



JOB DESCRIPTION

Financial Analyst

REPORTS TO: Director of Financial Planning and Analysis

ROLE SUMMARY: The Financial Analyst is responsible for supporting the Director of Financial Planning & Analysis in all financial forecast, annual budgeting and long-range planning related activities; as well as gathering various financial and operational data; assisting with compliance efforts; performing analysis and reporting the results. The role will leverage corporate financial policies, procedures, and modeling tools to reconcile, balance and report on various financial positions. Role will support strategic initiatives.

Additionally, this position requires participation in internal and external financial reporting process and the on-going maintenance of financial systems (both EHR and ERP) data and processes. The role will establish and maintain strong business relationships within and between the Corporate and Clinical Departments.

EDUCATION & EXPERIENCE: Bachelor's Degree in Accounting, Finance, or other relevant topic. 3-5 years of finance / accounting, analysis and reporting experience. Minimum of two years of experience applying knowledge of accounting and reporting guidance; or acquisition/divestiture operational processes. Experience in the healthcare, nonprofit sector (*preferred*) with minimum of 3 years of governmental or grant based accounting. Demonstrated proficiency in Excel (macros, pivot tables). Word and PowerPoint. Demonstrated intermediate to advanced level experience in the use of business reporting and financial systems such as Blackbaud, Oracle, NetSuite, SAGE Intacct, Power BI, Excel, etc. Previous experience with financial analysis (*preferred*).

SKILLS & KNOWLEDGE:

- **Financial / Analytical Knowledge and Skillset** – Serves as a Financial / Analytical SME, gaining knowledge and understanding of principles, practices, and functions of financial analysis. Continually working to improve and stay up to date with any federal or local reporting requirements or changes and policies. Ability to utilize standard operating procedures and policies when performing financial reporting functions, adheres to relevant laws and regulations, apply compliance knowledge to protect organization, identify ways to improve operational efficiency within role.
- **Attention to Detail** – Works carefully to provide accurate information and understands the importance of accurate time, attendance, payroll, benefit, and employee documentation. Ensures the compliance of employee data integrity, keeps up with current laws pertaining to Federal Grant management or reporting and tracks and maintains performance of various levels of detail in support of these requirements.
- **Communication**- Ability to effectively and appropriately communicate verbally, in written communication and presentation skills across all levels of the organization, comfortability communicating with audiences of all sizes, ability to ensure effective communication between the employee and the organization, using a variety of approaches and understand the importance of what is communicated and demonstrate the ability to maintain confidentiality and appropriate levels of transparency in ways that balance the needs of employees as well as the department or organization.
- **Relationship Management** - Effectively builds and cultivates relationships among all levels of the organization to build trust, show respect for people and their differences, create partnerships that foster collaboration, demonstrate approachability and openness, understand the relationship of Finance with and between both the employees and the organizational hierarchies.
- **Technology**- Able to discover, adapt to, and utilize new uses of technology to achieve desired results, proficiency with Windows operating environment, Office 365 and Microsoft Office products.

PRIMARY DUTIES:

- Assist with all accounting and reporting research, and grant, program and service activity as directed by Director of Financial Planning & Analysis.
- Interpret, apply, and monitor the internal control policies, procedures, and practices of the Company as guided by Director of Financial Planning & Analysis to assure compliance with corporate policy, and any federal or local grant accounting and reporting guidance.
- Assist in the month, quarter, and year-end financial close, internal and external reporting processes by developing reporting templates and analysis.
- Develop financial templates, models, and analysis tools in Excel, PowerBI using and developing a data lake model from various systems to include EHR and ERP (standard financial reporting tools).
- Provides information to management by assembling and summarizing data; preparing reports; making presentations of findings, analyses, and recommendations. Assist with clinical user training on Corporate Financial Systems as required.

OTHER DUTIES:

- Perform various financial inquiries using the Corporate Financial Systems and other ad-hoc assignments as requested. Responsible for maintenance of Corporate Financial Systems
- Other duties as assigned by supervisor

PHYSICAL AND MENTAL REQUIREMENTS:

- Visual and auditory accuracy
- Shift length - 8 hours
- Indoor setting
- Continuous use of computer and calculator
- Long periods of sitting
- Frequent use of telephone
- Continuous repetitive grasping and manipulation of both hands
- Continuous conversational communication
- Occasional reaching, walking, squatting, bending, kneeling, twisting and climbing
- Occasionally carrying, lifting, pushing, and pulling of up to 25 lbs.
- Occasionally working in confined, noisy, dusty areas
- Understand/carry out simple/detailed, oral/written instructions
- Memorize and retain instructions
- Read and interpret detailed specifications

REVIEWED WITH EMPLOYEE:

Employee

Supervisor

Date

4/19/2024