The Opportunity

Brandeis University – a distinguished private research university recognized for its academic excellence and leading-edge research – has an exciting opportunity for a talented and motivated Associate Director, Principal Gifts Research & Analysis.

Located in the suburbs of Boston, a global hub for higher education and innovation, Brandeis is dedicated to first-rate undergraduate education while making groundbreaking discoveries. Established as a nonsectarian university in 1948 by members of the American Jewish community, our visionary founders shared a commitment to social justice and to making the world a better place.

Our founders’ pioneering spirit and intellectual pursuits continue today at Brandeis – from helping to solve a national public health crisis through work at its newly established Opioid Policy Research Collaborative, to the biological discoveries that last year earned two faculty members a Nobel Prize in Physiology or Medicine. We aspire to further such important endeavors and are looking to grow our team with individuals who share our passion and commitment. In preparation for its next ambitious campaign, Institutional Advancement (IA) seeks to strengthen the bonds with the University’s many constituencies. By working together, we will secure the financial resources necessary to continue the legacy of excellence in teaching, research, and scholarship at Brandeis.

Position Summary

The Associate Director, Principal Gifts Research & Analysis (AD) provides high-level data and financial analysis and prepares related briefings and reports that rates (via forecasting and formulaic estimates) the ability and propensity of individuals, corporations and foundations to make philanthropic contributions to and serve in volunteer capacities for Brandeis University.

Specifically, the Associate Director will work primarily on prospects and donors capable of making gifts to Brandeis of $1 million or more and often at the level of $10 million or more. On an annual basis, it is expected that the Associate Director will perform work and/or contribute to the review of several hundred major and principal gift prospects (300+).

The Associate Director is responsible for identifying, rating and ranking a continual flow of highly qualified donors in support of the University’s highest fundraising priorities, effectively serving as the lead research analyst for principal and international gifts. The Associate Director also assists with identifying alumni, parents and friends for leadership volunteer opportunities, honors, and awards, including Board of Trustees vacancies, campaign leadership committees, advisory councils, etc.
Additionally, the Associate Director will provide mentorship to research colleagues related to advanced financial and statistical analysis techniques, including sharing insights and trends on high net worth individuals and ultra-high net worth individuals (HNWI and UHNWI), income and asset analysis, evaluating securities and stock portfolios, developing private company valuations, determining liquidity and tracking major wealth events, understanding financial and investment markets, industries and services, etc. The Associate Director will independently review, edit and provide feedback on profiles and analyses of principal gifts prospect prepared by other researcher for content, uniformity and accuracy.

Other responsibilities include effective collaboration and partnership with colleagues, peers and unit managers within a diverse advancement organization and complex top tier research institution. The Associate Director works closely and as a strategic partner with vice presidents and senior fundraising officers to develop cultivation and solicitation strategies for alumni, parents and friends that maximize their giving to and engagement with the University. The Associate Director participates in Principal Gift Strategy sessions and meetings and will aid in the development, tracking, prioritization and management of principal gifts prospect lists. An ability and willingness to work independently, think strategically, and communicate professionally within a fast-paced collaborative team environment is essential.

The Associate Director will be detail-oriented, inquisitive, and self-motivated in applying their research prowess and analytical abilities to identify and engage prospective donors, and to promote philanthropy and volunteerism on behalf of Brandeis University.

**Primary Responsibilities**

- Employ advanced research data collection and analysis skills (using public, proprietary, purchased or leased databases, published materials and other resources) to proactively identify, research and assess the philanthropic giving capacity of prospective donors. Analyze the wealth and assets, giving interests, backgrounds and relationships to Brandeis of individuals, corporations and foundations. Prepare high-level and well-written briefing reports for the use by the University President, deans, senior administrators and senior fundraising officers.

- Initiate contact with and respond to requests from Advancement senior management and fundraisers – specifically the Principal Gifts Strategy group to identify, prioritize and organize prospects for personal visits, event invitations, volunteer leadership opportunities, special projects and awards. Advise fundraisers on the ranking and prioritization of prospects for cultivation and solicitation to leverage the potential and diversity of Brandeis’ donor base.

- Conduct reviews or engage outside advisors on due diligence research on individuals, corporations and foundations related to the assessment of potential red flags, financial or reputational risk related to University gift review and acceptance policies.

- Use expertise to provide mentorship, review and feedback on the work of other research analysts related to principal gifts prospect development and pipeline management. Create and deliver training and professional development programs to share advanced techniques with colleagues and provide meaningful insights on wealth and philanthropy to fundraising and donor relations colleagues.
Essential Functions & Time Allocation

60% - Research, Analysis & Reporting. Perform a variety of advanced investigative research, financial and statistical analysis activities, including: ratio and trend analysis, assessments of earnings per share, book value vs. market value analysis, evaluation of debt and equity instruments, analyzing securities, options, insider trading reports, merger and acquisition documents, etc. Develop private company valuation models, income and accumulated assets analysis, market, sector and demographic analysis. Understand and use national and global statistics on HNW and UHNW populations to determine appropriate application for gift capacity forecasting methodologies. Write, edit and disseminate detailed and complex briefings and reports on same.

