**UNIVERSITY OF ARIZONA**

**Job Description**

Title: Fund Management Analyst

Office: University of Arizona Health Science (UAHS)

Reports to: Stewardship Manager

Job Status: Exempt Appointment type: Appointed Personnel

General Position Summary:

The Fund Management Analyst will provide support to the development team as they create and exceed fundraising goals and objectives. The Fund Management Analyst will report to the Stewardship Manager and will oversee the use of UA and UA Foundation funds by UAHS Colleges, Centers and Departments, ensuring donor intent is being met.

Duties and Responsibilities

* Refine process for oversight and coordination of use of UA and UA Foundation funds.
* Coordinate with development and donor services staff to identify funds received from key donors as strategic, and research donor restrictions and historical use of funds.
* Proactively work to identify under/non utilized funds and develop plans to use or transfer the monies.
* Develop process to combine/pool scholarships to affect greater utilization of funds.
* Quarterly report on fund usage.
* Present semiannual spendable funds report to various department heads and fiscal managers.
* Assist with stewardship reporting.
* Develop information and case statements for court petitions to change donor intent on restricted funds that are currently not useable.
* For funds related to projects that never developed, work with management to find ways to spend them and still maintain donor intent.
* In collaboration with UAHS SVP Office of Business Administration coordinates transfers between UA and UAF accounts.
* Interface with UAHS leadership & staff, donors, prospects, and faculty.
* Draft, prepare, proof and/or read correspondence, documents, forms, spreadsheets, reports and presentations. Often requires interpretation of UA and UAF policies and knowledge of organizational structure.
* Provide customer service to UAHS Office of the SVP, Colleges, Centers and Departments regarding available funds and historical spending
* Provide guidance on the establishment of new gifts, i.e.: research of existing funds that may be utilized or in determining if a current fund can be modified.
* On complicated new funds, coordinate with UAF, attorneys, UAHS leadership, development and accounting staff related to how funds will be established.
* Notify Primary Responsible Party (PRP), Development Officer (DO) and contact person of new funds.
* Oversee establishment of new quasi-endowment funds and provide historical review of the fund and coordination of parties needed in the process.
* Prepare ad-hoc financial analysis and other analytical support as needed.
* Utilize necessary systems and tools (Excel, UAccess, Outlook, Raiser’s Edge, etc.) in most effective manner to support needs of manager and/or department.
* In conjunction with the Office of the Sr. VP for UAHS and the UA Foundation, create financial models of philanthropic need within the Health Sciences.

Minimum Qualifications:

* Bachelor’s degree or equivalent combination of education and experience
* Minimum five years’ experience in high level administrative position
* Working knowledge and understanding of key financial concepts, and English grammar, to compose and edit business documents and materials.
* Strong aptitude for working with numbers – budgets, financial analysis, spreadsheet development.
* Ability to coordinate and manage various projects and tasks while regularly consulting with appropriate sources to ascertain status of projects in progress and troubleshooting, making adjustments, and meeting deadlines.
* Advanced skills in Microsoft Word, Excel and Outlook.
* Working knowledge of IRS and GAAP regulations related to charitable gifts.

Preferred Qualifications:

* High level of interpersonal skills
* Working knowledge of Raiser’s Edge
* Knowledge of UA, higher education or non-profit environment