

Position Description

Title: Senior Analyst for Financial Planning and Analysis (FP&A)

Department: Finance

Reports to: VP of Finance & Administration

Location: New York, San Francisco, Chicago, or DC

FLSA Status: Exempt

About the Organization

Over the years, Upwardly Global has supported thousands of immigrant and refugee professionals in transitioning from poverty or exclusion to quality, thriving-wage careers through its customized coaching program and holistic approach to integrating skilled immigrants into the US job market. Upwardly Global is a data-driven, innovative organization with a bold vision and a fearless spirit operating out of four major US markets and providing remote services to several parts of the country. It is unwavering in its commitment to a diverse and inclusive culture where every voice matters.

Position Overview

The Senior FP&A Analyst plays a crucial role in supporting the financial health and sustainability of the organization. The Senior FP&A Analyst gathers and analyzes financial data, develops financial forecasts, leads scenario planning, prepares reports, and provides insights and recommendations to aid strategic decision-making. The Senior FP&A Analyst collaborates with various departments to ensure financial transparency, compliance, and effective resource allocation.

Essential Duties & Responsibilities

Financial Analysis

- Establish the workflow for an expanded financial analysis function.
- Compile and analyze historical and current financial data to understand the organization's financial status.
- Establish key performance indicators for monitoring financial health.
- Develop and maintain pricing models for evolving products and services.

Budgeting and Planning

- Establish the workflow for a new financial planning function.
- Support established budget processes.
- Lead budget holders and other decision-makers in scenario planning.
- Develop and maintain interactive predictive financial models to support organizational decision-making around department structure, team and partner productivity, and product pricing.
- Communicate and train stakeholders on the use of financial models.

- Use models to support forecasts and multi-year budgets including spending and revenue progress and targets.
- Track and report financial data to support budget compliance.
- Help develop organization-wide processes for multi-year planning and forecasting.
- Identify and analyze specific trends for similar organizations and make recommendations based on those trends.
- Develop automated reporting and forecasting tools for more efficient use of data.
- Identify and lead selection and implementation of new software to support improved budgeting and forecasting.

Reporting

- Develop and maintain monthly financial reports and metrics
- Analyze and summarize financial results, provide variance analysis, and recommendations to leadership
- Deliver information to educate and engage audiences in financial planning, monitoring financial performance, and responding to results.

Other

- Proactively challenge existing finance processes and practices, and drive process change and improvement.
- Perform other related duties as assigned.

Knowledge and Skills Required

- Bachelor's degree in finance or data analytics-related studies
- CMA or FPAC credentials a plus
- 6+ years of professional experience working as a Senior FP&A Analyst
- Proven experience with developing financial models
- Knowledge of corporate or nonprofit finance, information analysis, and financial diagnosis
- Experience planning for growing businesses, nonprofit preferred
- Experience working with government and/or restricted funding preferred
- Proven expertise in methods of systems analysis and the principles, design and procedural methods used in data analysis
- Proven proficiency in spreadsheets, databases and financial software applications
- Familiarity with nonprofit accounting principles and compliance requirements
- Excellent reporting, presenting and communication skills
- Ability to communicate financial information to stakeholders outside of finance
- Strategic/critical thinking mindset, organizational skills, and attention to detail.

Work Environment/Physical Requirements

- Must be available to work evenings and weekends as needed.
- Must have reliable transportation depending on the region.
- Occasional domestic travel required

Salary Range Disclaimer

The base hourly rate represents the low and high end of the hourly rate for this position. Actual wages will vary depending on factors including but not limited to location, experience, and performance. The range listed is just one component of Upwardly Global's total compensation package for employees. Benefits include paid time off policy, hybrid or remote work schedule, medical/dental/vision insurance, short term disability insurance, life insurance and retirement plan with employer match.

Salary Range Transparency:

- *Central Region: \$80,000 - \$92,000 USD per year*
- *Western/Eastern Region: \$88,000 - \$105,000 USD per year*

Upwardly Global is deeply committed to building a workplace where inclusion is not only valued but prioritized. We're proud to be an equal opportunity employer, seeking to create a welcoming and diverse environment.

Interested candidates should click [here](#) to apply.