**Department of Human Resources**

**OPSEU Job Description**

**Job Title:** Team Lead, Research & Donations

**Job Number:** A-267

**NOC:** 1123

**Band:** 11

**Department:** External Relations & Development

**Supervisor Title:** Director, Portfolio Operations & Digital Philanthropy

**Last Reviewed:** March 30, 2022

**Job Purpose**

Reporting to the Director, Portfolio Operations & Digital Philanthropy, the Team Lead, Research & Donations is responsible for the oversight and management of the portfolio’s prospect research program and the donations office; including the monitoring and support of staff in these areas. The Team Lead, Research & Donations designs and develops programs in support of fundraising moves-management, prospect identification, donor profiling requirements, effective donation processing, fundraising reporting, and system coding architectures in support of portfolio objectives.

The Team Lead, Research & Donations also provides technical and advisory support to the database team to help ensure that constituent records and coding practices are in accordance with portfolio objectives in relation to individual record coding, campaign tracking, and general data health.

**Key Activities**

***Research Program***

1. Design and implement programs to qualify major gift prospects to the University by developing research and analysis strategies to examine connections to Trent University, giving capacities, and specific donor interests in Trent and its philanthropic priorities.
2. Devise strategies for identifying and acquiring new prospects to ensure the ongoing development, expansion and renewal of the University’s prospect base and pipeline of potential support.
3. Prepare detailed and current research briefings for Development staff, senior staff and faculty and senior volunteers, in advance of calls and events to maximize optimal outcomes.
4. Coaches and reviews portfolio assignments with fundraising employees at all levels within the University; ensuring that fundraisers have an actionable set of prospects that have been targeted for their intended outreach; including periodic in-person reviews to foster dynamic prospect pipelines and proper coding and documentation of donor proposals.
5. Gather and concisely interpret relevant information in a variety of formats (electronic, print, etc.) in the development of research profiles and summaries.
6. Primary contributor to Portfolio Operations plans in relation to information systems, processes and procedures pertaining to prospect and pipeline management, and other related infrastructure support services.
7. Scan media services to identify prospects as well as update existing key alumni and donor information.
8. Keep up to date on policy and regulatory changes, as well as current practices in the sector.
9. Trains and oversees the work of staff working in the prospect research area of the unit.
10. Develop, implement and manage systems and procedures to proactively meet the information needs of advancement staff in preparation for contacting, cultivating, soliciting, and stewarding of major gift prospects (individuals, corporations, foundations, other).

***Donations Office***

1. Oversees and monitors the daily tasks of staff working in the donation processing area of the unit to ensure timely and correct entry of all donations, as well as the issuing of receipts and donor communications; providing task support as required.
2. Ensures data entry results are correct and align well with campaign coding expectations, and proposal information.
3. Develops analysis to identify donors with additional capacity for prospect assignment.
4. Participates in inter-departmental fund allocations meetings with Advancement and Finance department staff as required.
5. Acts as primary point of contact for internal and external donation audits as required and ensures policies and procedures support a clean audit environment.
6. Identifies and implements process and procedure improvements to improve efficiencies in the donations area.

***Financial and Fundraising Reporting***

1. Designs and supplies financial reports in support of University financial audits in conjunction with the Financial Services unit with Accounting and for the purposes of CRA annual reporting and audits as required.
2. Responsible for the design and implementation of various fundraising and activity reports; including benchmark reports, campaign reports, donor and alumni activity reports, and rapid reports in support of real-time fundraising activity.

***Team Lead Strategy & Collaboration***

1. Regularly collaborate with the Director, Portfolio Operations & Digital Philanthropy and other unit coordinators and managers to introduce process and procedure improvements to enhance outcomes.
2. Acts as unit representative in Campaign Strategy meetings, providing expert information on prospect connections, capacity and interests; as well as bringing forward procedure and process changes and providing training to Key Relationship Managers.

***Collaborate on Other Assignments***

1. Provides support on special projects as determined by the Director, Portfolio Operations & Digital Philanthropy.

**Education**

Honours University Degree (4 year), ideally in Business/Finance, Library Science, Computer Science, Philanthropy, or related research-oriented and charitable financial disciplines.

CFRE designation and membership in APRA or AASP would be assets.

