Senior Financial Analyst

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JOB TITLE
Senior Financial Analyst

LOCATION
Worcester

DEPARTMENT NAME
Budget & Operations

DIVISION NAME
Worcester Polytechnic Institute - WPI

JOB DESCRIPTION SUMMARY
The Senior Financial Analyst will work closely with colleagues across the institution to understand their business processes and reporting needs, define key performance metrics, interpret analytics results, and identify trends and develop narratives from the data to support informed decision-making.

This position will track operational data that measures these divisional activities, efficiency, and progress toward strategic objectives. The Senior Financial Analyst will assist in continuous systems improvement and the implementation of higher education industry best practice policies and procedures.

This is a hybrid role with an expectation of three days on-site per week.

JOB DESCRIPTION

- Develop and conduct in-depth financial analysis across all fund types, including operating budgets, cash flows, and financial statements, strategic sourcing and long-term financial planning to uncover trends, patterns, risks and actionable insights. Contribute to analysis and short- and long-range financial plan development in support of the University's mission in coordination with other divisions.
- Reporting to AVP of Finance & Operations, assist CFO, AVP and Finance team in preparing ad-hoc analyses, reports, presentations, and data analytics to support strategic initiatives, the annual and multi-year budget processes. Provides clear, accurate, and concise explanations of changes in budgets and actuals.

- Perform research on industry best practices and benchmarks to support the budget process and senior leadership decision-making. Design, build, and maintain dynamic dashboards, scorecards, and KPIs to track financial performance and business drivers, ensuring accuracy, timeliness and integrity of financial data.
- Lead the development and implementation of automated reporting tools using AI, machine learning, business intelligence (BI) platforms, and planning systems (e.g., Power BI, Workday, Adaptive, Synario) to deliver real-time, data-driven insights. Translate complex financial data into clear visuals through dashboards and reports, encompassing advanced data analysis with optimal visualization techniques. Leverage technology to improve efficiency and effectiveness to enable fact-based, timely, and collaborative decisions guided by WPI strategy.
- Continuously develop, assess, and enhance systems and processes to achieve greater efficiencies, while also formulating recommendations for policies and procedures that impact budgetary models and initiatives within WPI.
- Maintain planning models, systems and tools to support scenario planning, forecasting, and strategic decision-making (Synario, excel, Adaptive), ensuring efficient management and support.
- Serve as a collaborative partner to cross-functional teams, offering expert problem-solving, comprehensive training, and strategic guidance on financial planning and analysis.
- Support finance & operations division (IT, facilities, police, finance) with day-to-day financial analysis, training and support.
- Stay abreast of emerging trends within the industry as well as in financial automation, data visualization, and AI integration. Serve as backup for forecasting, budgeting and support functions. Other duties determined necessary in support of the overall responsibilities of the Division of Finance & Operations.

Required Qualifications:

- Bachelor's degree in accounting, finance, or other relevant field.
- Minimum 4 years of progressive demonstrated success in an FP&A or other finance/accounting position or related position with similar duties.
- Excellent analytical, research, and problem-solving skills with attention to detail and ability to manage competing deadlines.
- Demonstrated advanced Excel skills or similar skills and ability to design complex spreadsheets and pivot tables utilizing advanced formulas (Power Query, Power pivots (including measures), x-lookup and other advanced functions, conditional formatting, etc.)
- Highly collaborative working style with excellent consultative, analytical, communication, and customer service skills. Ability to summarize analytical work and present findings in a visually compelling way.
- Strong organizational skills, and ability to use them in a fast-paced, highly productive environment.

- A commitment to quality, innovation, and process improvement with an emphasis on collaborative teamwork and high customer service standards.
- Ability to plan and direct projects and to lead innovative, strategic initiatives.
- Personal maturity and the ability to work with and maintain confidential information are essential.

Preferred Qualifications:

- Master's degree in business, finance, accounting, or related field.
- Experience with Synario, Adaptive Planning software, and Workday.
- Experience working with Power BI or other data visualization tools.
- Experience in a college or university, or other not-for-profit institution.

Salary Grade 9: $82,600 - $93,000 per year (depending on experience)

Salary is based on related experience, expertise, and internal equity; generally, new hires can expect pay between the minimum and midpoint of the range.

Compensation at WPI

FLSA STATUS
United States of America (Exempt)

WPI is an Equal Opportunity Employer. All qualified candidates will receive consideration for employment without regard to race, color, age, religion, sex, sexual orientation, gender identity, national origin, veteran status, or disability. It seeks individuals from all backgrounds and experiences who will contribute to a culture of creativity, collaboration, inclusion, problem solving, innovation, high performance, and change making. It is committed to maintaining a campus environment free of harassment and discrimination.

To apply, visit:https://wpi.wd5.myworkdayjobs.com/en-US/WPI_External_Career_Site/job/Worcester/Senior-Financial-Analyst_R0003335

About WPI
WPI is a vibrant, active, and diverse community of extraordinary students, world-renowned faculty, and state of the art research facilities. At WPI, we have competitive and comprehensive benefits, including health insurance, long-term care, retirement, tuition assistance, flexible spending accounts, work-life balance and much more.

Diversity & Inclusion at WPI
WPI is committed to creating an inclusive workplace where everyone feels valued and respected; a place where every student, faculty and staff member can be themselves, so that they can study, live, and work comfortably, to reach their full potential, and make meaningful contributions in order to meet departmental and institutional goals. WPI thrives

on innovative practice and welcomes diverse perspectives, insight, and people from diverse lived experiences, to enhance the community environment and propel the institution to the next level in a competitive, global marketplace.

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