

Saint Mary's College – POSITION SOURCE DOCUMENT

See *GUIDE TO WRITING A POSITION SOURCE DOCUMENT* for more specific information.

HR USE ONLY

Date Received _____ Date Reviewed _____ Reviewer (initial/signature): _____
 Recommendation: Revise Date: _____ Discussion with: _____ Comments: _____
 Approved as Position Description by (initial/signature): _____ Date: _____
 Job Grade: _____

Job Title: Director of Prospect Research Development Department: _____
 Supervisor's Title: Assistant Vice President for Development
 Developed by incumbent supervisor
 Name(s): Jane Doe Date: 10/1/08

Provide a brief **summary** (2-4 sentences) of the purpose of the position:
 Reporting to the Assistant Vice President for Development, the Director of Prospect Research is responsible for in-depth research, identification of prospects, proactive research, prospect ratings and prospect management.

Essential Functions/Major Areas of Responsibilities: List in descending order of importance.

Function/Responsibility	Frequency (D, W, M, Q, Y)	% of Time
1. Oversee development research program, ensuring that it continuously evolves to meet the College's development plans and to ensure that the College's research efforts keeps up with the constantly changing field of prospect research. Establish guidelines for quality-control of research products and establish performance goals for researchers.	D	35%
2. Oversee a prospect identification program to continually identify new prospects for Saint Mary's and for specific projects and programs as development needs arise.	D, W	15%

Saint Mary's College – POSITION SOURCE DOCUMENT

3. Oversee services for in-depth research for development staff to ensure that fundraisers receive timely, accurate, and complete information needed to work with prospects. Develop reports and tracking methods for development officers.	M	15%
4. In cooperation with colleagues, proactively oversee a prospect management system to help ensure that prospects in the system are managed effectively and to move prospects through phases of discovery, cultivation, solicitation and stewardship including integration of donor research and contact data. Oversee data entry of research information on prospect database to ensure timeliness and accuracy of information. Keep current on prospect research field to ensure that our program continues to be proactive and cutting edge; maintain an understanding of the field of development and the role prospect research plays in that process.	D,W,M	15%
5. Provide database system training and support to Development Office staff; assist with Trustee, Regent, Alumni and Advisory Board volunteer development.	M	10%
6. Develop unit goals, policies and procedures by providing input to the management team regarding how the unit can support overall advancement plans and various fundraising activities. Actively participate in unit and development staff meetings and carry out assigned tasks resulting from discussions.	W, M, Q	10%
7. Other Duties as Assigned		

POSITION FACTORS

<p><u>Problem Solving/Analysis</u> (check one)</p> <p> <input type="checkbox"/> Recurring/routine <input type="checkbox"/> Uncommon variations <input type="checkbox"/> Complex problems in own work area <input checked="" type="checkbox"/> Complex problems spanning many areas/fields <input type="checkbox"/> Unique situations w/substantial significance <input type="checkbox"/> Strategic College-wide problems/issues </p> <p>Give specific examples of types of problems:</p> <p>Identifies appropriate research sources and then analyzes & integrates data from several sources to determine targeted prospects and their potential and likelihood for significant and specific endowments.</p> <hr style="border: 0.5px solid black;"/> <p><u>Decision Making</u> (check one) Level of decisions:</p> <p> <input type="checkbox"/> Limited <input type="checkbox"/> Routine <input checked="" type="checkbox"/> Makes decisions regarding priorities <input type="checkbox"/> Makes decisions regarding programs </p> <p> <input type="checkbox"/> Establishes objectives for department <input type="checkbox"/> Initiates programs <input type="checkbox"/> Strategic decisions for College </p> <p>Give specific examples of types of decisions made:</p> <p>Establishes goals and plans to continually evaluate and upgrade the research methods and systems used for determining prospects and tracking the progress of prospects from discovery to endowment.</p>

Job Title:	Department:
------------	-------------

Saint Mary's College – POSITION SOURCE DOCUMENT

Impact of Decisions (check one)

Limited Moderate Important Substantial Significant Critical Strategic

Give examples of impact:

Proactively oversee the prospect management system in order to increase our competitive ability to compete for gifts and donations.

Budgetary Responsibility (check one)

Not directly involved Assists in developing/monitoring Recommends portions of larger budget
 Develops & manages formalized budget for functional area Develops & manages multiple formalized budgets for dept.
 Develops & manages budgets for the College

Give specific examples of budgetary responsibility: Provide direction and input to development budget priorities and expectations for developing new donor opportunities.

