



LEGACY
H E A L T H

Senior Vice President, Chief Financial Officer

Leadership Profile

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WittKieffer

Contents

The Opportunity	01
Organization Overview	02
Position Summary	03
Goals and Objectives	04
Candidate Qualifications	05
The Community	06
Timeline	07
Procedure for Candidacy	08

The Opportunity

Legacy Health, headquartered in Portland, Oregon, seeks an accomplished healthcare finance executive with strong strategic and business orientation to serve as its next Chief Financial Officer.

Legacy Health is a large, nonprofit, integrated health system with seven hospital campuses serving Oregon and Southwest Washington, including a full-service children's hospital and a behavioral health emergency services facility. Legacy also operates an extensive ambulatory services network that includes 70 clinic locations and offers a broad continuum of care. The organization is a \$3 billion + community system of care with over 14,000 employees in two states. Known for its commitment to high-quality, patient-centered care, Legacy Health has earned a strong reputation for clinical excellence, community partnership, and mission-driven service in the Pacific Northwest.

The next CFO will join an organization playing a vital role in a dynamic and critical time in the organization's history within the growing Pacific Northwest market. Reporting to incoming CEO, Dr. Susan Huang, the system will focus on defining the path forward through headwinds that are impacting health systems nationally including margin compression, reimbursement pressure, workforce stability, clinical quality, operational performance, and long-term sustainability. The CFO will have the chance to lead finance operations and strategy to position the health system for the future. Legacy Health maintains deep relationships with academic and training partners and serves as an important teaching and learning environment for clinicians across multiple disciplines. The CFO should bring exposure to and an appreciation for health systems with educational and teaching missions, including an understanding of physician enterprise dynamics and the balance between clinical care, education, and innovation.

Legacy seeks candidates who bring significant and credible financial leadership experience. Success in this role will require the ability to establish credibility and trust across the organization. The CFO will need to exercise broad influence and carefully evaluate the organization for opportunity. They will have the ability to move decisively and quickly. The ideal candidate will be a seasoned, results-oriented finance executive with a demonstrated track record of success in complex nonprofit or for-profit healthcare environments. Experience operating within a union environment is helpful. The CFO will be a gifted relationship-builder with the emotional intelligence required to partner effectively at all levels of the organization.

The CFO must establish themselves as an approachable, servant-oriented executive who is transparent, grounded in the task at hand. The CFO will lead by example by listening actively, building trust, and fostering strong relationships across a diverse range of stakeholders in Oregon and Washington. Most importantly, the CFO will inspire confidence and collaboration through authenticity, integrity, and the ability to connect meaningfully with others as they embark on this crucial journey forward with an organization entering a new era under Dr. Huang's leadership. This is an exciting opportunity for a progressive leader in finance to boldly shape the future of health care in the Pacific Northwest.

Legacy Health Overview

Legacy Health is a large, nonprofit, integrated health system with seven hospital campuses serving Oregon and Southwest Washington, including a full-service children's hospital and a behavioral health emergency services facility.

Driving Regional Impact

Legacy Health's facilities serve as hubs of innovation, compassion, and clinical excellence, each tailored to meet the diverse needs of the communities they serve:

- **Legacy Emanuel Medical Center** anchors trauma and critical care capabilities, housing one of Oregon's only Level 1 trauma centers and the region's only burn center between Seattle and Sacramento.
- **Randall Children's Hospital** sets the standard for pediatric care, offering Level IV NICU services and national verification as a Level 1 pediatric trauma and surgery center.
- **Legacy Good Samaritan Medical Center** provides nationally recognized specialty care in cancer, neurology, kidney transplantation, and more — serving Portland for over 150 years.
- **Legacy Meridian Park Medical Center** brings robotic surgery and advanced care to the metro area south of Portland, blending high-tech medicine with a community-focused approach.
- **Legacy Mount Hood Medical Center** continues to expand in Gresham, offering award-winning patient experiences and a full spectrum of services tailored to a growing population.
- **Legacy Salmon Creek Medical Center** in Southwest Washington is a five-star rated hospital known for innovation in joint replacement, stroke care, and robotic surgery — all delivered in a calming, patient-centered environment.
- **Legacy Silverton Medical Center** brings advanced diagnostics and trauma care to the heart of the Willamette Valley, connecting rural patients to top-tier specialists through virtual integration with Randall Children's Hospital.

