



Portfolio Strategy Specialist Position Description

Location: Irvine, CA
Department: Development
Reports To: Data Support Manager
Status: Full-Time, Hourly, Non-Exempt; \$31.79 - \$35.53/hour (DOE)
Schedule: Monday – Friday, 40 hours/week
Benefits: We offer excellent Benefit Plans including incremental PTO Plan; 15 + Paid Holidays plus a Birthday Floating Holiday. 403b retirement plan with a match. Medical & Dental insurance plans with majority paid by employer. Life Insurance plan and Employee Assistance Program paid by employer.

Would you like to go to work knowing that every day you'll be making a real difference in the lives of community members in Orange County? At Second Harvest Food Bank that's exactly what you'll be doing – contributing to our mission to provide food for those who need it. You'll be working alongside team members who are committed to living out the Food Bank's core values of **Integrity & Accountability, People First, Compassion, Purpose Driven, and Stewardship. Come join our upbeat, collaborative team who are improving lives every day.**

About Second Harvest Food Bank of Orange County

Second Harvest Food Bank's (SHFB) Vision: An Orange County with food and nutritional security for all. Our Mission: In collaboration with our partners, we provide dignified, equitable and consistent access to nutritious food, creating a foundation for community health. Since 1983 we have been a source of food security for all members of our community when they need our help.

POSITION DESCRIPTION:

The **Portfolio Strategy Specialist** plays a critical role in advancing Second Harvest Food Bank's philanthropic growth strategy by serving as the organizational engine behind frontline fundraising success. This position bridges data-driven portfolio management with high-quality prospect research across individuals, corporations, and foundations to ensure that our frontline fundraisers are equipped with the right prospects, the right intelligence, and the right processes to maximize their impact.

This role is responsible for building and maintaining a structured portfolio management process across the entire frontline fundraising team, as well as conducting deep, multi-sector prospect research to identify and qualify new major gift prospects and institutional funders. The ideal candidate is highly analytical, exceptionally organized, and passionate about translating data into actionable strategies that fuel philanthropic growth across all giving channels.

This position is highly cross-functional and requires strong analytical, communication, and project management skills to support a best-in-class frontline fundraising operation aligned with organizational values and revenue goals.

ESSENTIAL JOB FUNCTIONS:

Partner with the Data Support Manager to build and implement a structured portfolio management and prospect research strategy aligned with department revenue goals across individual, corporate, and foundation giving.

Portfolio Management for Frontline Fundraisers (45%)

- Implement and maintain a comprehensive portfolio management process for all frontline fundraisers, utilizing clear frameworks for donor and prospect assignment, segmentation, and tiering across individuals, corporations, and foundations.
- Partner with frontline fundraisers to regularly review and refresh portfolios, ensuring constituents are appropriately assigned based on capacity, affinity, giving type, and stage of relationship.
- Analyze donor and prospect data from the CRM to generate portfolio health reports, identifying trends, gaps, and opportunities for frontline staff to act upon.



- Build and maintain dashboards and tracking tools that give frontline fundraisers and leadership real-time visibility into portfolio activity, moves management, and performance metrics.
- Utilize standardized workflows and documentation for portfolio review cycles, moves management, and donor/prospect progression to ensure consistency across the team.
- Identify constituents in portfolios — individuals, companies, and foundations — ready for upgrade, renewal, increased engagement or removal, and surface actionable recommendations to the appropriate frontline fundraiser.
- Help maintain accurate CRM records to ensure data integrity across all frontline portfolios.
- Support frontline fundraisers with briefing materials, donor and prospect summaries, and cultivation talking points drawn from research and portfolio analysis.
- Contribute to continuous improvement of portfolio systems, tools, and processes to increase frontline fundraiser efficiency and effectiveness.

Prospect Research — Individuals, Corporations & Foundations (45%)

Individual Prospect Research

- Conduct thorough, high-quality research on individual prospects, identifying philanthropic capacity, giving history, community connections, and alignment with the organization's mission.
- Produce well-written, actionable research profiles and briefings for frontline fundraisers, senior leadership, and board engagement.
- Proactively identify and qualify new mid-level, major-level and transformational level gift prospects from existing donor data, event attendees, volunteers, board networks, and other organizational touchpoints.
- Utilize prospect research tools (e.g., DonorSearch) and public records to assess individual donor capacity and philanthropic interests.
- Integrate wealth screening data and giving analytics into the portfolio management process to support evidence-based donor assignments.

