Associate Director of Prospect Management
Institutional Advancement

POSITION SUMMARY

Reporting to the Executive Director of Advancement Operations and in partnership with IA's senior leadership, the Associate Director of Prospect Management provides senior level subject matter expertise and oversight of prospect development. The Associate Director helps influence the guidance of fundraising efforts by building a prospect management system, including a sustainable pipeline of annual, major, and planned gift donors to Occidental College.

Using prospecting tools such as research databases, screening, and data modeling to identify potential prospects, the Associate Director builds and maintains processes to facilitate the movement of prospects in and out of the prospect pool and through the pipeline. Additionally, they will analyze the overall prospect pool and targeted groups to support performance, planning, and projections.

Occidental College is committed to creating an accessible, supportive environment and an educational experience that recognizes diversity and cultural competence as integral elements of academic excellence. Candidates who can contribute to that goal are encouraged to apply and to identify their strengths in this area.

SUMMARY OF DUTIES, RESPONSIBILITIES AND GOALS

Key Responsibilities:

1. Pipeline Management: support the maturation of the prospect development pipeline through active management and reporting. This includes, but is not limited to:

   • Leading prospect strategy, portfolio review, and moves management meetings with fundraisers.
   • Determining what relationship management data is recorded, where it is recorded, who records it, how it can be searched, how it can be exported, and what policies govern it.
   • Utilize Blackbaud and Excel, or other statistical program tools, to provide metrics for the prospect pool, such as, number and percent of pool at each rating level, prospect stage, donors vs. non-donors, assigned vs. unassigned, geographical location, and other segments.
   • Evaluate and utilize screening results, including participation in data validation, assessment of source validity, and the creative use of additional sources to analyze capacity, inclination, and readiness. Determine what constitutes a good prospect for Oxy through analysis, conversations with staff, and knowledge of organizational history.

2. The Associate Director manages a full-time Prospect Research Analyst who plays an important role in the identification, qualification, and research of major/planned gift prospects.
3. In partnership with the AVP, Development, manage the annual Work Plan process. This includes training of and collaboration with colleagues with portfolio management responsibilities resulting in individual work plans that when compiled will inform annual IA department fundraising goals.

4. Provide prospect analysis results to inform executive-level decisions for long-term organizational planning, such as setting campaign goals, defining fundraising priorities, event planning and regional initiatives, and making staff-time allocation recommendations.

5. Collaborate with the Executive Director and senior IA leadership to refine how Oxy defines and measures fundraising, program, and relationship manager success, and then coordinate the development of reports needed to monitor activity and outcomes.

6. Develop and implement an orientation program and ongoing education training sessions for the relationship and prospect management programs.

**QUALIFICATIONS & EXPERIENCE**

- Bachelor’s degree required.
- Five years of professional research and relationship management experience, preferably within higher education or a similar environment. Transferable skills and experience in systems and project management, advancement, and research will be considered.
- Demonstrates a commitment to diversity, equity, and inclusion.
- Must have excellent written and verbal communication skills; strong interpersonal skills.
- Must exhibit a dedication to details and accuracy as evidenced by clear guidelines for gift officers regarding their roles in the accumulation, recording and application of timely prospect visit contact reports and clearly articulated and managed timelines and deliverables for such processes as prospect assignment updates, profiles for briefing reports, and complete giving histories.
- Extensive computer experience required, including database knowledge and online prospect research skills (e.g. WealthEngine, Lexis-Nexis, etc.) and Microsoft Office. Knowledge of statistical software is helpful.
- Ability to leverage emerging technology to develop new ways to identify potential donors.
- Ability to learn new software applications and programs with ease.
- Demonstrated comprehensive and anticipatory planning skills with the ability to identify priorities in a fast-paced, high-visibility environment.
- Ability to create, interpret and evaluate policy and procedural requirements for prospect research/management and related database management.
- Ability to define, produce and analyze reports relevant to prospect management and related data integrity.
- Familiarity with different reporting interfaces and methods, such as dashboards, on-demand reporting, mobile reporting, and scheduled reports.
- Tactful exercise of judgment and discretion with sensitive and highly confidential information.
- Strong organization skills and ability to perform time-sensitive duties with regular interruptions
- Proven track record of applying professional ethics and confidentiality standards.
APPLICATION INSTRUCTIONS

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

ADDITIONAL INFORMATION

Occidental is an Equal Opportunity Employer and does not unlawfully discriminate against employees or applicants on the basis of race, color, religion, sex, sexual orientation, gender identity, gender expression, pregnancy, breastfeeding or related medical condition, national origin, ancestry, citizenship, age, marital status, physical disability, mental disability, medical condition, genetic characteristic or information, military and veteran status, or any other characteristic protected by state or federal law. Occidental is strongly committed to increasing the diversity of the campus community and the curriculum, and to fostering an inclusive, equitable, and just environment within which students, staff, administrators, and faculty thrive. Candidates who can contribute to this goal through their work are encouraged to identify their strengths and experiences in this area. Individuals advancing the College’s strategic equity and justice goals and those from groups whose underrepresentation in the field are particularly encouraged to apply.

Salary is commensurate with experience and qualifications. A comprehensive benefits package is available that includes: excellent health, dental, life, and retirement benefits; tuition benefits for the employee, spouse, domestic partner, and dependents; additional extras including use of gym facilities and the College Library. For a detailed description of benefits, please visit https://www.oxy.edu/offices-services/human-resources/benefits-information.

All qualified applicants will be considered for employment, 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.

Occidental College is committed to working with and providing reasonable accommodations to applicants with qualifying disabilities. If you need a reasonable accommodation because of a disability for any part of the application or employment process, please contact Human Resources (hr@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.