JOB PURPOSE: The Senior Financial Analyst will support CSUSA’s Finance Department in carrying out multi-company budgeting, forecasting and financial management. The Senior Financial Analyst will perform professional-level work in analyzing budgetary data, budgetary requests, interpreting and applying budget guidelines, and projecting and forecasting financial results.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

**Performs duties and responsibilities commensurate with assigned functional area within a department(s) which may include, but are not limited to, any combination of the following tasks:**

* Plans and carries out budget procedures for multiple business units including monthly monitoring of department expenditures and revenues; communicating monitoring status to management; assisting business units and departments in the preparation of business unit and department budgets; reviewing and making recommendations on business unit and department budget proposals; assisting in the development of multi-year forecast estimates for business unit and department expenditures and revenues; reviewing business unit and department performance measures.
* Develops and maintains budget-monitoring models and coordinates production of the formal monitoring report (dashboard reporting, variance analysis).
* Assists department(s) in preparing proposals, provides input for forecasts and budgets and supporting information, explains policies and procedures, and provide recommendations.
* Assists with special studies that require data compilation; analysis analyzes and interprets information in oral and written presentations.
* Monitors and stays abreast of current and proposed legislation as it relates to the industry.
* Analyzes and performs research on current and past financial data performance and prepares reports and projections based on analysis. Identifies trends in financial performance and provide recommendations.
* Represents Finance in Board Meetings.
* Serves as department liaison to other departments across the organization (subject matter expert for assigned area)
* Mentors junior analyst and reviews forecasts and budgets as needed upon request.
* Prepares and analyzes reports for Regional reporting and ad hoc requests.

**\*\*MAY PERFORM OTHER DUTIES AS ASSIGNED\*\***

**DISCLAIMER**  
The above statements are intended to describe the general nature and level of work being performed. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

**SKILLS AND KNOWLEDGE**

1. In-depth knowledge of budgeting, forecasting and accounting. Including Income Statement, Balance Sheet, and Cash Flows and interplay between the three
2. Knowledge of the principles and practices of business organization and management
3. Knowledge of the organization and functions of a business operation with emphasis on departments to which assigned
4. Ability to research, analyze, and evaluate proposed programs and expenditures
5. Ability to work with large amounts of data, interpret financial records, detect errors, and prepare financial reports
6. Ability to express ideas effectively orally and in writing
7. Ability to maintain effective working relationships with other employees
8. Demonstrates leadership qualities

* Has a strong desire to progress into management-level positions.
* Willingness and ability to take lead on special projects; assists with special studies that require data compilation; analyzes and interprets information in oral and written presentations.
* Shows initiative in developing and improving current processes
* Develops and builds financial models to advance departmental objectives
* Shows strong presentation skills in developing and giving financial presentations
* Provide guidance and support to junior staff members

**WORK ENVIRONMENT**  
While performing the responsibilities of this position, the work environment characteristics listed below are representative of the environment the employee will encounter:

* Usual office working conditions.

**PHYSICAL DEMANDS**

* No physical exertion required.
* Travel within or outside of state.
* Light work: Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force as frequently as needed to move objects.

**TERMS OF EMPLOYMENT**  
Salary and benefits shall be paid consistent with CSUSA salary and benefit policy. Length of the work year and hours of employment shall be those established by Charter Schools USA.

**FLSA OVERTIME CATEGORY**  
Job is exempt from the overtime provisions of the Fair Labor Standards Act.

**EVALUATION**  
Performance will be evaluated in accordance with Charter Schools USA’s policy.

**DECLARATION**  
The Charter Schools USA Human Resources Department retains the sole right and discretion to make changes to this job description. Any employee making changes unauthorized by Human Resources Department will be subject to disciplinary action up to and including termination.

***JOB REQUIREMENTS:***

* Bachelor’s degree in business, finance or accounting (MBA or Masters in Finance strongly preferred)
* 5 or more years of professional experience in budgeting or accounting
* Significant experience with databases and spreadsheet programs and use of financial or accounting information systems. Advanced knowledge of Excel and PowerPoint.
* Equivalent combination of education, experience, and training that provides the required knowledge, skills, and abilities.