
Auburn University Job Description

Job Title:	Dir, Portfolio Strategy	Job Family:	No Family
Job Code:	OA38	Grade UA09:	\$64,700 - \$116,500
FLSA status:	Exempt		

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.

Essential Functions

1. Leads a team of analysts to identify major and principal gifts fundraising prospects, oversees portfolio and proposal management, and fundraiser performance metrics.
2. Leads portfolio review meetings and assists development staff in targeted strategies toward solicitation.
3. 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.
4. 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.
5. 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.
6. Oversees the process of evaluating and managing external data sources.
7. Contributes to operational strategies including the advancement database and related systems, analytics, business intelligence, and industry reporting.
8. Ensures effective training of staff on all related development programs, systems, and processes.
9. Maximizes research and reporting tools to contribute to fundraising success.
10. Identifies opportunities to incorporate both engagement and philanthropic initiatives into a cohesive advancement strategy.
11. Performs other duties as assigned.

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.

The above essential functions are representative of major duties of positions in this job classification. Specific duties and responsibilities may vary based upon departmental needs. Other duties may be assigned similar to the above consistent with the knowledge, skills and abilities required for the job. Not all of the duties may be assigned to a position.

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Minimum Required Education and Experience

	<u>Minimum</u>	<u>Focus of Education/Experience</u>
Education	Four-year college degree	No specific discipline.
Experience (yrs.)	8	8 years overall with 5 years of experience 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.

Substitutions allowed for Education:

Indicated education is required; no substitutions allowed.

Substitutions allowed for Experience:

Indicated experience is required; no substitutions allowed.

Minimum Required Knowledge

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.

Certification or Licensure Requirements

None Required.

Physical Requirements/ADA

No unusual physical requirements. Requires no heavy lifting, and nearly all work is performed in a comfortable indoor facility.

Routine deadlines; usually sufficient lead time; variance in work volume seasonal and predictable; priorities can be anticipated; some interruptions are present; involves occasional exposure to demands and pressures from persons other than immediate supervisor.

Job frequently requires sitting, reaching, talking, hearing, handling objects with hands, and lifting up to 10 pounds.

Job occasionally requires standing, walking, and lifting up to 25 pounds.

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No specific vision requirements.

Date: 2/21/2023

