

**Job Title:** Prospect Researcher

**Incumbent:** TBA

**College/Unit:** University Advancement

**Job Family:** Specialist/Professional, Phase 1

**Reports To:** Director, Advancement Operations

**Review Date:** September, 2009

### **Primary Purpose of the Position**

The Prospect Researcher, reporting to the Director, Advancement Operations, University Advancement, is responsible for conducting a research program which will support the university's overall development objectives. The researcher's role is to assist in identifying opportunities focused on philanthropic support by compiling, analyzing, verifying and presenting data/research on gift prospects.

### **Nature of the Work**

Reporting to the Director of Advancement Operations, the incumbent is a member of the research team and various other Advancement committees that deal with prospect strategy and fundraising. One of the Prospect Researcher's major roles is to identifying prospects that align with identified opportunities or priorities for philanthropic support at the university. The Prospect Researcher will compile, analyze, verify, and present data/research on gift prospects; produce in-depth individual, corporate, and foundation profiles on major gift prospects; prepare briefing notes; acquire, and analyze financial information; identify new prospects through proactive research; continually update research skills as necessary; provide training on prospect management and clearance and other aspects of the database system to central and college development officers as well as other campus representatives in support of prospect research. The Prospect Researcher will work closely with development program staff, college development officers and senior administration; and build collaborative and effective relationships with all institutional advancement staff. Deadlines are often competing and require the individual to be proactive. Consequence of error is significant.

### **Accountabilities:**

- Systematically identify major gift prospective donors
  - Use a variety of electronic and print resources, synthesize information on prospects to produce clear profiles of their background, career, financial capacity, philanthropic interests, and nature of their relationship with the university
  - Use both standard and novel prospect research techniques and tools to identify new prospects and complete donor background requests, including periodical and electronic screening and/or information provided by the prospect or their organization.
  - Review current local and national news and business publications, keeping abreast of prospect information and local and regional business developments and economic and industry trends and send articles to development staff as appropriate.
  - Analyze constituencies to identify, rate, screen and track prospective donors
- Collaborate and meet regularly with fundraising staff to plan research, proactively identify prospects and plan activities.
  - Review all contact reports and correspondence and debrief with the development officers for information updates and prospect identification leads
  - Advise development staff about new prospect possibilities as appropriate or requested
  - Collaborate with fundraisers to proactively suggest/recommend visits with potential major donors
  - Prepare necessary documentation for visits, such as peer review sheets and briefing notes
  - Consult with development staff to determine feasibility of research requests

- Develop, maintain, and update information on new and existing major gift prospective donors, alumni, volunteers and friends using a variety of electronic and print resources; synthesizing information on prospects to produce clear profiles of their background, career, financial capacity, philanthropic interests, and nature of their relationship with the university.
  - Create profile reports tailored to the needs of required by development staff
  - Provide written reports about specific donors and prospects, containing an analysis of information gathered from various public sources
- Perform detailed financial analysis of prospect's and donor's public wealth indicators to assess philanthropic capacity and analyze geographic and industrial constituencies to identify prospective donors and capabilities for institutional gain.
  - Analyze, investigate, and interpret strategic positioning for and communicate complex information pertaining to major donors, including comprehensive financial analysis, on a variety of subject areas (including law, corporate finance, international and domestic stock markets, medicine, the behavioural and physical sciences, management, engineering, architecture, etc.) for development officers in support of their cultivation, solicitation and stewardship of major donors.
- Develop and implement business processes and guidelines to support prospect management and tracking including prospect request, renewal, and maintenance; managing the data maintenance related to the prospect management process.
  - Ensure data regarding prospect management and tracking is up to date and accurate
  - Ensure that legislated and university fundraising and confidentiality guidelines are communicated and adhered to with regards to information stored in the database and paper files
  - Key contributor to the maintenance and integrity of the alumni and donor database
  - Manage organization record creation and utilize the database (UFriend) to track and store profile data.
  - Train the fundraising team, as well as others across campus, on the use of certain modules and reports within the alumni and donor database
  - Create, implement, and monitor procedures regarding data entry and maintenance of information in the database
  - Mentor the fundraising team on the usage of the database for fundraising purposes
- Support the management of the prospect pool as it relates to identified institutional fundraising priorities (capital projects, research, student engagement activities) and identification of prospects as they relate to themes presented in the university's integrated plan.
  - Consult with the fundraising team on cultivation strategies for prospects including where prospects may be identified for multiple fundraising campaigns/projects
- Contribute to the maintenance and integrity of the alumni and donor database; training stakeholders on the use of modules and reports within the alumni and donor database; coaching the fundraising team on the use of the database for fundraising purposes.
  - Develop, maintain, and update information on new and existing major gift prospective donors, alumni, volunteers and friends.
  - Ensure information maintenance and data entry into the database
  - Safeguard the confidentiality of donor information at all times
- With the development team, contribute to the development of metrics and reporting capabilities for donor activities and prospect assignment.
- Identify new sources of technology and practices for the research unit by attending training sessions and communicating with other researchers through professional organizational memberships,

conferences and electronic mailing lists focusing on development research and fundraising issues in order to improve the services of the research unit.