25% - Collaboration with Vice Presidents & Senior Fundraising Officers. Offer strategic insights and advice on the engagement of top prospects and donors, highlighting relationships, philanthropic interests, employment and family background, etc. that may be leveraged in support of Brandeis’ highest-level funding priorities and areas of academic and program excellence. Routinely interact and collaborate with prospect development team members, colleagues in the President and Senior Vice President for Institutional Advancement offices, as well as staff across the Advancement Division. In collaboration with the Executive Director, Prospect Development & Information Strategy, respond to a broad spectrum of high priority research and prospect identification projects and specialized briefing requests from senior University departments, including the President’s Office, Provost, CFO, Investment Office, deans, etc.

15% - Mentoring, Training & Professional Development. Provide oversight on projects related to principal and international prospect development activities. Mentor research colleagues on advanced research techniques; proactively share relevant articles and insights on trends in wealth management and philanthropy; develop presentations and discussion groups on special topics to inform and educate coordinators, associates and Advancement colleagues on lead generation and pre-qualification key characteristics of HNW and UNHW individuals.

Qualifications

- Bachelor’s degree required. Demonstrated competencies in applied marketing research, sales, marketing and/or financial analysis, library science or similar fields. Advanced degrees or related certifications highly desired.

- Minimum 7 years of advancement research, development, fundraising and/or equivalent experience, specifically working with donors and prospects at the $1 million+ gift capacity level. Preference given to candidates with understanding of and competency with Apra’s Advanced Skill Sets. International and high net worth research experience required.

- Proven library and research techniques, emphasizing the ability to gather, evaluate and synthesize complex data from various sources, apply intelligence and interpretative insights and present information in a clear and cohesive manner. A sample portfolio of work products and/or demonstrated analysis and writing samples will be requested.
• Exceptional reading, technical writing and proofreading skills with the ability to synthesize and interpret high volumes of data. Careful attention to detail, formatting and readability; ability to convey complex information straightforwardly and write concisely.

• High degree of fluency in computer technologies, including proficiency with building Internet and web queries, manipulating and retrieving data from complex database sources, managing news alerts and using electronic subscription services. Proficiency with word processing, spreadsheet and database systems with an ability to also become comfortable quickly with the University’s alumni and donor databases.

• Superior interpersonal skills with proven ability to successfully interact and collaborate with varied constituencies in a professional manner.

• Ability to apply good judgment and discretion when dealing with highly confidential alumni, parent, student, family, donor and prospect information. Ability to manage a commitment to professional ethics and confidentiality.

• Must be a detail-oriented, self-starter with an ability to work independently and manage multiple priorities to meet challenging timelines and deliver high-quality work end-products.

• Must be able and willing to work occasional evenings and weekends with an attitude of doing what it takes to get the job done.

**Commitment to Diversity, Equity, and Inclusion**

Founded as a model of ethnic and religious pluralism, Brandeis University welcomes students, faculty, and staff of every nationality, religion, and orientation. Social justice is central to the mission of Brandeis, which endeavors to foster a just and inclusive campus culture that embraces the diversity of our larger society. Brandeis embodies the American heritage of cultural diversity, equal access to opportunity and freedom of expression. Learn more at: [http://www.brandeis.edu/about/mission.html](http://www.brandeis.edu/about/mission.html)

Brandeis University is an affirmative action/equal opportunity employer. It is the policy of Brandeis University not to discriminate against any person on account of race, color, ancestry, religious creed, gender, national or ethnic origin, sex, sexual orientation, age, genetic information, disability, veteran status, or any other category protected by federal or state law. The following person has been designated to handle inquiries regarding the nondiscrimination policies: Vice President of Human Resources, Bernstein-Marcus building, 781-736-4464.
Submit Your Candidacy

We welcome your nominations, inquiries and expressions of interest in this position, which may be directed informally via email or telephone to Advancement administration contacts:

**Ania Morris**  
Assistant Director, Advancement Talent Management & Administration  
781-736-4004 | armorris@brandeis.edu

**Elizabeth Crabtree**  
Vice President, Advancement Administration & Operations  
781-736-4034 | ecrabtree@brandeis.edu

To apply, please visit our career website and submit your cover letter and resume via the Brandeis University Human Resources online portal at [https://careers.brandeis.edu/staffjobs/](https://careers.brandeis.edu/staffjobs/)

*Please note that you must upload your cover letter and resume as one combined file.*

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*The material presented in this position summary is for informational purposes only. Candidates offered a position at Brandeis University may be subject to an employment reference check and additional background screening satisfactory to Brandeis. This screening may include a criminal background check, drug testing, and motor vehicle records check.*