



Director, Advancement Services for Prospect Management (full-time, 35 hours/week)
University Advancement
Position 101980

Position Summary: The Director, Advancement Services for Prospect Management performs in-depth research and analysis on prospects. S/he conceptualizes and develops proactive prospecting methodologies to support fundraising objectives. Analyzes, interprets and summarizes complex financial disclosure documents for purposes of wealth assessment and briefing preparation. Uses specialized electronic resources to gather and analyze information and works with confidential as well as publicly accessible information, with a view to assessing donor interest and viability. Develops focused research profiles, prospect lists, identifies networks and analysis of philanthropic interests for fundraising staff University-wide. Proactively identifies opportunities for prospect identification and qualification. Uses in house and external resources to identify new prospects. Interprets biographical and financial information on individuals, corporations and foundations based on fundraising strategies and objectives. The Director serves as the leader of the Research Team and supervises one or more staff. As team leader s/he is responsible for ensuring the confidentiality of donor and prospect information created and maintained by the team, especially personally identifiable information (PII); and for monitoring compliance with the University policy as well as federal/state/municipal regulations.

Essential Responsibilities Include: The Director supports the qualification of prospect donors, by using standard professional research processes and tools to accurately and efficiently document a prospect's value to Catholic University's Advancement efforts. The Director, and his/her team will analyze complex financial disclosure documents, real estate and other wealth indicators for the purpose of determining accurate capacity rating, indicators of affinity and inclination, and known personal and professional networks. Triages and manages the workflow for the research team so that standard service agreements are regularly met. When necessary, communicates with fundraisers to support good decision-making about priorities and expected outcomes. Applies experience and extensive knowledge of resources to know when reasonable efforts have been exhausted in researching a prospect. Routinely documents sourcing of findings in written profiles. Regularly manages proactive research projects such as developing a potential prospect pool for a Catholic University Initiative. Partners closely with fundraisers to develop full understanding of the Initiatives and to define a suitable approach to the prospecting work. Identify opportunities for more effective and efficient alternatives to fundraiser requests when appropriate. Identifies opportunities for more effective and efficient alternatives to fundraiser requests when appropriate. Provides research guidance and mentorship for research team. Set a good example through actions and professional conduct, including acute attention to confidentiality of donor information.

Manages the prospect pipeline, including managing the assignment of prospects to fundraisers. Uses analytics to support maintenance of robust portfolios for gift offices that reflect CUA's Prospect management guidelines. Creates processes and mechanisms to optimize portfolio management. Presents research findings with clear, succinctly written documents that are suitable to be shared with leadership, Deans, member of the Cabinet and Trustees. Curates the library of prospect profiles so that profiles are easily accessed and so that duplicate profiles are not created. Partners with Gift officers to provide expertise and guidance on accurate interpretation of information. This will support development of strong cultivation and solicitation strategies.

Minimum Qualifications: Bachelor's degree is required. Five (5) + years of professional advancement research experience, Higher-Ed experience preferred. Knowledge of specialized fee-based research databases helpful. Proficiency at formulating an online search strategy required. Excellent writing and organizational skills; excellent computer skills; ability to prioritize and analyze confidential information with discretion required. Strong attention to accuracy and detail required. Ability to multi-task on different projects and initiatives. Ability to work under strict deadlines. Complete proficiency in Microsoft Office, including Word, Excel, PowerPoint and Google. Familiarity with the Raiser's Edge, will be viewed as advantageous. Ability to use extreme discretion when working with highly confidential information required. Proficiency at planning and setting meaningful objectives, integrating the work of prospect research into overall advancement goals. Ability to

understand, communicate, and promote the strategic plan of the department. Development experience preferred. Proficiency with business terms, documents, and practices preferred. Proficiency with wealth indicators and ability to locate and analyze complex financial disclosure documents required. Requires sound judgment, strong self-direction and self-motivation. Demonstrated ability to collaborate with people at all levels, and willingness to function as part of a team.

How to apply: forward application, resume, and cover letter with salary requirements as an attachment to (salary expectations are considered part of application process): CUARecruitment@cua.edu. Reference position **101980** in subject line of email. **Please do not include photos on resumes; save documents with first/last names. All applicants must be supportive of the mission and vision of *The Catholic University of America*.** Position is open until filled.

THE CATHOLIC UNIVERSITY OF AMERICA

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