Position Description – 7/1/17

POSITION TITLE: Prospect Researcher & Analyst (Non-Exempt)
DEPARTMENT: Operations
REPORTS TO: Chief Operating Officer
SUPERVISES: NA

POSITION SUMMARY

Reporting to the Chief Operating Officer, the Prospect Researcher & Analyst will work to enhance and support fundraising efforts in the area of prospect management, by focusing on prospect pools and pipelines. The Prospect Researcher & Analyst will be responsible for prospect- research and data mining in support of development efforts to uncover and assess new potential prospects for fundraising priorities, as well as track and update information on known donors and prospects. He/she will define, implement, and manage the process for researching, assigning and tracking donors and prospects and produce complex and high quality data analysis to ensure maximum function of the development officer's portfolios. He/she will also be responsible for identifying, compiling, evaluating, and segmenting large data sets for review and analysis in an effort to build a robust pipeline of prospects capable of making major gifts. This position will collaborate with operations, directors of development, and management to help set strategic direction and to ensure fundraising efforts are focused on working with the right donors for the right gifts at the right time.

ESSENTIAL FUNCTIONS

PROSPECT MANAGEMENT – 40%

1. Review prospect information (talking to DO's, correspondence, contact reports, etc.) for appropriate inclusion in the prospect management and tracking system.
2. Develop and manage a prospect rating and screening plan that supports and compliments the development efforts of the UND Foundation
3. Provide high-level research on individuals, corporations, and foundations and prepare profiles containing key information: biographical information, financial assets, potential for philanthropic supports, giving propensity, areas of interest, and other college affiliations. Data must be high quality, thoroughly researched, and accurate
4. Conduct periodic review and analysis of development officer portfolios to ensure the best prospects are assigned based on the parameters of the portfolio and the role of the development officer
5. Work collaboratively with the Sr. Director of Fundraising in leading portfolio reviews and prospect strategy meetings to ensure strong portfolios and facilitate the movement of prospects through the solicitation cycle

ANALYTICS – 40%

1. Work with data analytics to collect, interpret, and summarize data on prospective and existing donors
2. Transform wealth assessment and philanthropic information into analysis for development officers use to build successful strategies
3. Provide donor and prospect related statistical reports and results of prospect research activities and outcomes in concise profiles and briefing materials for development prospect visits
4. Analyze relevant data and develop and execute predictive behavior models to support the development of engagement strategies

5. Analyze prospect data to ensure high quality prospects are identified and communicated to Leadership and development staff
6. Performs advanced analytical tasks and data modeling in support of Organization goals. Translate data into usable format for achieving comprehensive fundraising goals

OTHER – 20%

1. Manage the strategic direction of the moves management program by developing policies and procedures, and proving data and trend analysis
2. Stay abreast of the new information sources applicable for use in research, and current trends in using technology in research and data analytics
3. Work with Chief Operations Officer to set research goals, objectives, and priorities

EDUCATION AND EXPERIENCE REQUIREMENTS

Education: Bachelor's degree preferred.
Experience: 3-5 years' experience in analytical, research, or information specialist role preferably in a higher education setting.

COMPETENCIES

Innovative in technology and best practices
Knowledge of tools and techniques for collecting, synthesizing and analyzing data
Knowledge with prospect research methodology and practice
Familiarity with a broad range of research techniques, internet search strategies, and databases
Ability to identify, retrieve, analyze and synthesize complex data from diverse sources
Exceptional analytical and problem solving skills
Ability to think strategically
Excellent oral and written communication skills
Ability to work collaboratively with colleagues, co-workers and constituents
Strong interpersonal skills
Ability to stay on task within the context of the big picture goal
Ability to handle sensitive and confidential matters with appropriate discretion
Ability to work in a fast-paced environment
Strong attention to detail

Updated July 2017