



The Boston Foundation believes that one of the great strengths of the Greater Boston community is the rich diversity of its residents in race, religion, national origin, ethnicity, sex, sexual orientation, gender identity, genetic information, age and physical abilities. The Foundation seeks to enhance and support that diversity, not only by its grant making, but also by adopting and implementing employment policies and practices designed to recognize and respond to such diversity.

The Boston Foundation is an Equal Opportunity Employer. We encourage applications from people with diverse backgrounds and experience.

All applications should be submitted online. Go to <https://www.tbf.org/who-we-are/careers> and select “Senior Financial Analyst” to complete our online application process.

Job Description

Title: Senior Financial Analyst

Department: Finance

Reports To: Controller

FLSA Classification: Exempt **FTE:** 1

Supervises: None

Hybrid Schedule (subject to change): Flexible in-office/remote schedule, some in-office work may be required based on business need. Quarterly in-office meetings required.

Position Summary:

Reporting to the Controller, the Senior Financial Analyst is principally responsible for managing the budget process, budget system, and designing workflows for a successful annual budget and mid-year forecast. This individual will perform internal management reporting, variance analysis, account reconciliations, and assist with special projects. Additionally, this role will provide financial data and strategic support to senior management including preparing executive level presentations, financial presentations, financial analysis, benchmarking, and other projects as requested.

Essential Functions:

- Works closely with Finance management to coordinate the annual budget and mid-year forecast;
- Manages the annual budget process including preparation of data, reports and analysis using an automated budget software system;
- Prepares monthly departmental and initiative financial reports, performing preliminary review of activity to identify posting errors;
- Monitors Operational Department Budgets and Initiatives on a quarterly basis;
- Prepares meaningful variance analysis of actual vs. budget vs. forecast performance;

- Prepares meaningful variance analysis for year over year and quarterly variance;
- Develops and implements financial models, forecasting tools and dashboards to improve process efficiencies and financial performance;
- Analyzes trends in operating results and the not-for-profit industry;
- Collaborates with technical staff to understand underlying source data and for financial reporting;
- Works closely with business units to understand drivers and appropriate metrics to develop customized reports for analysis and dashboards;
- Performs hands-on manipulation of data using Budget software, Excel, Salesforce and other tools;
- Provides ongoing and ad-hoc analysis and translation of data to support operations;
- Assists in the redesign and streamlining of processes including implementation of new systems;
- Performs complex reconciliations and analysis;
- Provides support for financial audits; creates assigned footnote analysis; and
- Leads and/or supports assigned projects including cost study, survey participation, risk analysis.

Other Duties and Responsibilities:

- Individuals assigned to this position may perform other duties as assigned, including tasks to support the operation of the Finance Department.

Qualifications

Preparation, Knowledge, Previous Experience:

- Bachelor's degree in accounting or finance field; or equivalent work experience;
- Minimum of 5 years of experience in budgeting, financial reporting and analysis in a professional work environment; and
- Minimum of 2 years of experience working with a budget software system.

Skills, Abilities, Competencies:

- Demonstrated experience with interpreting transactional data and developing effective reports and graphs;
- Strong working knowledge of Excel (including Pivot Tables), Word, PowerPoint and other tools;
- Strong working knowledge of Salesforce and other platforms;
- Ability to present and explain information to a wide range of audiences;
- Demonstrated attention to detail and accuracy of reports;
- Strong verbal and written communication skills;
- Ability to work under the pressure of tight deadlines; and
- Ability to manage and organize own workload.

Working Conditions:



- Hybrid work model, flexible with in-office or remote work assignment. Quarterly in-office meetings required. Some in-office work may be required based on business need; and
- Ability to work at workstation and use a computer keyboard for extended periods of time.

The content is intended to describe the general nature and level of work being performed by persons assigned to this job. It is not intended to constitute an exhaustive list of all responsibilities and duties required.

External and internal applicants, as well as position incumbents, who are or become disabled as defined under the Americans with Disabilities Act or applicable state law, must be able to perform the essential functions of the job (including those listed above) either with or without reasonable accommodation. Reasonable accommodation, if any, will be determined by management in consultation with the employee on a case-by-case basis.

This job description is intended to be general and may be revised from time to time. At management's discretion, the employee may be assigned different or additional duties from time to time.

