

UNITED WAY GREATER VICTORIA JOB DESCRIPTION

Position: Manager, Prospect Research

April 2017

Nature and Scope

Reporting to the Director, Resource Development the Manager, Prospect Research will cover a broad range of duties. The successful incumbent will lead, develop and execute the UW's research and donor management processes, systems and duties related to individuals, corporations and foundations. The applicant should be comfortable interpreting and synthesizing large volumes of data into easily comprehensible formats; and creating related narrative reports, tables, and charts.

Working as part of an integrated resource development team and in conjunction with the Finance and Information Technology department, develop prospect and donor management systems and processes related to our CRM platform and build research and data collection capacity of the organization.

General Accountability

The incumbent for this position performs all duties and activities in accordance with the Vision, Mission and Values of the United Way of Greater Victoria and adheres to the organizations policies, procedures and protocols at all times.

Specific Accountabilities

- Develop, implement, and manage systems and procedures to meet the information needs of major gift and annual giving (workplace) in preparation for contacting, cultivating, and soliciting major gift prospects (individuals, corporations, and other organizations, such as foundations).
- Devise strategies for obtaining new prospects in order to ensure the ongoing development, expansion, and renewal of the prospect base to ensure current and future support.
- Attends UW and public events to assist the MG team to identify, cultivate and steward relationships as appropriate.
- Participate in and contribute to the formulation of United Way's development planning as it pertains to: information systems developments; the processes and procedures of prospect management; and related infrastructure support services.
- Create profile reports tailored to needs of individual development programs.
- Maintain policies and procedures for the prospect research program.
- Monitor local and national news and business publications, keeping abreast of prospect information and local and regional business developments and economic trends that may impact fundraising strategies for current donors and prospects. Send articles to development staff and management team as appropriate.
- Maintain and develop professional relationships with local prospect researchers, as well as national and local associations.

- Keep abreast of trends in the field of prospect research, emerging technologies, and available research tools.
- Synthesize and analyze prospect information and classify prospects according to linkage, interest and financial ability.
- Create narrative and analytical reports and develop tables, charts, and illustrations as required to describe a prospect or group of prospects.
- Determine content of briefing materials prepared for calls.
- Prioritize research activities.
- Populate, organize, and maintain shared information systems.
- Manage research information services and review annual contracts.
- Manage administrative staff to ensure a high level of professionalism, accountability and project delivery for the area of Individual Giving.
- Proactively update and maintain prospect records while adhering to all appropriate ethical and privacy laws.
- Adhere to ethical and confidentiality guidelines of UW, the Association of Professional Researchers for Advancement, and the Association of Fundraising Professionals.
- Maintains the highest level of confidentiality and safeguards the privacy of donor information at all times.

Qualifications

Skills and Abilities

- Strong organization, prioritization, and problem-solving skills.
- Strong written and oral communication skills.
- High degree of initiative and proven research skills.
- Proficiency in locating and synthesizing material from multiple sources.
- Ability to interpret, analyze and summarize biographical, business and financial data.
- This position requires the ability to make sound judgment, demonstrate the ability and fortitude to identify unknown sources.
- Demonstrate knowledge and understanding of local business environment and corporate management structures.
- Excellent attention to detail.
- Ability to handle deadlines and changing priorities and multitask.
- Strong team player.
- Negotiate timelines and workflows for resource development staff holding prospect portfolios.
- Strong knowledge of prospect research protocols, techniques and information systems.
- Ability to meet expectations of varied workdays, to attend meetings/ special events which occur outside/ beyond regular office hours.

Formal Education

- Bachelor's degree in library science, business, or related field.

Experience

- Three years of work experience in development research.
- Experience working with information resources and publications is required, including fundraising databases and other on-line services.
- Thorough computer skills, including working with Microsoft products, online database searching, and use of the Internet. Show initiative in identifying new sources of information, as they become necessary and/or available.

The above reflects the general details to describe and evaluate the principal functions of the job identified, and shall not be taken as a detailed description of all the work requirements.