



For philanthropy leaders

Job description library

For roles in data analytics, database management, and prospect research

Published - February 2022 • 10-min read

01

Data and business analytics

Associate Director, Business Intelligence & Data Analytics (1 of 2)

Children's Hospital of Orange County

SUMMARY

The Associate Director of Business Intelligence and Data Analytics will serve CHOC Foundation as the primary resource for reporting, data integration and data analysis.

The successful candidate will work collaboratively with, Prospect Development, Data Services, and Information Systems Departments to provide a vision and plan to bring information and data services/products together, improve fundraising operations efficiencies, build solutions, and provide insights to meet the needs of the foundation as we enter into a campaign and beyond.

REQUIRED EXPERIENCE

- Minimum three (3) years of progressively advanced reporting and data management and visualization experience, with complex reporting requirements.
- Previous experience with relation databases for the collection, reporting, and dissemination of data.
- Experience working with online solutions and importing tools.
- Experience creating and managing complex data integrity processes from multiple data sources.

PREFERRED EXPERIENCE

- Experience with Power BI, Qlikview, Omatic data integration, Raiser's Edge, and RE NXT.
- Knowledge of fundraising operations best practices within healthcare or higher education.
- Experience supporting nonprofit organizations, specifically a comprehensive fundraising campaign.

EDUCATION

- Required: Bachelor's degree.
- Preferred: Bachelor's degree in Computer Science or related field.

Associate Director, Business Intelligence & Data Analytics (2 of 2)

Children's Hospital of Orange County

SPECIALIZED SKILLS

- Understanding of data logic and the analytical capability to evaluate and create solutions for end users.
- Ability to independently manage multiple priorities and initiatives involving stakeholders while collaborating with other staff.
- Knowledge of extracting, uploading, and manipulating data through a data warehouse for reporting, data mining, and segmentation.
- Ability to develop reports and querying using SQL, Access, and other reporting tools/applications.
- Strong leadership, team building, project management, vendor management, and customer-service orientation are key characteristics of a successful candidate for this position.

TRAINING

- None required

LICENSURE

- None required

Business Analyst

St. Jude Children's Research Hospital

SUMMARY

Responsible for in-depth analysis of Strategic Partnerships programs by creating and interpreting data from standard and ad hoc reports as well as conducting market research to improve fundraising programs' performance. Capable of understanding and interpreting programming code to ensure the appropriate criteria is utilized for analysis and target audience selection.

REQUIRED EXPERIENCE

- Ability to effectively and concisely communicate with the program stakeholders through verbal, written and face-to-face communication.
- Competent in the use of MS Word, MS Excel, MS Outlook, MS PowerPoint, and other tools that would be used for communication/documentation purposes.
- Proven ability to work well individually and within a team environment; sharing information with teammates as appropriate.
- Ability to develop relationships with the program personnel, exercising strong interpersonal skills.
- Ability to interpret SQL programming codes to ensure accuracy of data criteria. Proven strong meeting facilitation skills.
- Ability to assist with/lead multiple projects simultaneously.
- Knowledge ordinarily acquired through attainment of a Bachelor's degree and 5-8 years marketing analysis experience. Business Objects and SQL experience required.

PREFERRED EXPERIENCE

- Master's degree



Development Data Analyst

Kettering Health Network

SUMMARY

- Responsible for reporting, analysis, and research to support overall fundraising strategy for the Foundation.
- Assists with support and logistical services associated with the Foundation's donor database (Raiser's Edge).
- Maintains accuracy, effective operations, integration, and integrity of the donor database.
- Supports the Data Services Manager and Operations Team as needed in assigned tasks, including gift processing, production of acknowledgement letters, and pulling lists.

EDUCATIONAL REQUIREMENTS

- College degree required

ADDITIONAL SKILLS

- Proficiency in Raiser's Edge database management required; detail oriented; computer knowledge required; ability to handle confidential information appropriately.
- Proficiency in word processing required; familiarity with Microsoft Office Suite required; knowledge of Crystal Reports a plus; data entry management required.