Communication/Contacts (check one)

Exchanges info. w/supervisor or co-workers Exchanges info. w/students, staff, faculty or external contacts for routine service Exchanges info. for service on ongoing basis Communicates to provide service, coordinate info. & collaborate; coordinates info. exchange Interprets tech. info. or provides tech. or prof. advice Persuades, influences, or leads others on strategic issues Negotiates major issues; plans, develops & communicates College's mission & business strategies

Give specific examples: Communicates, provides and translates complex data into an easy to understand format that can be used by broader audience such as data specialists, major gift officers, the President and Trustee's in determining strategies and priorities.

Independence: (check one) Amount of guidance typically needed for carrying out responsibilities:

frequent supervision periodic supervision minimal supervision guided by broad policies, precedents
 guided by in-depth knowledge of College policies & short range plans; some guidance available guided by in-depth knowledge of College policies & long-range goals; independently commits College to long range projects

Give specific examples: Expected to carry out all aspects of job independently and consult with supervisor when critical issues arise that require more than a single decision point.

Supervision: Does the position supervise or coordinate the work of others? Yes No

If Yes, Is a specific function managed? single department supervised/managed? multiple departments supervised/managed?

Student Supervision? Describe type of work done by student worker(s)

Number of students supervised

List the titles this position is responsible for supervising or managing:

TITLE	FTE	Coordinate	Direct supervision
-------	-----	------------	--------------------

Job Title:	Department:
------------	-------------

Saint Mary's College – POSITION SOURCE DOCUMENT

Data Specialist	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Research Associate	1.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

QUALIFICATIONS:

Education: REQUIRED: Bachelor's Degree
desirable

PREFERRED: Master's Degree highly

Experience: (years required and applicable field of experience): 5-7 years experience in prospect research, financial research, or fundraising and supervising staff in higher education or similar settings. Direct experience working within a comprehensive campaign.

Skills/Abilities: (e.g. computer skills, written & verbal skills, trades, laws, procedures, technical) Strong analytical, computer skills; proficiency with research tools (e.g. Lexis/Nexus, etc.) and with Microsoft Office tools including Word, Excel and PowerPoint, email and internet usage. Experience with Datatel database products highly desirable.

Ability to communicate with technical staff, and non-technical staff and a demonstrated understanding of data analysis.

Attention to detail and strong communication skills, along with significant organizational and management skills required. Ability to define goals and objectives, identify target audiences, and develop and implement strategic plans to accomplish prospect research goals. Demonstrated supervisory experience required.

Licenses & Certifications (e.g. CPA, RN, etc.): **REQUIRED:**

PREFERRED:

Other Requirements: (e.g. travel, weekend/evening work) Demonstrated research abilities and an understanding of the role of prospect research in the fundraising process.

Job Title:	Department:
------------	-------------

Saint Mary's College – POSITION SOURCE DOCUMENT

Working Conditions: Specify the physical, mental and environmental conditions of the **essential function/responsibilities** of the position. For each item below check one of the following codes:

"C" Constantly (6-8 hours per day); "F" Frequently (3-6 hours per day); "O" Occasionally (up to 3 hours per day); "N" Never

Physical conditions:

<p>C F O N</p> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Bending [neck]	<p>C F O N</p> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Fine finger movement	<p>C F O N</p> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Reaching above/below shoulder
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Bending [waist]	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Climbing	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Kneeling
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Pushing	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Pulling	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Sitting
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Standing	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Squatting	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Walking
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Twisting [neck]	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> Twisting [waist]	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Data Entry 4-6 hours per day
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> Foot Controls	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Hand Controls	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Other
<input type="checkbox"/> Left Ft. <input type="checkbox"/> Right Ft. <input type="checkbox"/> Both	<input type="checkbox"/> Left Hand <input type="checkbox"/> Right Hand <input checked="" type="checkbox"/> Both	

Must carry/lift load of:

Carry	Lift	Carry	Lift
C F O N	C F O N	C F O N	C F O N
<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> up to 10 lbs	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> 25 – 50 lbs	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> 10 to 25 lbs	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> over 50 lbs	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>

Mental Requirements:

<p>C F O N</p> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Reading/Comprehending	<p>C F O N</p> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Writing	<p>C F O N</p> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Calculations
<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Communicating Orally	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Reasoning/Analyzing	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Other

Environmental Conditions: (as a requirement of the position)

C F O N

 Exposed to excessive noise?
 Around moving machinery/equipment?
 Drives Motorized vehicles?
 Exposed to bio-hazards such as: blood borne pathogens, sewage, waste, etc.?
 Contact with water/liquid/chemicals? Type:
 Use of protective equipment? Type?
 Walk on uneven ground or elevated work site or confined spaces (circle all that apply).
 Exposed to dust, fumes, chemicals, radiation or microwaves? (circle all that apply)
 Exposed to variation in temperature and or humidity?

Additional Information:

Job Title:	Department:
------------	-------------