

## CASE STUDY

# STABILIZING FINANCE OPERATIONS DURING ORGANIZATIONAL TRANSITION

Kaufman Rossin helped a mission-driven healthcare organization execute a departmental restructuring, maintain financial operations, and establish process discipline during a period of leadership disruption.

## COMPANY

A large organization operating across a complex healthcare environment. The organization delivers long-term care, rehabilitation, hospice, dialysis, senior living, and community-based health services across multiple care settings.

## CHALLENGE

The organization needed to execute a significant restructuring of its finance and accounting function while maintaining day-to-day operations across a complex healthcare environment. The transition introduced risk to reporting continuity, process execution, and overall financial stability.

Following unexpected leadership disruption, the organization required immediate support to sustain financial operations, maintain reporting, and ensure critical functions continued without interruption. Kaufman Rossin was engaged to provide hands-on execution support while helping formalize processes and stabilize the function.

# WHAT OUR DIAGNOSTIC REVEALED



Transition to a new organizational structure required redefinition of roles and responsibilities



Core accounting and reporting processes were not consistently documented



Financial operations relied heavily on institutional knowledge



Limited process standardization increased execution risk during transition



Leadership disruption created immediate need for operational continuity



## SOLUTION

Kaufman Rossin provided transitional leadership and operational support, working alongside management to execute the restructuring while maintaining continuity of financial operations. The team assumed responsibility for key finance and accounting functions, effectively operating in an interim leadership capacity.

The engagement focused on both execution and process formalization to support the new operating model.

Key elements included:

- Supporting execution of the **departmental restructuring**, including transition to a business unit-aligned ownership model
- Supporting **accounting and reporting** for affiliated entities, including foundation and investment activities
- Providing **day-to-day oversight** of financial operations, including reporting and close processes
- Assisting the organization in successfully navigating a **regulatory audit process**
- Developing and documenting **standard operating procedures (SOPs)** across core accounting functions, including:
  - Payroll | Intercompany accounting | Financial reporting | Month-end and year-end close
- Establishing **process consistency** to reduce reliance on individual knowledge and improve execution discipline

Kaufman Rossin maintained operational continuity over an extended period while enabling the organization to transition to a more structured and sustainable finance function.



## IMPACT

The organization successfully executed its finance transformation while maintaining uninterrupted operations during a period of transition and leadership disruption. The finance function emerged with improved structure, clearer accountability, and documented processes supporting long-term sustainability.

Stabilized financial operations during a critical transition period

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Successful implementation of a business unit-aligned finance structure

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Improved consistency and reliability of reporting and close processes

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Reduced key-person dependency through documented SOPs

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Strengthened readiness for audits and regulatory requirements

## HIGHLIGHTS

- ✔ Finance operations maintained without disruption during extended transition period
- ✔ Comprehensive SOP library developed across core accounting processes
- ✔ End-to-end accounting workflows documented and standardized
- ✔ Successful support of regulatory audit requirements

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*Client details have been anonymized to preserve confidentiality.*

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