



Compass

VICE PRESIDENT OF FINANCE

OPPORTUNITY PROFILE



OVERVIEW

Compass is seeking a Vice President of Finance (VPF) to lead the financial operations of the organization, ensuring its financial health while championing a culture that reflects its core values and supports individuals with disabilities. In this pivotal role, the VPF will manage financial reporting, planning, and risk management, collaborating with the Senior and Executive Teams to shape the company's strategic direction. This leader will drive efficiency and profitability, fostering both immediate successes and long-term growth in a competitive landscape. The VPF will have the opportunity to set the course for a sustainable and impactful future for Compass.

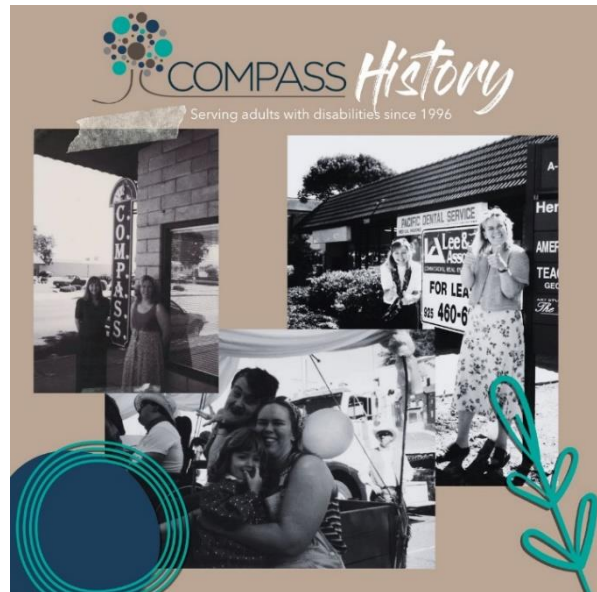
FAST FACTS

- 65M revenue in 2025 (Projection 400M by 2031)
- 600 employees
- 700 clients
- 100% government funded--reimbursements
- Average leadership tenure is 18 years.
- 17 offices over the next 7 years, throughout the entire state of California, and looking to expand nationally.

HISTORY

Compass was founded in 1996 by Sadie Huffmaster Hess and Joanne McCarley, who at the time were managing Supported Living Services (SLS) at a large nonprofit in Redding, CA.

Following a significant budget cut of 40% to the contracts due to newly approved regulations, that nonprofit decided to terminate the SLS program, giving clients just 30 days' notice. Concerned about the impact on clients facing the loss of their hard-won independence, Sadie and Joanne were determined to provide a solution. Within a month, they decided to launch Compass on July 5, with no business plan or startup funds.



By August 19, they had an approved service plan and began serving their first client, quickly transforming Compass into a beacon of hope for those who relied on SLS services and for the founders themselves as they embarked on their entrepreneurial journey.

In 2005, Sadie and her husband Eric partnered to further develop Compass. Eric took on financial and human resources responsibilities, later earning two MBAs from Columbia and Berkeley to strengthen the company's leadership. They bought out the co-founder, Joanne, in 2009.

Compass is built on the belief that collaboration fosters dreams, empowering both staff and clients to pursue their aspirations.

TODAY



Compass embodies hope and optimism, proving that even the most unlikely dreams can come true. From its unexpected beginnings, the organization has evolved into a passionate advocate for the aspirations of both clients and employees. Serving nearly 600 clients across fourteen counties and Five regional centers (ACRC, RCEB, SARC, RCRC, and FNRC), Compass is dedicated to fulfilling its mission.

MISSION

Dreams. Direction. Destiny.

Finding Destiny for Everyone

Turning Dreams into Reality

Giving Direction for Freedom

Watch the [video](#) to learn more about the mission.

PODCAST

A Side of Hope offers insights and stories for professionals in human services.

[APPLE](#), [SPOTIFY](#), [AMAZON](#)



SERVICES

Supported Living Services, SLS

This service is for adults living in their own home who typically need consistent and regular support, usually multiple hours each day. Care needs could look like behavioral support, medical care, companionship, person care, community integration and medication management.

Independent Living Services, ILS

This service is for adults living independently or striving to do so. Working with the client on ISP objectives focused on increased independence like preparing for a job interview, apartment searching, meal shopping and prep, and navigating community resources, usually less than 5 hours per week.

Coordinated Family Support, CFS

This service is for adults living in their family home. These services are adapted to the language and culture of the home. The intent of these supports is to assist the individual to develop skills in the home, coordinate and get services delivered, and access their community. Specialists usually work approximately 20 hours per week with these clients.

