

UMKC Foundation Position Description Director of Prospect Development

Purpose: The Director of Prospect Development is responsible for developing and executing prospect development strategies and managing the prospect development program and staff. In partnership with the UMKC Foundation's senior leadership, the Director of Prospect Development helps guide fundraising efforts to build a sustainable pipeline of major donors to UMKC.

Organizational Relationships: The Director of Prospect Research has a reporting relationship to the UMKC Foundation's Assistant Vice President for Development.

Essential Duties and Skills:

1. Provide overall program management of Prospect Development efforts, focused on prospect research and optimal deployment of staff in major and planned giving.
2. Manage Prospect Development staff, presently including the Prospect Research Analyst.
 - a. Working in collaboration with the senior Foundation leadership, develop and maintain an organizational relationship management policy, including implementation and periodic reviews of the policy to determine if modifications are needed.
 - b. Build relationships with senior Foundation leadership and actively communicate challenges and opportunities as they arise.
 - c. Prospect Strategy/Portfolio Management: Plan and coordinate prospect strategy and portfolio management meetings with fundraisers and senior leadership.
 - d. Prospect Pool/Base Analysis:
 - i. Utilize Advance, Excel, and other available tools to provide detailed descriptive statistics of the prospect pool, including how many prospects are at which rating levels and prospect stages, donors vs. non-donors, assigned vs. unassigned, as well as prospect pools by school or group or division, by geographical location and other segments.
 - ii. Apply 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.
 - iii. Apply business intelligence tools that transform raw data into meaningful and useful information that inform fundraising and campaign strategy.
 - e. Relationship Management Reporting:
 - i. Demonstrate ability to work with clients, stakeholders, and report designers to develop new reports as needed.
 - ii. Demonstrate awareness of different reporting interfaces and methods, such as dashboards, on-demand reporting, mobile reporting, and scheduled reports.
 - iii. Working with senior leadership to refine how UMKC Foundation defines and measures fundraising/program/relationship manager success, and then coordinate the development of reports needed to monitor activity and outcomes.
 - iv. Work in collaboration with the Director of Operations and Director of Annual Giving to develop reports and dashboards that provide a comprehensive overview of fundraising operations to senior leadership and staff.
 - f. Pipeline Management:
 - i. Support the maturation of the prospect development pipeline through active management with senior Foundation leadership team.
 - g. Database Management:
 - i. In collaboration with the Advance Data Manager, coordinate and help define what relationship management data is recorded at UMKC, where it is recorded, who records it, and how it can be searched and extracted.
 - ii. Create and maintain strategies to incorporate common prospect tracking data in Advance, such as prospect ratings, staff assignments, solicitation goals, strategies, moves, contact reports, proposals, and stages. In some cases, this data exists but may need to be applied or leveraged in new ways.
3. Orienting and Training Colleagues: Produce orientation programs and training for colleagues for all products and services offered by the Office of Prospect Development.
4. Prospect Research, Identification, and Qualification
 - a. Screenings: 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.
 - b. Organization and Fundraising Knowledge: Determine what constitutes a good prospect for UMKC through analysis, conversations with staff, and knowledge of organizational history.

- c. Supervise the research and production of briefings for development-related meetings, trips, and events.
- d. Interact directly with senior leadership and their staff members to understand the context of requests and meet expectations.
- e. Train new researchers and interns in research methodologies and department protocols for report writing, research distribution, and document management.
- f. Conduct/oversee the tracking and review of contact reports filed by gift officers in order to assess donor interests, prioritize donors for ratings, and ensure key data points are documented in Advance.
- g. Train and supervise prospect research team members on financial analysis of prospects' and donors' known wealth indicators to assess philanthropic capacity.
- h. Understand basic financial principles and read relevant industry publications to learn about and keep up-to-date on business trends.

Knowledge Desired:

- Strong written and verbal communication skills. Must be able to analyze, interpret, synthesize and present complex information effectively.
- Excellent organizational and time management skills; ability to juggle multiple projects and deadlines and adapt to shifting priorities.
- Solid experience with fundraising databases (Ellucian Advance, a plus), reporting and visualization tools (e.g. Cognos, Tableau), and online information and screening services such as Lexis Nexis, Sorkins, FoundationSearch, ResearchPoint, iWave, etc.
- Strong understanding of best practices in database management.
- High-level proficiency in using Microsoft Office suite, with particular emphasis on Excel.
- Professionalism and discretion in handling confidential donor and prospect information.
- Personal commitment to professional development and growth.

Education and Experience:

Bachelor's degree with a minimum of two years' employment in prospect development. Three to five years' comprehensive prospect development experience, preferably in higher education, but similar experience in another non-profit area will be considered.

Supervisory Controls: Incumbent must have a high level of independence in accomplishing the responsibilities of the position. Goals, priorities, and major projects are reviewed and discussed on an on-going basis with the AVP.

Guidelines: Guidelines are provided by the goals and objectives of the position, by fundraising strategies and techniques, by stewardship guidelines, and by the goals of the UMKC Foundation and the mission of the University. Confidentiality and discretion are mandatory.

Complexity: The ability to interact comfortably, tactfully, and effectively with varied internal and external constituencies is essential. Must display a high level of maturity and personal integrity and ability to understand, develop, and sustain resilient and dynamic relationships with colleagues and senior management.

Scope and Effect: This position has a significant effect on the success of the UMKC Foundation. Effective leadership in this role affects UMKC's ability to meet its goals and provide the best possible education and conduct life-changing research.

Environmental Demands: This position does not require unusual physical ability. Little physical exertion is involved, although considerable pressures exist; ability to handle tension and stress in a positive manner is required. No risks or discomforts are imposed upon this position by the physical surroundings or job situation. Travel requirements are minimal.

Salary Range: Commensurate with experience.

About the UMKC Foundation: The UMKC Foundation is a separate but affiliated enterprise devoted to raising funds for the university and for exercising fiduciary responsibility over endowments and other philanthropic investments made to UMKC.

If you are interested in helping grow the culture of philanthropy that supports UMKC, please send your cover letter and resume to: contact@umkcfoundation.org

Position will remain open until filled.