

Prospect Development Support
Sec IV; PG 9
Reports to: Prospect Development Coordinator

General purpose:

This is a key supporting role for Prospect Development, responsible for foundational prospect management support and initial prospect research activities. The position enables greater team efficiencies through effective management and execution of routine and high-volume activities. It resolves problems through critical thinking where review of the situation and data requires careful evaluation, and exercises judgment within generally-defined practices and policies.

Primary Responsibilities:

(50%) Prospect Management and Prospect Research

- Primary management of the Prospect Management mailbox, responding to customer requests on a timely basis and triaging non-routine issues to the appropriate team member, as needed.
- Provides records management, creating and managing prospect records in line with Advancement needs and Prospect Management Policies.
- Provides initial research and capacity ratings for new prospects when prospect records are created.
- Assists in executing additional prospect rating activities and projects, as needed.
- Provides additional initial to mid-level prospect research support.
- Assists the team with OASIS data entry and data management activities, such as updating biographic and research information, updating prospect assignments, prospect and proposal information updates.
- Assists with data integrity and data update activities.
- Assists in the screening, assembly and distribution of prospect management or prospect research reports, prospect news alerts, special research requests, and other projects, as directed.
- Provides back-up resources to support the prospect management activities of the Assistant Director(s) and Director, based on overall workflow.
- Provides back-up resources to ensure daily MAS wealth screening is executed on schedule.
- Works with the entire team to explore and implement process improvements, and identify and create efficiencies in the areas of responsibility listed above.

(30%) Document Scanning

- Execute daily document management processes to the highest level of consistency, efficiency and accuracy:
 - (10%) Review and prepare documents for digital scanning to determine if the documents are scannable and visually appropriate to be stored in the donor file in the OASIS database for future use by University Advancement, Stewardship, for recordkeeping, audits, IRS documentation and other various business functions.
 - Handle archival, fragile and confidential hard-copy documents and files in a manner that maintains the integrity, confidential nature and physical condition of these items.
 - (10%) Input (scanning and importing) of documents and entry of indexing information in the Advancement's digital document management system (OnBase).
 - (10%) Perform quality assurance review of document indexing after entry into the system: This includes, but is not limited to:
 - Approval of scanned image quality (contrast, legibility, completeness of image related to original)

- Correctness of indexing criteria assigned to document
- Reviewing retrieval reports for inappropriate usage or modification of documents.

(10%) General Administrative Support

- As an office manager, manages and performs overall support services in Prospect Development, manages the general office and relative administrative services including departmental billing, ordering equipment, supplies, etc.
- Assists Director with managing departmental budgets.
- Assists Director with managing vendors and suppliers.
- Assist staff with coordination of meetings and calendars.
- Assists staff with submissions for expenses and reimbursements.
- Creates Itineraries, plans and makes arrangements for meetings, conferences and visits on campus, off campus, and out-of-town, for the department.
- Tracks all staff absences for departments on the HRMS tracking sheet and then reviews the accuracy of all the timecards, makes necessary edits, and secures appropriate signatures.
- Process and track professional development and membership requests; track expenditures and assist with expense reimbursement requests; manage records of staff professional development and conference attendance; provide reports on attendance.

(10%) Other duties as assigned

Specific Knowledge Required:

- Working knowledge of the University's Prospect Management Policies
- Working knowledge of the University's Prospect Management Framework, including prospect and proposal stages and OASIS moves management
- Working knowledge of OASIS record types (entity, prospect, program, proposal)
- An understanding of Advancement expectations for documenting prospect interactions and progress
- Working knowledge of data standards and data entry for the OASIS system, including:
 - Biographical information updating
 - Contact reports and information elements included on contact reports
 - Interests/Projects
 - Entity Notes
 - Prospect details, including assignment, stage, readiness, inclination, strategy
 - Proposal details, including assignment, stage, strategy, purpose, cash flow

Requirements:

- College degree and 1 year of relevant administrative experience, or an equivalent combination of experience and training.
- Familiarity with fundraising and Gift Officer activities
- Excellent computer skills, facility with Excel and OASIS, and the ability to understand and use additional provided tools such as Tableau reports and dashboards.
- Strong attention to detail and desire for accuracy.
- A strong customer service orientation.
- A positive attitude and optimistic outlook in an environment of continuous change and high activity is critical.
- Must understand the need to maintain the confidentiality of donor and prospect information at all times, and adhere to the ethical standards of the University and University Advancement.