Consulting & Quick Solve Plus (QSP) Services

Over the next 7 years, the company plans to increase its consulting and QSP services, along with other business to business offerings, to represent 40% of its business. These services will provide specialized support to other organizations in the industry, offering tailored consulting and professional services designed to enhance operational efficiency and service delivery. The Vice President of Finance will be instrumental in scaling and managing the financial operations of these expanding business lines.

LEADERSHIP

Sadie Hess, Chief Execution Officer



Sadie founded the company in 1996 to provide options and support to people with disabilities. She dreams of making a difference in the lives of people with disabilities throughout California. Sadie holds her BA and MA in psychology, and her role in the organization is to cast a vision for tomorrow and see the clients today both happy, safe, and healthy in all regions.

Eric Hess, Chief Expansion Officer



Eric joined the organization in 2005 when he saw that Sadie's dream would need to be a family affair. He wanted to lend his strength and skills to further the company's mission and vision. He has a heart to see the staff live their dreams alongside the clients. Eric holds his BA in Biblical Studies and his MBA from Columbia and Berkeley. Eric's role is to provide stability for the staff and financial soundness to the organization.

Core Values

The “how” behind what Compass does is in their core values. Core values are who you are on your best day.



HONOR

Demonstrating value and loyalty to all stakeholders: clients, their families, and team members; vendors, regional centers and their affiliates.



COMMUNITY

Shaping individuals into a dynamic group of people, drawing power from each person’s unique potential.



TRUSTWORTHINESS

Being people who make and keep promises, maintain integrity, and are continuously accountable to each other.



EXCELLENCE

Never being satisfied with mediocrity, but always striving for each other’s personal and professional maturity.



GENEROSITY

Being a blessing to others, because Compass is thankful for their many blessings.



FREEDOM

Loving people as they are found and creating a safe, empowering culture so that people can be healed and fulfill their own destinies.



FAITH

Believing in endless possibilities for each other because God is good and He is always on our side.

WHAT OTHERS SAY ABOUT THE CULTURE AT COMPASS & THE NEXT VPF



- *We think we are there to change clients' lives when mostly they change ours—clients give us hope while serving them.*
- *Eric and Sadie complement each other; Eric is pastoral, and both are innovative, strategic—Compass is their calling. Their passion makes it our calling. Sometimes they disagree but will eventually, hug it out.'*
- *Our values are lived out. Sadie and Eric have a deep and committed faith orientation—we*

have a staff chaplain to assist in spiritual matters. We even have a room set aside for prayer!

- *Compass is like a family and this family makes a difference. See website staff testimonials [here](#).*
- *We do the work of Jesus in a competitive for-profit environment caring for the 'least of these'—marginalized populations.*
- *Sometimes empathy is more valued than efficiency or expertise, but it works very well.*
- *The VPF will probably be more left-brained and analytical but without losing the 'faces behind the numbers'...both profits and people matter. A visionary and engaging 'bean counter' (in the best sense of the word!).*
- *Communication can sometimes lag between departments.*
- *Sometimes some seemingly very good ideas and initiatives may be put into play without due diligence regarding possible outcomes, both positive and negative.*
- *The team is very invested in each other's lives; the VPF will need to learn to be vulnerable.*
- *Eric and Sadie have immense 'relational trust capital.' There is no micromanagement.*
- *Compass has a genuine, down to earth, 'feel good environment.'*
- *We consistently walk in our values; we walk the talk and model this in all areas—see page 5.*
- *Families are valued at Compass—every summer we do a strategic planning retreat and the whole family is invited.*
- *Compass operates on seven-year cycles. "During a time of prayer for company vision, God told us to plan our business on the Mosaic calendar: 6 years of aggressive work and one year of rest from aggressive growth. We are still learning how to do that, but we are committed to His directive."*





- They care for us as individuals—Eric was the first person to visit me in the hospital when I had my daughter.
- We are honest about successes and setbacks.
- We have many fun events for the clients—we recently took 80 clients (and 100 staff!) to Disneyland. We get paid to be a kid sometimes.
- Intrinsic rewards trump financial rewards, but we are paid well—Compass is

super generous.

- We do book studies together; *The Ideal Team Player (Humble, Hungry, Smart - <https://www.tablegroup.com/>)* was really impactful.
- The VPF must have the ability to embrace change (and a sense of grit) ...Eric and Sadie are definitely change agents.
- There are married couples on the team...many on the team have deep friendships and hang out together on weekends, parties, vacation...many of our kids have grown up together.