02

Data management and operations

Director, Advancement Services (1 of 2)

Nuvance Health

SUMMARY

- A member of the Foundation management team that provides internal consulting and a wide range of analytic products and services to Foundation staff.
- Works to establish overall goals and strategies for increasing philanthropic support to the Network and its hospitals.
- Responsible for ensuring that the Foundation staff has the necessary data and information for ongoing daily operations and strategic planning.
- Responsible for the development and implementation of the Foundation fundraising databases and prospect development.

RESPONSIBILITIES

- Assumes overall responsibility of prospect development. Develops processes for prospect identification and screening and manages the prospect pool. Develops and implements tools to capture vital prospect information. Works closely with the executive management and volunteer leadership throughout the Network on prospect assignment. Oversees prospect management to maximize fund raising opportunities throughout the Network.
- Develops and implements process improvement initiatives, such as process mapping, automation and digitization, that ensure high quality information and efficient operation of Foundation functions. Provides documentation and workflow analysis support for process improvement.
- Defines needs, compiles data and produce complex reports to provide forecasts, metrics and analyses to inform business decisions of the Foundation management team, clearly communicating strengths and opportunities.
- Directs the maintenance, enhancement, and updates of Foundation databases, and assumes responsibility for their accuracy and integrity. In conjunction with database vendor and ITG department, responsible for the proper functionality of hosted fundraising applications.
- Leads the design and development of analytical projects designed to understand key business behaviors that drive donor acquisition, retention, and engagement.
- Develops and maintains queries, lists, and key performance indicators to enhance the operational effectiveness of Foundation programs.

Director, Advancement Services (2 of 2)

Nuvance Health

- Acts as an internal consultant to fund raisers across the Network on prospects and strategy to position them for success.
- Directs the activities related to the Foundation's ePhilanthropy efforts, including managing the online giving options and the administering of the Foundation's email correspondence system. Collaborates with Network Marketing & Communications Department on the website and social media, updating and providing content.
- Analyzes, implements, interfaces, and maintains ongoing functional enhancements to Blackbaud and other Foundation related technology systems. Serves as the liaison for all technology related initiatives.
- Fulfills all compliance responsibilities related to the position.
- Performs other duties as assigned.

REQUIRED EXPERIENCE

- Blackbaud product experience. 2 years experience with Crystal Reports, or similar reporting programs.
- Advanced skills in Office suite programs.
- Demonstrated in-depth understanding of benchmarking and the conceptualization and use of metrics as tools for enhanced business performance.
- Ability to work effectively as an internal consultant and on multifunctional teams.
- Understanding of relational database and data research & analysis best practices and concepts.
- Experience in Advancement Services, Business Analytics, or related field. Minimum Experience: seven years or more.

Director of Philanthropy Services (1 of 3)

Loma Linda University Health

SUMMARY

Reports to the Assistant Vice President of Philanthropy. The Director of Philanthropy Services serves as the Philanthropy database administrator and is responsible for managing a team which processes gifts, provides reports and lists from Raiser's Edge, and maintains the integrity of the database. Manages specific aspects of Blackbaud NetCommunity. Performs other duties as needed.

ESSENTIAL RESPONSIBILITIES

- Manages the Philanthropy Data Services team, which, using the Raiser's Edge database, processes gifts, creates queries, runs reports, provides data and lists for Advancement staff, and updates constituent records.
- Serves as the database administrator for Raiser's Edge as evidenced by:
 - Primary liaison with Blackbaud and any other contracted vendors regarding data and database issues
 - Primary liaison with LLUH IS regarding functionality of software
 - Assigning and updating user security settings in the database to match users' responsibilities and training
 - Maintaining integrity of the database, including 1) Developing and maintaining policies and procedures and enforcing standards, 2) Creating and maintaining code structure in the database, 3) Globally updating constituent contact information (such as address, phone, email, and deceased) via national services and 4) Importing constituent groups, such as recent graduates, employees, patients and students
 - Managing training program for database
- Creates highly-customized summary and detailed gift reports from database for both internal and external audiences, including monthly campaign reports and annual reports for AAMC, AHP, CAE and IRS 990.
- Maintains knowledge of Raiser's Edge as well as new functionality and programs; recommends new processes and/or programs to improve productivity.
- Consults with Advancement staff regarding data needs to provide them with information to make strategic decisions and implement programs related to communication, solicitation and stewardship.

