

POSITION DESCRIPTION

Position Title:	<u>Advancement Research Analyst</u>
Department:	<u>Office of Advancement Research and Prospect Management</u>
Reports To:	<u>Director, Advancement Research and Prospect Management</u>
Salary:	<u>\$35.00 - \$38.23 hourly</u>
Exempt Status:	<u>Full-Time Benefited, Non-exempt</u>

POSITION SUMMARY:

Reporting to the Director of Advancement Research and Prospect Management, the Advancement Research Analyst is an integral member of the Advancement and Campaign Operations team in University Advancement. Conducting complex, in-depth, proactive and independent investigation using a variety of resources, the Advancement Research Analyst is responsible for identifying, researching and analyzing prospects for major gift cultivation and solicitation. Prospect research and analysis serves as the foundation of fundraising at San Jose State University and directly contributes to the success of the university's fundraising efforts.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- a. Under general direction from the Director of Advancement Research and Prospect Management, plan and execute strategies to identify sources of major gifts.
- b. Recommend strategies for cultivation and solicitation in consultation with development officers.
- c. Analyze and assess information from local, national, and international resources; financial and philanthropy reports; references (both printed and electronic) and university files.
- d. Utilize quantitative criteria, including income, assets, giving patterns, etc. as well as job position to evaluate prospects' ability and propensity and potential to give.
- e. As a result of analysis, provide high-quality, written bios and briefings with analysis and insight on donors and prospects using style, grammar and content appropriate to the specific audience.
- f. Interpret and translate complex financial, legal and corporate language into easily comprehensible terms while adhering to standards of discretion and confidentiality.
- g. Verifying, confirming and editing assets of prospects from wealth screenings.
- h. Identify and locate alumni from the old files not currently in Advance.
- i. In charge of running and distributing the development officers' portfolios on a quarterly basis or as needed.
- j. Stay updated on executive level alumni employment and changes using lead folders and alerts in LinkedIn.
- k. Oversee the review of a wide variety of newspapers, magazines, and other periodicals in order to collect and share timely information on existing and potential donors; accesses automated system to enter and update internal donor/prospect records as needed and share the information with the appropriate development officer.
- l. Participate in and contribute to the formulation of policies related to the processes and procedures of prospect management and related infrastructure support activities.
- m. Stay abreast of development in the research field by attending conferences, training sessions and online learning opportunities, and subscribing to relevant listservs and blogs.
- n. Contribute to database integrity by ensuring that donor and prospect information is current.

QUALIFICATIONS:

1. Knowledge, Skills and Abilities

- a. Thorough knowledge of methods, procedures and practices; English grammar, business writing, punctuation and spelling.
- b. Excellent research and analytical skills.
- c. Thorough attention to detail and follow through.
- d. Demonstrated ability to think critically and analytically in order to initiate and perform complex analysis.
- e. Demonstrated ability to analyze and synthesize data from a wide variety of sources and present the resulting information in a clear, concise summary.
- f. Demonstrated skill in information retrieval capabilities and protocols.
- g. Demonstrated skill in using multiple electronic resources such as Target Analytics' ResearchPoint, WealthEngine, PRO (Prospect Research Online), and other free and fee-based sources to locate and compile business and biographic information.
- h. Strong problem-solving skills and demonstrated ability to work under pressure.
- i. Knowledge of current trends in philanthropy and higher education.
- j. Knowledge of philosophical and practical bases of institutional advancement research methods.
- k. Knowledge of datamining techniques used to generate prospect lists.
- l. Working knowledge of terminology and resources specific to fundraising.
- m. Working familiarity with donor databases, particularly Ellucian Advance Web.
- n. Ability to perform accurately in a detail-oriented environment.
- o. Ability to recall, recognize and communicate interrelated information pertaining to university benefactors and prospects.
- p. Ability to organize, manage and complete a diverse range of assignments and projects with high efficiency.
- q. Ability to handle sensitive and confidential information appropriately and with discretion.
- r. Ability to quickly learn and apply a variety of state, federal, CSU, and SJSU policies and procedures.
- s. Strong oral communication skills. Must possess excellent customer service skills.
- t. General fundraising skills, including proficiency at supporting and participating in prospect management.
- u. Competent computer skills including Google Workspace and Microsoft Office especially Excel.

2. Education and experience

- a. A Bachelor's degree in a related field is required, advanced degree is a plus.
- b. At least two years' experience in prospect research, development, library research or related field, preferably in an academic or non-profit environment.
- c. Advanced writing skills required
- d. Preferred experience with Ellucian Advance Web or similar donor database.

3. Environmental Conditions

This is a typical office environment with standard equipment and tasks. Position requires work at a computer for long periods of time. The physical demands described are representative of those that must be met by an employee to successfully perform the essential functions of the job.

4. Complexity of Duties

To perform the duties of this position successfully it is critical for the incumbent to process a curious mind and a keen interest in continuous learning. Development research is a dynamic and evolving field that requires staying abreast of financial and economic trends with the ability to acquire in-depth knowledge in various subjects.

5. Supervisory Responsibilities:

This position has no supervisory responsibilities.

PHYSICAL REQUIREMENTS

The physical requirements described are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Must be able to operate general office equipment
- Must be able to sit and stand for extended periods of time
- Some physical labor may be required, must be able to lift a minimum of 30lbs.

REASONABLE ACCOMODATION

The Tower Foundation of San José State University is committed to providing access, equal opportunity and reasonable accommodation for individuals with physical or mental disabilities in the employment, recruitment, examination, hiring and interviewing processes. If you are a job seeker with a physical or mental disability and require a reasonable accommodation to search, apply, or interview for a job opening or otherwise need a reasonable accommodation during the application and hiring process, please contact us at towerjobs@sjsu.edu. In the email message, please indicate your full name, phone number and the type of assistance required. You must not reveal the underlying medical reason for your needed reasonable accommodation or otherwise disclose confidential medical information.

APPLICATION PROCEDURE

To apply for this position, submit a resume and letter of interest to towerjobs@sjsu.edu

A background check must be completed satisfactorily before any offers can be finalized.

The Tower Foundation offers an excellent benefits package including medical, dental, vision, life insurance, short and long-term disability, 403B retirement, vacation and sick leave.

COVID Vaccination Policy

The CSU requires faculty, staff, and students who are accessing campus facilities to be immunized against COVID-19 or declare a medical or religious exemption from doing so. Any candidates advanced in a currently open search process should be prepared to comply with this requirement as a condition of employment. The system wide policy can be found at <https://calstate.policystat.com/policy/9779821/latest/>

Tower Foundation is NOT a visa sponsoring organization

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