



Position Title:	Research Director	Job Code:	0123
Reports To:	Executive Director	Job Group:	PEC
Department:	Foundation	Salary Grade:	17
Prepared By/Date:	Luisa Tam/06-22-2009	FLSA Status:	Exempt
Approved By/Date:	Glenn Kaufhold/06-22-2009		
Revised:	Jennifer C. Brito/07-23-2009		

Summary:

The Director of Research and Prospect Management is responsible for the overall coordination and production of information on the prospects and donors to the College for tracking cultivation and solicitation progress, and for prospect identification.

Essential Duties and Responsibilities:

- Responsible for the overall coordination and production of information on the products and donors to the College for tracking cultivation and solicitation progress, and for prospect identification
- Responds to inquiries and prepare concise written reports to determines financial assets, potential for philanthropic support, areas of interest and other College affiliations
- Interprets biographical and financial information on individuals, cooperation's, and foundations based on the development staff's fundraising strategies and objectives
- Proactively identifies prospects for fundraising projects and College-wide support
- Provides information to the Foundation Office on corporate and individual net worth as well as identify corporate connections and business interests; actual and potential interest in the College and personal connections and other key relationships
- Uses daily and weekly sources of information, such as business newspapers, magazines and electronic data sources form important information on past donors, prospects, and for the identification of new prospects
- Assigns prospect ratings based on giving capacity as determined by extensive financial research through on-line database and SEC documents
- Responsible for the overall coordination and production of information on the prospects and donors to the College for tracking cultivation and solicitation progress, and for prospect identification
- Responsible for oversight and supervision of the Foundation's Prospect Management System (PMS) and enforces all policies associated with this system.
- Provide standing and special request reports and data relating to the PMS
- Coordinates all transfers or changes in assignments for all entitles associated with PMS
- Develop a complete working knowledge and policy of the Foundation's PMS
- Performs other related duties as assigned.

Knowledge, Skills and Abilities:

- Knowledge of and ability to utilize IRS statistical net wealth estimation data
- Knowledge of the establishment and use of private personal and family foundations
- Ability to find and evaluate evidence of philanthropic interests in other organizations
- Mastery of SEC data; Mastery of all aspects of real property research
- Ability to employ a wide variety of proactive prospecting methodologies
- Mastery in accurately analyzing, interpreting, and evaluating information

- Mastery of general fundraising strategies
- Ability to facilitate and coordinate definition of relationship management policies and procedures
- Mastery of organization's prospect tracking and management systems
- Understand development and execution of queries, reports and other relationship management tools

Work Environment:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

While performing the duties of this job, the noise level in the work environment is usually quiet.

Physical Demands:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is frequently required to sit and reach with hands and arms. The employee is regularly required to use hands to finger, handle, or feel objects, tools, or controls and talk or hear. The employee is occasionally required to stand and walk.

Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus.

Essential Personnel:

Non-essential

Minimum Requirements:

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.

- Bachelor's degree and eight (8) years of experience or Master's Degree and five (5) years of experience.

ACKNOWLEDGEMENT

I have read and acknowledge receipt of a copy of my job description.

Signature

Date

Printed Name