



Senior Vice President & Chief Financial Officer

Leadership Profile

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The logo for WittKieffer, featuring the name "WittKieffer" in a white, italicized, serif font. The logo is positioned in the bottom left corner of a dark teal rectangular area that occupies the bottom half of the page. A decorative graphic of thin, light blue lines forms a series of overlapping, curved shapes that flow from the left side of the page into the teal area, framing the logo.

WittKieffer

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The Opportunity

Delta Dental of Arizona (DDAZ) is seeking a dynamic and visionary Chief Financial Officer (CFO) to join a strong executive leadership team. DDAZ is the market leader in Arizona and is recognized for its outstanding service, network strength, community benefit support, and commitment to making dental and vision coverage accessible to a wide variety of groups and individuals.

Reporting to the President and Chief Executive Officer, the CFO will lead a high-performing team, drive strategic initiatives, and ensure financial sustainability while supporting DDAZ's mission. The CFO will oversee finance, financial planning, accounting, treasury, operations, underwriting, and facilities management while contributing to strategic initiatives that support the company's mission, vision and long-term goals. The CFO will navigate the nuances in the changing healthcare landscape with innovative ideas beyond the scope of the dental industry and will play a critical role in driving growth and sustainability.

The ideal candidate will have extensive experience in strategic planning, financial stewardship, and operational excellence. A leader who brings a proven track record of guiding organizations through growth and transformation, ideally within healthcare or insurance, is preferred. The CFO will join a winning organization and be a collaborative partner with strong communication skills and an ability to work closely with other senior executives to support DDAZ's broader strategic goals. They will embody a passion for innovation and a steadfast commitment to excellence, fully aligning with DDAZ's mission of providing a path to better health and wellness.

Organization Overview

Covering 1.5 million members, year after year DDAZ is ranked as Arizona's number one dental benefits carrier. As a 501(c)(4) organization, DDAZ participates in the improvement of overall health and wellness through an emphasis on preventive care and making dental and vision coverage accessible to a wide variety of groups, and individuals. DDAZ offers the following plans:

- Traditional Dental and Vision Plans for individuals and families with a variety of pricing and coverage options
- Group Dental and Vision Plans for two or more Enrolled Employees, including both Small and Mid-Large Group Dental and Vision Insurance Plans

Mission and Vision

DDAZ's mission: Create a path to better health and wellness.

DDAZ's vision: Healthier lives for everyone.

Delta Dental of Arizona by the Numbers

- Total Employees: 153 and will be fully staffed at 159 in 2025
- Total Assets: approximately \$167,000,000
- Total Revenues: approximately \$347,000,000 (includes ASO claims)
- Total Dental Subscribers: approximately 500,000
- Subscriber Retention: 99.5%
- Provider Network: 3,880 (representing the top network position in Arizona)

Delta Dental of Arizona Foundation

Community benefit and engagement is an essential part of the organization, and provides a strong sense of purpose for employees. The DDAZ Foundation is a 501c (3) nonprofit organization committed to improving health and wellness in Arizona and addressing food insecurities for individuals and communities, with a particular emphasis on improving access for the underserved and uninsured marginalized by poor access and availability. The Foundation works with a host of healthcare and dental partners to effectively use resources and knowledge to increase public awareness of oral health and nutrition issues. The Foundation has partnered closely with organizations throughout Arizona, such as St. Vincent DePaul, Banner University, Honor Health, Arizona PBS, the Children's Museum of Phoenix, A.T. Still University, Maricopa Sealant Program, and Northern Arizona State University on medical/dental integration, the promotion of optimal oral health and in the provision of oral health education, disease prevention, and access to dental care. Strategies have included the establishment and expansion of dental sealant programs in schools, supporting fluoride varnish programs, the creation of outreach programs offering education/preventive services, and providing leadership on oral health issues.

DDAZ gives back to its local communities to help those in need because they believe that everyone deserves access to oral health services and adequate food. In one year alone, DDAZ donated \$2.1 million to improve oral health in Arizona, donating 178,352 toothbrushes, 169,790 tubes of toothpaste, 112,354 dental floss pods, and 252,094 Arizonans across all 15 counties receiving oral health education and/or services.

Position Summary

The Chief Financial Officer (CFO) serves as a key strategic partner to the CEO, Executive Team, and other organizational stakeholders. This role provides leadership and direction for all financial functions, including financial planning, accounting, underwriting, and treasury as well as facilities, and operations. The CFO ensures financial strength, transparency, and accountability while aligning financial strategy with organizational goals. As a member of the Executive Team, the CFO contributes to enterprise-wide decision making and helps drive sustainable growth, innovation, and value creation.

Reporting Relationships

Reporting to the President and Chief Executive Officer

Direct Reports include:

- Controller
- Senior Director of Underwriting
- Director of Operations (overseeing Claims and Customer Service)
- Facilities Supervisor

Responsibilities

The successful Chief Financial Officer candidate will:

- Serve as a trusted advisor to the CEO, Executive Team, and Board of Directors on financial matters, business strategy, and enterprise risk. Serves as the primary staff liaison to the Audit and Investment Committee, and the Finance and Strategic Investment Subcommittee.
- Lead the Finance and Accounting function, as well as Underwriting and Facilities.
- Oversee the Operations team which includes a world-class Customer Service organization as well as a highly efficient Claims department.
- Provide financial leadership for growth and strategic initiatives, due diligence, mergers and acquisitions, investments, and/or expansion into new markets. Leads capital planning and funding strategies.
- Partner with executive peers to shape and execute corporate strategy, ensuring financial alignment and sustainability.
- Present timely, accurate, and insightful financial reports and data to the CEO, Executive Team, and Board of Directors. Ensures that the organization leverages predictive analytics, AI, and automation to improve forecasting and efficiency.
- Drive enterprise-wide performance by defining and monitoring key performance indicators, ensuring accountability and results.
- Establish and maintain strong relationships with banks, auditors, regulators, and other key stakeholders.

