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 experienced Executive Director, Prospect Development & Information Strategy.

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 recently 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 Executive Director, Prospect Development and Information Strategy is a strategic, innovative, self-motivated professional with a client services orientation and an entrepreneurial spirit. Reporting to the Sr. Executive Director of Advancement Services, the Executive Director is an integral member of the Institutional Advancement division’s core management team, i.e. unit directors. The Executive Director will lead several programmatic areas and teams critical to fundraising success: Research & Prospect Development; Relationship Management & Pipeline Development; and Data Mining & Fundraising Analytics.

The Executive Director has the overall responsibility to provide an innovative and strategic vision for the process of identification, research, qualification, and relationship management of Brandeis University’s most promising prospects for significant financial support. The Executive Director provides leadership, direction and expertise to develop and implement new programs to significantly expand the prospect base, to strengthen the prospect pipeline, and to enhance prospect management and the solicitation pipeline to maximize fundraising success.

In alignment with advancement strategies and initiatives and in collaboration with fundraising leadership, the Executive Director develops and manages policies, protocols, processes and workflows for prospect relationship management from among Brandeis’ 300,000+ constituent records, including the regular analysis, review, assessment, and realignment of 20+ gift officer portfolios; prospect stage and relationship tracking systems; contact report management; prospect assignment processes; solicitation pipeline management and associated fundraising KPIs and performance metrics.
The Executive Director manages a team of 7 – 10 professional staff, including the associate director, principal gifts research and analysis; associate director, prospect management and pipeline development; and several research analysts and data analytics professionals. The Executive Director directs the team’s efforts to provide insight and intelligence for IA’s fundraising and engagement initiatives. The Executive Director develops annual work plans; provides oversight of all unit functions; mentors, manages and motivates staff to ensure best-in-class high performance standards.

Other responsibilities include effective partnership with colleagues, peers and unit managers within a diverse advancement organization and across a complex top tier research institution.

Decisiveness, diplomacy, trustworthiness, discretion, and creativity are indispensable qualities of the Executive Director. The incumbent must have the ability to interact easily with University senior administration, deans, peers and colleagues, and at all times, must professionally represent Brandeis.

Primary Responsibilities and Essential Activities

- Direct and manage a prospect development program in a complex, fast-paced environment with a heavy influx of projects and client needs. Ensure that the high-level data analysis needs of the President’s Office and Principal Gifts program are met consistently and contribute to the successful engagement and solicitation strategy related to donors making gifts of $5 million or more.

- Create and direct all aspects of the prospect research program focused on the discovery and evaluation of prospective donors, their interests and relationship, inclination to give and philanthropic capacity to give. Responsibilities include the development of policies and procedures; outlining research methodologies; creating work product templates; developing quality control standards and processes: managing the queue of research requests and engaging in a broad range of pro-active prospect identification projects.

- Direct and manage a donor-centric, relationship management program in collaboration with the Vice President for Development and Vice President for Administration & Operations. Design and develop policies, centralized tracking and reporting systems, processes and workflows related to fundraising activities. Ensure gift officer efforts are focused on working with the best prospects and creating meaningful, productive relationships that lead to effective solicitation and maximize the donor’s philanthropic capacity and interest across all areas of Brandeis. Monitor fundraising performance through the management of contacts, strategy plans, solicitation pipelines, performance metrics, etc. Ensure accuracy and timeliness of data to enable effective revenue stream forecasting and inform fundraising performance management.

- Lead the information strategy that draws conclusions and identifies trends through the statistical analysis of internal and external data, particularly that which relates to understanding donor behaviors, interests and lifetime giving potential. Inspire a data-driven decision culture and work collaboratively across the division to understand the highest priorities where data mining, modeling, enhancement and analysis can directly improve and increase fundraising success. Identify new and innovative ways to analyze and model information, provide data visualization and dashboards, forecast revenue and demonstration IA’s progress in the form of metrics.

- Mentor, coach and manage a professional staff of 7 – 10. Provide guidance on advanced research methodologies and techniques, data analysis and information management standards. Create and deliver relevant training and professional development programs to team members as well as colleagues across the division.
Essential Functions & Time Allocations

40% - Prospect Identification & Research

- Defines research policies and procedures, both within the unit and within IA.

- Facilitates communication with other departments of IA to ensure that research priorities align with the division's operating needs.

