



SENIOR DIRECTOR OF DEVELOPMENT RESEARCH AND PROSPECT MANAGEMENT

Position Summary

The Senior Director of Development Research and Prospect Management is responsible for all aspects of development research and prospect management within the Foundation including developing, directing and managing a comprehensive prospect development program for Rutgers University. This program will encompass prospect identification, donor research, wealth and giving capacity assessment, prospect relationship management, market research, data mining and related vendor screening products and relationships. The Senior Director of Development Research and Prospect Management plays a leadership role in developing, implementing, and maintaining a framework and process for supporting the fundraising enterprise, collaborating with and providing critical strategic and analytical expertise, guidance and counsel to the Foundation's President and Vice President of Major Gifts, Vice President of Gift Planning, the Associate Vice President of Corporate and Foundation Relations and the Associate Vice President of Principal Gifts. The Senior Director will also conceptualize, plan and track development activities designed to leverage resources, promote new and unprecedented growth in fundraising revenues and achieve success in the Campaign and beyond.

Key Duties in Order of Importance and Percent of Time

1. Oversee and direct a donor research, wealth and gift capacity assessment program. (20%)
2. Oversee and direct the development, management and division-wide use of a robust and coordinated constituency (prospect) relationship management (CRM) system. (20%)
3. Facilitate and participate in senior staff collaboration on major and principal gifts strategy development as well as the prioritization and evaluation of prospects. (20%)
4. Oversee and direct a data mining and modeling program to support prospect identification, segmentation and engagement. (20%)
5. Oversee, manage and train staff of 8 professional, 2 part-time and one administrative staff members (15%)
6. Plan annual budget, monitor status and overall administration of department. (5%)

Education, Experience, Skills and Special Conditions

- Bachelor's degree required, advanced degree preferred; and 10+ years of progressively responsible leadership experience in advancement research, fundraising, marketing, business development, and/or equivalent combination of education and relevant experience, preferably in higher education.
- Experience with and a deep understanding of philanthropy, higher education and fundraising programs and related strategies with proven ability to collaborate and organize fundraising activities effectively, prioritizing prospects and participating in high level strategies and gift discussions.
- Minimum of 3 - 5 years direct supervisory experience with demonstrated ability to effectively lead, inspire mentor, and develop a goal-oriented professional staff.
- Minimum of 3 – 5 years in capital campaigns with knowledge of campaign procedures, including goal-setting, conceptualizing plans and strategies, prospect and volunteer identification and assignment, developing

materials such as formal presentations, fundraising procedures and processes, high level management reporting, etc.

- Strong organizational and analytical skills with ability to initiate, analyze, monitor, evaluate and advance strategic plans that support the University's mission and contribute to the overall goals and objectives of the fundraising program.
- Superior interpersonal skills with proven ability to successfully interact and collaborate with varied constituencies in a professional manner, including University leadership, exhibiting excellent written and oral communication skills and demonstrating tact and diplomacy working with a wide variety of personalities.
- Ability to lead groups and projects as well as function as part of an integrated senior management team.
- Comprehensive management information systems experience and a proven track record of effective technological project planning and implementation, including policy development, end-user training and documentation.
- Expert knowledge of wealth and giving capacity modeling and forecasting methodologies, data mining and analysis.
- High level of computer proficiency required; must have working knowledge of major research databases and technology tools, as well as expert knowledge of the Window environment (Microsoft Word, Excel, PowerPoint and Access) and major statistical software packages (SAS, SPSS, DataDesk, Tableau, Advizor Solutions, etc.) and relevant vendor services.
- High degree of professionalism ethical sensitivity and discretion; ability to maintain a commitment to confidentiality; apply good judgment and proven responsible decision-making skills.
- Ability to manage multiple projects and priorities and meet challenging and changing deadlines.

Other Critical Job Information

The Sr. Director of Development Research and Prospect Management is a member of the senior fundraising management team. This individual will demonstrate leadership capabilities central to the continuous improvement of the University's fundraising efforts. The position will oversee the strategic growth of the department in support of a \$1+ billion campaign, ensuring that significantly increased and timely output is achieved and balanced against high-quality information that has a measurable impact on fundraising success. Key responsibilities and performance indicators, include:

1. Articulate an overall vision and strategic direction for prospect development at Rutgers University that is seamlessly integrated with the goals of the Campaign and is reflective of the growing and sophisticated fundraising environment. Create the staffing plan, organizational structure, budgets, policies and procedures necessary to support these objectives. Foster a sense of collegial teamwork and institutional growth among all members of the staff and endeavor to provide staff with opportunities for professional growth through career advancement and educational programs with a quintessential goal of building a first-class department of research and prospect management that is considered a leader in the nonprofit sector.
2. Establish standards for engaging in high-level donor research, establishing operating principles, standards, strategies and goals for conducting wealth and gift capacity assessment, leading the department in developing proactive, ethical prospecting and profiling methodologies to support the identification and rating of potential donors to advance the University's mission. Develop methodology for accurately projecting a donor's giving capacity in alignment with the gift levels of the campaign gift table pyramid, staying abreast of new techniques, trends in philanthropy and the economic environment, and regularly reviewing and adjusting policies and procedures, as needed.

