



<https://evergreen.partners/careers/diropsfin/>

## Director of Operations – Finance Systems

### Position Overview

**The Director of Operations – Finance Systems** is responsible for supporting the operations, systems, and strategic initiatives of the Finance team. This role acts as the operational anchor for Finance, ensuring the continuity, accuracy, scalability, and optimization of Evergreen's financial systems, processes, and reporting infrastructure.

In particular, the Director will serve as the operational lead for Workday Financials (FINS)—owning adoption, data integrity, issue resolution, process improvement, and cross-functional alignment. This position requires **5+ years of hands-on experience with Workday Financials (FINS), including configuration, reporting, and optimization, as well as 7+ years in finance operations, systems management, or accounting leadership roles.**

As part of Evergreen's broader Director of Operations community, this leader will collaborate across functions to ensure financial operations effectively support and enable the broader business. They will proactively identify how changes in one area impact others and help teams understand the "what" and "why" behind process changes.

The Director of Operations – Finance Systems actively contributes to our culture of belonging, where everyone feels welcome and supported. In addition, this person embraces Evergreen's goal of being the "Best Place to Work" through building relationships, working collaboratively, and embodying our company values (Care Personally, Extend Grace, Be Responsive, Take Ownership, Be Transparent, Innovate).

This position is a member of the Finance & Operations Team and reports to the SVP of Finance & Operations. Work can be done either in-person in our Middleton, WI office, hybrid or fully remote.

### Essential Functions

#### Team Operations

- Act as the Finance Team Lead for the initial implementation, foundational data model design and rollout of Workday Financials, ensuring alignment with business needs and best practices.
- Serve as the primary business owner for Workday Financials, overseeing system configuration, reporting, maintenance, data accuracy, optimization and ensuring continuous improvement meets operational needs.

### Hiring organization

Evergreen Healthcare Partners

### Job Location

6720 Frank Lloyd Wright Ave, Suite  
200, 53562, Middleton, WI, USA

- Evaluate the scalability of finance systems, processes, and team structure; recommend future-state design and resourcing plans to support company growth.
- Manage relationships with financial technology vendors and partners to ensure high-quality service delivery, system support and alignment with business goals.
- Partner closely with IT and PMO on digital transformation initiatives, data and reporting, system upgrades, and process improvements.
- Develop and maintain finance-specific dashboards and reports to monitor key performance indicators (KPIs), compliance metrics, and process adherence; collaborating with key digital operations resources as appropriate.
- Stay informed of financial technology trends and best practices, providing guidance to ensure Evergreen's systems remain responsive to evolving business and industry requirements.

### **Cross-Functional Shared Service and Collaboration**

- Partner closely with executive leadership and vertical leaders across the growth divisions to ensure alignment between financial systems and Evergreen's business development, delivery, and growth strategies.
- Serve as a liaison between the Finance team and cross-functional partners to ensure system workflows and reporting structures support accurate, timely, and actionable insights.
- Translate financial operations and system capabilities into accessible resources and tools that help client-facing teams (e.g., Client Partnerships, Delivery) understand billing mechanics, margin drivers, and project financials.
- Collaborate on the development of internal dashboards, proposal pricing templates, reporting tools, and other assets that enable consistent financial planning, forecasting, and communication across teams.
- Equip cross-functional teams with visibility into key financial and operational performance metrics, while educating stakeholders on how those metrics connect to strategic goals.

### **Leadership and People Management**

- Provide direct leadership of the Project Accounting function, ensuring accurate project-level tracking, change management, billing and reporting.
- Partner cross-functionally to evaluate and support the development of a scalable billing and disbursements operation as the company expands.
- Conduct regular team meetings and one-on-ones to unify communication, expectations, goals, and project updates.
- Oversee onboarding, performance management, and career development, providing mentorship and coaching.
- Ensure adherence to policies, procedures, deadlines, and compliance requirements.
- Foster a positive and inclusive work environment, promoting employee engagement, well-being, collaboration, innovation, and accountability.

### **General**

- Uphold Evergreen's mission (Create authentic partnerships that improve healthcare) and values.
- Cultivate strong relationships across Evergreen and with external partners.
- Communicate with clarity, transparency, and respect.
- Lead or participate in cross-functional projects and company-wide initiatives.
- Contribute to the development, documentation, and improvement of finance processes, procedures, and policies.
- Embrace change and innovation as Evergreen scales systems and processes.
- Attend Evergreen's annual in-person retreat.

## **Qualifications**

- Bachelor's degree in Accounting, Finance, Information Systems, or related field.
- 5+ years of hands-on experience with Workday Financials (FINS), including configuration, reporting, and optimization.
- 7+ years in finance operations, systems management or accounting leadership roles.
- Demonstrated experience leading ERP implementations, including data model design and rollout.
- Proven success in driving automation, systems integration, and process improvements.
- Strong vendor and partner relationship management skills.
- Ability to assess organizational needs and recommend future-state design and resourcing.
- Excellent interpersonal skills with the ability to manage sensitive and confidential information with professionalism and diplomacy.
- Strong time management, organizational, and analytical skills.
- Ability to lead teams, manage change, and collaborate across diverse stakeholders.

## **Preferred Qualifications**

- Workday Financials certification(s).
- Experience in a fast-paced, high-growth, or tech/startup environment.

## **Other Duties**

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required of the employee for this job. Duties, responsibilities, and activities may change at any time with or without notice.

## **Salary Range**

\$ 135,000+ depending on experience, in addition to bonus eligibility and a comprehensive benefits package.

## **Work Hours + Travel Requirements**

Evergreen's core working hours are 9am – 5pm Central Time, and most of our internal meetings take place during this window. Flexible schedule available in consultation with management. Occasional domestic travel up to 5%. If remote, travel might include annual visit to Evergreen's headquarters in Middleton, Wisconsin.

**Physical Demands**

Prolonged periods sitting at a desk and working on a computer. Must be able to lift up to 15 pounds at a time.

**Work Authorization Requirements**

Evergreen is interested in every qualified candidate who is eligible to work in the United States. However, we are currently unable to sponsor work visas. At this time, candidates must reside in the U.S. to be eligible to work at Evergreen Healthcare Partners.