Director of Philanthropy Services (2 of 3)

Loma Linda University Health

- Helps to strengthen the Advancement team and its processes by actively participating in at least one Advancement Taskforce.
- Manages gift, event, and constituent management portions of the organization's online community (Blackbaud NetCommunity) by:
 - Creating and managing donation pages for which responsibility has been assigned.
 - Monitoring system and triaging assignment of tasks to appropriate staff, including account and event signups, gifts, and constituent changes.
 - Training others regarding use of assigned aspects of product.
- Maintains a log of projects/issues to ensure timely completion and to balance shifting workload. Works on multiple projects with competing deadlines, while paying strong attention to detail. Provides consistent, professional technical support to all users by phone, e-mail and in person.

LEADERSHIP RESPONSIBILITIES

Financial Management : Develops and maintains a quality budget according to the goals and objectives of LLUHS meeting all established time frames established for budget completion;

- Effectively forecasting annual budget needs;
- Minimal necessity for revisions due to inaccuracies or incomplete data;
- Collaborate with medical staff/Administration to find opportunities to reduce cost or enhance revenues;
- Implements appropriate cost savings measures for the department.

Productivity: Develops and implements an effective productivity measurement tool for the department by the end of the fiscal year. Demonstrates ability to use time effectively and proportionately so that responsibilities are completed within designated time frame(s) as evidenced by:

- Prioritizing tasks/projects effectively; initiating changes as required, or as necessary for the improvement of office facilities and staff productivity;
- Exercising good judgment, creativity in solving unusual problems, and flexibility to adapt to changes;
- Managing additional assignments and multiple tasks effectively and efficiently;
- Demonstrating personal attributes and behaviors which contribute to smooth operation of office.

Director of Philanthropy Services (3 of 3)

Loma Linda University Health

Quality of Service: Establishes and maintains effective practices that provide for optimal quality and outcomes for patients/customers. Ensures compliance with regulatory agencies (JCAHO, CMS, Title 22, etc.). Foster continuous learning in all aspects of service including financial, operational, clinical, academic, customer service and innovation. Understands and promotes adherence to the Compliance Plan by:

- Exhibiting behavior consistent with the Compliance Plan and Code of Conduct
- Encouraging staff to prevent, detect and resolve violations
- Detecting and reporting non-compliance with the compliance plan, LLUHS policy and federal/state laws
- Ensuring all employees under his/her supervision complete required compliance training

Human Resource Management: Maintains the facility's Employee Relations Program by:

- Conducting employee performance appraisals according to guidelines and completed by due date.
- Providing positive work environment and mentoring to employees to assure employee engagement.
- Submitting all required personnel paperwork (i.e., disciplinary forms, change of status, etc.) to the appropriate parties in accordance with organizational policy.
- Conducting regular staff meetings and ensuring that all required in-services are attended by staff.
- Updating performance standards and job descriptions on an annual basis.
- Dealing with all disciplinary matters in accordance with LLUHS policy and complying with EEO/AA objectives

Medical, Administrative, and Staff Relations: Maintains positive physician, administrative, and staff relationships as observed from comments, informal observation of problem-solving, and feedback.

Strategic Plan/Implementation: Sets strategic initiatives for department, to complement with LLUHS strategic goals and completes all initiatives timely and effectively

Situational Leadership: Demonstrates the ability to respond positively to changing circumstances. Always acts decisively and takes effective action. Demonstrates consistent and positive interpersonal relation skills. Shares information appropriately. Consistently completes staff assignments in a timely, thorough and appropriately detailed manner.

