UNIVERSITY OF TEXAS MEDICAL BRANCH
JOB DESCRIPTION

JOB CODE: 9809
JOB TITLE: Portfolio Manager
CREATION DATE: 03/03/2012
REVISION DATE: 
FLSA STATUS: EXEMPT

JOB SUMMARY:
Responsible for the development of systems and strategies needed to optimize major gift prospect moves management. Help increase the number of major gifts by strategically prioritizing major gift prospect assignments. Serve as a resource to assist development officers in maintaining high-quality and effective relationships with those who generously invest or have an interest in UTMB’s programs and people.

ESSENTIAL JOB FUNCTIONS:

• Develops and implements a clear strategy for UTMB prospect management efforts:
  o Using statistical analysis of the alumni/development database, develop indicators, benchmarks, milestones, and reports that inform decision-making and support fundraising performance.
  o Make recommendations to the Associate Vice President for Development to build and update major gift portfolios based on prospect management strategies.
  o Periodically review assigned and unassigned prospect base to assess the potential value of UTMB’s development pipeline.

• Working closely with the Assistant Vice President of Development and the Director of Data Management and Reporting, manages the prospect assignment process to maximize the performance of development officers and the prospect pool:
  o Designs and implements a prospect assignment system that incorporates prospect connectivity, capacity, regional assignments, and placement in development cycle.
  o Oversees the implementation of moves management tools, action tracking and reporting through the prospect management cycle.
  o Maintains coding system to track prospects through stages of development cycle.
  o Develops training and procedures for prospect management tools.

• Oversees process for identifying and researching new prospects:
  o Reviews prospect lists (first time donors; consecutive giving, alumni, friends, etc.) and recommends assignments in light of overall prospect management strategy.
  o Develops criteria for selection of new prospects and assignment to development officer portfolios.
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• Conducts periodic reviews of criteria.
• Provides oversight to the department’s research function:
  o Reviews research requests, makes assignments, and assigns priorities.
  o Trains development researchers in best research practices.
  o Develops research profile standards and templates.
  o Supervises research staff.
• Develops policies and procedures based on best practices in portfolio management.
• Works with Stewardship Manager to coordinate management of stewardship prospects in development officers’ portfolio.
• Adheres to internal controls and reporting structure.

MARGINAL OR PERIODIC JOB FUNCTIONS:
• Performs related duties as required.

REQUIRED EDUCATION / EXPERIENCE:
Bachelor’s degree or equivalent and three years of related work experience.

EQUIPMENT:
Standard office equipment.

WORKING ENVIRONMENT/LOCATION OF POSITION:
Standard office environment.

OTHER:
Specific job requirements or physical location of some positions allocated to this classification, may render this position security sensitive, and thereby subject to the provisions of Section 51.215, Texas Education Code.
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ANY QUALIFICATIONS TO BE CONSIDERED AS EQUIVALENTS IN LIEU OF STATED MINIMUMS REQUIRE THE PRIOR APPROVAL OF THE VICE PRESIDENT FOR HUMAN RESOURCES AND EMPLOYEE SERVICES.

THE UNIVERSITY OF TEXAS MEDICAL BRANCH AT GALVESTON IS AN EQUAL OPPORTUNITY / AFFIRMATIVE ACTION UNIVERSITY