



## Prospect Research Analyst

### *Institutional Advancement*

---

#### **Summary**

The Prospect Research Analyst reports to the Senior Associate Director of Prospect Research and Relationship Management and serves as an integral part of the Institutional Advancement team. This position has an important role in the identification, qualification, and research of major/planned gift prospects. This position requires the ability to gather, summarize, and disseminate large volumes of information from numerous sources; to make recommendations for solicitation strategies; to attend events and engagements as required; and to compose prospect briefings and profiles. This position also requires a good understanding of prospect management and fundraising within a higher education context as well as a commitment to data integrity. The ability to think analytically and intuitively in a fast-paced environment is key. This position will support the Major and Planned Gifts Office in addition to the College President, Vice President of Institutional Advancement, and Annual Fund Office.

#### **Essential Responsibilities**

##### **Prospect Research**

- Analyze and synthesize accumulated financial, philanthropic and affinity data on individuals, corporations and private foundations to assess prospects' giving capability, philanthropic tendencies, and appropriate potential solicitors. Produce and report various findings to the Major/Planned Gifts team.
- Prepare profiles/briefings/information for gift officers, IA Vice President, and College President as well as for key events/meetings.
- Maintain strong skills and knowledge of online research resources, technologies, and methodologies.

##### **Prospect Screening**

- Design and conduct proactive screening projects to identify new prospects.
- Stay abreast of new developments in external and internal screening products/techniques and how they can help prospect identification efforts.

##### **Data Analysis**

- Performs quantitative analysis to determine capacity ratings based on financial data. Provide an ongoing assessment of research methods, goals, and strategies.

- Using leading-edge analytics and modeling, this position is responsible for performing comprehensive reviews of prospect pools for schools, units and campaign initiatives and uncovering and leveraging key relationship networks.

### ***Prospect Management***

- Assist the Director of Prospect Management and Prospect Research in managing the IA Prospect Management System.
- Maintain the data integrity of the prospect management system in Banner and supervise the data entry of prospect management information.
- Partner with gift officers and others to manage proposals, projects, planned solicitations and assignments. Also, work with gift officers to determine appropriate solicitation strategies for new and existing prospects.
- Prepare reporting for the President, IA Vice Presidents, and Gift Officers regarding prospect activity. Provide additional support for contact report review and prospect documentation.

## ***Qualifications***

### **Required**

- Minimum one year of professional research experience, preferably within higher education or similar environment.
- A Bachelor's degree or equivalent education/work experience is required.
- Candidates must possess outstanding prospect research skills and the ability to interpret business and financial data.
- Requires well-developed interpersonal skills and the availability to attend evening and weekend engagements. Should be able to provide insight in prospect cultivation strategies.
- Ability to prioritize tasks and manage multiple assignments with minimum supervision while meeting strict deadlines.
- Must have excellent writing skills and be detail-oriented and accurate.
- Extensive computer experience, including database knowledge and online prospect research skills (e.g. WealthEngine, Research Point, Blackbaud Fundraiser Performance Management, RelSci, Banner, Lexi-Nexis, etc.) and Microsoft Office.

### **Preferred**

- Training through Association of Professional Researchers for Advancement (APRA) seminars and workshops and the Council for Advancement and Support of Education (CASE) for prospect research and management.
- Thinking analytically and intuitively in a fast-paced environment is important.

## ***APPLICATION INSTRUCTIONS***

Please submit a resume and cover letter explaining how your qualifications meet the requirements of the position to [resumes@oxy.edu](mailto: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 that are underrepresented 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/humanresources/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](mailto: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.