Supervisor of Operations (1 of 3)

University of Vermont Medical Center

SUMMARY

The Supervisor of Operations oversees the implementation and management of day-to-day operations for all aspects of fundraising management systems that support the development and donor relations functions, and the overall information needs of the development office. The Supervisor will develop strategies based on research of best practices for development operations and will directly recommend and advise the Senior Director of Administration, Academic Health Sciences and ensure the execution of approved processes is completed by the development team.

The Supervisor of Operations will oversee Medical Center gift processing, receipting and acknowledging, gift reporting, management of biographical and professional data, within the database. S/he will supervise staff in the areas of gift processing and donor information system. S/he will be responsible for the management, administration and integrity of the information in the fundraising database and fully supports all list management and reporting for the development office. S/he will advise the Senior Director on future planning priorities, new technologies and recommend tools and systems to ensure best practices in data management and systems. The Supervisor will consult and partner with UVM Foundation development operations and other staff as appropriate.

REPORTING RELATIONSHIPS

The Supervisor of Operations reports to the Senior Director of Administration for the Academic Health Sciences development team. This position supervises two Development Coordinators, and the administrative staff supporting the Medical Center development office. The position collaborates regularly with the Director of Annual Giving, Academic Health Sciences and oversees list management and database extraction for the direct mail program. Additionally, this individual will partner with the front-line fundraising team and research staff to provide the necessary benchmarking tools to monitor progress and chart future and further successful fundraising outcomes.

WORKING RELATIONSHIP/CONTACTS

Works closely with the staff of the Development Office, Accounting, Finance, Internal Audit and Information Systems, Marketing and Government Relations as well as respective offices at the UVM Foundation and the UVM College of Medicine and College of Nursing and Health Sciences as appropriate. In addition, establishes and maintains relationships with external vendors.

Supervisor of Operations (2 of 3)

University of Vermont Medical Center

EDUCATION

Bachelor's degree required; Master's degree preferred

EXPERIENCE

- 5+ years of professional development experience, with evidence of increasing responsibility
- Previous management experience within a Development office
- Experience with development databases including training and monitoring of key measurements.
- Experience in using development software: Blackbaud's Raiser's Edge, Kintera and Sphere highly desired.
- Proven ability in designing and generating fundraising reports and analysis
- Knowledge of existing IRS and FASB regulations related to gift receipting and closed end pledges
- Campaign experience preferred

KNOWLEDGE/SPECIAL SKILLS

- Excellent written and oral communication skills
- Superior analytical skills and ability to synthesize information

JOB ACCOUNTABILITIES

Effectively directs human resources needs within assigned areas of responsibility

- Provides direction, hires, trains, schedules, coaches, counsels and disciplines, evaluates performance and ensures appropriate staffing for business needs.
- Orients, teaches and develops staff by identifying learning needs and creating opportunities for growth.
- Assists the Senior Director with staff planning, development and ongoing team building efforts, including the evaluation of staffing needs and recruitment

Supervisor of Operations (3 of 3)

University of Vermont Medical Center

-
- Participates in ongoing educational opportunities to keep updated on best practices in development and incorporates these within the department.
 - Work with Development leadership team to develop and implement policies and procedures for Development

Fiscal responsibility and efficient use of resources

- Partners with the Senior Director Administration, Academic Health Sciences to develop the annual operations budget
- Continuously evaluates and implements opportunities for enhancing cost effective delivery of services.
- Ensures compliance with the organization and IRS donation laws, policies and guidelines including non-monetary assets
- Coordinates with Accounting, Finance, and, as needed, the University of Vermont Foundation reporting of gifts

Oversees fundraising management systems

- Develops and recommends strategies to the Senior Director concerning Operations components; ensures execution of final strategies
- Oversee gift processing and acknowledgements while continuously streamlining and improving internal processes
- Establish performance goals for monitoring gift processing
- Manage timely preparation and distribution of regular (daily, weekly, monthly, quarterly) reports
- Develop efficient methods for the retrieval and updating of information
- Support the administration of a major campaign as needed

Data Specialist

Loma Linda University Health

SUMMARY

The Data Specialist assists the team in the maintenance and integrity of the Raiser's Edge database, generates detailed and accurate reports for departmental development, as well as performs functions related to the processing of monetary and non-monetary gifts, and distribution of database information. Provides consistent, professional technical support and quality service to all users by phone, e-mail, and in person. Performs other duties as needed.