POSITION MISSION STATEMENT

The mission of the Vice President of Finance (VPF) is to oversee the financial operations of the company, taking charge of its financial well-being. The VPF should have a strong affinity for the company culture, a commitment to supporting individuals with disabilities, and a passion for the world of finance. In this role, the VPF will orchestrate financial reporting, planning and analysis, budgeting, and financial risk management, ensuring alignment with the organization’s overall goals and vision.

The VPF will shape and guide financial decisions to promote stability, efficiency, and profitability. By collaborating with the Senior and Executive Teams, the VPF will play a vital role in setting company strategy and assisting teams in making decisions that influence the company's future. Through effective leadership, the VPF will establish a course for both immediate successes and long-term strategic growth, positioning the company for sustainable success in a competitive landscape.

REPORTING

The VPF primarily reports to Eric Hess, but all members of the executive team report to both Eric and Sadie Hess. The VPF is a member of the executive leadership.

Compass Organization Structure.

The VPF works closely with the entire team for vision and strategy, including three direct reports: Controller, Accounts Receivable Coordinator, and Accounts Payable and Banking Coordinator. The Accounts Receivable Assistant reports to the AR Coordinator.

KEY RESPONSIBILITIES

Leadership

- Lead the Finance Team
 - Guide the team in achieving key financial objectives.
 - Foster a culture of transparency, integrity, and efficiency within the department.
- Oversee Financial Activities
 - Manage all aspects of accounting, budgeting, and financial planning and analysis.
 - Ensure accurate internal and external financial reporting.
- Ensure Compliance
 - Uphold compliance with regulatory standards.
 - Maintain high ethical standards in all financial practices.
- Drive Innovation
 - Implement innovative financial processes and systems.
 - Enhance productivity across the finance department.

Partnership

- Build and Maintain Relationships
 - Establish and nurture relationships with internal and external stakeholders.
- Collaborate Across Departments
 - Work with other departments and leaders to align financial strategies with shared goals.
- Provide Insights and Expertise
 - Offer financial insights and expertise to support decision-making processes.
 - Contribute to setting company strategy and goals.
- Negotiate Financial Contracts
 - Negotiate contracts that align with and support the organization's strategic objectives.

Communication

- Share Financial Results and Forecasts
 - Communicate financial results and forecasts to all relevant parties appropriately.
- Connect Finance with Other Teams
 - Facilitate connections between the finance team and other departments to ensure efficiency and accuracy in financial matters.

- Ensure Timely and Accurate Communications
 - Provide timely and accurate communications with external stakeholders, reflecting Compass' core values.
- Foster Trustworthiness
 - Maintains confidentiality in all communications, ensuring trustworthiness in messages from both the individual and their department.

Growth

- Implement Professional Development Programs
 - Establish and support continuous learning initiatives for the finance team.
- Maintain a Teachable Attitude
 - Pursue personal growth through ongoing education, networking, and industry involvement.
- Contribute to Company Growth
 - Enhance the company's reputation by embodying and demonstrating Compass' core values.
- Staying Ahead of Industry Trends
 - Monitor industry trends and changes to position the company for long-term success.

Planning

- In coordination with other team members develop overall budget and manage budget process.
- Strong financial projection skills—Assist in formulating Compass's future direction and supporting tactical initiatives.
- Financial Planning & Analysis (FP&A): Lead the development and management of financial models, budgeting, forecasting, variance analysis, and financial reporting. Drive data-driven insights to support strategic decision-making and performance optimization. Play a pivotal role in establishing and growing an FP&A team within the Finance department to enhance financial planning, analysis, and overall business performance.

Operations

- Participate in key decisions as a member of the Executive Management Team.
- Maintain in-depth relations and support all members of the Management Team.
- Manage the functional areas of financial accounting and reporting, budgeting, human resources, tax, and treasury.
- Forecast and monitor cash requirements and work closely with the CFO in investing cash and investment funding and withdrawals.
- Oversee day-to-day investment transactions such as capital funding and distributions, proper recording, and valuation.
- Report financial and budget vs. actual results to owners and Executive team.

- Signature authority on checks and online banking, and back up on all legal documents including investment documents.
- Retirement plan and benefits plan administrator.
- Works closely with Executive Directors to analyze potential grantee financial information as requested.

Risk Management

- Establish appropriate internal controls.
- Maintain appropriate business insurance coverage.
- Responsible for charitable organization, tax, and foreign reporting compliance.
- Review all legal contracts prior to CFO's approval.
- Ensure that financial record keeping meets the requirements of auditors and government agencies.

Third Parties

- Maintain banking and custodial relationships.
- Maintain excellent relationships with investment managers as it relates to funding and withdrawals and obtaining financial and performance information.
- Be of service to potential grantees in completing grant application financial information.
- Volunteer on non-profit committees as requested.