- Maintain the professional and ethical standards set forth by the Association of Professional Researchers for Advancement (APRA)
- Perform other responsibilities as required.

### **Qualifications:**

- Bachelor's degree, preferably in Business or Library Science
- One or more years of experience in fundraising, preferably prospect or management research. An equivalent combination of education and related experience may be considered. Experience in non-profit sector, campaign and/or fundraising experience is highly desirable. Being a member of APRA would be considered an asset.
- Ability to handle highly confidential information, make sound judgments and meet goals and deadlines in a timely manner; strong written and verbal communication skills; excellent analytical and problem-solving skills and attention to detail; an aptitude for logical thinking; good organizational and time management skills and the ability to manage and prioritize several projects simultaneously; a good understanding of financial principles; proactive with initiative and ability to work independently, collaboratively, and in a team environment; demonstrated leadership in providing guidance and expertise; and the ability to teach and inform others; exceptional understanding, familiarity and expertise using Internet search engines as a research tool, knowledge of the Canadian and regional business scene, and an inquisitive nature and fortitude to identify unknown sources; a commitment to professional ethics, and the ability to interact with development staff as well as experience working in non-profit sector; ability and fortitude to identify unknown sources; working proficiency with current Microsoft Office software and electronic databases.

### **Competencies**

**Leadership / Vision** *The demonstrated ability to build a shared, compelling and credible vision of the future, influencing people to ensure outcomes that support achieving the vision; applicable to all jobs at all levels; a culture of leadership.*

- Influences others to share and commit to a common vision
- Fosters positive work and learning environments
- Values and considers differing points of view before making a decision
- Makes timely decisions even when unpopular or difficult
- Anticipates how decisions affect people
- Delegates authority and responsibility
- Holds others accountable for making and meeting commitments
- Provides continuous, honest and supportive feedback
- Supports development and continuous improvement

**Support for Progress** *The demonstrated ability to initiate, implement, and support innovation and institutional change and enhance programs and services.*

- Challenges the status quo
- Advocates innovation and creativity, even when risk is involved
- Adapts and maintains productivity in an atmosphere of changing practices
- Demonstrates an optimistic attitude towards change
- Demonstrates emotional maturity and resiliency in difficult circumstances
- Engages and supports others in the change process

- Works with, rather than resists, forces of change

**Results Orientation** *Focuses on results and completing objectives within the framework defined by the university's plans and policies.*

- Readily accepts and responds to challenges
- Directly confronts problems and persists in finding solution
- Remains optimistic and persistent in the face of adversity
- Demonstrates courage rather than avoidance to resolve difficult issues
- Identifies shared interests to develop positive outcomes
- Focuses on facts and root causes rather than reacting to symptoms
- Celebrates successes and learns from mistakes

**Personal Effectiveness** *Demonstrates an ability to reflect, clarify and commit to what is important, take responsibility for growth and development, and contribute to positive and productive work and learning environments.*

- Demonstrates integrity and ethical conduct in words and deeds
- Keeps promises and commitments even when unpopular or difficult
- Seeks out and appreciates feedback, demonstrating a commitment to learning
- Accepts ownership and responsibility for outcomes
- Learns and recovers from setbacks / mistakes
- Shares expertise willingly and is sought out as a resource for others
- Forgoes personal recognition in support of success of others
- Takes responsibility for balancing work and personal commitments

**Communication** *The demonstrated ability to convey information and ideas to individuals in a manner that engages the audience and helps them understand, retain, and respond to the message.*

- Communicates clearly and ensures understanding
- Listens actively to understand others' points of view
- Provides useful and valuable information to others
- Demonstrates an awareness of the effects of communications on others
- Understands and demonstrates the need for confidentiality and discretion

**Relationship Building** *The demonstrated ability to develop the rapport necessary to build, maintain and/or strengthen partnerships and relationships inside and outside of the university.*

- Seeks out and promotes positive relationships
- Builds opportunities through collaboration and partnerships
- Maximizes opportunities to achieve outcomes through or with others
- Demonstrates understanding, respect and concern for others
- Participates willingly and openly supports team decisions
- Proactively deals with conflict by openly addressing problems