

HOUSTON ENDOWMENT

JOB DESCRIPTION

JOB TITLE: **Manager of Financial Planning and Analysis**

REPORTS TO: Vice President for Finance

POSITION SUMMARY

Houston Endowment Inc. (the “Foundation”) seeks an experienced, solutions-oriented Manager of Financial Planning and Analysis to join our team to support the organization in developing and enhancing long-range financial and endowment planning capabilities. This position will prepare sophisticated financial models and analytics to support enterprise-wide decision making and develop related financial dashboard and presentations. This position will also support the VP for Finance in the development of internal investment oversight of the Foundation’s outsourced investment firm. The Manager of Financial Planning and Analysis will support and work closely with the Director of Finance and Accounting.

KEY RESPONSIBILITIES

The Manager of Financial Analysis and Planning will:

- Support the Vice President for Finance to enhance existing financial models that support spending analysis. Develop 5-year rolling operating and capital budgets, forecasting and other financial models, including economic scenario planning. Advise finance/executive leadership team on key decision points.
- Proactively monitor authorized spending level and compliance with annual payout requirements, including forecasting any impact from changes in endowment values, staffing and operating expense assumptions, and grant making assumptions.
- Lead discussions in finance staff and other meetings on performance and key variances on a monthly, quarterly and annual basis to aid financial and business decisions.
- Work with outsourced investment firm to develop economic scenarios to use in stress test of long-range planning models. Review, analyze trends and interpret monthly and quarterly investment performance to support internal due diligence oversight of outsourced investment firm.
- Work with Director of Finance and Accounting to strategically plan multi-year payout in order to ensure tax compliance and maximize tax efficiency with minimal impact on grantmaking and financial liquidity.
- Establish, identify and monitor key financial operating metrics for inclusion on financial dashboard reports.
- Oversee and perform annual refresh of enterprise risk management framework to support enterprise wide decision-making.
- Serve as a thought partner to finance team around reporting standards through the pursuit of continuous process improvement.
- Evaluate and implement business intelligence tools, such as Tableau or otherwise, to support financial and enterprise-wide planning and analysis work.
- Support Vice President for Finance in preparation of materials for Board of Director meetings and to create ad hoc presentations across a variety of strategic initiatives, including conducting research on philanthropic hot topics and funding trends, that enhance the ongoing business.
- Establish Financial Planning and Analysis as a proven center of analytical excellence to support financial discipline and thoughtfulness throughout the Foundation.
- Cultivate and maintain strong, effective, collaborative relationships with the executive team and other cross-functional departments.

DESIRED QUALIFICATIONS

We seek a team member with experience in a relevant professional capacity who is enthusiastic about supporting HEI in achieving its mission. The successful candidate will have a proven track record of success in working collaboratively with multiple internal (including C-Suite) and external teams and constituents. Moreover, the candidate must have the aptitude to engage in projects, systems, and processes through multiple lifecycles and iterations. The candidate must be a self-starter, be able to work independently with minimal supervision, be solutions-oriented, thrive on challenges and be comfortable with ambiguity and a fast-paced, demanding environment.

Specifically, the successful candidate will possess:

- A Bachelor's degree in Accounting, Finance or related field. MBA/CPA or equivalent advanced degree preferred.
- A minimum of five years of progressively responsible related work experience that demonstrates a track record of success in financial planning and analysis with multiple stakeholders, including C-suite level, meeting deadlines and assuring timely execution of deliverables.
- Strong financial acumen, including core literacy of accounting and financial concepts and metrics, streamlining processes, such as budgeting, forecasting and reporting.
- Excellent skills using Microsoft Excel, PowerPoint and business intelligence tools.
- Excellent written and oral communication skills, including the ability to make complex issues understandable and relevant to various audiences.
- Familiarity with the nonprofit, philanthropic or foundation sector a plus.
- Familiarity with the investment management sector a plus.

KEY ATTRIBUTES AND COMPETENCIES

- Strong business acumen, strategic thinking and ability to prioritize projects, meet deadlines and support others in doing the same.
- Appreciation for colleagues and the important role of others in the Foundation's mission and daily operations. Demonstrated ability to effectively participate in a multidisciplinary team environment.
- Ability to thrive and adapt in an environment of growth and change.
- Ability to switch between strategic and practical thinking.
- Commitment to diversity, equity and inclusion.
- Passion for improving quality of life for the people of greater Houston.
- Proactive approach to issue identification and resolution.
- Orientation as a team player who strives to understand and deliver excellent customer service to internal and external stakeholders.
- Excellent judgment, integrity and commitment to personal responsibility and accountability.

COMPENSATION

Salary will be set in accordance with the successful candidate's experience. The Foundation provides comprehensive employee benefits, including health, dental and vision plans, paid time off, and matching 401(k) and pension retirement plans.

TO APPLY

Send resume and cover letter to employment@houstonendowment.org. We will contact those candidates who most closely match our requirements. We thank you in advance for your interest.