

## POSITION DESCRIPTION

JOB TITLE: Financial Analyst STATUS: Exempt  
REPORTS TO: Director, Finance & Administration HOURS: Full-Time  
DATE: April 2021 DEPT: Educate Texas

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### **Educate Texas Vision**

A leading catalyst for progress, Educate Texas, a public-private initiative of Communities Foundation of Texas, is an innovative alliance of public and private groups that share a common goal: *Strengthen the public and higher education system so that every Texas student is prepared for educational and workforce success.*

### **Educate Texas Mission**

Increase postsecondary readiness, access and success for all students by building partnerships, leading innovation and scaling practices and policies.

### **Summary**

The Financial Analyst will provide support in finance functions to the Managing Director of Finance and the Deputy Director of Finance including budgeting, forecasting, financial modeling, revenue analysis and various ad-hoc reports and projects as needed.

### **Key Responsibilities**

#### *Finance and Administrative*

- Assist in the preparation of the annual operating budget and cash flow projections for the organization
- Assist in the preparation of revenue and expense forecasts.
- Work with program teams to develop program level budgets & projections.
- Work with program teams in the monitoring of actual performance against the operating budget and providing variance explanations.
- Perform revenue and expense trend analysis and prepare spreadsheets, graphs and charts to help illustrate financial trends.
- Prepare project-based budgets to be used in requests to various funding sources including state and federal funding.
- Participate in the development of a regular forecasting and analysis process. Document policies and procedures regarding the process.
- Review transactions and prepare necessary accounting entries and reconciliations
- Contribute to ad hoc analytical projects

#### *Project Management*

- Assist internal teams with developing and maintaining project plans



- Participate in project meetings internally and externally as needed
- Analyze and synthesize project expenditures against outcomes
- Help identify opportunities for greater project efficiencies

#### *Contribution to a Learning Organization*

- Enhance the organization's capacity and effectiveness through participation in strategic learning activities
- Use data to improve programs and accelerate impact
- Contribute constructively to helping others improve progress and performance

#### **Organizational Responsibilities**

- Manage and perform day-to-day activities for your area
- Assist in the implementation of strategy developed by supervisors and Educate Texas Leadership and contribute to discussions regarding long-term strategy
- Help support budget oversight and maintenance, fundraising efforts, and communication pieces for your area

#### **Qualifications**

- Minimum 5 years of finance/accounting experience with excellent analytical skills
- Bachelor's degree in Accounting or Finance
- Advanced Excel experience, with proficiency in financial modeling including P&L's.
- Blackbaud experience a plus
- Non Profit experience a plus
- Knowledge of education issues in Texas, as well as on a national level a plus.

#### **Skills & Requirements**

- Ability to communicate effectively both orally and in writing
- Excellent problem-solving skills and process improvement skills
- Work effectively with staff in a team-oriented environment with a positive, can-do attitude
- Exhibit a high degree of professionalism, business judgment, tact and diplomacy
- Detail-oriented, self-starter with strong organizational skills and the ability to manage multiple projects at the same time
- Dedication to continuous improvement and learning, both as an individual and an organization

**Disclaimer:** The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all employees within this class.

**Accommodations:** Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions of the position.

We're working closely with our talent partner, [WorkMonger](#), on this search. To apply, please complete the application at the link [here](#), and we'll be in touch within five days. Please know the application does require a resume and cover letter.