Extending Reach Through Integrated Services

Legacy Health's influence extends beyond its hospitals' walls:

- **Legacy Medical Group** unites more than 900 providers across primary care, urgent care, and specialty clinics, delivering coordinated, team-based care.
- **Legacy Hospice** offers compassionate, home-based care for patients and families navigating end-of-life transitions throughout the Portland metro and Willamette Valley.
- **Legacy Research Institute** drives innovation with one of Oregon's largest clinical trials programs and internationally recognized research in neurobiology, biomechanics, and ophthalmology.

Collaborative Partnerships for Population Health

Legacy Health is a convener and collaborator, working across sectors to transform health outcomes:

- **Unity Center for Behavioral Health**, a partnership in which Legacy Health has full operational oversight in a partnership with three other health systems, provides crisis care in a unique, patient-centered setting for adults and adolescents.
- **Legacy–GoHealth Urgent Care** expands access to immediate care while ensuring seamless integration with Legacy’s broader system.
- **Legacy Health Partners**, a physician-led network, leverages data and technology to improve population health across Oregon and Southwest Washington.
- **PacificSource Health Plans**, a strategic partner, helps advance the triple aim of better care, better cost, and better health for the communities served.

Positioned for Impact Across the Pacific Northwest

Legacy Health’s physical, human, and intellectual assets form a powerful platform for regional transformation. Whether through trauma care, pediatric innovation, rural access, or behavioral health, Legacy Health is responding to today’s needs and shaping the health of tomorrow.

Legacy’s Mission, Vision, and Values

Mission

Our mission is good health for our people, our patients, our communities, and our world. And above all we will do the right thing.

Vision

Our vision is to be essential to the health of the region.

Values

- **Respect** – We treat all people with respect and compassion.
- **Service** – We put the needs of our patients and their families first.
- **Quality** – We deliver outstanding clinical services within healing environments.
- **Excellence** – We set high standards and achieve them.
- **Responsibility** – We are good stewards of our resources, ensuring access to care for all.
- **Innovation** – We are progressive in our thinking and actions.
- **Leadership** – We serve as a role model of good health and good citizenship.

Position Summary

The Senior Vice President/Chief Financial Officer (CFO) is the executive responsible for the comprehensive finance function of the organization, overseeing financial operations, revenue cycle, patient access, purchasing and supply chain management, treasury, payor contracting, capital and real estate. As a critical member of Legacy's senior executive team, the CFO develops short- and long-range plans to support the organization's strategic and operational objectives, in addition to aligning the finance vision with the mission, vision and strategic direction of the organization.

Reporting Relationships

The CFO will report directly to the CEO, Susan Huang, MD.

Direct reports of the CFO include:

- Vice President, & Associate Chief Financial Officer
- Vice President, Payor Contracting
- Vice President & Chief Revenue Cycle Officer
- Vice President & Chief Supply Chain Officer

Responsibilities

The successful CFO candidate:

- Performs fiduciary management responsibilities on behalf of, and under the direction of, the President and the Governing Board.
- Provides expert financial advice, leadership, guidance, and counsel to the Governing Board, Senior Management, and other Legacy constituencies.
- Partners with the Legacy Board of Directors and provides strong management support, including education, to the Board Finance Committee.
- Leads necessary transitions and transformations to the business based on deep understanding of financial impact of industry trends and developments.
- Continually evaluates the organization's financial condition in the context of the overall economic environment and develops strategies to respond to the market with agility.
- Develops new and innovative sources of capital and corporate investment strategies.
- Directs the strategic and operational finance functions, planning, and reporting in service of achieving near-term and long-term financial sustainability.
- Identifies and directs effective short- and long-term financial investments, cost-saving opportunities, and operating productivity goals and strategies.
- Aligns financial plans with the organization's performance goals related to patient satisfaction, clinical quality and patient safety, employee engagement, and physician relations.
- Directs efforts to increase productivity, improve efficiency, and reduce expenses across operational and clinical areas.
- Works directly with external partners (ratings agencies, regulatory agencies, banks, etc.) to ensure compliance and positive relations.
- Assesses and improves financial reporting and other information systems to align with the needs of the organization.