3. Direct and approve protocols and formats used to prepare briefing reports, evaluations, charts and presentations for the use of the University leadership (University President, Foundation President, Deans, etc.), senior management (department heads) and major and principal gifts fundraisers.
4. Provide ongoing opportunities for Assistant Director and Research Analysts to hone their skills, network with peers, and remain highly effective at performing a variety of advanced financial and statistical analysis techniques, including: ratio and trend analysis, assessment of earnings per share, book value vs. market value analysis, evaluate debt and equity instruments (analyzing securities, options, insider trading reports, merger and acquisition documents, etc.), develop private company valuation models, income and asset analysis, market, sector and demographic analysis, understand and use national statistics to determine appropriate application for developing various forecasting methodologies.
5. Establish policies, procedures and best practices for prospect relationship management, including operating principles for prospect identification, assignment, coordination and collaboration, contact and moves management, proposal development, benchmarking, program evaluation and performance standards for fundraiser accountability, and ethical guidelines related to managing donor privacy and confidentiality.
6. Lead the conceptual redesign and integrated use of the prospect management module of the SUNGARD Advance database that recognizes and supports the needs of the various fundraising programs and that connect them to the department's overall strategies for increasing fundraising revenues and for managing the complexity of campaign activities. Chair and facilitate discussions of the Prospect Assignment and Management Committee, engage vendors and consultants, as needed, and work closely with the Information Technology Services department and programming team to implement necessary system enhancements, create standardized and custom fundraising management reports, and develop end-user training.
7. Oversee and direct staff managing the day-to-day operation, maintenance, auditing and end-user support of the prospect management system. Provide ongoing opportunities for Prospect Management staff to hone their skills, network with peers and remain highly effective at managing the system, policies and related procedures.
8. Develop and manage internal processes, including setting priorities for campaign strategy sessions, creating protocols for articulating and recording formal strategies, developing standardized formats for cultivation and solicitation briefing reports, various campaign tracking reports, including financial, regional, program, volunteer and proposal pipeline reports.
9. Facilitate and participate in major and principal gifts strategy development, assisting with regular evaluation of program performance, individual fundraiser prospect pools, prioritization of prospects, uncovering and understanding key relationships, and regularly identifying, evaluating and assigning new prospects to managers. Collaborate and engage in regular communications with other unit managers and 70+ frontline fundraisers.
10. Plan, implement and direct a market research, data mining and modeling program, identifying specific Advancement issues for examination and analysis. Leverage data sources and determine protocols for data retrieval; initiate and supervise staff's retrieval and analysis of data to determine trends and provide increased understanding and hypothesis testing of patterns in alumni, donor and volunteer behavior, identify and forecast growth opportunities and address challenges.
11. Plan for and manage a robust prospect identification program, employing sophisticated data mining and modeling techniques to increase the number and improve the quality of newly identified prospects and address specialized fundraising initiatives, programs and priorities.
12. Evaluate available vendor services and data sources, negotiating all related service contracts. Lead efforts and direct the coordination to acquire, append and apply quality demographic, marketing, predictive modeling and electronic screening data across the constituency database for the purpose of enhancing analysis and segmentation.

13. Stay abreast of current and emerging trends in philanthropy, fundraising, higher education and business; and prepare and disseminate presentations and executive summary reports.

Familiarity and facility with the following equipment, software, and specialized materials is required:

Sungard Advance (RADAR) database

Vendor services related to asset, wealth, and corporate, philanthropic and demographic electronic database screenings, such as those offered by Wealth Engine, Target Analytics/Blackbaud, Grenzebach Glier & Associates, Bentz Whaley Flessner, among others.

Subscription databases such as those available from Lexis-Nexis, Hoovers, Dun & Bradstreet, Foundation Center, Factiva, 10K Wizard, BoardEX, among others.

Microsoft Office products, including excellent knowledge and use of Word, Excel, Access and PowerPoint.

Knowledge of and proficiently with major statistical, business intelligence, data mining and data visualization software packages (SAS, SPSS, DataDesk, Tableau, and/or Advizor, etc.) and ad hoc reporting tools (Cognos, Business Objects, Oracle Explorer, etc.)

Please visit our website to apply for this position:

<https://careers-ruf.icims.com/jobs/1008/job>