ESSENTIAL RESPONSIBILITIES

- Assists in the maintenance and integrity of the Raiser's Edge constituent management database; including updating biographical information.
- Processes all gifts, both monetary and non-monetary, to LLUH with accuracy and timeliness.
- Generates detailed, accurate reports and mailing lists from database information to support the communication and development activities of the department. Consults with staff to gather information about report needs, objectives, functions, features, and input and output requirements.
- Provides consistent, professional technical support and quality service to all users by phone, e-mail, and in person.
- Participates in discussion with team in ways to enhance processes and procedures.
- Completes projects in a timely fashion, and to problem solve creatively and effectively.

Coordinator, Gift Services

Loma Linda University Health

SUMMARY

The Coordinator-Gift Services ensures that all gifts are accurately recorded in the database and reconciled with the Accounting Office. Works with Finance Deans, Accounting offices, and Philanthropy team to develop and implement processes to ensure financial integrity, accuracy, and appropriate allocation. Provides consistent, professional technical support and quality service to all users by phone, e-mail, and in person. Performs other duties as needed.

ESSENTIAL RESPONSIBILITIES

- Reconciles gift batches, generates reports to Finance, and prepares batches for daily deposit. Manages the accounts receivable process.
- Works closely with the Philanthropy team to address questions relating to gift designation and to ensure financial integrity and accuracy to match donor intent.
- Manages funds in database in coordination with finance to ensure appropriate accounts are linked between systems as well as any restrictions are places on the funds and matched with donor intent.
- Records donors' pledges in the databases and provides reports including payment forecasts, pledge reminders, account receivables and outstanding pledges that are easily understandable to Philanthropy, Internal Audit, and Finance.
- Maintains campaign pledge files.
- Serves as Administrator for digital record database. Tracks and maintains proposal records.
- Participates in discussion with team in ways to enhance processes and procedures.

Lead Development Coordinator (1 of 4)

University of Vermont Medical Center

SUMMARY

The Lead Development Coordinator plays a very specific and integral role in the Development Office through the entry, maintenance and audit, analysis, and reporting of constituent information in the development database. The position requires mastery in these areas, provides functional guidance to the Development Coordinator, and proactively contributes to the development of systems to ensure the integrity of the data.

The Lead Development Coordinator also works closely with the Director of Annual Giving to generate, track, and analyze lists and merges for the annual giving program and serves as the leader for the logistics and processing of contributions related to Big Change Round Up.

This position serves as a resource for all staff by providing technical support on various pieces of software used in the Development Office. The position partners closely with the Supervisor of Operations and the Director of Administration to implement regular communications with donors through a variety of channels and to develop and implement new office procedures related to the use of technology.

REPORTING RELATIONSHIPS

The Development Coordinator reports to the Supervisor of Operations

WORKING RELATIONSHIP/CONTACTS

The Lead Development Coordinator regularly interacts with all members of the Development Team as well as accounting and finance, marketing and communications and government relations. Other regular contacts include employees, account signors, donors, prospects, event participants, and vendors.

EDUCATION

Bachelor's degree required,

Lead Development Coordinator (2 of 4)

University of Vermont Medical Center

EXPERIENCE

- Minimum of 4 years experience with a relational database, Raiser's Edge experience preferred.
- Experience with Sphere or other online fundraising software is a plus.
- Prior experience in Healthcare, a large organization, and development preferred

KNOWLEDGE/SPECIAL SKILLS

The incumbent must be able to handle confidential information appropriately, have strong attention to detail, accuracy and must be dependable. Must possess strong interpersonal communication skills, written and verbal, including sound grammar, spelling, and punctuation abilities. The ability to prioritize multiple tasks and work with frequent interruption is required. Successful applicants will have a customer service orientation, and the ability to communicate and listen effectively.

