



University Advancement, 900 University Avenue, 1156 Hinderaker Hall, Riverside, CA 92521

General Information

Job Description	Prospect Research Specialist 3	Working Title	Prospect Development Consultant, Business, Engineering, Sciences, and Medicine
Job Code	007139	Grade	22
Department Name	VCUA – Office	Department Head	Monique Dozier
Supervisor	Heather Morales	Effective Date	

Position(s) Directly Supervised

Generic Scope

Experienced professional who knows how to apply theory and put it into practice with in-depth understanding of the professional field; independently performs the full range of responsibilities within the function; possesses broad job knowledge; analyzes problems/issues of diverse scope and determines solutions.

Custom Scope

Applies skills and experience as a seasoned professional to produce prospect research projects of medium size and complexity. Provides fundraisers and others with strategic information and tools to successfully build relationships with donors.

Department Custom Scope

Campus presence required with hybrid accommodations. As a member of the Prospect Development team, the Prospect Development Consultant serves as a strategic partner to assigned constituency programs and academic units with regard to prospect management, research, and analysis. Using an account management model, the consultant serves as a partner to ensure excellence in service to fundraisers in pipeline and portfolio development. The position will serve as a subject matter expert for assigned units and university priorities, regularly consulting with program or unit lead development officers to ensure gift officer portfolios comply with University Advancement guidelines on composition and stage migration. Please note the budgeted amount for this position is up to \$75,000.

Education & Experience Requirements

Education Requirements

Degree	Requirement
Bachelor's degree in related area and/or equivalent experience/training.	Required

Experience Requirements

Experience	Requirement
4-7 years of related experience.	Preferred
Minimum 3 - 5 years of experience in fundraising, prospect research, prospect management, development, library research, or relate field in higher education environment.	Required

Key Responsibilities

Description	% Time
Oversees all prospect management and research activity for assigned constituency programs and/or academic units. Position is responsible for implementing prospect management strategies, business processes, and protocols. Partners and consults with program or unit lead development officers to ensure portfolio compilation and stage migration is in compliance with Advancement guidelines. Position provides insights and recommendations to enhances prospect qualification, cultivation, and solicitation strategy. Partners closely with Prospect Development Analysts to research and identify new prospects. Coordinates with Assistant Director of Prospect Development and Director of Prospect Development on all principal-level prospects.	40
<p>Contributes to identifying prospect strategies, donor stewardship plans and event strategies to achieve campaign and annual goals and to advance donor relationships.</p> <ul style="list-style-type: none"> Communicates business rules, presents analyses, and makes prospect strategy recommendations to assist development officers in moving prospects through the development cycle. 	15
Designs, prepares and maintains complex reports and analyses for fundraising team to track progress, results, goals and objectives.	15

Description	% Time
<ul style="list-style-type: none"> Serves as the functional lead coordinator for all vendor releases, upgrades, and patches. Oversees all prospect management, research, and analysis prepared for assigned units, actively participating in regular portfolio review meetings with key development officers. May prepare research and analysis or communicate findings from research and analysis prepared by other Prospect Development staff. Understand unit and gift officer metrics and annual goals, and ensure metric data is collected and properly entered into the database. Ability to perform complex analyses and organize information to identify philanthropic patterns, tendencies, and relationships primarily among individual donors and prospects. 	
<p>Partners with assigned fundraising staff to build research resources, data analysis, and training to maintain robust portfolios and status relative to overall goals.</p> <ul style="list-style-type: none"> Holds monthly and annual portfolio reviews with development officers from assigned constituency programs and/or units provides strategies to encourage healthy portfolio churn, and ensures the development officer is on track to meet goals. Provides counsel to individual fundraisers and UA staff in the appropriate use and application of research materials in prospect assessment. Conduct training that complies with best practices and UA policies of proper documentation of actions, stage changes, proposals, qualifications, and disqualifications. 	15
<p>Monitors documentation entered by development community, follows-up, and identifies when appropriate to escalate. Verifies accurate documentation and reporting. Maintains and enhances database(s).</p> <ul style="list-style-type: none"> Conduct audits and creates reports on schedule and ad hoc as needed to ensure consistency and accurate information entered into master database. Regularly reviews contact reports to analyze trends, identify areas of collaboration across campus, recommend next-step strategies, and ensure contact report is classified properly for gift officer metrics. 	15

Knowledge, Skills & Abilities

Knowledge/Skill/Ability	Requirement
<p>Proven ability to manage a project through to completion while performing a wide variety of tasks, adapting to changing priorities, deadlines and directions.</p>	Required
<p>Strong technical skills to utilize and manipulate database, biographical, financial and other research systems and tools. Ability to extract information and generate reports from complex databases. Familiarity with research data interpretation such as SEC, Real Estate and Compensation documentation.</p>	Required

Knowledge/Skill/Ability	Requirement
Strong research, editing and proofreading skills and familiarity with PD resources, in order to evaluate research and edit deliverables.	Required
Strong skills to evaluate issues and identify solutions within defined procedures and policies. Proven ability to address problems and suggest solutions through critical thinking processes.	Required
Thorough knowledge of prospect research techniques, tools and data analysis.	Required
Strong verbal and written communication skills to explain technical concepts and articulate reasoning behind analyses and recommendations. Active listening skills to understand varying opinions and receive feedback.	Required
Interpersonal skills to maintain professional relationships with peers, team members and management.	Required
Thorough knowledge of confidentiality, regulatory and university policies governing research activities.	Preferred
Possess an understanding of wealth indicators, donor motivations for giving, knowledge of ethics statements by the Association of Professional Researchers for Advancement (APRA), Council for Advancement and Support of Education (CASE), the Association of Fundraising Professionals (AFP) and related organizations.	Preferred

Level of Supervision Received

General Direction

Environment

Working Environment

Campus presence required with hybrid accommodations

Other Requirements

Items Used

- Standard Office Equipment

Physical Requirements

- **Climb** : N/A
- **Crawl** : N/A
- **Walk** : Frequently
- **Bend** : Occasionally
- **Stand** : Frequently
- **Squat** : Occasionally
- **Sit** : Constantly

Mental Requirements

- **Communicate Orally** : Constantly
- **Read/Comprehend** : Constantly
- **Perform Calculations** : Constantly
- **Write** : Constantly
- **Reason & Analyze** : Constantly

Environmental Requirements

- **Is around moving machinery** : No
- **Works in confined quarters** : No
- **Fumes** : No
- **Dust** : No

- Is exposed to excessive noise : No
- Drives motorized equipment : No
- Is exposed to marked changes in temperature and/or humidity : No

Critical Position

Is Critical Position: Yes

