



## **Job Descriptions**

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### **Manager of Prospect Management**

#### **Job Duties and Responsibilities:**

#### **Plan and manage prospect assignment, prospect and proposal tracking and management. 30%**

- Work with Deans, development officers, and central development staff to formulate policies for prospect assignment, management, and tracking, and facilitate the process as it evolves
- Monitor and direct development officers' progress in prospect cultivation, solicitation and stewardship. Provide analysis and interpretation of prospect and donor information and facilitate communication regarding prospects.
- Coordinate top prospect solicitation and strategy sessions.
- Assign prospects to development officers, approve clearance for solicitation.
- Prepare and distribute prospect management reports. Develop new analytical reports that provide accurate projections of gifts in the pipeline and demographic snapshots of prospect pool.
- Develop, articulate, establish, and implement Prospect Management and Tracking System policies and procedures and training for development officers and university staff.
- Hire, supervise and evaluate administrative support staff as needed. Provide training as appropriate.

#### **Prospect Management and Tracking System Design, Analysis and Administration. 20%**

- Responsible for the analysis, conceptualization, management, and design enhancements of a comprehensive, campus wide computerized prospect tracking system.
- Refine the prospect Management and Tracking system design and concepts to adequately support the management and tracking of prospects, proposals, and donors
- Monitor the system to maintain a high level of data integrity.
- Review campus-wide prospect information (correspondence, strategy memos, contact reports, etc.) for appropriate inclusion on the Prospect Management and Tracking System.
- Review and analyze system generated reports.
- Supervise data entry into and monitor data in the Prospect Management and Tracking System.
- Evaluate and analyze tracking program strengths and weaknesses at appropriate intervals and develop corrective measures as needed.
- Set policies and procedures for content and appearance of data.
- Coordinate content of Prospect Management and Tracking System utilizing unit fund-raising plans.

#### **Program and Prospect Analysis 20%**

- Analyze collected assignment, contact, proposal, pledge and gift data to determine areas for program emphasis and enhancement.
- Maintain an active awareness of goals, objectives, and directions of the development program as a whole.



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- Incorporate them into the Prospect Management operating plans and long-term strategies.
- Translate these goals into the Prospect Management and Tracking system functionality and policy.
- Establish long-range strategies to facilitate state objectives
- Responsible for budget preparation and justification and administration of expenditures.
- Work with Prospect Research Analysts to incorporate new prospects into the Prospect Tracking System, and aid in the referral of prospects to central and constituency units.
- Work with Advancement Information systems programmers to develop new reports and to evaluate, analyze, and articulate recommendation for the Enhancement of the Prospect Management and Tracking System.

### **University/Foundation Liaison 20%**

- Provides leadership in planning and achieving major gift fund raising goals of the Foundation through research, data analysis, writings, training and presentations
- Serves as a member of the Development Cabinet and other committees as appropriate to provide insight and expertise about prospect tracking, prospect management, strategy development, and other relevant subjects.
- Develops relationships that foster an understanding of applications for prospect management.
- Develops and refines services aimed at meeting the needs of people involved in institutional advancement.
- Develop systematic training for development officers, deans, and development assistants in the use of Advance C/S, with emphasis on prospect tracking and management, and deliver it on a regular basis.
- Cultivates personal knowledge of University priorities and programs, research and fundraising techniques, and of individuals and organizations whose involvement with the University would be beneficial.

### **Other duties as assigned – 10%**

### **Knowledge, Skills, and Abilities**

- Knowledge of Prospect Management and Prospect Tracking principles and methods
- Ability to keep accurate records and complete timely reports
- Knowledge of process, ethics and policies of professional fundraising
- Ability to maintain confidentiality of sensitive information
- Ability to communicate effectively, both orally and in writing
- Ability to work collaboratively with colleagues, co-worker and constituents
- Skill and ability to applying knowledge of computerized alumni/donor development systems
- Knowledge of University/Foundation organizational structure, policies and procedures
- Knowledge of microcomputer applications such as e-mail, word processing, spreadsheet applications and alumni/donor databases
- Knowledge of supervisory principals and practices
- Ability to prioritize and handle multiple projects simultaneously

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- Ability to use common sense approaches, work with little to no supervision, and make prudent and sound decisions
- Ability to provide high quality services in a cost-effective manner and to recommend improved methods of performing the work
- Commitment to diversity and an understanding and appreciation of the benefits of a diverse workplace and the knowledge of how to shape processes and procedures that reflect and enhance the diversity of the institution's communities

### **Essential Work Competencies:**

- Demonstrated ability to perform the essential functions of the job, with or without accommodation

### **Mental Requirements:**

- Ability to communicate effectively both orally and in writing
- Ability to handle simultaneously several problems
- Ability to recall, analyze and organize information.
- Ability to keep track of multiple tasks and accomplish them in a timely and reasonable manner
- Ability to maintain a positive attitude during stressful situations, to maintain poise, and apply discretion in stressful work situations
- Ability to reason logically and make independent decisions to solve problems
- Analytical, interpretive, evaluative and constructive thinking within a broadly defined environment
- Ability to independently learn new experimental methods
- Ability to analyze and interpret information and make decisions
- Ability to read, understand, learn and apply technical knowledge, writings and materials
- Ability to use mental skills to recall and analyze information and make complex decisions
- Ability to analyze and comprehend complex situations and problems to reach reasonable conclusions for the proper course of action
- Ability to establish effective working relationships

### **Work Conditions:**

- Ability to work under pressure and with continuous interruptions
- The holder of this position must expect and become used to regular interruptions when in the office.
- Work may be stressful due to multiple deadlines and program requirements.
- Frequent high stress level due to management responsibilities.
- Multiple confidential high skill level work assignments.
- Most contacts by this position are positive in nature as people are generally seeking a positive experience and are wishing you to assist them in making this happen.
- Some negative contact may occur with dissatisfied customer of the unit's services.
- Work occurs in an office environment.
- Must be willing to work evenings and weekends, to travel, and must have a valid driver's license.



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### **Physical Conditions:**

- Ability to sit for extended period of time
- Physical demands are modest
- Frequent sitting, standing and walking
- Visual acuity and manual dexterity are required for keyboarding
- Occasional travel to other university offices and activity sites
- Speech, visual and hearing abilities that are sufficient to read and view written materials and effectively communicate and interact with staff and the public in person and over the telephone

### **Minimum Qualifications:**

Bachelor's degree; four years of full-time experience in prospect management, prospect research, development or a related field and one (1) year of supervisory experience. Any combination of relevant education and experience may be substituted for the educational requirement on a year-for-year basis.

### **Preferred Qualifications:**

Advanced degree in a field demonstrated to have some relevance to this position; program and systems analysis and reporting; familiarity with advancement computing systems; and higher education advancement experience.