AUBURN
Human Resources

Analyst II, Portfolio Strategy

Job Description

JOB INFORMATION

Job Code	OA54B
Job Description Title	Analyst II, Portfolio Strategy
Pay Grade	UA05
Range Minimum	$50,770
33rd %	$59,230
Range Midpoint	$63,460
67th %	$67,690
Range Maximum	$76,150
Exemption Status	Exempt
Approved Date:	4/23/2025 5:25:02 PM

JOB FAMILY AND FUNCTION

Job Family:	University Advancement
Job Function:	Development Support

JOB SUMMARY

The Portfolio Strategy Analyst II serves as a key partner to colleges and units in regards to prospect strategy, research, and analysis. Ensures excellence in service to fundraisers in pipeline development and portfolio management including training and communication.

RESPONSIBILITIES

- Partners with fundraising units who require moderately complex research and/or prospect management needs.
- Collaborates with assigned development officers to fully comprehend and gain thorough knowledge and understanding of priorities, development officer portfolios, and short- and long-term prospect goals.
- Conducts quarterly pipeline meetings with all assigned development officers to facilitate strategic conversations regarding the management of prospects, pipeline development and portfolio strength.
- Manages and makes updates within the database related to development officer portfolio and relationship manager assignments.
- Assists institution in the development, management, and tracking of fundraising goals and metrics.
- Identifies, qualifies, rates, and assigns major gift prospects to development officers in support of fundraising goals and objectives.
- Drives a consistent approach to research and prospect management across units through regular communication with unit leadership and staff, ongoing training, and alignment with Advancement priorities.
- Provides training and database support to development officers on prospect management and research resources and policies. Identifies areas of growth within units and assists with developing individualized training plans.

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	May be responsible for training, assisting or assigning tasks to others. May provide input to performance reviews of other employees.

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	with no specific discipline.	and	5 years of	experience in data maintenance, reporting, and research. Experience in a fundraising environment desired.	

MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of the prospect management best practices and processes.	And
Knowledge of fundraising practices. 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.	And
Knowledge working with relational databases (Raiser's Edge, Advance, Salesforce, Fundraising Performance Management), Microsoft Suite, and electronic screening tools.	And
Proficiency with data management, building complex data queries and prospect segmentation.	And
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			
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			

WORKING ENVIRONMENT

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

Vision Requirements:
Ability to see information in print and/or electronically.