



## *Job Descriptions*

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### **Donor Stewardship and Prospect Research Analyst**

#### **ESSENTIAL FUNCTIONS:**

This position will oversee donor recognition efforts through a variety of means including, but not limited to, acknowledgment letters and annual reports; monitor endowed scholarship awards in conjunction with the Financial Aid Office and Auxiliary Business Services

Coordinate all historical record-keeping and information concerning endowment donors; work with donors and/or support development officers as appropriate with information related to endowed scholarships and funds and coordinate all donor and prospect research for the Office of University Advancement and the Office of the President.

Duties include but are not limited to:

Implement and maintain a consistent donor recognition program through letters, events, permanent recognition (naming opportunities, gift clubs, etc.) and annual recognition initiatives (honor roll, gift clubs, etc.)

Draft acknowledgement and special letter from the President and VP for University Advancement as appropriate.

Identify, contact, and meet with donors; qualify donor capacity and prepare cultivation and stewardship strategies for upgrading.

Establish donor agreements regarding scholarship, memorial and similarly endowed funds.

Follow the progress of donations for the life of the agreement.

Ensure donors are informed about the impact of their gifts.

Prepare accurately and timely reports on gifts, endowed funds, scholarships and memorial funds including financial status of funds to donors and administrators.

Provide additional stewardship by identifying and tracking donors' interests and periodically updating donors on University programs or activities of interest.

Monitor the endowed scholarship/awards program in close cooperation with the Financial Aid Office and Auxiliary Business Services (ABS) to ensure appropriate use of endowed funds and that communication with the donors is occurring as appropriate.

Gather and retrieve information from a variety of resources and reference sources; interpret detailed legal, financial, technical, and trade documents, including securities transactions and real property files.

Provide both requested research and proactively provide information on prospects uncovered by research.



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Analyze and organize information to identify philanthropic patterns and relationships among individuals, corporations, and foundations.

Prepare background summaries that provide interests, university affiliations, and estimates of financial capacity to guide the development of cultivation and solicitation strategies by development officers.

Identify potential donors from online databases, internet sources, and printed materials. Proactively uncover new prospects and provide prospect lists at the request of development officers for approved projects.

Daily maintain prospect management module in alumni/development database, including initial data entry and report generation.

Develop and provide training to users on use of system and data entry requirements. Also update and maintain biographic information in alumni/development database.

Work collaboratively with development officers to assess research priorities and strategies for major gift and campaign efforts.

Support development officers with information related to endowed scholarship and funds.

Assist in the preparation of materials and reports on prospects and fundraising initiatives for management review.

Coordinate with development officers, deans, and department chairs to provide information in preparation for donor visits; implement and coordinate donor recognition events in cooperation with major gift officers to ensure consistency; participate in review sessions and in developing major gift strategy to ensure appropriate stewardship and recognition plans are in place.

Perform other duties or projects as assigned.

### **QUALIFICATIONS:**

Bachelor's degree in marketing, public relations, communications or closely related field.

Additional years of qualifying experience may be substituted for the required education on a year-for-year basis.

The full-time equivalent of two to three years of related professional experience.

Prospect research experience preferred or experience in similar areas such as investigative research in the financial sector or internet/database searching for business or educational purposes.

Related experience in development in higher education or comparable environment preferred.

Knowledge of university fundraising and stewardship practices highly preferred.



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### **SPECIALIZED SKILLS AND ABILITIES:**

Working knowledge of and ability to apply standard theories, principles, practices, and techniques applicable to development/research prospect.

Thorough knowledge of policies, procedures, and outside regulations pertaining to development/prospect research.

Working knowledge of operational and fiscal analysis and techniques.

Ability to take initiative and independently plan, organize, coordinate, and perform work in various situations where numerous and diverse demands are involved and where meticulous attention to detail is required.

Demonstrated strong analytical and problem-solving skills.

Skill in the research, development and evaluation of policies and programs, including skill in the collection, evaluation, and interpretation of data to develop sound conclusions and make appropriate recommendations.

Expertise in investigating and analyzing problems with a broad administrative impact and implications.

Ability to anticipate problems and address them proactively.

Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form.

Ability to compile, write, and present reports related to development/prospect research.

Working knowledge of Microsoft Outlook, Word, and Excel, database applications (alumni/development databases preferred).

Familiarity with Lexis/Nexis or comparable software is preferred.

Ability to train others on new skills and procedures and provide lead work direction.

Demonstrated ability to establish and maintain effective working relationships within and outside the work group and serve as a liaison for University Advancement.

Project management skills and ability to work independently as well as collaboratively to achieve results.

Demonstrated dedication to outstanding customer service.

Ability to establish rapport with people from diverse backgrounds.

Exceptional interpersonal skills, including strong listening and interpretive skills. Ability to work effectively with donors, alumni, faculty, administrators, and students.



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Ability to maintain a flexible schedule and work evenings and weekends on occasion.