



Chief Financial Officer

Leadership Profile

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The Opportunity

Capital Health Plan (CHP) offers an exceptional opportunity for a mission-driven financial executive to serve as its next Chief Financial Officer (CFO). As one of the highest-rated health plans in the nation, CHP combines the stability of a 40-year not-for-profit organization with the strategic advantages of its affiliation with Florida Blue. Through this affiliation agreement, Florida Blue maintains majority control of CHP's corporate membership, providing the organization with governance support while preserving CHP's long-standing independence and community focus.

In addition to being a highly respected regional health plan, CHP is also a true HMO and operates its own integrated provider group. This includes three state-of-the-art health centers staffed by employed physicians and care teams, offering primary care, specialty care, diagnostics, urgent care, digital imaging, and senior health services—creating a coordinated delivery system designed to improve outcomes and manage costs across its membership.

The CFO will join a value-based leadership team committed to delivering high-quality, affordable healthcare to more than 140,000 members across the Big Bend Region of Florida. This role offers a unique platform to shape the financial and strategic direction of a respected, community centered plan supported by both a delivery system and the strategic backing of Florida Blue.

The CFO will have an opportunity to influence long-term organizational strategy, increased discipline in strategic financial performance, modernize analytics to drive decision-making, and strengthen reporting and planning capabilities. With over \$1 billion in annual revenue, a highly integrated care model, and a strong physician partnership network, CHP offers both meaningful impact and mission-driven work.

This executive will lead a finance organization during a pivotal period in healthcare. The CFO will help position CHP for its next phase of success by enhancing actuarial rigor, driving medical cost management in collaboration with clinical leadership, and ensuring the organization continues to deliver on its promise of high-quality, affordable health coverage for the community it serves.

For a seasoned financial leader seeking organizational stability, mission alignment, and the opportunity to influence the future of healthcare delivery within a well-regarded health plan that also operates its own provider group, this position represents a compelling career opportunity.

Organization Overview

Capital Health Plan (CHP) is a long-standing, not-for-profit HMO headquartered in Tallahassee, Florida, delivering high-quality, affordable healthcare to the Big Bend region for more than 40 years. Recognized as one of the highest-rated health plans in Florida and nationally by the NCQA, CHP serves over 140,000 members and operates a highly coordinated care model built around primary care, evidence-based medicine, and low administrative costs. Its integrated delivery system includes three state-of-the-art health centers staffed by employed physicians and equipped with electronic health records, offering comprehensive services such as preventive care, specialty care, diagnostics, and urgent care—all designed to drive exceptional outcomes and member satisfaction. As the market leader in the Tallahassee area, CHP maintains strong partnerships with more than 500 local physicians and continues to reinvest in the community, making it a trusted, patient-centered choice for individuals, employers, and retirees seeking valued-driven healthcare.

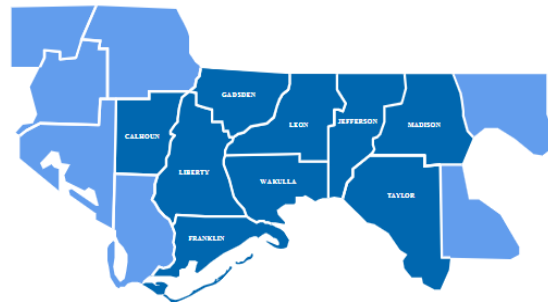
Capital Health Plan offers a comprehensive suite of health insurance options, including commercial employer group, Medicare Advantage and individual marketplace plans, designed to meet the diverse needs of individuals, families, retirees, and businesses across the Big Bend region. The organization manages a robust delivery system anchored by three advanced health centers providing primary care, specialty care, diagnostics, urgent care, digital imaging, infusion services, and senior health programs, all supported by fully integrated electronic medical records to enhance care coordination.

Financially, CHP is a major force in Florida’s healthcare landscape, generating over \$1.3 billion in revenue in 2025. Throughout its 40+ year history, CHP has earned consistent national recognition, including multiple years as one of the highest-rated health plans in Florida and the nation from the NCQA and repeated 4.5-Star Medicare Advantage ratings.

Service Area

Capital Health Plan provides comprehensive and affordable health care to our members in the Tallahassee area. We proudly serve:

- ☑ Calhoun
- ☑ Franklin
- ☑ Gadsden
- ☑ Jefferson
- ☑ Leon
- ☑ Liberty
- ☑ Madison
- ☑ Taylor
- ☑ Wakulla



Position Summary

The CFO, SVP Finance is responsible for successful leadership, management, and oversight of all financial activities including Financial Reporting, Planning and Analysis; Risk Management and Internal Control structures; Actuarial Services; Internal Audit; Risk Adjustment Data integrity and management; Treasury; Investments strategy and management; Medical Cost analysis, cost containment strategies and Decision Support; Reinsurance and Insurance. This executive is a strategic thought leader and adviser to the CEO, and Executive Leadership Team, in establishing and achieving the company's strategic goals and objectives, with a constant commitment to improving the quality and affordability of our benefit offerings.

Reporting Relationships

Reporting to the President and Chief Executive Officer, Sabin Bass.

Responsibilities

The successful Chief Financial Officer candidate will:

- Be a strategic advisor to the CEO and executive leadership directly supporting the successful achievement of the company's strategic plan, while providing oversight that the most effective financial systems are in place from which to manage the day-to-day operations and the company's strategic future.
- Provide the leadership necessary to recruit, develop and retain the best financial executives and other resources within the organization who can be counted upon to bring about the results necessary, in a manner that emphasizes accuracy and timeliness of reporting to the board, its management committees, and staff.
- Drive the long-term vision of the business by shaping and executing forward-looking strategies that position the company for sustained growth and future success.
- Oversee the budget development-operating and capital, financial reporting, -GAAP, Statutory, tax (Form 990), regulatory implications, financial systems and operations to provide timely, accurate and meaningful information to all stakeholders and ensure appropriate internal controls are in place.
- Establish and maintain strong relationships with senior executives to identify their needs and provide solutions for a full range of business challenges; ensure these executives are provided with a competent and effective finance staff to support operational activities and strategic initiatives.

