

POSITION DESCRIPTION

Position Title:	Prospect Research Associate or Prospect Research Manager
Department:	Development
Time Assignment:	Full time
Exemption Status:	Non-exempt
Reports To:	Vice President of Development
Effective:	March 2017

Position Summary:

Enhance and support fundraising efforts in the area of prospect management by focusing on prospect pools and pipelines. 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. Define, implement, and manage the process for researching, assigning and tracking donors and prospects to ensure maximum function of the development officer's portfolios. Identify, and evaluate large data sets for review and analysis in an effort to build a robust pipeline of prospects capable of making major gifts. Collaborate with information services, directors of development, and management to help set strategic direction and to ensure fundraising efforts are focused on working the right donors for the right gifts and the right time.

Essential Duties and Responsibilities:

1. Prospect Management
 - a. Review prospect information through visits with directors of development, correspondence, contact reports, etc., for appropriate inclusion in the prospect management and tracking system.
 - b. Develop and manage a prospect rating and screening plan that supports and compliments the development efforts of the Foundation
 - c. 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
 - d. Conduct periodic review and analysis of portfolios for directors of development to ensure the best prospects are assigned based on the parameters of the portfolio and the role of the director of development
 - e. Work collaboratively with the Vice President of Development in leading portfolio reviews and prospect strategy meetings to ensure strong portfolios and facilitate the movement of prospects through the solicitation cycle

2. Analytics
 - a. Work with data analytics to collect, interpret, and summarize data on prospective and existing donors
 - b. Analyze wealth assessment and philanthropic information to provide direction for directors of development to build successful strategies
 - c. 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 and related metrics
 - d. Analyze prospect data to ensure high quality prospects are identified and communicated to Leadership and development staff
 - e. Collaborate with information services to perform advanced analytical tasks and data modeling in support of organizational goals
 - f. Translate data into usable format for achieving comprehensive fundraising goals

3. Other
 - a. Manage the strategic direction of the moves management program by assisting in development of policies and procedures, and providing data and trend analysis
 - b. Stay abreast of the new information sources applicable for use in research, and current trends in using technology in research and data analytics
 - c. Work with the Vice President of Development to set research goals, objectives, and priorities
 - d. Other duties and projects as assigned

Essential Functions:

1. Set priorities, develop a work schedule, monitor progress towards goals, and track details/data/information/activities.
Tasks:
 - a. Efficiently operate a personal computer and associated software (Outlook, Word, Excel, etc.)
 - b. Maintain files accurately, in paper and in software programs
 - c. Maintain records and prepare reports
 - d. Handle multiple tasks simultaneously
 - e. Plan, prioritize and meet deadlines
2. Establish and maintain positive working relationships with others both internally and externally to achieve the goals of the organization.
Tasks:
 - a. Interact in an effective and appropriate manner with diverse populations, internal staff, University community and the public
3. Work cooperatively and effectively with others to resolve problems and make decisions that enhance organizational effectiveness.
Tasks:
 - a. Maintain confidentiality of records and information
 - b. Display excellent judgment and decision making
 - c. Follow through on projects with little supervision
 - d. Identify problems
4. Speak, listen and write in a clear, thorough and timely manner using appropriate and effective communication tools and techniques.

Minimum Qualifications:

1. Associate's degree
2. 3 years' experience in analytical, research, or information specialist role
3. Ability to identify, retrieve, analyze and synthesize complex data from diverse sources
4. Ability to think strategically
5. Excellent oral and written communication skills
6. Ability to work collaboratively with colleagues, co-workers and constituents
7. Strong interpersonal skills
8. Ability to stay on task within the context of the big picture goal
9. Ability to handle sensitive and confidential matters with appropriate discretion
10. Ability to work in a fast-paced environment
11. Strong attention to detail
12. Proficiency with technology including Microsoft Office Suite

Preferred Qualifications:

1. Bachelor's degree
2. 5 years' experience in analytical, research, or information specialist role
3. Experience working in a higher education or non-profit setting
4. Experience with Raiser's Edge/NXT or other CRM

Physical Demands:

Must be able to remain in a stationary position for extended periods of time. The person in this position needs to occasionally move about inside the office to access file cabinets, office machinery, etc. Constantly operates a computer and other office productivity machinery, such as computer, printer, copy machines.

The position description is not intended to be an all-inclusive list of job responsibilities, duties and requirements: but to describe the standard level of work being performed. Employees may be required to perform other duties as assigned or as required by the needs of the business. The NDSU Foundation and Alumni Association reserves the right to add or change the duties of the position at any time.

Employee's Signature

Date

Supervisor's Signature

Date