Corporate Prospect Research

- Research and qualify corporate prospects, analyzing CSR priorities, employee giving programs, cause alignment, sponsorship history, and giving capacity.
- Identify companies with existing connections to the organization (volunteers, event sponsors, in-kind donors) and assess their potential for deeper partnership or increased investment.
- Develop corporate prospect profiles and briefings that highlight giving history, key contacts, decision-making timelines, and recommended engagement strategies.
- Support cultivation and solicitation strategy for corporate prospects in collaboration with frontline fundraisers and the Corporate Partnerships team.

Foundation & Grants Prospect Research

- Research and identify foundation prospects whose funding priorities align with the organization's programs and strategic initiatives.
- Analyze foundation giving histories, grant cycles, deadlines, geographic and issue area restrictions, and application processes to assess fit and readiness.
- Produce foundation prospect profiles and landscape analyses that help frontline staff and grants teams prioritize outreach and cultivation efforts.
- Collaborate with program and grants staff to align prospect research with current funding opportunities and organizational priorities.

Shared Research Responsibilities

- Maintain and grow a pipeline of qualified prospects across all three revenue streams, ensuring a consistent flow of new cultivation opportunities for frontline fundraisers.
- Track and document all research and prospect intelligence in the CRM for organizational continuity.
- Stay current on best practices in prospect research across individual, corporate, and foundation giving and contribute knowledge to team learning.

Leadership, Accountability & Growth (10%)

- Participate in professional development opportunities to strengthen prospect research, data analysis, and fundraising strategy skills.
- Meet organizational deadlines and maintain accurate, timely documentation of donor and prospect activity.



- Contribute to a culture of continuous improvement, collaboration, and accountability within the Development team.
- Support additional development team needs as assigned.

REQUIREMENTS:

- 3–5 years of relevant experience in nonprofit development, prospect research, development operations, or related field.
- Bachelor's or Associate's degree preferred.
- Experience with prospect research platforms (e.g., iWave, DonorSearch, WealthEngine, Foundation Directory Online) a strong plus.
- Demonstrated experience working with donor CRM systems (e.g., Virtuous, Raiser's Edge, Salesforce NPSP, Bloomerang).
- Familiarity with corporate giving programs, CSR strategies, and/or foundation grant research a plus.
- Valid Driver's License and vehicle insurance.
- Flexibility to work occasional weekends and evenings.

QUALIFICATIONS:

Abilities

- Ability to synthesize large volumes of data from multiple sources — including individual, corporate, and foundation giving data — and translate findings into clear, actionable recommendations.
- Ability to manage multiple projects under pressure, balance competing priorities, and meet deadlines.
- Ability to adapt to changing routines and pace of activity due to unpredictable demands without loss of efficiency or composure.
- Ability to use Microsoft Office applications, donor CRM systems, and prospect research tools.
- Ability to write and communicate clearly and professionally in the English language.

People Skills Expectations

- Dedication to developing excellent relationships with colleagues, frontline fundraisers, and external constituents.
- Comfortable presenting data and research findings to frontline staff, leadership, and other stakeholders with clarity and confidence.
- Comfortable interacting with high-level individual, corporate, and foundation constituents with tact and composure.

Work Habits and Professionalism Expectations

- Handle sensitive and confidential donor information appropriately and with discretion.
- Receive direction and constructive feedback and be coachable.
- Work independently and move projects forward with minimal supervision.
- Follow through and complete projects and tasks in a timely manner.

PHYSICAL DEMANDS/ENVIRONMENTAL FACTORS:

- Regularly required to stand, walk, reach, and use hands
- Extended periods of sitting while working on computer
- Occasionally required to stoop, kneel, and crouch
- Indoor office environment with moderate noise
- Lifting occasionally required (up to 25 lbs.)

The above statements are intended to describe the general nature and level of work performed, rather than to be an exhaustive list of all duties, responsibilities, and skills required for the position. The position duties may be changed at any time at management's discretion. This position description is not intended to create contractual obligations of any kind.

Second Harvest Food Bank of Orange County, Inc. is an Equal Opportunity Employer.

To apply, visit <https://feedoc.org/open-positions/>