- Ensure compliance with federal, state, local, insurance and financial services regulations, guidelines, and best practices, including but not limited to tax laws, generally accepted accounting principles (GAAP), statutory accounting principles (SAP), federal acquisition regulations (FAR), and cost accounting standards (CAS).
- Knowledge of the laws, rules, regulations, and guidelines established by the National Association of Insurance Commissioners (NAIC).
- Foster a high-performing organization by recruiting, developing, and mentoring talent.
- Stay ahead of industry trends, economic conditions, and technological innovations that impact finance and business operations.
- Lead select business transformation initiatives that improve efficiency, scalability, and value creation.
- Perform other executive duties as required.

Goals and Objectives

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

- **Acclimation:** Become a trusted and visible leader within DDAZ, engaging executive team members and other colleagues as a key resource relative to accounting and finance through partnership, positioning, decision-making and supporting impactful solutions on behalf of the business.
- **Image and Reputation:** Demonstrate and advance DDAZ's image and reputation to reflect the organization's status as Arizona's network of choice for dental and vision care. Collaborate with other members of the executive leadership team to identify and implement sound financial guidance and solutions that further the wellness mission of DDAZ while continuing to achieve broad recognition of the excellence of DDAZ's services, community engagement, and people.
- **Develop and Advance Strategic Growth:** The CFO will serve as a core contributor to the growth of the enterprise. This will include advancing key relationships internally and externally that will impact the business, as well as developing potential partnerships that will take advantage of DDAZ's unique position in the market. To this end, the CFO will identify organic and inorganic growth opportunities that align with and build on existing businesses. The CFO will partner with the CIO in DDAZ to create predictive technology and financial tools that will drive innovation in the coming years.
- **Strategy:** Facilitate the formulation of a financial strategy that promotes innovation and growth while being aligned with the mission and vision of DDAZ and the DDAZ Foundation. This will include developing an organization- wide financial plan that mirrors the DDAZ strategic plan that is based on input from colleagues and board members. The goal will be to have a financial plan that informs and supports leadership growth initiatives into new products and services.
- **Emotional Intelligence and Organizational Awareness:** Quickly establish rapport and trusting relationships while cultivating a cohesive, team-oriented, cooperative culture within the department. Evaluate and identify opportunities to develop a high-performing team and enable a culture that energizes and supports staff and offers career growth and development opportunities to aid recruitment and retention.
- **Drive for Results:** The next CFO will bring new thinking, actionable financial reporting tools, and rigor to business planning. The CFO will work in collaboration with the CEO, peers and board members to achieve growth and profitability targets in a way that fosters excitement about the present and future.
- **Structure:** Perform an overall assessment of the current Finance department. Identify any gaps and make changes necessary to enable a service-oriented organization that effectively serves the future needs of DDAZ.

Candidate Qualifications

Education/Certification

- Bachelor's degree in Accounting, Finance or related field is required; MBA and/or CPA is required.

Knowledge and Work Experience

- Minimum of 12 years of progressive financial leadership, with a proven track record in strategic planning and execution.
- Experience in health insurance and/or healthcare industry is preferred.
- Executive team and board-related exposure are required.

Leadership Skills and Competencies

- Demonstrated leadership collaborating across an executive team, managing diverse teams, driving performance, and fostering a collaborative, service-oriented culture.
- Strong interpersonal and communication skills, with the ability to convey complex finance concepts to non-financial-savvy stakeholders. Experience and comfort presenting to large internal and external audiences, including the Board of Directors.
- Expertise in financial planning and analysis, capital markets, and risk management.
- Knowledge and experience with incurred but not reported (IBNR) claims.
- Exceptional problem-solving and critical-thinking skills, with the ability to anticipate risks and develop innovative solutions.
- High emotional intelligence and an ability to build strong relationships internally and externally.

The Community

Scottsdale, Arizona

Scottsdale, Arizona is a dynamic city nestled in the heart of the Sonoran Desert, just east of Phoenix. Renowned for its breathtaking desert scenery and upscale living, Scottsdale seamlessly blends natural beauty with urban sophistication. The city is celebrated for its luxurious resorts, top-tier golf courses, and a vibrant arts scene, especially in Old Town Scottsdale, which features over 90 restaurants, 320 retail shops, and more than 80 art galleries.

As of 2024, Scottsdale has a population of approximately 245,000 people, as the city has seen steady growth over the years, reflecting its appeal as a desirable place to live and work.

Scottsdale also boasts the McDowell Sonoran Preserve, the largest urban wilderness area in the United States, offering over 60 miles of trails through diverse desert landscapes. With an average of 314 sunny days each year, it's a haven for outdoor enthusiasts. The city's motto, "The West's Most Western Town," highlights its rich cultural heritage and dedication to preserving its Western roots.

In terms of sports, Scottsdale offers a wide range of activities and facilities. The city is home to numerous sports leagues and recreational opportunities, including golf, tennis, pickleball, and hiking. Scottsdale also hosts major sporting events such as the annual PGA Waste Management Phoenix Open and Cactus League Spring Training for Major League Baseball.

Procedure for Candidacy

Please direct all nominations and resumes to Jason Petros, Tom Quinn, and Charlotte Harris via the WittKieffer Candidate Portal [here](#). Inquiries may also be directed to the consultants through the portal or charris@wittkieffer.com.

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