



POSITION TITLE: Senior Analyst, Financial Planning & Analysis (FP&A)

REPORTS TO: Controller

DEPARTMENT: Finance

OVERVIEW:

Jewish Federation of Greater Atlanta is building a diverse team of highly motivated and qualified individuals to create a new model of 21st-century community philanthropy and engagement. We seek forward-thinking, analytical, and tech-savvy candidates who thrive in a dynamic, mission-driven nonprofit environment.

The FP&A Senior Analyst will play a critical role in supporting strategic decision-making through financial planning, forecasting, and dynamic reporting across multiple business units, departments, programs, and the Atlanta Jewish Foundation. This position will help drive financial transparency, operational efficiency, and data-informed decision-making.

PRINCIPAL FUNCTION:

The FP&A Senior Analyst will lead the development and maintenance of financial models, dashboards, and reports that support budgeting, forecasting, and strategic planning. This role will collaborate across departments to streamline financial processes and leverage technology and AI tools to enhance reporting capabilities. The Senior Analyst will manage software conversion projects, as needed, that the Controller and other finance staff oversee.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Lead the annual budgeting and forecasting process across departments and business units.
- Develop and maintain dynamic financial models and interactive dashboards utilizing Excel, Power BI, and other analytics platforms.
- Conduct in-depth analyses of financial performance and trends to provide actionable insights directly to leadership.
- Partner with program and departmental leaders to optimize financial planning and resource allocation initiatives.
- Generate monthly and quarterly financial reports tailored for internal stakeholders, committees, and the Board.
- Support budgeting, monitoring, and reporting for grants in partnership with the Advancement and Program teams.
- Identify and implement technology solutions to automate reporting processes, enhancing data accuracy and operational efficiency.



- Integrate AI tools to enhance forecasting, scenario planning, and operational efficiency.
- Collaborate with the Foundation Operations Manager to support financial reporting and analysis for donor-advised funds and investment portfolios.
- Assist with audit preparation and compliance reporting.
- Identify opportunities for process enhancements to streamline financial operations continually.
- Ensure the highest level of confidentiality concerning financial and donor-related information.

QUALIFICATIONS:

- A bachelor's degree in finance, accounting, economics, or a related field is required. CPA and/or MBA strongly preferred.
- 5+ years of experience in financial planning and analysis, preferably in a nonprofit or mission-driven organization.
- Strong proficiency in Microsoft Excel (including pivot tables, XLOOKUP, and advanced formulas).
- Experience with financial systems such as Abila MIP, Salesforce, Stellar iPhi, and Clearwater is a plus.
- Familiarity with data visualization tools (e.g., Power BI, Tableau) and AI-driven analytics platforms.
- Experience with application programming interfaces (APIs) and general coding (e.g., C++, Java, SQL) is a plus.
- Demonstrated ability to manage multiple projects and deadlines in a fast-paced environment.
- Excellent analytical, problem-solving, and communication skills.
- Commitment to the mission and values of Jewish Federation of Greater Atlanta.

PHYSICAL REQUIREMENTS:

Minimal physical effort is required, including intermittent standing and walking and prolonged periods of sitting in meetings or at a desk working on a computer.

COMPENSATION

The salary range for this position is \$100,000 - \$115,000 plus a comprehensive benefits package. Anticipated salary near midpoint; commensurate with experience.

Jewish Federation of Greater Atlanta is an equal opportunity employer.