

Simmons University – Associate Director of Prospect Strategy & Management

The Role – Associate Director of Prospect Strategy & Management

The Associate Director of Prospect Strategy and Management (“Associate Director”) acts as a partner in building strategic prospect profiles that unlock the possibilities for prospect engagement and philanthropy. To that end, the Associate Director works collaboratively on a team striving to build a vital major and principal gifts program in support of the University’s 125th anniversary. Prospect strategy work will focus on uncovering some key legacy families to discovering new prospects for strategic academic priorities for donors to support the life and health sciences.

This is a full-time (40-hours/week) position with occasional night and weekend requirements; eligible for a flexible, hybrid in-office/remote work structure.

Responsibilities

Prospect Research and Analysis

- Direct prospect research activities using a variety of techniques in response to the needs of any anticipated fundraising initiatives.
 - Perform research and analysis of biographical, philanthropic, professional and financial information of donors and prospects.
 - Use quantitative assessments to identify, research, and qualify new prospects.
 - Through relationship mapping, identify connections between prospects and other individuals and organizations to facilitate institutional involvement and network growth.
 - Use push technology to track news on prospects and provide pertinent information to the appropriate prospect manager.
- Develop prospect matrices to align individuals and organizations with specific funding opportunities.
- Prepare written profiles, ratings, and qualified lists to support the cultivation of individual prospects. Ensure the timely delivery of accurate prospect research findings to prospect managers to facilitate qualifying, cultivating, and soliciting prospects.
- Work in partnership with prospect managers to review prospect assignments, collaborate on strategies around newly identified prospects, review qualified prospects, and provide research updates and train staff on new research policies and prospect management protocols.

Prospect Strategy and Reporting

- Recommend prospect assignments supporting overall prospect management strategy.
- Working closely with Advancement fundraising leadership and prospect managers, to ensure active prioritization on priority prospects and when new prospects are discovered, ensure timely qualification outreach and visits.
 - Design and implement a prospect assignment system that incorporates prospect connectivity, capacity, regional assignments, and placement in development cycle.

- Oversee moves management and action tracking (and reporting) through the prospect management cycle.
- Facilitate the delivery of reports on cultivation activity, prospect peer screenings, etc.
- Oversee use of the donor database system for prospect moves management, including moves tracking and proposal tracking.
- Assist in creating gift tables and pyramid reports for major gift initiatives, class reunions, and campaign goals.
- Periodically review assigned and unassigned prospect base to assess the potential value of Simmons development pipeline.
- Deliver quarterly recommendations to Advancement fundraising leadership to build and update major gift portfolios based on prospect management strategies.
- Participate in prospect strategy-related meetings.
- Data and Infrastructure Management
- Lead the creation, implementation, and management of prospect tracking protocols.
- Plan, implement, and oversee the data-related activities associated with entering and maintaining research and asset data in the Advancement donor database system and with moving prospects along the development cycle.
- Maintain coding system to track prospects through stages of development cycle.
- Ensure all relevant prospect data are added to prospect records in the donor database system (Raiser's Edge/NXT).
- Manage research request protocols and, in collaboration with key stakeholders, establish service level expectations surrounding briefings and bios, and coordinate proactive research activities.
- Ensure adherence to prospect research and management protocols through effective communication and training to staff.
- Develop training and procedures for prospect managers in using prospect management tools.
- Partner with operations-focused staff to maintain the Advancement research resources library.
- Consult in the processes for managing and coordinating the evaluation, purchase, and renewal of research resources, publications and services.
- Maintain expertise on research techniques and resources.
- Occasionally serve as a representative of the University within professional research communities.

Preferred Knowledge, Skills, and Abilities

- Knowledge of current research technologies and information search techniques, including online library sources, pay-subscription sources, public records, and Internet search.
- Demonstrated knowledge of and skill with utilizing the following applications (or similar client management and prospect research tools) a plus: Raiser's Edge/NXT, iWave, LexisNexis, and EverTrue.
- Exceptional planning and organizational skills; strong attention to detail.
- Excellent written, oral/interpersonal communication skills. Must be able to write concise research documents with attention to accuracy and detail.
- Demonstrated ability to work with individuals across all social identities and backgrounds

- Strong ability to work effectively in a deadline-driven, team environment; proven ability to take responsibility for assigned tasks and take initiative
- Ability to handle several projects simultaneously.
- Ability to shift priorities as needed.
- Demonstrates strong initiative, organizational ability, and independent judgment.
- Ability to locate and interpret financial and biographical information from a variety of sources.
- The ideal candidate will: demonstrate a keen intellectual curiosity; be positive, extremely service-oriented, able to build strong working relationships; and love to approach the prospect work with passion and creativity.

Requirements

- A Bachelor's degree, or equivalent work experience.
- A minimum of three (3) years of work experience in development or related fields, preferably in doing prospect research, demonstrating skills in research, writing, and editing.

The position is benefits eligible. The Simmons University FY23 Benefits Highlights can be found [here](#).

Simmons University is committed to inclusive excellence in all aspects of an individual's community experience. Simmons is committed to creating, developing, promoting, and enhancing inclusive hiring practices—at all levels, for all positions—ensuring diverse talent pools and the delivery of a consistent positive candidate experience. Simmons is an equal opportunity employer and is committed to continuing to develop a more diverse faculty, staff, student body, and curriculum.

To explore this opportunity further, please send your resume (with the subject line "Simmons Associate Director") in confidence to:

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