- Manages the research request pipeline; assigns requests; reviews drafts; ensures that work is completed in a timely fashion. Fulfills rush and complex research requests as needed. Ensures that high-quality products are delivered for all requests.

- Independently reviews, edits, and provides feedback on profiles and analyses of prospects prepared by researchers for content, uniformity and accuracy.

- Supports and oversees the activities related to Presidential and Principal Gifts Prospect Research, with hands-on day-to-day management performed by the Associate Director.

- Develops plans and strategies for the management and expansion of the overall pool of prospects and donors through a broad range of pro-active prospect identification projects.

- Leads the assessment and analysis at agreed upon intervals of the wealth, financial capacity, and philanthropic engagement levels of the University's overall constituent pool.

- Sets standards and develops protocols for IA’s Giving Capacity Ratings (GCRs) and leads the unit's efforts in the strategy for the assessment and rating of existing prospects.

- Utilizes best practices, new technology and trends in all aspects of prospect development work, and regularly shares insights and information with the team and with appropriate IA staff.

30% - Prospect Management and Pipeline Development

- Directs and oversees the activities of the Prospect Management and Pipeline Development program, with hands-on day-to-day management performed by the Associate Director.

- Oversees and provides guidance on the establishment and implementation of prospect management policies, processes, and protocols, utilizing prospect research tools and maximizing the functionality of donor management systems.

- Plays a strategic role with fundraising gift assignment and strategy meetings. Supervises the establishment and implementation of a strategic prospect assignment process in alignment with portfolio criteria and constituent assessment.

- Supervises the review and analysis of the University's constituency base and prospect pools. Utilizes data to align portfolios with the maximal potential for philanthropic contributions.

- Oversees the development, management and monitoring of a proposal pipeline function that will regularly demonstrate IA’s and individual fundraisers’ revenue progress.
• Oversees policies and protocols around the proposal pipeline process and moves, and training to fundraising staff.

• Ensures the regular preparation, dissemination, and enhancements of prospect management progress reports including, but not limited to, portfolio giving statistics, fundraising metrics, prospect pool summaries, cultivation trends, needs analysis, pipeline reports, and other forecasting.

**20% - Information Strategy**

• Works closely with the Data Administration & Records Management staff to ensure that the fundraising database facilitates a strategic, integrated program of prospect identification, research and donor management in support of fundraising and engagement efforts.

• Inform the design and implementation of database enhancements, new or improved reporting, and other necessary process improvements to best support the work of the fundraising staff.

• Oversees the compilation of constituent data to provide strategic assessment of prospect and donor behavior and trends to inform decision-making.

• Assesses information workflow as it relates to prospect development-related business processes.

• Defines data needs and compiles data and information to provide statistical models, forecasts, metrics and analyses to enable fundraisers to make informed business decisions and manage donors and prospects from an individual or segment perspective.

**10% - Department Management**

• Responsible for the effective and efficient management of the Prospect Development and Information Strategy unit, including hiring, supervising, training, establishing priorities, workflow for deliverables and unit productivity.

• Works closely with department management to assess information that can inform decision-making and support fundraising.

• Coaches, mentors, and provides professional development opportunities for all team members.

• Manages budget and all other operational aspects of the unit.
Qualifications

- Bachelor’s degree required. Advanced degrees and/or related certifications highly desired.

- Minimum 10 years of direct experience in prospect research, prospect management, development and/or fundraising. Preference given to candidates with understanding of and competency with Apra’s Advanced Skill Sets. Experience in a higher education setting preferred.

- Demonstrated competencies in applied marketing research, sales, marketing, data and/or financial analysis, library science or similar fields.

- Supervisory and management experience with ability to coach, mentor, and to tailor professional development plans for individual staff members.

- Demonstrated project management skills with experience managing a team and initiating, planning, executing, controlling, and completing multiple complex projects within tight deadlines.

- 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.

- 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, presentation software and relational database systems with an ability to also become comfortable quickly with the University’s alumni and donor databases. Expertise in data and financial analysis and use of related statistical software.

- Superior interpersonal skills with proven ability to successfully interact and collaborate with varied constituencies in a professional manner, exhibiting excellent written and oral communications skills.

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

- Must be a detail-oriented, self-starter with an ability to work independently and manage multiple projects and priorities to meet aggressive and challenging deadlines.

- 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

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/

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

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.