Previous experience with Microsoft Office Suite and relational databases. Knowledge of HTML coding is a plus. Must be able to handle multiple tasks, along with the ability to prioritize and balance customer needs. Some night and weekend work will be required as associated with events.

JOB ACCOUNTABILITIES

1) Compiles, interprets and analyzes data in Raisers Edge

- Ensures accurate and timely entry of all giving information into Raiser's Edge
- Maintains checks and balances to ensure the highest level of safety and accountability for all checks, credit cards, stock and cash transactions
- Update and maintain gift, relationship, and other structures in the database
- Generate stewardship mechanisms based on giving 3 acknowledgement letters, new donor reports, tribute cards, etc.- in a timely manner
- Provide data entry support for registration donor information for all special events
- Import and tag data into Raiser's Edge from external systems including FAHC internal databases
- Work closely with Annual Fund and Event staff to analyze ROI and cost per dollar raised of direct mail
- Participate in the development of effective benchmarks and provide data to measure our success relative to those benchmarks.
- Maintains all hard files of donors and gift records

Lead Development Coordinator (3 of 4)

University of Vermont Medical Center

2) Undertakes regular audit testing of the database to ensure integrity and accuracy.

- Posts gifts to Financial Edge daily.
- Develop and complete weekly, monthly and quarterly audits of the demographic and relationship information in the database to ensure the integrity of the data
- Completes periodic duplication procedures to minimize duplicate records
- Partners with other departments: Marketing, Gov't Relations and CHI to ensure data is system is most current
- Using outside services initiate processes to update data including but not limited to NCOA; deceased records and email/phone finders
- Assist in the management of the connection between Raiser's Edge, Financial Edge and Sphere to insure non-duplicate data and smooth integration between the systems

3) Provides accurate, timely and complete reports to software end users and other Foundation stakeholders

- Provide weekly call reports to staff
- Complete all monthly financial reports and provide them to accounting for monthly close
- Run and distribute all monthly fund reports to internal signors and distribution lists
- Provide support to internal account signors on current fund balances and spendable portions of endowments
- Develop other reporting needs as developed and assigned
- Write queries, exports and reports to accommodate other users needs, particularly the Director of Annual Giving
- Work with Supervisor of Operations to track and report office and staff benchmarks to measure success and performance
- Provide extractions, solicitation lists and merges using information from the database
- Implements monthly and quarterly communication tools with selected donors to support fundraising efforts including quarterly e-newsletters, monthly birthday cards, etc.

Lead Development Coordinator (4 of 4)

University of Vermont Medical Center

4) Provide technical support to staff on Raiser's Edge and Sphere

- Provides technical support to staff on the use of the databases
- Periodic lead staff training sessions
- Stays current with changes in technology and makes recommendations on changes that should be considered
- Using Sphere, develop fundraising websites, in partnership with the event staff, to maximize fundraising capacity
- Assists fundraising staff in the entry of demographic and relationship information in the database
- Develop and participate in the roll out new policies and procedures around data management

5) Ongoing support of special projects and ongoing strategic initiatives

- Participate in retreats and annual planning sessions to develop goals and strategies.
- Participate in the development of the UVM Medical Center website, as it pertains to development activities, and other fundraising websites related to events
- Attend community events as necessary
- Participate in other stewardship activities as appropriate and assigned

03

Prospect research

Prospect Management and Research Supervisor (1 of 5)

University of Vermont Medical Center

SUMMARY

The Prospect Management & Research Supervisor is responsible for the development, execution and leadership of a comprehensive prospect management and research program to maximize major and principal gift fundraising success for the Academic Health Sciences including the University of Vermont Medical Center, the University of Vermont's Larner College of Medicine and College of Nursing and Health Sciences, and the University of Vermont Health Network. This position is a key member of the Assistant Vice President (AVP) for Major Gifts' team, partnering with the AVP to set strategies, goals, and systems for the Major Gifts program.

