

**Sr. Director of Financial Planning and Analysis**

**About Montana Tech Foundation**

Since 1967, the Montana Technological University Foundation has worked tirelessly to support and advance Montana Technological University. We are proud of our efforts to grow Montana Technological University into one of the country’s premier universities.

We are dedicated to enhancing the quality of the educational programs of Montana Technological University by managing funds on behalf of our donors and encouraging philanthropy among its constituents. We collaborate with alumni, students, faculty, staff, and administration to steward donations to Montana Technological University and teach the benefits and importance of continuing your financial support of the university.

**Vision**

The premier higher education non-profit fundraising organization for the state of Montana

**Mission**

The mission of the Montana Technological University Foundation is to advance the teaching, research and public service endeavors of Montana Technological University by generating private contributions to supplement the institution's state and federal revenues for capital, operating and student assistance funds. The Foundation is the catalyst and channel through which gifts and donation income flow to provide instantaneous and long-term support for Montana Technological University and all of its programs.

**Values**

* Respect
* Communication
* Honesty
* Fun
* Kindness
* Collaboration
* Accountability
* Growth
* Pride

**Sr. Director of Financial Planning and Analysis - Position Description Summary**

The successful candidate must lead with a solution-driven approach to further the vision of the organization with big picture thinking, partnership, empowerment and a growth mindset.

Reporting to the Chief Executive Officer, the Sr. Director of Financial Planning and Analysis serves as the lead financial officer for the Foundation and is responsible for establishing and maintaining appropriate financial controls, developing budget and funding plans, leading and implementing project plans, providing ongoing assessment and analysis of the effectiveness of selected strategies and leading new initiatives to improve the organization’s effectiveness and impact. This position conducts analysis of financial and operational issues, develops solutions/tactics, and works collaboratively with Foundation staff, Board of Directors, alumni, friends, donors, University and community constituents.

This position supervises a small team of financial personnel tasked with providing shared fiscal services within the Foundation and University related constituents. The candidate must have successful experience supervising staff, working in teams, and mentoring excellent customer service.

**Essential duties and responsibilities include**

* With the CEO, develop the operating and financial plan required to achieve organization’s strategic plan
* Manage financial controls and accounting procedures
* Ensure full transparency over the financial performance of the Foundation
* Effectively and clearly communicate potentials risk in a timely manner
* Oversee annual external auditing process
* Monitor cash flow and financial planning
* Analyze the Foundation’s financial strengths and weaknesses and propose corrective action
* Provide leadership and management to the finance and operations department
* Direct the delivery of monthly reporting package of the Foundation’s financial performance versus budget and forecast including updating the full year forecast on a monthly basis and prepare variance analysis explanations
* Delegated signature authority for fiscal and administrative management of the Foundation
* Support of the Board of Directors Finance and Investment Committee
* Work with fiscal services staff to approve expenditures; trouble-shoot appointment and payroll issues; and develop and oversee spreadsheets to track budgets and expenditures, including updating formulas and budget entries to reflect changes in payroll throughout the year
* Serves as a primary reviewer for the financial statement team; managing and analyzing data for long-term financial planning
* Provide reliable data and transform it into actionable information that will be used to make informed business decisions
* Leverage forecasts and actual vs. plan variances to advise management on decisions affecting cost management, performance improvement, risk management, demand planning, and opportunities for both external and internal organizational growth.
* Create presentations that provide insightful analysis, identify required action items, and effectively frame decisions to be made
* Continuously develop tools/systems and automate processes
* Maintain awareness of proper internal controls
* Protect the organization’s value by keeping information confidential
* Willing to work nights and weekends
* Perform additional duties as assigned

**Minimum Qualifications:**

* Bachelors’ degree in business, finance, accounting or closely related field.
* Certified Public Accountant (CPA)
* 5 or more years of financial/budgeting work experience with at least some portion in higher education
* Experience with complex non-profit funding or state or federal funds
* Experience with enterprise-wide administrative data processing systems. The candidate will be responsible for working with organization CRM Raiser’s Edge, FENXT, Fundriver, and Paychex (payroll system)
* Experience with project management, leadership roles, communication, team building and organizational skills within a complex organization and with a diverse group of individuals
* Experience identifying and implementing creative solutions to problems, working both independently and as a team member
* Proficient in business correspondence as demonstrated in application materials
* Editing and writing business correspondence using proper grammar and punctuation as demonstrated in application materials
* Proficient knowledge and experience working with a CRM and multiple channel platforms
* Strategic thinker and problem-solver with the ability to be hands on
* Ability to build strong, collaborative relationships across all functions and levels of the organization
* Build strong external relationships with auditors, investment organization, and financial institution partners
* Familiar with establishing, documenting and managing organizational internal controls
* Experience in managing internal financial and audit controls

**Preferred Qualifications:**

* Masters’ degree in business, finance, accounting or closely related field

**Required Competencies (Skills, Knowledge, and Abilities)**

* Initiative and resourcefulness
* Detail-oriented and focused on quality
* Analysis and problem solving
* Proficiency with MS Office including Excel
* Project management
* Excellent written and verbal communication skills
* Possesses strong interpersonal and customer service skills

**Compensation and Benefits:**

* Competitive Salary Range: $90K -- $100K depending on professional experience
* Full medical, dental and vision insurance
* 401(k) match
* People first culture