



POSITION TITLE: Budget & Financial Analyst

JOB SUMMARY:

This position is responsible for analyzing the organization's budget and finding ways to allocate resources more efficiently across grants and contracts. They do this by monitoring organizational spending and create cost-benefit analyses which help the organization make informed decisions about spending. The Budget & Financial Analyst works closely with programming staff to develop spending plans, monitor programmatic spending, and ensure compliance with funder requirements. This position also forecasts future revenue and expenditures to help determine budgets for upcoming projects.

ESSENTIAL FUNCTIONS:

Grant Management

- Understands funder requirements on grants and ensures programs are adhering to guidelines in monthly reviews of spending. This includes reviewing and understanding notice of award and identifying key grant guidance impacting grants, documenting this information in the appropriate systems, communicating it to all parties, and serving as budget lead in the grant launch process
- Strategizes the optimal use of grant dollars given the impact of other organizational grants in monthly meetings with program management.
- Coaches programming staff on unallowable expenditures, appropriate replacements, and key grant guidance that may/has come into play. Provides feedback to COO on progress, issues, and other larger concepts arising from the review of monthlies.

Budget & Financials

- Prepares organizational budget and quarterly budget amendments which includes the input of key information concerning staff allocations, benefits, and current grant spending patterns.
- Makes forecasts for future budget needs and suggests improvements to increase revenue and/or profits.
- Prepares periodical and special reports and/or presentations that represent the organization's financial picture which can be utilized in board meetings and leadership conversations.
- Tracks budget categories across organization to identify patterns and multi-year trends. Suggests solutions and/or procedural and process changes to address these trends, implements upon approval, and tracks the results.
- Works in collaboration with the Innovation & Program Development division to develop and review grant and contract budgets prior to submission to funder. Provides advice on reasonable costs and budget amounts and develops and maintains budget templates to facilitate this work.
- Reviews monthly financial statements for each program for adherence to funder guidelines, expenditure patterns, and budget forecasting accuracy.
- Reviews projections and spending patterns provided by program management to ensure accuracy, spending is advancing per plan and expectations, and integration into the organizational budget is complete and accurate and develops and maintains organizational spending projections in conjunction with key staff.

- Recommends to COO needed changes or modifications in existing procedures, policies, and processes to maximize budget and financial activities.

Accounts Payable, Accounts Receivable, and Audit

- Monitors weekly AP process to ensure that programmatic spending adheres to funder requirements and identify anomalies in spending patterns or coding.
- Prepares AR invoices and compiles necessary documentation for timely invoice submission. Monitor AR balances and addresses outstanding invoices with appropriate parties.
- Coordinates all steps in the audit process with auditors and bookkeeper in conjunction with the COO and compiles all necessary documentation for the completion of the audit.

An essential function of all employees is to provide excellent customer service by being professional and respectful in all interactions each day. It is also expected that all employees are timely and responsive in their communication with others.

NON-ESSENTIAL FUNCTIONS:

- Other duties as assigned

This list of functions is not intended to be exhaustive, but the job functions require the core competencies listed below. The organization reserves the right to revise this job description as needed to comply with actual job requirements.

COMPETENCIES:

Competencies describe the skills, knowledge, and attributes necessary to perform the job and these competencies should be demonstrated by all employees across the organization.

- **COMMUNICATION SKILLS** – The ability to express oneself clearly in conversations and interactions with others. The ability to express oneself clearly in business writing.
- **DELIVERS RESULTS** – Establishes high goals for organization success and personal accomplishment; meets or exceeds those goals; conveys a sense of urgency and drives issues to closure.
- **ACCOUNTABILITY** – Accepts responsibility for outcomes (positive or negative) of one’s work; takes ownership for mistakes or missteps and refocuses efforts when necessary; holds self and others accountable for reaching short and long-term goals.
- **ATTENTION TO DETAIL** – Accomplishes tasks by considering all areas involved, no matter how small; shows concern for all aspects of the job; accurately checks processes and tasks; is watchful over a period of time.
- **PROBLEM ANALYSIS AND PROBLEM SOLVING** – Uses sound or logical judgement to spot and analyze problems, develop alternative solutions, and initiate corrective action.

COMPANY VALUES:

- **COLLABORATION** – We foster open and honest communication with our team and partners to advance the mission and strengthen our relationships.
- **RESPECT** —Our organization is strengthened by our shared commitment to each other, the communities we serve, and our thoughtful consideration of differing experiences and perspectives.
- **GROWTH** – We embrace our people’s unique talents and strengths, creating opportunities for them to explore their passions to be their best and grow authentically.

QUALIFICATIONS:

REQUIRED:

- Bachelor’s degree in Accounting, Finance, or other appropriate field with at least 5 years of experience performing job functions noted in job description.
- Understanding of accounting principles.
- Proven experience as a budget analyst.
- Understanding of and experience with grant budget management, administration, and compliance. Government grant experience preferred.
- Strong analytical skills with knowledge of data analysis and forecasting methods.
- Understanding of budgeting and regulatory requirements.
- Excellent writing and verbal communication skills.
- Experience utilizing equipment (such as phone, laptop, tablet) to complete required job functions.
- Experience utilizing software such as Microsoft Office (Word, Excel, PowerPoint) and comfortable learning new software required for the position.
- Reliable transportation, valid driver’s license, and insurance required on vehicle used for work purposes (employee must be listed on insurance).

PREFERRED:

- Bilingual in Spanish and English a plus.

SKILLS:

REQUIRED:

- Experience with Power BI or equivalent software
- Advanced skills in Excel (add specific examples)
- Understands budgets including how they function in practice, how to monitor budgets, budget forecasting, and budget integration

- Ability to read and understand Notices of Award and other grant and contract agreements and complex guidelines and conditions therein
- Understands complex interactions resulting from multiple grant funding sources and how to successfully monitor and implement said budgets
- Ability to perform in-depth analyses and meet deadlines in a productive and efficient manner
- Prolonged periods of sitting at a desk and working on a computer. May be required to stand for prolonged periods of time, climb stairs, and perform strenuous activity.
- Must be able to frequently lift and/or move up to 10 pounds.

PREFERRED:

- Experience with QuickBooks a plus.

SPECIAL CONDITIONS:

- Thorough background screening upon hire including Local, State, and Federal Law check, Employment Reference check, DMV check, criminal records check.

JOB CLASS: Specialized Technical

POSITION STATUS: Exempt

SUPERVISED BY: Chief Operating Officer

I have read and understand this job description and hereby certify that I am qualified to perform this job, with or without a reasonable accommodation.

Name (Print)

Employee Signature and Date

Supervisor's Name (Print)

Supervisor's Signature and Date