Key responsibilities include the creation and management of prospect management policies, procedures, and strategies including prospect identification, information, and portfolio development; close collaboration with the UVM Health Network and the UVM Foundation fundraising and prospect management teams to ensure fundraising success, collaboration, and efficiencies; and the supervision of two Development Coordinators supporting major gift officers with prospect management, research, and administrative responsibilities.

This position works closely with the major gifts and annual giving teams across the Academic Health Sciences to inform strategy and implement plans that further the common goal of record-setting fundraising results.

This position ensures effective prospect management data analysis, reporting, confidentiality, and integrity, working closely with the Supervisor of Development Operations and other IT and records staff across partner organizations including the UVM Foundation and the Health Network. This includes ensuring other staff are trained in the effective use and tracking of prospect information in the database.

REPORTING RELATIONSHIPS

The position reports to the Assistant Vice President for Major Gifts and manages two Development Coordinators.

WORKING RELATIONSHIP/CONTACTS

This position works in close collaboration with the Major Gifts team for the Academic Health Sciences, the prospect management team at the UVM Foundation, the UVM Health Network Research & Development Strategist, UVM Medical Center and Foundation staff and volunteers, and various outside vendors.

Prospect Management and Research Supervisor (2 of 5)

University of Vermont Medical Center

EDUCATION

Bachelors Degree or an equivalent combination of education and experience in non-profit prospect research.

EXPERIENCE

- Minimum of five to eight years of related experience in prospect research and database management, preferably in a not-for-profit environment.
- Knowledgeable in supporting and interpreting research to advance prospect strategies.
- Effective and efficient project management skills gained through experience in project/process management projects and /or initiatives.
- Must be able to maintain confidentiality and work with donor databases and files.
- Strong data maintenance, management, and reporting experience including knowledge of donor databases, spreadsheets, and word processing
- Excellent written and interpersonal communication skills; ability to combine honesty and diplomacy when communicating with colleagues.
- Strong qualitative and quantitative analytical abilities.

KNOWLEDGE/SPECIAL SKILLS:

- Research, project management, administrative skills, computer skills and a high degree of accuracy and attention to detail in frequently constrained time periods.
- Experience with Raiser's Edge and integration of multiple databases preferred but not required.
- The position is responsible for conducting and documenting research regarding individuals, corporations and foundations for identification and cultivation of donors. Qualified applicants must have experience in research and knowledge of techniques, including online research source.
- Ability to research, evaluate, and interpret both fundraising progress and industry trends using effective data analysis, statistics, and market research tools; experience with predictive modeling.
- Ability to teach and educate colleagues and users about the functionality of the database and how to use it effectively.
- Strong written and verbal communication skills and demonstrated ability to communicate effectively with health care providers and within all levels of the organization.

Prospect Management and Research Supervisor (3 of 5)

University of Vermont Medical Center

JOB ACCOUNTABILITIES

1. Build prospect identification and qualification strategies to promote long-term major gift prospect pipeline.

- Conducts in-depth prospect research on individuals, corporations and foundation prospects.
- Proactively provides prospect leads to Annual, Major and Planned Giving staff members.
- Review of a wide variety of media including newspapers, magazines, and newsletters as well as electronic research resources in order to collect informational clippings on existing and potential donors
- Coordinates information from outside prospect research companies.
- Coordinate and undertake regular database screenings, peer/constituency screenings and ratings
- Utilize quantitative criteria, including income, assets, liabilities, and giving patterns to evaluate and rate each identified prospect's potential and propensity to give.

2. Creates and implements donor prospect management process

- Develop and implement strategies to ensure that newly identified prospects are presented and assigned to fundraisers in a timely and appropriate manner.
- Track prospect assignments, readiness, capacity and other relevant information.
- Create and maintain prospect tracking mechanisms to ensure that major gift officers and their managers have what they need to monitor their progress towards goals.
- Collaborate with fundraising staff to develop prospect identification, qualification, cultivation, solicitation and overall fundraising strategies..

