



**JOB INFORMATION**

Job Code	OA54
Job Description Title	Portfolio Strategy Analyst
Pay Grade	UA05
Range Minimum	\$46,900
33rd %	\$56,280
Range Midpoint	\$60,970
67th %	\$65,660
Range Maximum	\$75,040
Exemption Status	Exempt
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:	Development Support

**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.

**RESPONSIBILITIES**

- 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 facilitate strategic conversations regarding the management of prospects, pipeline development and portfolio strength.
- Manages and updates within the fundraiser performance management (FPM) 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.
- 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.
- Provides training and database support to development officers on research resources and policies. Assesses unit training needs and develops individualized training plans.
- Performs other duties as assigned.

**SUPERVISORY RESPONSIBILITIES**

Supervisory Responsibility	May be responsible for training, assisting or assigning tasks to others. May provide input to performance reviews of other employees.
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**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 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	5 years of	Experience in data maintenance, reporting, and research. Experience in 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			
Extreme heat		X			
Humidity		X			
Wet		X			

## WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Noise		X			
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

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