



SENIOR PROSPECT RESEARCH ANALYST

Institutional Advancement

POSITION SUMMARY

The Senior Prospect Research Analyst reports to the Associate Director of Prospect Research and Relationship Management and serves as an integral part of the Institutional Advancement team. As part of the Prospect Research team, the Analyst will support the development of analytical strategies, tools, and ad-hoc reports to support prospect research programs such as centralized portfolio management, prospect identification and assignment, and portfolio analysis and recalibration. Provide on-going assessments of programs' effectiveness, coordinate routine and ad hoc analysis and reporting on prospect qualification, cultivation and solicitation activities. In collaboration with the Prospect Research team, plan, develop and implement custom predictive models to facilitate the identification of high-quality prospects to ensure portfolios have a sufficient number of prospects to meet goals and to develop an understanding of donor behavior. 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.

SUMMARY OF DUTIES, RESPONSIBILITIES AND GOALS

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 campaign initiatives and uncovering and leveraging key relationship networks.
- Serve as an adviser to the entire Development team including the Vice President and President.

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.

Training

- Hire, train, develop projects for, and supervise student workers.
- Support on-the-job training of junior colleagues in prospect research and prospect management.
- Document business rules, as well as policies and procedures

QUALIFICATIONS

Preferred

- Minimum four years of professional research experience, preferably within higher education or similar environment.
- 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.
- Ability to extract information and generate reports from complex databases.
- Familiarity with research data interpretation such as SEC, Real Estate and Compensation documentation.
- Strong skills to evaluate issues and identify solutions within defined procedures and policies.
- Proven ability to address problems and suggest solutions through critical thinking process.
- Able to provide insight in prospect cultivation strategies.
- Thinking analytically and intuitively in a fast-paced environment is important.
- Exemplary written and verbal communication skills.
- Exemplary organizational and customer service skills.
- Handles extremely sensitive information with confidentiality and tact.
- Performs quantitative analysis to determine capacity ratings based on financial data.
- Keep abreast of new practices in prospect research, analytics, data mining, and higher education philanthropy.

Required

- Bachelor's degree or equivalent education/work experience.
- Candidates must possess outstanding prospect research skills and the ability to interpret business and financial data.
- Extensive computer experience, including database knowledge and online prospect research skills (e.g. Research Point, RelSci, Blackbaud Fundraiser Performance Management, Banner, Lexi-Nexis, etc.) and Microsoft Office. Knowledge of Tableau and/or SQL a plus.
- Well-developed interpersonal skills and the availability to attend evening and weekend engagements.

- Ability to prioritize tasks and manage multiple assignments with minimum supervision while meeting strict deadlines.
- Excellent writing skills and be detail-oriented and accurate
- Ability to work independently and as a self-starter in a team-oriented environment, work congenially with staff, senior development management, and fundraisers.

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 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).

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.