- Establishes and maintains best-practice systems to manage and control the organization's assets.
- Oversees the completion of the operating and capital budgets, cash flow projections, tax filings, and cost reports.
- Provides reimbursement reporting oversight and ensures regulatory compliance with respect to finance reimbursement and audits.
- Ensures the highest standards for the organization's fiscal records and prepares a variety of financial reports for internal and external stakeholders.
- Models high standards and demonstrates integrity in following accounting rules, finance regulations, and best practices.

Goals and Objectives

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

Mission, Community, and Place-Based Leadership

- Fully immerse oneself in Legacy Health's mission, values, and communities, developing a deep understanding of the organization's history, culture, and role across the Portland–Vancouver region and the Mid-Willamette Valley.
- Build authentic relationships with caregivers, physicians, leaders, and community stakeholders through visible presence, listening, and engagement.
- Ensure financial leadership and decision-making reflect Legacy Health's responsibility to its patients, workforce, and communities, balancing financial discipline with mission-driven service.

Enterprise Financial Stewardship & Sustainable Performance

- Provide disciplined, executive-level financial leadership to position Legacy Health for sustainable operating performance over the long term, balancing mission, quality, and financial responsibility.
- Guide the thoughtful evolution of the organization's cost structure and operating models to support efficiency, workforce stability, and consistent performance across the system.
- Strengthen enterprise-wide performance management capabilities that support informed decision-making and shared accountability across hospitals, ambulatory services, and service lines.

Liquidity, Capital, and Balance Sheet Stewardship

- Ensure strong liquidity, cash flow, and balance sheet resilience in support of Legacy Health's strategic priorities and long-term sustainability.
- Lead disciplined capital planning, debt strategy, and external financial relationships to maintain flexibility and credibility with investors, lenders, and rating agencies.
- Steward capital allocation decisions to ensure investments are aligned with organizational strategy, community needs, and long-term value creation.

Clinical & Operational Partnership

- Partner closely with clinical and operational leaders to align financial strategy with care delivery priorities, reinforcing Legacy Health's commitment to quality, access, and patient-centered care.
- Support service line and physician leadership with financial insight and tools that inform performance improvement while respecting clinical judgment and local context.
- Advance the use of clear, actionable data to support decision-making at the point of care and across the enterprise

Revenue Stewardship & Market Alignment

- Provide strategic oversight of revenue cycle and reimbursement performance to ensure financial practices support patient access, experience, and system sustainability.
- Guide payer contracting and reimbursement strategies that reflect Legacy Health's market position, risk tolerance, and commitment to community benefit.

- Improve visibility into revenue performance and variation, supporting thoughtful actions to strengthen financial predictability and integrity.

Culture of Accountability, Transparency, and Trust

- Establish clear financial expectations and shared accountability across the organization, reinforcing a culture of responsibility and follow-through.
- Promote transparency, timeliness, and clarity in financial communication, enabling leaders to navigate complexity and make informed decisions.
- Serve as a trusted advisor to the CEO, executive team, and Board by providing insight, context, and foresight rather than solely reporting results.

Candidate Qualifications

Education/Certification

- Master's degree in health or business administration, or advanced degree in finance or related field or equivalent applicable experience. CPA preferred.

Knowledge and Work Experience

- A minimum of 10 years of senior finance leader in an integrated delivery system ideally as CFO. Multi facility experience strongly preferred. Extensive corporate, hospital, medical group, and health plan financial operations experience, with demonstrated success in managing a large and complex portfolio (supply chain, revenue cycle, billing, etc.) of more than \$1 billion in annual revenues.
- Experience with and knowledge of debt strategy, bond financing, business and product line analyses, capital planning, tax policy, pension funding, and the changing regulatory environment required.
- Experience with joint ventures, medical group financing, charity care, mergers, and alliances of multiple healthcare entities strongly preferred.

