JOB TITLE: Financial Planning Analyst
REPORTS TO: Vice President of Finance
DATE: July 2021
STATUS: Exempt
HOURS: Full Time
DEPT: Finance

CFT’s Vision
To build thriving communities for all

CFT’s Mission
CFT stimulates creative solutions to key challenges in our community. We thoughtfully and effectively support our diverse donors and grantees by providing exemplary service and by demonstrating accountability. We improve lives through an unwaiving commitment to lasting impact.

CFT’s Values
Enhancing the experience and impact of giving through:
1. Exemplary service;
2. Wise stewardship of resources; and as a
3. Trusted partner for community knowledge and collaboration.

Communities Foundation of Texas’ main focus is to enhance the experience and impact of giving for individuals, families, companies, foundations and nonprofits by offering charitable tools like donor-advised funds, scholarships, North Texas Giving Day and more. CFT’s strategic plan includes 1) growing giving in our region, 2) catalyzing change in critically important areas such as education, medical and scientific research and public safety and 3) strengthening the local philanthropic sector of donors and nonprofits. CFT programs include Educate Texas, Working Families Success Network, the W. W. Caruth, Jr. Fund and other key initiatives. Since 1953, CFT has granted more than $1.8 billion to support nonprofits in our region, across the nation and the world. Learn more at www.CFTexas.org and through this recent overview video.

Position Summary
This individual will be responsible for the annual budgeting process, reporting, operational metrics tracking, operating plan variance analysis and special projects. S/he will provide financial support to the foundation, including preparing financial presentations, capital expenditure analysis, and industry/peer group comparisons, and board materials. This role reports to the Vice President of Finance.

Key Responsibilities
- Assist in the development and forecasting of annual budgets
- Analyze financial results by monitoring variances, identifying trends and recommending actions to management
• Routinely provide financial consulting and support to other departments within the organization regarding budget
• Aid in the capital budgeting and expenditure planning processes
• Perform financial forecasting, reporting, and operational metrics tracking
• Analyze financial data – and create financial models for decision support
• Perform annual spending calculations on endowments; track and report results
• Conduct comparable analysis and market research to support internal financial analysis
• Identify and drive process improvements, including the creation of standard and ad-hoc reports, tools, and Excel dashboards
• Assist in the preparation of external surveys
• Ensure policies and procedures are updated timely
• Partner with accounting and investments, as appropriate
• Assist with North Texas Giving Day
• Special projects as assigned

Qualifications
• Bachelor’s degree in Accounting or Finance, or related field
• At least 2 years of professional-level experience (or equivalent), including experience with financial analysis and strong familiarity with accounting/GAAP
• Advanced Microsoft Excel and PowerPoint skills as well as data management tools
• Experience in non-profits or community foundations, a plus

Skills & Requirements
• Strong quantitative/analytical competency and data gathering skills
• Highly organized and a strong attention to detail
• Good business acumen
• Self-starter with excellent interpersonal communication and problem-solving skills
• Comfort dealing with ambiguity and ability to work independently
• Excellent written and oral communication and presentation skills; comfortable interacting with executive-level management
• Ability to think creatively and demonstrate intellectual curiosity
• Demonstrated ability to work collaboratively with team members, others at all levels in the organization, external vendors, auditors, financial institutions, and brokers
• Ability to streamline/improve processes and passion to learn and grow
• Valid state issued driver’s license

Disclaimer: The above statements are intended to describe the general nature and level of work being performed by employees assigned to this classification. Overview is 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.

To apply, please send resume, cover letter and salary requirements to careers@cftexas.org.