

JOB INFORMATION

Job Code	OA54C
Job Description Title	Analyst III, Portfolio Strategy
Pay Grade	UA07
Range Minimum	\$61,000
33rd %	\$71,170
Range Midpoint	\$76,250
67th %	\$81,330
Range Maximum	\$91,500
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.
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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	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:

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.