

Assistant Director of Prospect Management
Job Description – Proposed

As a member of the prospect development team, the Assistant Director of Prospect Management is responsible for the effective management, measurement, and analysis of the movement of prospects through the fundraising cycle. The assistant director works closely with advancement staff to provide strategic insights into prospect and portfolio management in order to build and maintain constituent relationships, and plays a role in the overall success of UCF's advancement enterprise.

Essential Functions/Major Responsibilities:

- Displays and demonstrates overall knowledge of philanthropy, fundraising processes and prospect development initiatives including prospect identification techniques, research practices and prospect management.
- Builds and maintains partnerships with Development Officers and Advancement staff to effectively manage prospect assignments by providing insights for prospect strategy through ongoing portfolio and pipeline analysis and discussions.
- Responsible for the information management of prospect relationship data in the CRM database and reporting of prospect management systems. Experience with the Raiser's Edge, BBCRM, or similar relational database required.
- Provides ongoing training opportunities to Advancement staff and Development Officers on the moves management system and related prospect development functions as a Subject Matter Expert (SME).
- Participates in the Data Integrity Group (DIG) and various Tasks Forces in order to maintain and share current knowledge of Advancement data and database functions, and to provide a prospect development perspective in decision making opportunities.
- Works with Advancement staff to assess prospect management policies and procedures.
- Assists in assigning prospect capacity ratings through the manual manipulation of vendor-generated scores.

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- Develops and maintains queries in BBCRM to assist in data integrity initiatives, analyzes and synthesizes relevant information for appropriate distribution of prospect leads and provides support in prospect identification projects.
- Responds to a broad spectrum of high priority and ad hoc requests
- Records and maintains relevant prospect information in the BBCRM database
- Contributes to the review and evaluation of informational resources
- Provides high level customer service and maintains a solutions oriented mindset
- Creates narrative reports, profiles, prospect alerts, charts, graphs and other data visualizations as needed
- Utilizes independent judgement to prioritize and multi-task daily and long term projects and ad hoc assignments
- Seeks to improve the organization by incorporating best practices, new knowledge and trends within the profession
- Assists in the cross training of new hires and updating prospect development staff on all aspects of prospect development, including prospect identification, prospect research and prospect management
- Maintains a high level of contact with university administrators from all colleges, academic support units and regional offices. Works in partnership with all Advancement staff and consultants to affect a coordinated approach to the prospect development process.

Job Scope:

Duties are performed with limited supervision. Work responsibilities frequently concern confidential and/or sensitive information requiring the use of professional discretion in all communications. Critical features of this job are described above. Nothing in this position description restricts management's right to assign or reassign duties and responsibilities to this job at any time.

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Specific Job Skills:

- Demonstrated skill and knowledge of, or ability to learn quickly, the technology tools available to UCF Advancement, including The Raiser's Edge and/or Blackbaud's CRM, a Microsoft Windows computer environment, and the Microsoft Office suite (including Microsoft Outlook, Word, Excel, PowerPoint and Access) required. Experience with Lexis-Nexis, Wealth Engine's Find Wealth 8, iWave, Foundation Directory, Hoovers, Dun & Bradstreet, Guidestar and other on-line research databases are preferred. Knowledge of Advizor software a plus.
- Must have a sense of initiative and inquisitiveness, be a strategic, creative thinker with excellent prioritization and multi-tasking skills.
- Familiarity with Internet search strategies, and the ability to determine the validity of online sources.
- Proficiency with query techniques and tools used to modify, retrieve, manipulate, and report on information stored.
- Skill in establishing and maintaining effective working relationships, including the ability to communicate effectively. Strong commitment to customer service required.
- Strong written and verbal communication skills, including a strong ability to edit documents for formatting, spelling, grammar, and sentence structure errors.
- High attention to detail and follow-up, and excellent organizational skills required.
- An aptitude for critical thinking and problem solving.
- Must be flexible and adaptable to new programs in an emerging and changing environment.

Minimum Qualifications:

- Bachelor's degree AND a minimum of four (4) years of related professional work experience required.
- Proficiency doing research using a variety of online research databases and other resources.

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- Experience using a relational database management system required.
- Any equivalent combination of experience, training and/or education approved by Human Resources.

Preferred Qualifications:

- Four (4) or more years of professional work experience at a non-profit, education, or related organization.
- Two (2) or more years of experience in prospect development, market research, writing, editing, or a comparable field.
- Understanding of the principals of fundraising and philanthropy, particularly in a higher education setting.
- Proficiency in the use of fundraising software (The Raiser's Edge or Blackbaud's CRM preferred).
- Knowledge of major corporations, foundations and charitable individuals is also preferred.