance metrics.
- Maintain compliance with all applicable nonprofit, Medicaid, governmental and regulatory requirements.
- Provide oversight of audits, tax filings and external financial relationships.
- Strengthen financial controls, policies and procedures to support organizational scalability and risk management.

Continues



POSITION SUMMARY

KEY RESPONSIBILITIES

Finance Transformation & Operational Excellence

- Lead execution of continuous improvement projects and prioritize high-impact initiatives that improve efficiency, controls, reporting and scalability.
- Stabilize and modernize accounts receivable processes, improve reconciliation practices and enhance collections visibility.
- Advance enterprise forecasting, scenario modeling and decision-support capabilities to guide strategic planning and resource allocation.
- Identify opportunities to streamline processes, increase productivity and leverage technology to improve performance.
- Develop dashboards and management reporting tools that provide actionable insights to leaders throughout the organization.

Cross Functional Leadership

- Build strong partnerships with operational and program leaders to ensure financial information supports decision-making at all levels.
- Translate complex financial concepts into clear, accessible information for non-financial audiences.
- Strengthen collaboration among Finance, Programs, Payroll, Human Resources and other key functions.
- Partner closely with Human Resources and Payroll leadership to ensure alignment across workforce planning, compensation execution and functional outcomes.
- Foster enterprise-wide accountability for financial performance while supporting the organization's mission and values.



IDEAL CANDIDATE PROFILE

LEADERSHIP COMPETENCIES

The Chief Financial Officer at Lifeworks is expected to demonstrate the following leadership competencies:

Strategic & Enterprise Leadership

- Brings a forward-looking, enterprise perspective to strategy, balancing mission impact, financial sustainability, and risk. Guides the organization in making informed trade-offs and prioritizing the highest-value opportunities. Partners across the executive team and with the Board to shape direction, align resources, and drive long-term organizational success.

Sound Decision Making

- Possesses strong intellectual curiosity and the ability to analytically, conceptually and critically evaluate information to determine relative strengths and weaknesses of ideas and proposals. Leverages data and insights in critical decisions. Comfortable managing incomplete information, balancing action with the appropriate level of risk.

Fosters Collaboration

- Creates an environment that supports collaboration by facilitating communication and coordination across all parts of the organization. Builds trust, encourages healthy discourse and ensures that diverse perspectives are considered in decision-making. Builds an intentional and cohesive culture that aligns functional agendas and unites the team.

Disciplined Execution

- Translates strategy into clear priorities, actionable plans, and measurable outcomes. Aligns resources, builds organizational capability, and ensures consistent follow-through. Maintains focus and momentum while adapting to evolving conditions, driving accountability and performance across the organization.

Builds Talent

- Develops and maintains high-performing teams and coaches other leaders to develop their own leadership capabilities. Ensures all leaders and team members challenge and support each other while respecting others' unique roles and contributions.

Emotional Intelligence

- Demonstrates a high level of self-awareness, sound judgment, and emotional regulation. Maintains composure and clarity in ambiguous or high-pressure situations. Seeks feedback, reflects on impact, and adjusts approach to build trust, credibility, and strong working relationships.





IDEAL CANDIDATE PROFILE

SKILLS, EXPERIENCES, QUALIFICATIONS

In addition to demonstration of the Leadership Competencies above, key skills and experiences desired include:

- 5+ years of proven experience serving as a strategic finance leader and advisor to CEOs, executive leadership teams and boards within one or more complex organizations
- Experience operating within highly regulated industries such as healthcare, human services, Medicaid-funded services, senior care, insurance, government contracting or similar environments is highly preferred
- Demonstrated ability to translate financial information into actionable business insights that support strategic decision-making
- Strong financial planning and analysis capabilities, including forecasting, scenario modeling, business case development and long-range financial planning; ability to balance mission, growth, risk and financial sustainability when evaluating strategic opportunities and investments
- Demonstrated success strengthening financial processes, internal controls, reporting capabilities and organizational infrastructure
- Strong understanding of compliance, risk management, audit requirements and regulatory oversight; partnering with related agencies and advisors
- Proven ability to lead through change and build high-performing teams
- Prior experience working with one or more boards of directors, with a clear understanding of good governance practices and fiduciary responsibilities
- MBA preferred; CPA preferred





IDEAL CANDIDATE PROFILE

LEADERSHIP STYLES

- Calm, grounded, steady and brings composure in high-pressure situations
- Approaches challenges with a solution-driven mindset
- Low ego, high impact approach that prioritizes team success over personal recognition
- Confident, thoughtful communicator who is willing to express challenging views with respect and collegiality
- Fully accountable and drives execution with discipline and urgency
- Demonstrates curiosity and patience, particularly with non-financial teams
- Demonstrates a clear moral compass and commitment to doing the right thing
- Balances confidence with humility; remains open to input and adjusts perspective when presented with new information
- Builds trust through transparency, follow-through and measured responses





C O M P E N S A T I O N

Base salary range \$210,000 - \$225,000 plus up to 20% bonus potential. Best-in-class benefits package including:

- Comprehensive health coverage including extensive medical, dental and vision plans with low premiums and copays, covering a wide range of services. Additionally, offering long-term disability and life insurance
- Retirement Plans offering competitive 403(b) employer contributions up to a total of 7% (between employer contribution and matching employee contributions)
- Generous Paid Time Off and Holiday pay



TO APPLY

Lifeworks' hybrid work model and inclusive culture emphasize collaboration, interpersonal relationships, and high-quality performance. Presence on-site or in-person will be defined by the needs of the business.

Lifeworks strives to be radically accessible, diverse, equitable, and inclusive. We appreciate the vibrancy of differences, center the voices of silenced and marginalized people, and champion universal rights.

Lifeworks Services is committed to hiring people from a variety of diverse cultures with diverse life experiences. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, age, national origin, protected veteran status, disability status, sexual orientation, gender identity or expression, marital status, familial status; genetic information, or any other characteristic protected by law.

Lifeworks Services is an equal opportunity employer, and we encourage members of diverse groups to apply.

We are committed to an inclusive and accessible hiring process. If you need an accommodation to apply or participate in an interview, please share your needs with the Doran Leadership Partners team.

Lifeworks has partnered with Doran Leadership Partners to lead this search.
Please send your interest, resume or nominations to Nayana Jha or Ali Biro.
Cover letters are welcomed but not required.

Applications will be accepted until the position is filled.
Review of applications will begin immediately.

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Doran Leadership Partners is a woman-owned leadership advisory firm specializing in executive search and organization development. Our singular purpose is Great Leadership. Our approach, process, tools and interactions are centered in our core values of Passion, Trust & Partnership, Inclusivity, Empathy & Tenacity and Highest Standards.