

## California's Valued Trust

### JOB DESCRIPTION

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**Position:** Director of Strategic Initiatives

**Reports To:** Executive Director

**Status:** Full Time

**Classification:** Exempt

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#### **Position Summary**

Under the general direction and supervision of the Executive Director. The Director of Strategic Initiatives will lead a cross-functional process for integrated, continuous corporate strategic planning and will support planning and implementation of strategic initiatives and business intelligence. They will build the competitive and business intelligence function to support key strategies including: market segmentation; integrated health management; member engagement models; and provider network alignment. The Director will also provide briefings to the Executive Director, Directors and Board as requested.

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#### **Essential Duties:**

- Partner with the executive team to develop and manage the company's strategic plan document to define measures and identify the initiatives necessary to execute the strategy
- Translate strategies into operational terms with critical planning activities across the organization
- Manage key strategic projects as determined by CVT's management team and Board of Directors
- Research applicable subject matter practices and stay up to date on industry trends
- Develop and maintain relationships with vendor partners, industry experts and government agencies
- Provide subject matter expertise in response to day to day business issues
- Collaborate with internal and external experts to develop metrics and support strategies for improving measurements and processes
- Support efforts to enhance or develop CVT growth opportunities based on data observation

- Translate data trends into strategic recommendations for program development and action plans
- Perform strategic data analysis and research to support business needs including development of benchmarks and reference points
- Develop a detailed understanding of relevant business processes, goals and strategies. s
- Act as a resource for training and guidance to staff to improve customer deliverables
- Represent CVT at forums in California related to strategic initiatives
- Assume a lead role to design, plan and help facilitate multiple senior leader strategic planning sessions
- Design, deploy and manage a centralized strategic initiative reporting process to monitor progress and impact of key strategic initiatives
- Provide insights and suggestions regarding major industry trends, current operational challenges, identify potential strategic considerations and opportunities for the organization
- Deliver on ad hoc requests from the Executive Director, Board of Directors and other senior leaders as necessary
- Prepare presentations and reports for the leadership team, Board of Directors meetings and for other forums as necessary
- Define and report key internal measures to monitor performance and benchmark best practices externally
- Other duties as assigned

### **Minimum Qualifications**

#### **Education:**

Bachelor's Degree or equivalent required in business management, financial planning, strategic management or related field  
Masters Degree in Business Administration or other advanced degree preferred

#### **Experience, Skills & Abilities:**

- Minimum of five years demonstrated Strategic and Operational Planning experience
- Minimum of 10 years of overall business experience with a record of progressive leadership positions in health care and/or management consulting
- Demonstrated knowledge and understanding of the health care industry, specifically as it relates to current and future trends in the delivery and financing of health services
- Working knowledge of health policy, health care delivery systems, provider networks and reimbursement mechanisms

- Solid understanding and demonstrated experience managing strategic and operational planning activities
- Strong interpersonal skills and ability to effectively collaborate with others at all organizational levels
- High level of organizational astuteness, professionalism, executive presence and poise
- Ability to develop and articulate general strategies and detailed operational plans
- Experience managing cross-functional projects and ability to plan and facilitate effective meetings; demonstrated leadership skills in team and/or group settings
- Strong business, analytical and planning skills and creative thinking
- Ability to create highly professional and effective presentations for senior leadership and demonstrated experience presenting information at all levels
- Proven ability to form strong trusting and collaborative relationships
- Demonstrated leadership skills
- Working knowledge of database and spreadsheet applications

**Miscellaneous:**

Required to work irregular hours, evening, and weekends when necessary, without additional compensation  
 Travel is extensive locally, statewide and occasionally nationally  
 Required to maintain and submit accurate monthly expense account information with proper documentation

**License**

**Requirements:**

Possession of a valid Class III California driver's license. Must be insurable/bondable at the "standard rate" by the insurance carrier at all times while employed as Director of Strategic Initiatives

**Confidentiality:**

Requires adherence to established policies on confidentiality of records and other information available through employment with the Trust