



DIOCESE OF ORANGE

Financial Analyst **POSITION DESCRIPTION**

JOB CLASSIFICATION: Non-exempt/ Hourly Full-time

DEPARTMENT: Shared Services

REPORTS TO: Director of Finance, Elementary Schools & Parishes

POSITION SUMMARY:

The Shared Services Department delivers financial management support to schools and parishes throughout the Diocese. The Financial Analyst is critical in evaluating financial performance and market conditions, creating forecasts, and developing reporting instruments to help management with essential decisions.

As a representative of the Diocese of Orange, this position will develop and maintain positive and effective working relationships with all levels of staff, pastors, school principals, and business managers.

ESSENTIAL FUNCTIONS:

- Support the Director of Finance in all areas of financial analysis for the organization.
- Compile financial and non-financial data to assess and evaluate the financial health and site sustainability and clearly and concisely communicate those assessments.
- Create reliable techniques, methods, and financial models to assess key performance indicators, forecast revenue, operating cost trends, and cash flow to guide key recommendations to leadership.
- Develop approaches and process enhancements to increase accuracy, timeliness, and reliability of financial and non-financial data reporting
- Collaborate in the annual budgeting cycle, establish, and communicate budget assumptions, provide support throughout the budget process, and finalize budgets for approval.
- Conduct actual versus budget analysis to identify achievements, risks, and opportunities.
- Participate in the evaluation of capital projects, develop a return on investment, business case analysis, and feasibility studies for program initiatives

- Collaborate with the Information Technology team to design and implement new data reporting capabilities in alignment with the Bishop’s Strategic Plan.
- Support Business Managers in the preparation of financial statements and forecasts.
- Provide and make recommendations to maximize site efficiencies.
- Provide analytical support and lead ad hoc projects and duties as assigned.

QUALIFICATIONS & EXPERIENCE:

- 1-2 years experience and proven budgeting, forecasting, and financial modeling skills.
- Intellectual curiosity with a drive towards continuous improvement through process enhancement and change.
- Ability to operate independently to identify issues, gather facts to understand the root cause, offer solution options and make recommendations.
- Skills in problem-solving based on data analysis coupled with situational assessment.
- Expertise in working with and managing large amounts of data with the ability to translate it into a meaningful story.
- Demonstrated ability to work collaboratively across varied business functions using excellent verbal and written communication skills at all levels.
- Proficiency in Excel, Power BI and database software programs.
- Solid understanding of Generally Accepted Accounting Principles (GAAP).
- Bachelor's degree in Finance, Economics, Business Administration, or Mathematics.

PHYSICAL REQUIREMENTS/WORK ENVIRONMENT:

Working Conditions	Typical office environment.
Equipment & Software Used	Basic computer equipment, keyboard, mouse, telephone, copier, calculator and shredder/ FACTS, QuickBooks, SIS and other program software.
Essential Physical Tasks	Communicate, move, remain stationary, reach, occasionally carry materials as needed weighing up to 30 lbs.