
Auburn University Job Description

Job Title: **Portfolio Strategy Analyst**

Job Family: No Family

Job Code: **OA54**

Grade UA05: \$43,500 - \$69,600

FLSA status: Exempt

Job Summary

The Portfolio Strategy Analyst 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.

Essential Functions

1. 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.
2. Conducts quarterly pipeline meetings with all assigned development officers to facilitate strategic conversations regarding the management of prospects, pipeline development and portfolio strength.
3. Manages and updates within the fundraiser performance management (FPM) related to development officer portfolio and relationship manager assignments.
4. Assists institution in the development, management, and tracking of fundraising goals and metrics.
5. Identifies, qualifies, rates, and assigns major gift prospects to development officers in support of fundraising goals and objectives.
6. Partners with data analytics staff to identify prospects and refine portfolios.
7. 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.
8. Provides training and database support to development officers on research resources and policies. Assesses unit training needs and develops individualized training plans.
9. Performs other duties as assigned.

Supervisory Responsibility

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

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.)	5	Experience in data maintenance, reporting, and research. Experience in fundraising environment desired.

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

Knowledge of the prospect management best practices and processes. 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. 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.

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

Date: 2/21/2023
