



SENIOR FINANCIAL ANALYST

Job Title: Senior Financial Analyst

Opening Date: June 30, 2017

Location Name: Pastoral Center

City: Portland

State: OR

Zip: 97214

Job Number:

Job Category:

Position FTE: Full Time

Term of Service:

Position Summary:

Provides support to Archdiocesan schools (and parishes) in the areas of accounting, internal controls, tax, finance, budgeting, and computer software applications. Support includes reviewing and analyzing budgets, financial operation, financial statements, as well as providing guidance in the effectiveness of internal controls, accuracy of financial records, and efficiency of operations. It also includes conducting in-service training and assistance. Provides support to Catholic Schools' Department for its Tuition Assistance Grant Program.

Essential Functions/Major Responsibilities:

1. Designs, plans and modifies internal review of operational procedures at parishes and schools.
2. Responds to accounting, internal controls, budget, payroll, accounting software, and tax reporting questions. Interprets and maintains Elementary School Financial Operating Plan (ESFOP).
3. Provides phone support and on-site training in the areas of accounting, internal controls, tax, finance, and budgeting for schools and parishes.
4. Prepares and presents training sessions on effective business operations for parish and school staff, including Finance and Administration Days, New Principals' Group, Principal Formation Institute, new business managers' training, and Finance Forums.



5. Oversees Western Catholic Education Endowment Fund (CEEF) matching grant program, as well as other CEEF Educational grant programs of the Archdiocese. Performs regular audits of CEEF accounts.
6. Prepares updates of short and long term investment policies and financial policies.
7. Reviews annual reporting of schools' use of CEEF funds for consistency with policies.
8. In the area of tuition assistance program, assists Superintendent of Catholic Schools in setting eligibility criteria, in-service training for principals, phone contact with schools, applicants, and FACTS (outside service providing financial need analysis), recommends award amounts, and coordinates payments to schools.
9. Reviews financial status of parishes and/or schools which are financially challenged. Tracks progress/development, reports findings, and recommends solutions. Performs special studies and maintains ongoing monitoring of the status of schools and parishes facing financial challenges.
10. Monitors out of parish school subsidies.
11. Assists Secretary for the Parish Funds Trust:
 - a. Proposes quarterly rates paid for savings accounts and rates charged for loans.
 - b. Assists parishes in preparation of cash flows and background assumptions.
12. Develops and/or modifies an effective Enterprise Risk Management program.
13. Summarizes and reviews annual financial statements for schools or parishes.
14. Works collaboratively with parishes and schools in area of investments and financial analysis.
15. Assists the Department of Schools' new principals with budgeting and understanding of financial statements.
16. Present topic specific workshops to parishes and schools at events such as Finance & Administration Days and New Pastor Workshops.
17. Prepares updates to finance website.



18. Maintains records containing confidential monthly and annual financial and/or budget reports for schools, tuition rates, and financial applications for tuition assistance.
19. Other duties may also be assigned.

Job Scope:

Position encounters frequent new and varied work situations with a high degree of complexity. Analyst determines own practices and procedures, performing with minimal direction needed or supervision given. Contacts are normally made inside and outside the Pastoral Center and throughout the Archdiocese. Contacts are usually made on own initiative and sometimes contain discussion about confidential or sensitive matters.

Specific Job Skills:

Ability to interpret and analyze financial information and prepare cash flow projections. Proficiency with PC software, calculator and all basic office equipment, including experience with spreadsheets, word processing, accounting (Business Works, QuickBooks, etc.), and report-writing software. Detailed familiarity with QuickBooks preferred. Excellent verbal and written communication skills, including oral presentation. Must have strong interpersonal skills and be able to function independently and maintain confidentiality. Must be able to regularly perform advanced math and should have excellent attention to detail.

Education and/or Experience:

Bachelor's degree in Accounting/Finance with CPA certification or 5-8 years accounting and business consulting experience with a service orientation. Specific experience in a complex, multi-unit organization (preferably nonprofit or religious organization) with service orientation. Knowledge of church organizational and operations procedures, financial/tax law regulations and legislation, and working knowledge of accounting concepts, techniques, and principles. Practicing Catholic preferred. Bilingual in Spanish preferred. Valid driver's license required.



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Human Resources

Physical Demands:

While performing the duties of this job, the employee is required to stand, walk, talk, reach, sit, grasp, hear, handle and perform repetitive motions of the hands/wrists. Lifts and carries items up to 20 pounds.

Working Environment:

Work is performed mostly in an office setting. Employee is required to travel to other locations, attend occasional evening meetings, and do extensive close and computer work.

Supervises: N/A

Please send resume and cover letter to hr@archdpdx.org to apply.