GENERAL PURPOSE:
This position provides leadership and guidance to development staff in the application of prospect management methodologies and prospect identification best practices, and plays a key role in managing the breadth and depth of the University’s base of support.

The Assistant Director is the point person responsible for overseeing and executing day-to-day prospect management and prospect research activities for assigned Advancement unit(s), in direct collaboration with unit leadership, gift officers and support staff. With emphasis on the identification, assignment and forward movement of unit-allocated prospects, the Assistant Director will collaboratively work with and manage assigned prospect research staff to ensure high quality, dynamic services to the unit(s).

Under the leadership of the Senior Director, the Assistant Director will coordinate with colleagues overseeing other Advancement units to effectively manage workload across the Office of Prospect Management and Research, and ensure that prospect management activities are responsive to the specific needs and overall University-related interests of each prospect.

SPECIFIC RESPONSIBILITIES:

(40%) Prospect Management
- Through formal evaluation, and contact with unit leadership and colleagues through scheduled meetings and informal communication, assess the unit’s strategy and business needs related to prospect management, identification and research.
- Oversee the movement of identified prospects in the allocated unit prospect pool and fundraiser portfolios through regular analysis, review and reporting.
  - Identify assignment priority for prospects in the overall allocated pool.
  - Based on unit strategy and gift officer objectives, assign and optimize prospects to gift officer portfolios to ensure high-priority prospects are appropriately assigned and managed.
  - Assist gift officers and unit support personnel in maintaining timely and accurate data entry into the OASIS system, with particular emphasis on moves management in keeping with prospect management policies and expectations.
  - Assist in the analysis and understanding of gift officer and unit proposal pipelines.
  - Maintain portfolio quality over time through regularly-scheduled portfolio reviews (quarterly, semi-annually), and ad-hoc reviews as necessary.
- Document prospect assignments and work with unit leadership to resolve inter-unit assignment conflicts. Communicate any potential intra-unit assignment conflicts to the Director or appropriate committee for resolution.
• Provide support and assistance to fundraisers in additional portfolio management, trip planning, and prospecting activities as requested.
• Assist the Director in managing the Advancement-wide pool allocation process as needed.
• Collaborate with the Director of Analytics in the design, development, maintenance, and use of analytical and data management tools, dashboards, and other analytical activities as needed.

(30%) Prospect Identification and Research
• Work directly with leadership and staff members of assigned unit(s) to define their needs and share results, and enhance the value and effective use of research in identifying, qualifying, cultivating, closing, and stewarding donors.
• Work with unit leadership to plan and schedule needs for prospect reviews, research profiles, event bios, and prospect identification activities for execution within the available capacity of research personnel and resources assigned to the unit.
• Coordinate and collaborate with Assistant Directors of Prospect Management & Research and Senior Research Analysts assigned to other fundraising units to manage needs which overlap across units.
• Define and execute prospect identification projects in collaboration with unit leadership and gift officers.
• Lead prospect identification activities involving data mining activities in OASIS.
• Collaborate with the unit prospect research analyst to design and execute prospect identification activities for new, currently unknown prospects and “out of the box” prospects via external information and prospect research tools and databases.
• Collaborate with unit fundraising staff and the prospect research analyst to identify opportunities to deepen knowledge of current and potential major gift prospects through the production of profiles and prospect-specific intelligence appropriate with cultivation and solicitation activities.
• Integrate newly identified prospects into the allocated prospect pool for moves management.
• Assist prospect research analyst with research execution during periods of high demand.

(10%) Unit Support
• Provide definitive guidance as first point of contact for unit personnel in the areas of prospect management policy, OASIS data integrity, and moves management.
• Provide initial and refresher training in prospect management policies and data entry best practices as needed to unit personnel.
• Provide leadership and guidance to unit support staff responsible for data integrity as a subject matter expert, and coordinate on data maintenance and data update activities.
• Collaborate with the Office of Analytics as needed to deliver effective support to unit personnel.

(10%) Data Management
Work with senior management to lead the development, planning, and implementation of prospect management policies and procedures. This includes, but is not limited to: reporting; training; and troubleshooting the suggestions of senior management prior to implementation.

Ensure accurate and timely updates to policy documentation and OASIS help through collaboration with Talent Management staff.

Enter and monitor prospect assignments, new prospect records requests, and other essential information as needed.

Manage data quality and correct errors independently or by assisting OASIS clients.

Work with the OASIS systems team to implement and test system modifications to the prospect module in order to increase effectiveness and efficiency.

Monitor user compliance and address issues as needed.

Perform regular audits of prospect management data.

Work with users to clean-up incorrect data entry and, as needed, develop training and support materials on prospect management policies and procedures.

Safeguard the confidentiality of constituent information at all times; uphold departmental policies regarding confidential information. Adhere to ethical and confidentiality guidelines of University Advancement, the University, and the Association of Professional Researchers for Advancement (APRA).

(10%) Management and Administration

Supervise Senior Advancement Research Analyst(s) assigned to unit(s), including managing staff workloads, providing professional development support, and conducting annual performance reviews and acting as an ongoing resource.

Participate as a member of various prospect management committees.

In conjunction with senior management, design prospect policies that meet Advancement business needs.

Audit best practices within the industry and among peer institutions, recommending the adoption and/or modification of practices as warranted. Acquire and maintain working knowledge of all functions and systems related to prospect management and research.

In conjunction with the Director, define resource needs and manage resources assigned to Prospect Management and Research.

Maintain awareness of issues within the development profession, and of the goals and activities of the University of Rochester and its peer institutions. Pursue ongoing professional development through participation in meetings, conferences, and related training opportunities offered by vendors, the University and professional organizations.

Independently manage own workload and priorities, consulting supervisors and/or clientele as necessary.

Other duties and projects as assigned by the Director of Research and Prospect Management.

Qualifications:
• College degree or superior combination of education and equivalent experience required.
• Three to five years of experience in prospect management, prospect research and/or within a complex development operation.

Skills:
• Computing and technical skills and experience, including:
  o Ellucian or similar fundraising information system or equivalent
  o A networked, Windows-based environment
  o MS Office applications, advanced capabilities with MS Excel
  o Designing complex queries and user-friendly databases and reports
  o Visual analysis applications such as Tableau is preferred but not required.
• Superior interpersonal skills, excellent oral and written communication skills, and presentation skills.
• Proven attitude of accuracy and flexibility as to work performed or supervised.
• Tact and diplomacy in communication with a wide variety of personalities and the ability to interact with executive level users is essential.
• A positive attitude, sense of humor, and optimistic outlook in an environment of continuous change and high activity level is critical.