AUBURN
Human Resources

# Analyst III, Portfolio Strategy

Job Description

## JOB INFORMATION

| | |
|---|---|
| Job Code | OA54C |
| Job Description Title | Analyst III, Portfolio Strategy |
| Pay Grade | UA07 |
| Range Minimum | $62,820 |
| 33rd % | $73,290 |
| Range Midpoint | $78,530 |
| 67th % | $83,760 |
| Range Maximum | $94,230 |
| Exemption Status | Exempt |
| Approved Date: | 4/23/2025 5:26:21 PM |

## JOB FAMILY AND FUNCTION

| | |
|---|---|
| Job Family: | University Advancement |
| Job Function: | Development Support |

## JOB SUMMARY

The Portfolio Strategy Analyst III 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 have very complex research and/or prospect management needs.
- Serves as a strategic partner for assigned units and development officers. 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 drive 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 and principal gift prospects to development officers in support of fundraising goals and objectives.
- Partners with data analytics staff to identify prospects and refine portfolios.
- 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.
- Leads onboarding and new-employee training on prospect management and research resources and policies. Assesses Portfolio Strategy and unit training needs and develops individualized training plans.
- Assists in preparing and monitoring Portfolio Strategy’s fiscal year budget.
- Monitors requests for prospect profiles and assigns them to Portfolio Strategy team members.

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 supervise employees but supervision is not the main focus of the job. |

## 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 | 7 years of | experience in data maintenance, reporting, or research in prospect management, and/or reporting in a non-profit or higher education development office. | |

## MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

| | |
|---|---|
| Advanced knowledge of the prospect management best practices and processes. | And |
| Advanced 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 |
| Advanced 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 | | | |
| 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. |