

WILLIAM & MARY

UNIVERSITY ADVANCEMENT

Prospect Research Analyst

Mission Statement

University Advancement creates the conditions for opportunity – human, financial & experiential – by garnering and stewarding the resources that advance William & Mary.

Position Summary

Reporting to the Associate Director of Prospect Research, the Prospect Research Analyst provides full-scale prospect research, identification and development services throughout the prospect life cycle. Using the account management model, the Analyst supports several fundraising teams and individual fundraisers. Collaborating with advancement leadership, front-line development officers, and volunteers on prospect management and activity, proactive and reactive prospect research and identification projects, wealth and propensity reviews, and other prospect development related projects.

The research analyst utilizes advanced research and analytical methodologies to identify, qualify, and rank a viable pool of highly qualified prospective donors and volunteers in support of the University's strategic fundraising activities, including the annual, planned, major, and leadership gifts fundraising programs. Collects, synthesizes, analyzes, and interprets biographical and financial data to produce briefings and reports that inform decision-making; these reports include calculated wealth estimates and capacity ratings that indicate the ability and propensity of individuals, corporations and foundations to make philanthropic contributions to and serve in volunteer capacities for the university. Advises advancement leadership and gift officers on prospect strategy and comprehensive portfolio management, routinely reviewing fundraising benchmarks with emphasis on strategic movement of prospects through the fundraising cycle (e.g., cultivation, solicitation, and stewardship).

The Prospect Research Analyst will help foster a culture of belonging that embraces all people and perspectives. This is a hybrid position based in Williamsburg, VA, that offers a flexible work environment.

This position is classified as professional, meaning it is salaried and exempt from overtime. For benefits and leave purposes, this role falls under the "12-month Professionals & Faculty" classification on the HR website.

Learn more and download the position description on the University Advancement recruitment website: <https://advancement.wm.edu/come-work-with-us>.

Required Qualifications

- Bachelor's degree with coursework in research principles, library science, history, business, writing, communications, or a related field or equivalent education and/or experience.
- Strong analytical skills: ability to interpret financial information, manipulate, analyze, and synthesize data and present findings that are clear and actionable to a variety of Advancement professionals.
- Knowledge of a broad range of research techniques, web-based research, as well as database operation and usage.
- Possess a strong aptitude for logical thinking and intellectual curiosity. Strong problem solving, analytical, and organizational skills.
- Ability to adapt to shifting priorities and manage multiple projects in a fast-paced, deadline-driven environment.
- Excellent oral and written communication skills with the ability to work effectively with a diverse audience, with the ability to translate analysis into an accessible format when interacting with non-technical audiences. Proficiency in delivering information clearly to others in both oral and written forms.
- Outstanding interpersonal skills necessary to interface with a diverse group of colleagues and constituents as well as the ability to lead and build consensus among colleagues.
- Demonstrated ability to maintain strict confidentiality; handle sensitive information and material in a discretionary manner.
- Knowledge and understanding of current trends in philanthropy as well as fundraising principles (typically 1-3 years).
- Knowledge and understanding of the fundraising process and business intelligence concepts to include the ability to understand business financial concepts.
- Knowledge of web-based and online research databases and techniques (typically 1-3 years).
- Knowledge of standard research methodology and prospect portfolio development and management, evaluating donor prospects for capacity, inclination, readiness, and recommending relationship development strategies.

Preferred Qualifications

- Master's degree in Business, information studies, public administration, or related field.
- Experience in prospect research and management within an academic, nonprofit, corporate, or consulting environment.
- Experience analyzing, interpreting, and evaluating wealth data, gift vehicles, and their application in solicitation strategy.

- Experience incorporating common prospect tracking data in a relationship management system, such as prospect ratings, staff assignments, solicitation goals, strategies, moves, contact reports, proposals, and stages.
- Experience with Blackbaud CRM and industry tools leveraged in prospect research and management activities.

Conditions of Employment

- Long hours may be required to meet deadlines.
- Highest standard of professional ethics and agreement to abide by ethical and confidentiality precepts as set forth by the Commonwealth of Virginia, the university, CASE, and APRA.

