AUBURN
Human Resources

Dir, Portfolio Strategy

Job Description

JOB INFORMATION

Job Code	OA38
Job Description Title	Dir, Portfolio Strategy
Pay Grade	UA09
Range Minimum	$72,570
33rd %	$91,920
Range Midpoint	$101,600
67th %	$111,270
Range Maximum	$130,620
Exemption Status	Exempt
Organizational use restricted to the following divisions	109 Senior VP-Advancement
Approved Date:	1/1/1900 12:00:00 AM
Legacy Date Last Edited	2/21/2023

JOB FAMILY AND FUNCTION

Job Family:	University Advancement
Job Function:	Advancement Operations

JOB SUMMARY

Reporting to the Chief Advancement Operations & Strategy Officer, the Director of Portfolio Strategy provides leadership to Auburn Advancement's fundraising pipeline and implements a comprehensive prospect management system that identifies, manages, prioritizes, and recommends potential philanthropic constituents across all university fundraising programs. Directly contributes to fundraising program management that maximizes annual productivity.

RESPONSIBILITIES

- Leads a team of analysts to identify major and principal gifts fundraising prospects, oversees portfolio and proposal management, and fundraiser performance metrics.
- Leads portfolio review meetings and assists development staff in targeted strategies toward solicitation.
- Delivers quantitative and qualitative analysis of pipeline movement to drive strategic advancement initiatives. Advises senior leadership on new strategies and trends to optimize the pipeline and increase fundraising productivity.
- Serves as a central resource to all fundraising staff, providing guidance to staff on philanthropic policies and practices. Contributes to collaborative fundraising efforts that prioritize the donors' collective interests in Auburn University.
- Serves as a subject matter expert on fundraising systems and business processes. Makes recommendations for modifications to systems and processes to enhance fundraising and engagement effectiveness.
- Oversees the process of evaluating and managing external data sources.
- Contributes to operational strategies including the advancement database and related systems, analytics, business intelligence, and industry reporting.
- Ensures effective training of staff on all related development programs, systems, and processes.
- Maximizes research and reporting tools to contribute to fundraising success.
- Identifies opportunities to incorporate both engagement and philanthropic initiatives into a cohesive advancement strategy.

The responsibilities listed above show the typical duties for jobs in this classification. Actual tasks may differ depending on the department's needs. Other similar duties may be assigned with discretion of the supervisor. Not every duty will apply to every position, and the amount of time spent on each task can change based on department needs.

SUPERVISORY RESPONSIBILITIES

Supervisory Responsibility	Full supervisory responsibility for other employees is a major responsibility and includes training, evaluating, and making or recommending pay, promotion or other employment decisions.

MINIMUM QUALIFICATIONS

To be eligible, an individual must meet all minimum requirements which are representative of the knowledge, skills, and abilities typically expected to be successful in the role. For education and experience, minimum requirements are listed on the top row below. If substitutions are available, they will be listed on subsequent rows and may only to be utilized when the candidate does not meet the minimum requirements.

MINIMUM EDUCATION & EXPERIENCE

Education Level	Focus of Education		Years of Experience	Focus of Experience	
Bachelor's Degree	No specific discipline.	and	8 years of	experience with 5 years in prospect research and management, statistics, development, and/ or fundraising, qualitative and quantitative research, relational data products, data structures and reporting, and work in non-profit or higher education development office. Experience must show progressively increasing levels of responsibility and accountability. At least 2 years of supervising or leading full time employees.	And

MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Strong knowledge of prospect management best practices and experience using standard prospect research resources including, but not limited, to LexisNexis for Development Professionals; SEC documents, Foundation Center or similar; ResearchPoint, iWave, or similar; private company valuation tools; search engines, etc.	
Knowledge of prospect research and management, conducting research, analyzing information resources, and experience locating, analyzing, interpreting, and synthesizing biographical, business, and financial data from an array of online print resources.	
Strong knowledge working with relational databases (Raiser's Edge, Advance, Salesforce, Fundraising Performance Management), Microsoft Suite, and electronic screening tools.	
Proficiency with data management, building complex data queries and prospect segmentation.	
Understanding philanthropy and donor cultivation process and experience working in a fundraising environment.	

MINIMUM LICENSES & CERTIFICATIONS

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/ Desired	
None Required.				

PHYSICAL DEMANDS & WORKING CONDITIONS

Physical Demands Category:	Other

PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
Standing					X	

PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
Walking			X			
Sitting					X	
Lifting	X					
Climbing		X				
Stooping/ Kneeling/ Crouching		X				
Reaching			X			
Talking				X		
Hearing				X		
Repetitive Motions			X			
Eye/Hand/Foot Coordination			X			

WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Extreme cold		X			
Extreme heat		X			
Humidity		X			
Wet		X			
Noise		X			
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

Vision Requirements:

No special vision requirements.