



# Amherst College

## Office of Human Resources

### JOB DESCRIPTION

---

Title: Assistant Director of Prospect Management

Department: Development Reports to title: Director of Prospect Development

Full Time: X Part Time: \_\_\_\_\_ Date Prepared: 08/26/2019

Job Group & Level: PT-3 Regular Daily Work Schedule: \_\_\_\_\_ to \_\_\_\_\_

Pay Type: Weekly \_\_\_\_\_ Monthly X Months Per Year: 12 Hours Per Week: 40

(Summer Months) Months Per Year: \_\_\_\_\_ Hours Per Week: \_\_\_\_\_

---

#### 1. Summary of Position:

The Assistant Director of Prospect Management position is responsible for the gathering of prospect intelligence and reporting of significant moments in the relationship between prospective donors and the College, with a focus on bringing efficiency, predictability, and accountability to the fundraising effort. These responsibilities are critical to Amherst College's fundraising success.

The Assistant Director contributes to the achievement of Amherst College fundraising goals through the management, analysis, and reporting of all data related to the Campaign and Major Gift fundraising pipeline and gift solicitation activity, ensuring that senior Advancement staff, volunteer Campaign leaders and board members, have accurate, thorough, timely, and well-communicated information to inform fundraising strategy and decision-making.

The Assistant Director of Prospect Management gathers this strategic information through in-person meetings and written reports, oversees its storage and accuracy, and develops clear, user-friendly reports to communicate it to leadership.

The Assistant Director of Prospect Management takes appropriate actions to support a diverse workforce and participates in the College's efforts to create a respectful, inclusive, and welcoming work environment.

---

#### 2. Principal Duties and Responsibilities:

##### 65% Prospect Management Data

- Develop and document Campaign Guidelines for the collection and storage of prospect data. Communicate guidelines to Advancement colleagues; provide ongoing training and supervision to ensure guidelines are followed.
- As project manager for semi-annual Portfolio Review program (18+ meetings annually), lead the series of meetings, each of which focuses on the prospect portfolio of a member of the solicitation staff (including a meeting for the Chief Advancement Officer). Responsible for all aspects of the program including facilitating the meetings, scheduling and invitations, providing collateral materials, and post-meeting follow up.
- Meet with solicitation staff individually monthly in for gift pipeline and track data updates.
- Provide portfolio strategy advise, in collaboration with Director of Leadership Giving, adding, removing or reassigning prospects for most effective deployment of Leadership Giving staff.

- Collect additional key information from prospect visit reports and other sources.
- Perform regular data quality audits, and develop and monitor automated alerts for data errors to ensure accuracy and completeness of prospect data.

30% Prospect Information Analysis and Reporting

- Provide campaign reporting to Chief Advancement Officer and senior leadership in Advancement, as well as to Campaign Co-Chairs and other top volunteer leaders. Reports include Campaign Pyramid, Major Gift Pipeline, and Campaign Activity Progress reports. Design user-friendly, visually attractive deliverables.
- Manage major data analysis projects using a vendor, such as predictive modeling of all constituents (28,000+ records) and prospect identification screenings. Collect and prepare data ("data hygiene"), upload file for vendor, review and analyze results.
- Develop in-house reports, lists, and ad-hoc queries in addition to vendor-supported projects. Use vendor and in-house tools to identify areas of success and opportunity, and make recommendations to management.
- Propose and manage data analysis projects including prospect identification projects to discover new potential donors.
- Build capacity for sophisticated data visualization and analytics methods including geographic prospect maps. Identify and evaluate useful products (such as Tableau and Power BI).
- Assist Director of Advancement Services and Chief Advancement Officer with mid-campaign and post-campaign analysis.

5% Perform other duties/functions as requested.

All employees are expected to participate in the College's efforts to create a respectful, inclusive, and welcoming work environment.

3. Internal-External Interaction/Communication:

- Conduct straightforward communication with Advancement staff across all teams.
- Occasionally provide non-standard event briefings and data visualization reports that are shared with board members, high-level campaign volunteers, and the President's Office.

4. Education: (include certifications and licenses)

Required: Bachelor's Degree

5. Experience: (List specific skills necessary to perform this job)

Required:

- 3-5 years of experience in fundraising or similar field
- Experience with a CRM fundraising database, such as Colleague Advance
- Proficient in word processing and spreadsheet applications (eg, Word/Excel and/or Google Docs/Google Sheets)
- Ability to take initiative, and work independently and collaboratively
- Demonstrated analytical and problem solving skills with the ability to exercise sound judgment
- Strong time-management, organizational, verbal and written communication, and interpersonal skills
- Demonstrated understanding of the principles of prospect management
- Discretion with confidential information
- Commitment to or experience working with a diverse community

Preferred:

- Experience with Colleague Advance
- Experience with Microsoft Access
- Experience with wealth and capacity screenings, predictive modeling, data visualization
- Experience developing or implementing prospect management guidelines/policies

---

6. Environmental and Physical Demands: (Please describe the work environment and unusual physical demands, i.e. lifting requirements.)

Office environment: Repetitive motions including wrists, fingers and hands; visual – normal concentration; lift, carry, pull and push up to 10 lbs.

---

7. Decision Making:

- Process and interpret complex issues, identify problems and possible solutions, take appropriate action and may use assessment tools and proven techniques. Exercise independent judgement, including parsing visit report narratives and translating into Colleague data and determining when to update gift pipeline data.
  - Provide data and analysis used to inform decisions made by Advancement leadership.
- 

8. Supervision Exercised/Received:

Minimal supervision by Director of Prospect Development.  
No supervisory responsibilities.

Supervisory Responsibility: Yes \_\_\_\_\_ No X \_\_\_\_\_

Number of Employees Supervised: \_\_\_\_\_