3. Creates, maintains, produces and oversees research information used to identify vital tracking facts for Development Office staff which aides in cultivation of prospects

- Coordinate briefings to be used by staff to prepare for solicitations and events.
- Code the vital information on each prospect to enable efficient retrieval when necessary.
- Develop procedures and guidelines for entering data on prospects and donors.
- Leads and participates in development meetings and enters resulting information and strategies into database as appropriate.
- Works with the Supervisor, Operations to ensure integrity and security of prospect related data in the database

Prospect Management and Research Supervisor (4 of 5)

University of Vermont Medical Center

4. Trains staff in database functions to ensure the integrity of the data as it pertains to research and prospect management.

- Trains Development staff in system changes, upgrades and use(s), policies and procedures related to prospect management and research.
- Develops and updates queries and reports to analyze data for developing new programs and projects. Uses system generated reports and queries to ensure accuracy of data. Runs periodic audits system data for accuracy in data input.
- Work with the Supervisor, Operations to establish controls for information entered into files and database and maintains confidentiality
- Assists staff in using the database for prospect management.
- Evaluate research results to develop and implement further research strategies utilizing ethical intelligence-gathering techniques of the information profession.
- Provide consultative services and orientation sessions on research methodologies and resources to fundraisers, faculty and other key personnel involved in fundraising

5. Preparation of narrative reports and graphic presentations of data

- Coordinate briefings to be used by staff to prepare for solicitations and events.
- Produces accurate and timely reports from database and distribute to users.
- Assesses and employs appropriate methods for presenting information based on user needs
- Provides analysis and writes documents (profiles, bios and project summaries) using style, grammar, and content appropriate to the specific audience.
- Extracts and communicate key information which directs the cultivation and solicitation strategy.
- Glean prospect information through research such as ratings, interests, linkages and relationships is maintained in a complex database system which is accessible to campus-wide fundraising staff and used to develop future cultivation strategies.
- Works with the Supervisor, Operations and other Development staff to determine appropriate reporting structure and needs.

Prospect Management and Research Supervisor (5 of 5)

University of Vermont Medical Center

6. Leadership

- Sets goals for the prospect management & research team, developing organizational capability and modeling how to work together.
- Counsels, guides and mentors direct reports to ensure research needs are met and that work product meets standards for quality and accuracy.
- Motivates, communicates and gains commitment from direct reports for achieving individual and collective performance goals.
- Identifies and communicates key responsibilities and practices to ensure the team of direct reports promotes a successful attitude, confidence in leadership, and teamwork to achieve business results.
- Successfully communicates up, down and across the organization. Understand audiences and tailors communications appropriately.
- Identifies operating budget needs and adheres to allocated funds.

Prospect Research Analyst

Nuvance Health

SUMMARY

Work collaboratively as a member of the Foundation team to find proactive prospect identification leads generated through research tools and data segmentation to grow the organization's prospect pool. Prepare in-depth research to assist in the development of prospect strategies and maintain this data in an efficient and timely matter.

RESPONSIBILITIES

- Collects in-depth research and analysis of prospective and existing donors to successfully articulate biographical, financial, philanthropic and other relevant information within comprehensive research profiles. 35%
- Devises strategies for obtaining new prospects to ensure the ongoing development, expansion, and renewal of the prospect base, to which the Foundation will turn for current and future support. 25%
- Assists in maintaining, updating and improving the Foundation's database records, ensuring accurate and timely data processing. 10%
- Coordinates and maintain a structured prospect management system that effectively tracks and monitors potential donors, identified through the research process, as they progress through the fundraising cycle. 10%
- Conducts prospect review meetings and solicitor portfolio reviews. 10%
- Monitors news and other public information channels related to existing prospects, Nuvance board members and volunteers, and non-profit sector peers. 10%
- Fulfills all compliance related items for the position.
- Performs other duties as required or requested.

OTHER INFORMATION

Knowledge of Blackbaud/Raiser's Edge and prospect management is highly preferred.



655 New York Avenue NW, Washington DC 20001
202-266-5600 | [advisory.com](https://www.advisory.com)