Assistant Director, Prospect Management and Research

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Job No: 494941

Work Type: Regular

Location: Los Angeles

Categories: Salaried

Title: Director, Assistant, Prospect Management and Research

Department: Donor Research

Duration: Indefinite

Employment Status: Exempt, Full Time

Job Summary

Reporting to the Director of Prospect Development and Research, the Assistant Director of Prospect Management and Research supports the strategic oversight of the College's prospect management system, and provides advanced analytics, research and insight to gift officers and leadership. They pivotal role in strengthening the College's philanthropic pipeline by identifying, analyzing, and guiding the engagement and philanthropic strategy for current and potential donors.

The Assistant Director serves as a subject matter expert in the use of data tools, including CRM Analytics and DonorSearch Ai, and partners closely with development staff to ensure alignment of strategy and actionable intelligence. The Assistant Director will strategize with key stakeholders on the fundraising, data, and events teams to provide research materials such as profiles, data sets and reports that drive strategy and identify key audiences for fundraising initiatives. The Assistant Director supports the Director with moves management strategies and implementation through data entry and analysis of portfolio composition and performance metrics. The Assistant Director closely collaborates with the Prospect Research Analyst and plays a lead role in workflow optimization, data driven decision making, and ongoing training and documentation efforts.

The Assistant Director will provide insight for strategic alignment between gift officers, leadership, and prospects. The Assistant Director will play a role in providing support to the Institutional Advancement team to drive understanding of the CRM and Prospect Research

guidelines. The Assistant Director will supervise the Advancement Services student workers to complete data integrity and ad-hoc projects related to the team's OKR's, in collaboration with other IA student workers. The Assistant will oversee data integrity of the Research, biographical and reporting components of the CRM and will be responsible for optimizing current processes. The Director of Prospect Research will collaborate with the Assistant Director to support Prospect Management efforts such as documentation, training and utilization of the CRM to support the Institutional Advancement Team.

Job Duties

- 40% - **Strategic Prospect Management & Analysis** - Proactively identify, research, and analyze new and existing donors and prospects for gift cultivation. Monitor the prospect and donor pool for engagement opportunities and potential matches with targeted priority areas. In partnership with the Director, support and implement moves management changes in the system and provide thorough analysis of portfolio performance. Use research industry standards to perform expert biographical and financial analysis to establish prospect research ratings and develop strategy. Support the timely and expert delivery of all research inquiries requested of prospect research. This includes leveraging existing data, data subscriptions and public information sources to deliver research, briefings, ...and providing guidance to the Prospect Analyst. In partnership with the Director, develop and deliver protocols to determine how constituent data is managed. Evaluate and utilize screening results, including data validation, assessment of source validity, and the creative use of additional sources to analyze capacity, inclination, and readiness of potential prospects. Support the development and delivery of standard briefing and research protocols across Institutional Advancement - (Essential)
- 20% - **Data Analysis and Reporting** - Using advanced analytical and research tools (DSAi, e.g.), conduct complex analyses of the constituent database to provide metrics for the prospect pool, such as number and percent of pool at each rating level, opportunity stage, donors vs. non-donors, assigned vs. unassigned, geographical location, and other segments. Oversee the monthly data sync between CRM and DSAi to ensure the model is most accurately reflecting gift officer's work; make recommendations on model refinement and conduct quality assurance testing. Support gift officer's reporting needs related to their portfolio and their prospect's giving. Continue to investigate areas of improvement needed for reporting capabilities for not only the gift officer team but also the donor relations and events teams through tools such as, but not limited to, Salesforce Maps and Tableau Conduct analyses on gift officer metrics, event audiences and other requests as needed - (Essential)

- 15% - **Team Leadership & Supervision** - Serve as the subject matter expert for data tools such as, but not limited to, Salesforce Maps and DonorSearchAi and custom prospect management solutions. Oversee the Advancement Services student workers to complete necessary projects related to data integrity in the CRM, proactive prospecting and ad-hoc requests Provide a comprehensive on-boarding of all IA student workers in collaboration with other student employee managers to ensure all student workers are upholding the College's data integrity Collaborate with the Prospect Research Analyst to provide support for research requests, event briefings and large datasets for screenings. - (Essential)
- 15% - **Prospect Management & Pipeline Optimization** - Support the Director, Prospect Research in implementing prospect management policies in the College's CRM Collaborate on CRM trainings to support the knowledge and comfortability of the new system for all members of the Institutional Advancement team Collaborate with other members of the Advancement Services team to ensure a strong pipeline of high net worth prospects, especially those who have not been previously engaged with Occidental. Oversee strategic segmentation of prospects to further the effectiveness of targeted portfolios, leading to a greater increase in funding for identified priorities - (Essential)
- 10% - **Duties as Assigned** - Continue to support the improvement of the Institutional Advancement team's CRM, reporting capabilities and general processes as needed - (Essential)

Minimum Qualifications

- Bachelor's degree in Business Administration, Data Analytics, Information Systems or equivalent combination of education and experience.
- Five years of progressive experience in prospect research, advancement services, or a related field, supporting fundraising strategy and relationship management (prospect identification, qualification, portfolio analysis, research/briefing materials). Experience with data, analytics, and research tools to interpret complex information (financial, philanthropic, biographical, engagement) and translate findings into actionable strategies.
- Proven cross-functional collaboration skills to align research with fundraising priorities.
- Experience with CRM systems, data management, reporting, and contributing to evolving processes.
- Experience with donor research and analysis tools (examples include DSAI, RelSci, WealthEngine, Lexis-Nexis, Access, Tableau, PowerBI, advanced Excel) and the ability to leverage emerging technology to identify potential donors.
- Ability to maintain a high level of detail and accuracy, demonstrated through comprehensive reporting, effective training of gift officers on timely prospect contact reporting, and clear management of timelines and deliverables for briefing profiles, reporting, and complete giving histories.

- Adept at interpreting complex financial, philanthropic, biographical, and engagement information to assess donor capacity and inclination while adhering to ethical guidelines.
- Demonstrated project management, systems-thinking, and organizational skills to manage priorities, drive continuous improvement, and perform time-sensitive duties with regular interruptions.
- Strong written and verbal communication skills for presenting research and strategic recommendations clearly and ethically.
- Ability to learn new software applications and programs quickly and create, interpret, and evaluate policies and procedures for prospect research and related database management.
- Ability to define, produce, and analyze reports relevant to prospect management and data integrity, with familiarity with multiple reporting interfaces and methods (dashboards, on-demand, mobile, scheduled reports).
- Tactful exercise of judgment and discretion when handling sensitive and highly confidential information, with a proven track record of applying professional ethics and confidentiality standards.

Preferred Qualifications

- APRA or CASE certification.
- One year of experience in higher education or philanthropic organizations.
- Advanced CRM experience (Salesforce, Education Cloud, nonprofit models).
- Experience in systems enhancements (requirements, testing, workflow, vendor collaboration).
- Working knowledge of industry standards (APRA, CASE) and commitment to learning.

EXPECTED HIRING RANGE: $70,304/yr-$84,000/yr

If you are offered this position at Occidental College, your final base salary compensation will be determined based on factors such as skills, education, experience, and/or geographic location. In addition to those factors, Occidental complies with applicable pay equity laws and considers internal equity among current employees when developing the final offer. Please keep in mind that the range mentioned above is the base salary range for the role. Hiring at the maximum of the range would not be typical in order to allow for future and continued salary growth. We also offer a generous compensation and benefits package. Occidental College is an Equal Opportunity Employer. Women and members of underrepresented groups are encouraged to apply.