Is the position remote work eligible? Hybrid (works remotely at least 1 day per week but not full-time)

Position Duties

Prospect Identification and Research: 50%

- Provide full scale research and prospect management services to a group of assigned fundraising teams, focusing on both individual fundraiser and team prospect needs.
- Conduct prospect research including the conceptualization and implementation of search strategies. Synthesize and analyze information. Interpret historical, biographical, and financial data. Present the research in strategic and relevant ways. Create actionable recommendations for prospect strategies in support of the University's strategic priorities.
- Leverage wealth screening tools and comprehensive research methods to identify prospects and develop comprehensive prospect research profiles and recommendations.
- Collaborate with fundraisers or other interested parties in establishing appropriate ask amounts for an annual, leadership, and/or planned gifts based on prospect ratings or other key indicators.
- Apply prospect analysis results to a variety of projects. Inform team-level decisions for long-term planning to set campaign goals, define fundraising priorities, event planning, and regional initiatives.
- Proactively and independently plan and execute creative strategies to identify sources of major gift support using creative research techniques and electronic searching methodologies of internal and external data to ensure that campus wide fundraising initiatives, regional fundraising pools, and individual fundraiser portfolios have sufficient appropriate prospects to meet fundraising goals.
- Curate event bios, prospect summaries, and full prospect profiles to inform gift officers and advancement and university leadership with meaningful and actionable information.

- Provide analysis for future fundraising progress based on capacity, penetration, and activity of the prospect pool. Identify data that is critical to inform fundraisers in order to arrive at successful strategy next steps and outcomes.
- Perform other related duties as assigned.

Prospect Strategy: 40%

- Provide prospect strategy and support portfolio management for fundraisers with a focus on providing optimal portfolio balance and ability to achieve fundraiser performance metrics as well as team goals. Provide insight, analysis, and movement for key prospects individual gift officers and team managers to inform decision-making.
- Support / troubleshoot avenues for fundraisers to capture moves data (workflows / in-person strategies).
- Collaborate with Portfolio Management team in prospect strategy and portfolio management meetings with Advancement leadership and gift officers. Review prospects with senior leadership and front-line fundraisers. Develop strategies related to fundraising readiness. Develop and execute proactive alert strategies for a core group of prospects and maintain an active awareness of the important news and events involving them.
- Create and communicate actionable recommendations for prospect strategies in support of the University's strategic priorities.
- Review prospects with senior leadership and front-line fundraisers and develop strategies related to fundraising readiness.
- Develop and execute strategies to ensure that newly identified prospects are presented and assigned to appropriate campus fundraisers in a timely manner.

Prospect Development Consulting and Other Projects: 10%

- Collaborate and consult with diverse campus contacts including fundraisers, fundraising leadership, and other campus partners on matters related to portfolio development, solicitation strategy formulation, and information gathering through peer screenings.
- Interpret results and provide direction on the segmentation and management of large groups of prospects and donors identified through the electronic screening process.
- Provide consultative services and orientation sessions on research methodologies and resources to fundraisers, faculty, and other key campus partners involved in fundraising.
- Design and implement other prospect development projects as assigned.
- Assist in the development, implementation, and delivery of policies, procedures, and prospect research & management training.

Equal Opportunity Statement

EEO is the Law. Applicants can learn more about William & Mary's status as an equal opportunity employer by viewing the "Know Your Rights" poster published by the U.S. Equal Employment Opportunity Commission. <https://www.eeoc.gov/know-your-rights-workplace-discrimination-illegal>

Background Check Statement

William & Mary is committed to providing a safe campus community. W&M conducts background investigations for applicants being considered for employment. Background investigations include reference checks, a criminal history record check, and when appropriate, a financial (credit) report or driving history check.

Benefits Summary Statement

William & Mary offers our employees a full array of benefits including retirement, health insurance with options for expanded dental and vision along with group and optional life insurance with coverage for spouse and children, flexible spending accounts, and an EAP (Employee Assistance Program). Our employees enjoy additional university benefits such as educational assistance, professional development, wellness benefits, and a robust holiday schedule. All employees have access to fitness facilities on campus. Staff members also have access to the university libraries, and much more. To learn more, go to: <https://www.wm.edu/offices/hr/currentemployees/benefits/index.php>

WILLIAM & MARY

UNIVERSITY ADVANCEMENT

In addition to salary, William & Mary provides wonderful benefits and perks that add to an employee's total compensation package. **Below is a comprehensive overview of benefits for the Prospect Research Analyst with a top salary of \$55,000.** This position is classified as professional which defines the benefits package.

HEALTH & LIFE

Our **health plan options** are designed to support a healthy lifestyle for you and your family. You may enroll in a statewide health plan, regional plan, or, if living or working in the Hampton Roads area only, a health maintenance organization (HMO). Full-time employees pay the employee portion of the total monthly premium, and the state pays the remainder of the cost, anywhere from \$584 to \$1,802 per month depending on the employee's plan; premiums are deducted from paychecks before taxes are paid.