Additional Responsibilities

- Oversight of all current and future company facilities, IT infrastructure, and vehicles, ensuring effective management and alignment with business needs.

REQUIRED PERSONAL CHARACTERISTICS

- **Aligns with Compass' seven core values**, fostering harmony between corporate mindset and vocation. (See page 5)
- **Demonstrates experience and effectiveness** in promoting diversity (gender, race, culture) with a grace-centered, optimistic approach.
- **Self-starter** with strong initiative and quick learning ability.
- **Tenacious** and resilient, with a strong sense of determination.
- **Teachable**: Willing to seek guidance from more experienced professionals when necessary.
- **Stands firm on convictions**, demonstrating integrity in areas of responsibility.
- **Skilled in handling difficult conversations** with professionalism and tact.
- **Adaptable to growth and change**, consistently open to new challenges.
- **Aptitude for learning** and applying best practices and new information.

- **Detail-oriented**, with an ability to maintain a strategic, big-picture perspective.
- **Exceptional time management**, organizational, and follow-through skills.
- **Goal-oriented** with a drive to produce tangible results and exceed expectations.
- **Process improvement focus**, leveraging technology to reduce costs and enhance outcomes.
- **Uses metrics** to measure and drive performance improvements.
- **Comfortable in a dynamic, entrepreneurial environment** with the flexibility to thrive in ambiguity.
- **Strong communicator**, both written and verbal.
- **Collaborates effectively** at all levels of the organization.
- **Effective leader**, skilled in hiring, developing, motivating, and recognizing talent.
- **Approachable and patient**, maintaining a calm, even tone in all interactions.
- **Highly skilled in building collaborative relationships** across diverse teams.
- **Emotional intelligence (E.Q.):** Aware of how one's actions impact others, adjusting approach to strengthen relationships.
- **Trustworthy and credible**, with a strong attention to detail, yet not a micromanager.
- **Strong problem solver**, able to navigate complex financial challenges.
- **Process-oriented**, skilled at balancing competing priorities and making decisions for the greater good of the organization.
- **Receptive to constructive criticism**, engaging with it in a respectful and open manner.
- **Experienced in presenting complex financial data** to diverse audiences, including board members and investors.
- **Committed to maintaining a safe, respectful work environment**, free from harassment, violence, and discrimination.

IDEAL PROFESSIONAL QUALIFICATIONS

Education and Experience:

- A bachelor's degree (BA/BS) in a finance-related field (minimum education requirement) plus ten (10) years of increasingly responsible management/supervisory experience on a finance team in an organization (For or nonprofit) with revenue 15M+.
- A master's degree (MBA/Master of Accounting or similar) with a focus in a finance-related field is highly desired.
- CPA or similar designation is highly desired.
- Experience required in Financial Planning and Analysis (FP&A). Proven track record in developing and managing financial models, budgeting, forecasting, variance analysis, and financial reporting.
- Demonstrated potential to build and lead a high-performing FP&A team within the Finance department to drive financial planning, performance analysis, and business growth.

- Experience and/or a passion to serve within a social services context.

Knowledge, Skills, and Abilities:

- Strong knowledge and ability in GAAP accounting.
- Experience or passion to learn about:
 - Community services to people with disabilities.
 - [Regional Center system](#)
 - [Department of Developmental Services-Vendor Provider Information](#)
- Ability to analyze and forecast financial data regarding profits, trends, costs, and compliance.
- Strong knowledge of tax laws and regulations specific to the industry.
- Familiarity with State and Federal labor/payroll laws.
- Proficient in financial and service-related reports.
- Proficient in typing and use of the Microsoft Office suite, with an aptitude for learning new software.
- Ability to follow and communicate verbal and written directions effectively.
- Ability to establish and maintain effective working relationships with co-workers.
- Multi-unit and acquisition experience. The ability to scale.

THE SEARCH PROCESS

If you or someone you know is interested and meets most of the qualifications outlined in this profile, please contact us or recommend them for consideration. Alternatively, you may forward this information to them. Thank you.

Send your resume to the contact below.

Candidates can rest assured that their names will be handled discreetly, and their inquiries will be treated with the utmost confidentiality.

Compass is an equal opportunity employer and does not discriminate based on race, age, religion, color, gender, national origin, familial status, veteran status, or mental/physical disability.

We understand and fully respect the need for confidentiality of information provided by interested parties. Be assured that backgrounds and interests will not be discussed with anyone, including our client, without prior consent. Additionally, reference contacts will not be made until mutual interest has been established.

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