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## Auburn University Job Description

Job Title: **Dir, Prospect Mgmt & Research**

Job Family: No Family

Job Code: **BA86**

Grade UA09 \$64,700 - \$116,500

FLSA status: Exempt

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### Job Summary

Reporting to the Associate Vice President of Advancement Services, directs the prospect management and research functions in support of private fundraising efforts by the Auburn University Foundation in accordance with the Office of Development program values and priorities. Using extensive expertise, this position is responsible for overseeing key knowledge management functions, determining how to translate data into usable, actionable information for the formation and execution of fundraising and constituent management states measures of success. Regularly collaborates independently with C-level executives, AVPs, VPs, and the President's office to facilitate a strategic, integrated program of prospect identification, research and donor management in support of major fundraising campaigns.

### Essential Functions

1. Oversees a team and ensures the information systems facilitate a strategic, integrated program of prospect identification, research, and donor management in support of fundraising campaigns.
2. Implements a comprehensive prospect identification program that identifies, rates, and recommends prospects for the university across all programs and a comprehensive program of quality prospect research (biographic, financial, and philanthropic) to support cultivation and solicitation activity by advancement staff, campus partners and the Office of the President.
3. Oversees and proactively manages alerts and other proactive research tools to keep fundraisers up to date on principal gift prospects.
4. Hires, supervises, coaches, and conducts performance management for a team of employee(s).
5. Prepares annual strategic business plan and budget for the research and prospect management unit. Provides quantitative and qualitative analysis of pipeline activity and movement to drive strategic planning across Development.
6. Devises success metrics by which the research program can be measured and evaluated annually and collaborates with the Director of IMS to make recommendations for database modifications needed to support effective reporting and analysis.
7. Maximizes effectiveness of fundraiser portfolios, including the annual review of portfolios and regular portfolio and strategy reviews with the AVPs and all fundraising field staff. Leads portfolio review meetings and assists gift officers in developing targeted strategies toward solicitation.
8. Manages the assignment of prospects and partners with the AVPs to ensure that fundraising activity is coordinated and prospects are moved successfully through the fundraising cycle.
9. Develops and implements training on the American Prospect Research Association (APRA) Ethics Statement on privacy and data usage and ethics guidelines around access to prospect data and usage.
10. Maintains awareness of and consults with development officers as appropriate on advances in development, prospect research, higher education, local, regional, national and international business news and events, and in development affecting the development officer's fundraising area and university-wide initiatives.
11. Ensures that the team participates in systematic and skill-based training to increase knowledge base and enhance overall performance and service delivery.

### Supervisory Responsibility

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## **Auburn University Job Description**

### **Supervisory Responsibility**

Full supervisory responsibility for other employees is a major responsibility and includes training, evaluating, and making or recommending pay, promotion or other employment decisions.

*The above essential functions are representative of major duties of positions in this job classification. Specific duties and responsibilities may vary based upon departmental needs. Other duties may be assigned similar to the above consistent with the knowledge, skills and abilities required for the job. Not all of the duties may be assigned to a position.*



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### Minimum Required Education and Experience

	<u>Minimum</u>	<u>Focus of Education/Experience</u>
<b>Education</b>	Four-year college degree	No specific discipline
<b>Experience (yrs.)</b>	8	8 years overall with 5 years of experience in prospect research and management, statistics, development and/or fundraising, qualitative and quantitative research, relational database products, data structures and reporting, and work in a non-profit or higher education development office. Experience must show progressively increasing levels of responsibility and accountability.

#### **Substitutions allowed for Education:**

Indicated education is required; no substitutions allowed.

#### **Substitutions allowed for Experience:**

Indicated experience is required; no substitutions allowed.

#### **Minimum Required Knowledge**

Strong knowledge of prospect management best practices and experience using standard prospect research resources including, but not limited, to LexisNexis for Development Professionals; SEC documents, Foundation Center or similar; ResearchPoint, iWave, or similar; private company valuation tools; search engines, etc.

Knowledge of prospect research and management, conducting research, analyzing information resources, and experience locating, analyzing, interpreting, and synthesizing biographical, business, and financial data from an array of online and print resources.

Strong knowledge working with relational databases (Raiser's Edge, Advance, Salesforce, Fundraising Performance Management), Microsoft Office Suite, and electronic screening tools.

Proficiency with data management, building complex data queries and prospect segmentation.

Understanding of philanthropy and the donor cultivation process and experience working in a fundraising environment.

#### **Certification or Licensure Requirements**

None Required.

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### Physical Requirements/ADA

No unusual physical requirements. Requires no heavy lifting, and nearly all work is performed in a comfortable indoor facility.

Routine deadlines; usually sufficient lead time; variance in work volume seasonal and predictable; priorities can be anticipated; some interruptions are present; involves occasional exposure to demands and pressures from persons other than immediate supervisor.

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## **Auburn University Job Description**

Job frequently requires sitting, talking, hearing, .

Job occasionally requires standing, walking, .

Vision requirements: Ability to see information in print and/or electronically.

Date: 5/4/2020