Group life insurance policy is also provided for you. The amount is equal to your annual salary rounded to the next highest thousand (when applicable), and then doubled. This is a double indemnity policy that would pay twice the value of the insurance in the event of an accidental death.

Employees are covered by one of two disability plans: University Sick & Disability Plan (university plan) or Virginia Sickness and Disability Program (VSDP).

University Sick & Disability Plan provides 100% pay for 120 calendar days for you if you experience an illness, surgery or accidental injury that requires you to be absent from work more than seven calendar days. Each July, 30 days of short-term disability are restored. A long-term disability plan is available for an additional cost.

The Virginia Sickness and Disability Program (VSDP) provides 60% pay up to six months for you if you experience an illness, surgery or accidental injury that requires you to be absent from work more than seven calendar days. This percentage increases after five years of service. A **long-term disability** plan is also available at no cost to you. This provides you with 60% preinjury salary.

TIME OFF

In addition to 12 paid holidays per year, William & Mary offers several leave programs. You will accrue 24 days per year of **annual leave**, which can be used for personal time, vacation, and sickness. Employees also accrue 4 - 8 days of **sick leave** to be used if you are sick or injured, or for medical appointments. A benefit unique to William & Mary eligible employees is an additional 16 hours of paid leave per year for **community service leave**, so you can get out there and be a part of the broader community.

RETIREMENT

All salaried and benefits-eligible employees can choose to participate in the state retirement plan (VRS) or the Optional Retirement Plan (ORP). VRS contains both a pension benefit with 100% vesting after 5 years of employment and a defined contribution component with William & Mary contributing up to 3.5%. With ORP, vesting is immediate and is solely a defined contribution plan in which William and Mary is contributing 8.5% of your salary.

Take advantage of any or all our optional 403(b) and 457 savings programs offering pre-tax savings or Roth after-tax deferrals. Contribute up to the IRS-determined limit annually in each account and receive a 50% match from William & Mary for up to \$20 per pay period.

ADDITIONAL PERKS

In addition to the perk of living in Williamsburg, close to beautiful parks, nature trails, fabulous shopping, Second Sundays on Merchant's Square, farmer's markets and more, William & Mary employees enjoy these additional perks.

EMPLOYEE EDUCATIONAL ASSISTANCE

Under the [Educational Assistance Policy](#), faculty and staff who are eligible for retirement participation may be eligible to enroll in certain academic credit courses at William & Mary and have the current tuition paid or waived for up to 6 credit hours each semester and during summer session (all summer sessions combined). Some restrictions do apply. In certain cases, an employee may be approved to enroll in an academic course at an institution other than William & Mary and have the current tuition reimbursed. If you have questions after reading the policy, please contact the Tax Compliance Office at Tax@wm.edu.

AFLAC

Employees can choose from different optional policies for coverage such as cancer insurance, intensive care insurance and disability, etc. These are optional plans. For additional information please call 1-800-992-3522 or visit [AFLAC](#) on the web.

DISCOUNTS

W&M ID Card Local Discounts: Employees can use their ID card at participating local vendors in the Williamsburg area to receive discounts on meals, lodging and purchases.

Colonial Williamsburg Collegiate Pass: W&M employees are eligible for a discounted Colonial Williamsburg Collegiate Pass, which includes the use of Colonial Williamsburg's bus system and admission into any of the exhibits in the restored area. Present your W&M ID at the Colonial Williamsburg Visitor's Center or ticket offices to get your discounted pass.

Statewide Discounts: [DHRM List](#) information is online.

OTHER GREAT PERKS

Use of W&M Facilities: Many university facilities, including the [recreational facilities](#) and [the libraries](#), as well as [fitness classes](#), are available to employees. Contact specific facilities for details.

SunTrust Bank: SunTrust Bank provides benefits to William & Mary employees. For questions and assistance, please contact your local Jamestown Road SunTrust Branch (1186 Jamestown Road, Williamsburg, VA 23185) at 757-603-4749.

Child Care: [Williamsburg Campus Child Care](#) (WCCC) is a nonprofit organization which has had a successful program in Williamsburg since 1981.

CommonHealth: [CommonHealth](#) of Virginia offers programs available to all full-time William & Mary employees and dependents.

Legal Resources: [Legal Resources](#) is a program that allows employees to pay \$16.50 per month for legal services. Visit the website to learn more.