

## Job Description

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<b>Job Title:</b>	Prospect Research Officer
<b>Department:</b>	Office of Advancement
<b>Reports To:</b>	Associate Director, Prospect Research
<b>Jobs Reporting:</b>	None
<b>Salary Grade:</b>	USG 8/9
<b>Effective Date:</b>	February 2016

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### **Primary Purpose**

The primary purpose of the position is to support strategic and donor-centred fundraising efforts at the University of Waterloo through research and analytical activity. This may include researching existing and potential donors to the University; preparing reports related to fundraising priorities; liaising with Development Officers; and contributing to donor strategies.

### **Key Accountabilities**

#### **Research & Strategic Intelligence**

- Prepare and provide prospect research material to inform Advancement fundraising strategies
- Conduct targeted, complex searches using Boolean logic and multiple e-databases as well as social media to identify relevant information
- Exercise expertise, independent thought and analytical judgement in selecting information to include in research materials based on reliability of source, client needs, departmental goals and university strategy
- Produce concise yet thorough prospect research reports and documents
- Familiarity with and understanding of fundraising techniques and strategies for each phase of the moves management cycle (qualification, cultivation, solicitation and stewardship)
- Provide input and make recommendations on prospect strategy based on prospect research materials and personal expertise
- Identify and interpret financial and wealth indicators and their potential impact on giving including stock transactions, real estate values and corporate holdings
- Understanding of wealth indicators and available research resources in key international Waterloo markets such as Hong Kong
- Monitor global news sources to uncover opportunities for building relationships with potential new Waterloo prospects, or leveraging and developing existing ones
- Aware of best practices in Prospect Research

#### **Prospect Identification & Pipeline Development**

- Conceptualize, develop and implement proactive prospecting methodologies to identify potential major gift donors
- Conduct regular portfolio analyses and reviews with members of assigned Faculties/Units
- Develop and create capacity ratings based on industry standard formulas and an understanding of the impact of life stage and wealth indicators on capacity
- Uncover university affiliations and new opportunities for prospect engagement/connection
- Familiarity with departmental processes for managing prospects including reports and database tracking processes
- Aware of best practices in Pipeline Development and Prospect Management

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### **Faculty/Unit Liaison**

- Liaise with assigned Faculties/Units on behalf of Prospect Research
- Understanding of Faculty/Unit priorities, strategies and goals and how they relate to prospect research needs and services
- Communicate on deadlines and negotiate project details with assigned Faculties/Units on behalf of Prospect Research
- Monitor and contribute to management of pipeline development in the Faculties/Units
- Bring forward opportunities for Advancement training sessions to the Associate Director, Prospect Research

### **Other**

- Assist with maintenance of Advancement print and electronic prospect and donor files
- Ensure fundraising and research data are accurately recorded on the Advancement database with the help of the Research Specialist and other Advancement Services units
- Make recommendations regarding purchases of Prospect Research subscription resources to the Associate Director, Prospect Research
- Train new Prospect Research staff and/or supervise co-op students as required
- Be an active Team Player with all Advancement units
- Other duties as assigned

*\*All employees of the University are expected to follow University and departmental health and safety policy, procedures and work practices at all times. Employees are also responsible for the completion of all health and safety training, as assigned. Employees with staff supervision and/or management responsibilities will ensure that assigned staff abide by the above, and actively identify, assess and correct health and safety hazards, as required.*

## **Required Qualifications**

### **Education**

- Completion of a Bachelor's degree, or equivalent combination of education and experience
- Masters of Library & Information Science preferred

### **Experience**

- 3+ years at a charitable organization preferred
- Previous prospect research experience an asset

### **Knowledge/Skills/Abilities**

- Excellent client service, demonstrating diplomacy in all situations
- Proven strong verbal and written communication skills
- Possess sense of curiosity and collaborative mind set
- Strong attention to detail and organizational skills
- Ability to work independently and as part of a Team
- Excellent problem solving and interpersonal skills
- Strong computer skills, with advanced proficiency in MS Word and Excel, and basic PowerPoint skills
- Ability to build searches using Boolean logic
- Familiarity with donor database software an asset; Raiser's Edge preferred
- Knowledge of electronic news, business databases and social media, their search features and available content

## **Nature and Scope**

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- **Contacts:** Internally, communicates with Advancement staff at all levels to promote and foster a positive relationship with Prospect Research and Advancement Services. May also involve communicating with Waterloo faculty and non-Advancement staff at varying levels of seniority. Requires the ability to handle sensitive and confidential information ethically and with discretion. Externally, will have little regular contact outside the University, but will be expected to develop a network of peers at other institutions and in all instances represent Waterloo in a professional manner.
- **Level of Responsibility:** The position is responsible for supporting Faculty/Unit major gift level fundraising activities through prospect research and prospect management. Requires a significant level of independence and decision making that will impact the success of fundraising efforts. Ensures key issues requiring the attention of the Associate Director are brought forward in a timely manner.
- **Decision-Making Authority:** Responsible and accountable for managing and completing Faculty/Unit prospect research requests based on known deadlines, priorities and strategic plans.
- **Physical and Sensory Demands:** Minimal demands typical of a professional office environment; majority of time will be spent at a desk working on a computer.
- **Working Environment:** Minimal exposure to disagreeable conditions typical of a professional office setting. Some exposure to stress and pressure associated with constant deadlines, competing priorities and the impact of prospect research decisions on fundraising efforts.