Goals and Objectives

The following goals and objectives have been identified as priorities for this position:

- **Strengthen regulatory and compliance readiness**, ensuring proactive oversight and alignment with increasingly stringent industry requirements.
- **Sustain and grow financial performance**, instill and drive a 'whole of p&l' approach to generate a consistent target margin that supports service expansion and long-term strategic growth, as well as lead the annual zero-based budgeting process with added rigor and transparency.
- **Balance cost discipline with targeted investment**, tightening controllable expenses where needed while allocating resources to high-ROI initiatives that drive future value.
- **Modernize analytics and reporting**, transition ad hoc, spreadsheet-heavy work to organizational dashboards, predictive analytics, and push-button reporting.
- **Enhance medical cost management** in partnership with the CMO, using data-driven strategies and payer economics to reduce medical trends and improve affordability.
- **Strengthen actuarial capabilities**, increased precision in; pricing , IBNR and strategic, forecasting, integrating synthesizing efforts of the finance and actuarial teams.
- **Support service area expansion** by providing clear, evidence-based financial modeling, risk assessment, and strategic counsel.
- **Improve leadership, delegation, and team efficiency**, keeping the team engaged while streamlining processes, , and pushing the organization beyond its comfort zone.

Candidate Qualifications

Education/Certification

- Bachelor's degree in Accounting, or Finance required, Master's preferred.
- Active Certified Public Accountant license required.

Knowledge and Work Experience

- Eight (8) plus years of progressively responsible financial management, including executive leadership roles in an HMO or health insurance carrier.
- Three to Five (3-5) years' experience in CFO role preferred.
- Excellent organizational, communication and data analysis skills.
- Experience working directly with physicians, physician groups and hospitals.
- Experience in Alternative/Value-Based payment models.
- Experience in Medicare Advantage, ACA exchange [Individual].
- Experience with ERP/financial system modernization (Lawson/Infor) and the use of automation and analytics to drive efficiencies.
- Robust background in health plan or insurance finance, with an understanding of the headwinds facing the industry—especially medical and pharmacy cost trends and utilization management.

Leadership Skills and Competencies

- Mission-aligned, values-driven, and committed to not-for-profit stewardship.
- Engaged in the community and visible as a representative of CHP.
- Strategic, operational leadership and oversight of the finance organization.
- Provides decision support to the company including cost containment, network strategies, performance management and incentive alignment.
- Key leader in enterprise risk management, internal control activities.
- Strategic value-based risk sharing partnership development, management support.
- Presents to Board of Directors, Finance & Strategic Planning, Audit committees.
- Risk adjustment data Integrity – strategic oversight and management.
- A strategic operator who can provide direction at the enterprise level while working hands-on in a flat organizational structure.
- Collaborative, approachable, and able to build trust across a close-knit organization.
- Other duties as may be assigned by the Chief Executive Officer.

The Community

Tallahassee, FL

Tallahassee, the capital city of Florida, blends deep historical roots, lush natural landscapes, and a vibrant cultural identity into a uniquely captivating community. Its name, derived from a Muskogean Indian word meaning “old fields” or “old town”, reflects the region’s Indigenous heritage and long-standing significance. Tallahassee offers rolling hills, canopied oak-lined roads, and abundant green spaces. Its parks and natural attractions, such as the Alfred B. Maclay Gardens State Park and the nearby St. Marks National Wildlife Refuge, invite residents and visitors to explore scenic trails, gardens, forests, and waterways. From cooling off in the crystal-clear springs of Wakulla to wandering through the lush grounds of Cascades Park, outdoor recreation is ingrained in the lifestyle here.



As both a college town and the seat of state government, Tallahassee pulses with creativity, education, and civic activity. Home to major institutions including Florida State University, Florida A&M University, and Tallahassee State College, the city boasts a student population of more than 70,000, giving it a youthful energy and fueling its thriving arts, research, and innovation scenes. Cultural experiences abound—from the Museum of Florida History and Tallahassee Museum to the lively Railroad Square Art District and monthly First Friday gallery hop. Music, theater, and visual arts flourish across both intimate venues and larger performance spaces, making the city a center for artistic expression.

Tallahassee also carries significant historical weight. As the state capital since 1824, it houses the Florida State Capitol, Supreme Court, and nearly 30 state agency headquarters, while its historic districts, preserved landmarks, and museums tell the story of Florida’s political, cultural, and social evolution. The city has been recognized nationally as well, earning the All-America City Award three times for its community engagement and quality-of-life achievements.

Whether you’re drawn to its natural beauty, its flourishing arts community, its academic and research institutions, or its deep historical roots, Tallahassee offers a compelling blend of past and present making it one of Florida’s most distinctive and enriching places to live, work, and explore.

Timeline

Estimated Timeline of Search Process

Presentation of Candidates	Week of April 13 th , 2026
Round One Virtual Interviews with CHP	Week of April 27 th , 2026
Round Two Onsite Interviews in Tallahassee, Florida	Weeks of May 11 th and May 18 th 2026
Search Conclusion	End of May 2026

Procedure for Candidacy

Please direct all nominations, applications, and inquiries to Tom Quinn, Lisa Mooney, and Taeler Kaufmann through the WittKieffer Candidate Portal. For additional questions, please contact Taeler Kaufmann at tkaufmann@wittkieffer.com.

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