**Experience Required**

1. Minimum three years related experience in prospect research, development, library research or information related field preferably in a higher education environment. Knowledge of the range of resources available to prospect researchers and the ability to apply those resources in an organized and purposeful manner.
2. Minimum two years experience preparing fundraising and financial reports in a charitable setting.
3. Demonstrated experience using the Raiser’s Edge system to process and maintain donations and manage pipeline activity and proposal records.
4. Demonstrated experience and understanding of charitable donation acceptance practices following CRA regulations.
5. Demonstrated analytical skills to initiate and perform complex analyses and organize information to identify philanthropic patterns, tendencies, and relationships among individuals, corporations and foundations. Ability to analyze and interpret complex financial disclosure documents for the purposes of wealth assessment (securities filings, real property files, financial and legal disclosures, etc.).
6. Demonstrated ability to conceptualize and develop proactive prospecting methodologies to support organizational goals, including data mining, sophisticated constituent database queries, etc.
7. Demonstrated background in Internet-based research.
8. Strong computer skills, including experience downloading and exporting information between systems and developing robust reports using such tools as SharePoint, SSRS, Crystal Reports, Tableau, or similar applications.
9. Experience working with a relational database is a necessity, preferably Blackbaud’s RE NXT or Raiser’s Edge, as well as the Microsoft Office suite of products, including Word and Excel.
10. Excellent oral and interpersonal skills, including diplomacy required to function effectively with major gift team, high level campus administrators, volunteers, student team and other constituencies to bring large scale projects to completion. Ability to work in a team environment.
11. Demonstrated ability to work independently, prioritize work, and independently manage multiple, diverse and competing priorities while meeting deadlines.
12. Strong project management skills and problem-solving skills and demonstrated ability to work in a demanding environment.
13. Ability to maintain confidentiality and work with sensitive information.
14. Ability to recall, recognize and communicate interrelated information pertaining to University benefactors and prospects.
15. General fundraising skills, including proficiency at supporting and participating in prospect management and tracking processes and staying informed of trends in the field.
16. Knowledge of ethics statements by APRA, AFP, and CASE.
17. Flexibility to work on occasional weekends.
18. Must be willing and able to travel locally, regionally, and occasionally nationally.

**Responsibility for the Work of Others**

Supervision Responsibility

Team Lead for staff and student employees working in the donations office and in the prospect research unit.

**Analytical Reasoning**

* Complex analytical reasoning is applied to research, interpretation and management of prospect and donor information; as well as to produce accurate financial reports and campaign reports.
* Ability to identify and establish complex transaction patterns and create meaningful donor activity correlations to other systems data in order to increase the likelihood of successful donor solicitations at higher levels.
* Complex analysis of data entry and problem tracing related to financial entries and mass data tactics.

**Decision Making**

* Complex decision-making on a daily-basis in all the areas identified under key tasks.
* Negotiation and decision-making with colleagues and stakeholders
* Experience, discretion, tact, and judgment are required.
* Complex system coding and development decisions
* Make critical reputational and relationship building decisions related to donor activity in difficult and sensitive situations

**Impact**

* Actions or decisions taken by the Team Lead, Research & Donations impact upon the accomplishment of External Relations and University objectives
* Impact upon reputation of the University with volunteers and community leaders

**Communication**

Internal:

* With fundraising staff at all levels across the University (often interactions with senior University officials – PVP, Deans, Department Chairs, College Principals: prospect identification, qualification & strategy; development of lists, research support and reporting
* Interaction with Portfolio Operations leaders providing expert guidance in areas of responsibility.
* Other colleagues within External Relations and Development

External:

* Key volunteers, alumni and major gift donors engaged in campaign activities.
* Peers at other universities and within sector

**Motor/ Sensory Skills**

* Keyboarding & mouse manipulation - Computer usage impacts upon majority of responsibilities
* Driving - To attend internal and external meetings
* Dexterity/Coordination - Interaction at special events
* Hearing, speech and visual - remote and face to face communication, negotiation and presentations

**Effort**

Mental:

* Sustained concentration & focus - Research, strategy development – for content and prospects, proposal writing, prospect identification and qualification, systems function and development.

Physical:

* Long periods of time spent keyboarding, in meetings

**Working Conditions**

Physical:

* Long periods of time spent keyboarding, in meetings

Psychological:

* Demonstrated flexibility in meeting shifting demands and priorities and managing multiple tasks
* Flexibility to work occasional weekends
* Occasional travel expected
* Frequently deal with donor sensitivities and occasionally stakeholder complaints
* Stress imposed by quarterly and annual fundraising and program objectives