

Senior Advancement Research Analyst

PG 53

Reports to: Assistant/Associate Director, Prospect Development

General Purpose:

The Senior Advancement Research Analyst is responsible for performing advanced research to support Advancement in identifying, qualifying, cultivating, soliciting, and stewarding donors and prospective donors whose philanthropic resources and interests align with University philanthropic opportunities. The position will utilize public information and subscription-based resources, and will compile biographic, business, philanthropic, and financial data into concise, analytical reports. Strong communication skills, both written and verbal, are essential. Must be able to analyze and interpret information and work independently, while also being an effective strategic consultant for the front-line Advancement team.

With coordination and direction from the Assistant/Associate Director, this position is responsible for executing prospect research activities for assigned Advancement unit(s), in direct collaboration with unit leadership, gift officers and support staff. The Senior Advancement Research Analyst will manage research requests focused on specific prospects, produce profiles and other similar work products, monitor current events news coverage, and collaborate with the Assistant/Associate Director to execute proactive prospect identification projects. A strong client service orientation is necessary for interaction with Advancement staff and other University personnel.

Specific Responsibilities:

(60%) Research Management and Execution

- Work directly with assigned unit leadership, gift officers and support staff to define their prospect research needs and enhance the value and effective use of research in identifying, qualifying, cultivating, closing, and stewarding donors. (15%)
- Analyze and interpret business and financial information from fundraising information systems and external financial, news, biographic sources, social media and other sources as appropriate. (15%)
- Compile biographic, business, philanthropic, and financial data on individuals into concise, analytical reports. (5%)
- Use relevant research tools, track news alerts on selected priority prospects by setting up automated Internet-based alerts. Share information and news alerts according to expected distribution protocols. (5%)
- Deliver relevant information and insights to unit personnel through direct meetings and conversations, and personally following up if the primary delivery method was via email or OASIS upload. (5%)
- Staff unit portfolio review meetings, staff meetings, and prospect reviews as appropriate. (5%)

(20%) Research Process Management

- Through meetings, conversations, conferences, listservs, industry publications and networking, continue to develop industry knowledge to keep abreast of emerging trends and best practices for prospect research and identification, and implement new approaches as appropriate.
- Through meetings and conversations, collaborate with the Assistant/Associate Director, Director, and Prospect Development team members to define information, technology, training, human and other resource needs and appropriately steward resources assigned for prospect research.
- Attend and participate in staff meetings as required, and actively contribute to the success of the team.
- (10%) Manage Donor Relationship Database
- Enter data and maintain individual records in fundraising information systems as necessary.
- Create prospect records in OASIS, or other assigned prospect management tasks as needed.

(10%) Special Projects and Other Duties as Assigned

Skills:

- Excellent writing, analytical and verbal communication skills
- As credibility with internal clients is essential to success in this role, must be able to present themselves and their work in a professional manner at all times.
- A strong client service orientation is necessary for interaction with Advancement staff and other University personnel on research assignments.
- Must have a positive outlook and be highly adaptable to change in a fast-paced, growing environment.
- Must have an innovative, solutions-based approach to problem solving.

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- Must be willing to implement new research techniques as they arise, striving to design the ultimate prospect research methodology.
- Must be able to analyze and interpret information and work independently, while also being an effective member of the Advancement team.
- Must understand the need to maintain the confidentiality of donor and prospect information.
- Must be comfortable working in a deadline driven environment.
- Must excel at quickly and accurately investigating, analyzing, and synthesizing large quantities of data into user-friendly, concise research documents which evaluate a prospect's financial capacity, ability to give, willingness to give, charitable interests, and connection to the organization for the use of advancement colleagues, as well as academic and administrative University personnel, in their strategic donor engagement and cultivation activities.
- Capable of accurately interpreting complex business and financial documents, including Securities and Exchange Commission filings.

Qualifications:

- Bachelor's degree strongly preferred with three to five years of advancement research, development, fundraising, financial analysis, or equivalent professional experience in positions that require inquisitiveness and a methodological approach, such as:
 - Humanities (History, English, Anthropology, Mathematics, Economics, Theatre, etc.)
 - Business (Market, Financial or Business Analysis, Recruiting, Technical Writing, Lead Generation, etc.)
 - Research and Reference (Librarians / MLIS holders, Investigative Journalism / Reporting, Paralegal, etc.)
- A mission-driven approach to the work required of the Prospect Development Team and an understanding of the importance of Advancement to the University of Rochester.
- Experience with fundraising information systems, and preferred departmental research tools.
- Computing and technical skills and experience, including:
 - Ellucian or similar fundraising information system or equivalent relationship management system
 - A networked, Windows-based environment
 - MS Office applications
 - Internet-based searches and research tools
- Healthcare-related advancement, development or fundraising experience would be helpful