Summary

The Senior Associate Director of Advancement Operations reports to the Director of Advancement Operations and serves as an integral part of the Institutional Advancement team.

This position will lead two teams in partnership with the Director, and will manage two direct reports:

1. The Prospect Management and Research team is comprised of 3 staff members who provide prospect research profiles, data mining and analysis, and portfolio analysis.
2. The Advancement Services team is comprised of 4 staff members.

This position is responsible for overseeing moves management through pipeline stages, portfolio balancing, and analysis of Blackbaud Fundraiser Performance Management reports and dashboard metrics. Additionally, this position will serve as the system administrator for Blackbaud and will support system users.

This position requires an understanding of fundraising and prospect management, experience using CRMs and analyzing reports, and a commitment to data integrity. This position works closely with the AVP of Individual Giving to support the Gift Officers and the Office of the President.

Essential Functions

- Lead Prospect Management by partnering with fundraisers in the management of their portfolios, including facilitating regular portfolio review sessions with their team leads.
- Oversee Prospect Research and use data mining to inform discovery and active pipeline management.
- Contribute to the refinement of existing prospect management and tracking system policies, including documenting business rules, and recommending enhanced approaches and techniques.
- Create curriculum and lead training for all team members who use the Blackbaud system.
- Collect and evaluate suggestions from end users about system improvements, new processes, and reports.
- Oversee Advancement Services to ensure data integrity and lead data auditing projects so that system records support reporting, analysis, and data mining for decision making.
Office Management and Project Management – 30%

1. Manage and assess the Prospect Management and Research team, as well as the Advancement Services team, on a day-to-day basis.
2. Oversee and mentor staff to ensure the utmost integrity, accuracy, and confidentiality of their work. Supervise and procure training to strengthen the professional development of the teams and to ensure industry standards and best practices are met.
3. Establish priorities and ensure that all deadlines are successfully met.
4. Serve as a resource for Advancement Operations information and strategy in meetings and in discussions.
5. At the direction of the Director of Advancement Services, collaborate to develop an operating plan for the Office of Prospect Research and Relationship Management and work to develop measurable goals for the team.

Prospect Management – 60%

1. Oversee the Relationship Management system for the Office of Institutional Advancement. Maintain the data integrity of the relationship management system in Banner and supervise the data entry of relationship management information.
2. Manage prospect assignment process and balancing of fund raising staff's portfolios.
3. Work closely with other members of the Advancement Services team to ensure the integrity of the College's prospect database and will have a thorough working knowledge of the prospect database management system. Play a key role in maintaining updated information on this system.
4. Develop and analyze metrics to show pipeline activity, and develop metrics to quantify the operations of Institutional Advancement. Prepare reports for the President, IA Vice Presidents, and Gift Officers regarding prospect activity.

Prospect Research – 10%

1. Oversee and manage proactive screening projects to identify and qualify potential new donors and segments. Develop strategic plans for engaging new prospect segments in alignment with fundraising priorities and campus-wide initiatives. Create a plan for the research and qualification of prospects identified through outside wealth screenings.
2. Prepare briefings/information for the President, Vice President and Associate/Assistant Vice Presidents and well as a gift officers as needed.
3. Maintain skills and knowledge of online research resources, technologies, and methodologies.
4. Work with vendors to maintain contracts for subscriptions.

Knowledge/Experience Requirements

- Bachelor's degree required.
- Five or more years' experience in a prospect development role.
- Ability to lead multi-team projects, and create and manage project plans.
- The ideal candidate is a curious, detail-oriented individual with analytical skills who enjoys working in a team environment and is comfortable with databases and manipulating data.
• Excellent organizational, time management, and decision-making skills to prioritize work, meet deadlines for simultaneous projects, and make decisions using independent judgement.
• Candidates must possess the ability to interpret business and financial data as well as experience in producing high-level analyses about development related questions.
• Requires ability to handle multiple assignments with minimum supervision while meeting strict deadlines in a fast paced environment with the ability to multi-task and think analytically and intuitively is important.
• Must have excellent writing skills, and be detail-oriented and accurate.
• Extensive computer experience required, including database knowledge, online prospect research skills (e.g. WealthEngine, Lexis-Nexis, etc.), and Microsoft Office competency.

APPLICATION INSTRUCTIONS

Please submit a resume and cover letter explaining how your qualifications meet the requirements of the position to resumes@oxy.edu.

As a condition of hire for a staff position and for appointment to a faculty position, Occidental College requires that all candidates who have received a conditional offer of employment complete an application form (if they have not already done so) and consent to a background check. Satisfactory completion of a background check, along with pre-employment verifications and references are required as a condition of employment, but only as permitted by federal, state, and local law, including the City of Los Angeles Fair Chance Initiative for Hiring Ordinance.

We will consider for employment all qualified Applicants, including those with Criminal Histories, in a manner consistent with the requirements of applicable state and local laws, including the City of Los Angeles’ Fair Chance Initiative for Hiring Ordinance.