Leadership Skills and Competencies

- *Strategic Leadership*
 - Visionary Thinking: Anticipates legal and regulatory trends and aligns financial strategy with organizational goals.
 - Business Acumen: Understands the healthcare industry, including clinical operations, research, and payer/provider dynamics.
 - Change Leadership: Drives transformation within the finance function and across the enterprise, fostering innovation and adaptability.
- *Financial Expertise and Judgment*
 - Risk Management: Identifies, assesses, and mitigates financial risks proactively.
 - Ethical Stewardship: Champions integrity, transparency, and ethical decision-making throughout the organization.
- *Influence and Relationship Management*
 - Executive Presence: Builds trust and credibility with the CEO, Board of Directors, and senior leadership through confident, clear, and strategic communication.
 - Stakeholder Engagement: Cultivates strong relationships with internal and external stakeholders, including creditors, reporting agencies, and community partners.
 - Collaboration: Works cross-functionally to support enterprise-wide initiatives and foster a culture of partnership.
- *Operational Excellence*
 - Departmental Leadership: Defines and leads the finance department's structure, priorities, and service delivery model to ensure responsiveness and value.
 - Talent Development: Recruits, develops, and retains top talent; fosters a high-performing, inclusive, and engaged team.
 - Process Improvement: Implements systems and practices that enhance efficiency, accountability, and service quality.
- *Communication and Influence*
 - Clear Communicator: Translates complex financial concepts into actionable guidance for diverse audiences.
 - Crisis Management: Provides calm, decisive leadership during organizational challenges or financial crises.

The Community

Mid-Willamette Valley, the Portland Metro Area & Southwest Washington

Oregon and Southwest Washington offer more than breathtaking scenery. They offer a way of life rooted in purpose, connection, and possibility. From the lush forests of the Mid-Willamette Valley to the vibrant neighborhoods of Portland and the welcoming communities of Southwest Washington, this region invites leaders and families alike to thrive. It's a place where values like sustainability, inclusivity, and innovation are not just ideals, they're woven into the fabric of daily life.

Outdoor enthusiasts will find endless opportunities to explore, whether hiking in the Cascades, kayaking along the Columbia River, skiing on Mount Hood, or enjoying the rugged beauty of the Pacific Coast. The region's commitment to environmental stewardship and healthy living supports an active lifestyle year-round, making it an ideal setting for those who seek balance between professional impact and personal well-being.

Families will find excellent public and private school options throughout the region, with many districts known for academic strength, innovative programs, and strong community engagement. Whether in Portland, the Mid-Willamette Valley, or Southwest Washington, you can choose from a range of educational environments that support both achievement and personal growth.

Communities here value sustainability, creativity, and inclusivity, creating a welcoming environment for individuals and families. The region is home to residents with a rich diversity of backgrounds and a strong spirit of engagement.



Whether it's the vibrant culture of Portland, the quieter pace of smaller towns, or the close-knit neighborhoods in Vancouver and surrounding areas, this is a place where people can build meaningful connections both personally and professionally while enjoying an exceptional quality of life. The Portland Metro Area is a hub of creativity and progress, home to global brands like Adidas, Nike, Patagonia, Columbia, and Intel, as well as established nonprofits such as Literary Arts, Mercy Corps, and the Portland Art Museum. Museums, parks, sports arenas, and theaters provide a variety of entertainment options for all. The Portland Metro is also known for its impressive culinary scene as well as its numerous festivals and events throughout the year for residents and visitors to enjoy. Whether you're drawn to the outdoor adventures, creative culture, or the close-knit neighborhoods, this region provides a unique opportunity to thrive both personally and professionally.

For more information about Portland, Oregon, please visit:

<https://www.travelportland.com/>

<https://traveloregon.com/>

Procedure for Candidacy

Please direct all inquiries, nominations, and resumes to Jason Petros through the office the office of Trey Wilson via email at: twilson@wittkieffer.com.

Jason Petros Executive Partner & Solution Leader, Global Search (630) 575-6156	Trey Wilson Consultant (314) 754-6065
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Legacy Health is dedicated to developing and maintaining a diverse workforce that understands and meets the needs of our diverse patient population. All decisions made by Legacy Health System regarding employment, including transfers, promotions, demotions, compensation, benefits, and training are made without regard to race, color, gender, religion, national origin, citizenship status, marital status, including domestic partnership, age (except as the law allows), genetic information, gender identity, sexual orientation, disability, military status, veteran's status or any other basis covered by local, state or federal law.

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