Director of Prospect Research & Data Management
St. Joseph’s Collegiate Institute
Reports to: Vice President for Institutional Advancement
Status: Full time, exempt

St. Joseph’s Collegiate Institute announces an opening for the full-time position of Director of Prospect Research & Data Management ("Director"). Reporting to the Vice President for Advancement, the Director gathers, organizes, manages and disseminates information on prospects, suspects, and donors to guide and support: sound and effective discovery of suspects; constituent research; management of prospect portfolios; and accompanying analytical research and methods in support of fundraising efforts for St. Joe’s. The Director manages the research program for major and principal gift initiatives, including planning; and implements and directs a comprehensive program to support activities that identify and develop relationships with constituents, to encourage their support of St. Joe’s. The Director advises school leadership on the establishment of policies surrounding contact reports, portfolio sizes, moves management, and metrics for development officers based on the latest industry best practices and benchmarks. The Director manages the input and output of all data through Raiser’s Edge, ensuring its integrity and proper usage for Institutional Advancement fundraising efforts.

The Director of Prospect Research & Data Management will provide crucial assistance to the advancement team by developing and coordinating a prospect tracking and management system, and comprehensive research that supports cultivation and solicitation strategies for major gift donors and prospects. As a key member of the Advancement team, and in collaboration with annual giving, alumni engagement and other team members, the Director helps to identify and cultivate future donors through alumni and donor engagement strategies.

Roles and Responsibilities:

- **Research and Analytics** - Identify, evaluate and recommend current and potential major gift prospects and assess their affinity and capacity. Maintain an overall knowledge of top prospects to assist fundraisers in developing appropriate cultivation, solicitation, and stewardship strategies; reference and represent that information at meetings and in discussions, as needed. Provide research and analysis of biographical, philanthropic, professional and financial information of donors and prospects. Prepare written profiles, rating memos, event bios and qualified lists to support the cultivation of individuals, corporations and foundations. Perform quantitative analysis to determine capacity ratings based on financial data to qualify prospects. Track prospects and donors through monitoring daily news, online "alerts," and utilizing internal information. Use push technology to track news and insider stock holdings (as applicable) and provide this pertinent information to the appropriate relationship manager.

- **Relationship Management** - The Director will categorize leadership and major gift prospects/donors in terms of interest, affinity, capacity, and known relationships (if any); and consult with leadership and advancement officers on the assignment of leadership, major and principal gift prospects/donors. The Director prepares capacity/affinity reports, analyzes relationship history, and considers solicitor feedback to substantiate and augment decision-making during the assignment process. The Director will monitor and direct advancement officers’ progress in prospect cultivation, solicitation and stewardship. Additionally, the Director will provide analysis and interpretation of prospect and donor information and facilitate communication regarding prospects. The Director shall regularly advise senior leadership and the President on prospect portfolio profile, size, quality, and churn rate to ensure that all prospects are being acted upon appropriately and in a timely fashion; as well as to facilitate the reassignment or multi-assignment of prospects as needed. The Director plays a leading advisory role in managing the content, profile, and size of portfolios for all advancement officers; and assists in the coordination of prospect assignments to advancement officers. The Director advises on moves management, next steps, strategy, and pipeline status at his/her discretion.
• **Establish & Implement Policies and Procedures** - Coordinate all research aspects for leadership and major gifts, including creating and implementing procedures, managing the research and management policies and procedures manual, maintaining the prospect information management system, coordinating proactive research and creating processes to increase effectiveness by meeting the needs of the advancement staff. Enhance the understanding of research through effective communication and training.

• **Strategy** - Work in partnership with senior leadership and the advancement team to organize and coordinate periodic alumni engagement and donor strategy meetings. Collaborate with senior leadership as well as the advancement team during strategy meetings to develop cultivation and solicitation strategies and facilitate prospect relationship management. Identify new donors for major gift initiatives through proactive research and present findings at strategy meetings. Share information found through research with the advancement team that may assist in the advancement of relationships and in developing strategy. Make recommendations to leadership regarding potential major donors.

• **Data Management** – Create and produce monthly reports and dashboards outlining total cash and pledges received across all fund areas. Work closely with the Business Office for matters of balancing receivables and revenue, reporting on endowed funds, making gift adjustments and pulling fund information for donor stewardship purposes. Manage the input and output of all data through the Raiser’s Edge system, to include pulling data for annual appeal letters, events, mailings, annual reports, emails and e-newsletters, year-end acknowledgement letters, endowment performance letters, audit documents, as well as importing new alumni and parent data and engagement markers derived from digital media. Act as owner and author of all data, ensuring its integrity and high-degree of utilization in fundraising efforts.

**Minimum Qualifications:**

- Bachelor’s degree
- At least 5-7 years in a research or research-related environment, or translatable work experience
- Advanced skills in prospect research and prospect relationship management including an understanding of major gifts and the development process, prospect management tools, gift and planned gift vehicles (wills, trusts) and business, government and legal documents (IRS Form 990, SEC filings, property assessments etc.)
- Fluency in industry accepted best practices of moves management and prospect pipeline optimization.
- Experience with information resources and publications is required, including fundraising databases, online services (DonorSearch and LexisNexis desired), and database overlays
- Understanding of wealth indicators and ability to translate such information into prospect ratings and gift estimates
- Exceptional communication; writing and editing abilities; strong listening, and collaboration skills. Ability to communicate with all levels of the organization; well-developed organizational skills, and attention to detail
- Proficiency in locating and synthesizing material from multiple sources
- Ability to interpret, analyze and summarize complex biographical, business and financial data
- Ability to handle deadlines and changing priorities
- Strong team player
- Demonstration of initiative, motivation, creativity and ability to work independently
- Ability to appropriately communicate sensitive information and to judge how and with whom this information should be shared. Complete respect for confidentiality
- Proficiency with Microsoft Office and data analytic systems
- Demonstrated record of initiative, problem solving, and adaptability

**Candidate Submission Information:**

To apply, please send a cover letter and resume to Dan Warner, Vice President of Institutional Advancement at dwarner@sjci.com.