



Xavier University | Office of Human Resources

POSITION DESCRIPTION

DO NOT SUBMIT THIS FORM TO HUMAN RESOURCES. This serves as a template for the position description discussion with your direct supervisor. Once your position description is finalized, please submit the information online at:

Position Title: Director, Prospect Management and Discovery <input checked="" type="checkbox"/> Full-time <input type="checkbox"/> Part-time	Department: Internal Operations Division: University Relations
Position Grade (filled in by HR): Position reports to (position title): Associate VP, University Relations Supervisor's email address: Direct reports (number of reports and position titles):	

Position Summary: *In 3-4 sentences, briefly but specifically, summarize the primary purpose of the job.*

The primary purpose of this position is to support the efforts of the division of by acting as the strategic leader for prospect management, research and discovery. Working with the Associate Vice President, develop an overall strategic plan/vision for discovery and prospect management, to include planning, implementing and directing a comprehensive program that address activities associated with discovering, cultivating and stewarding prospects. This position will create and implement procedures, set priorities, oversee proactive prospect research and management, analyze and evaluate information and assist with the yearly financial forecasting.

Duties and Responsibilities: *List up to five essential functions of the job in the space provided below, indicating the most important first, and the approximate percentage of time spent on each function over the course of a year. Similar tasks should be grouped into one category and described as such (see example). DO NOT list any duties or responsibilities that require 5% or less of the position's time.*

1. Program Management

- Work with development officers, and other divisional staff to formulate policies for discovery and prospect assignment, management, and tracking, and facilitate the process as it evolves.
- Monitor and direct development officers' progress.

30 % of Time

2. Prospect Management and Tracking System Design, Analysis and Administration

- Refine the prospect management and tracking system design and concepts to adequately support the management and tracking of prospects, proposals, and donors.
- Monitor and make recommendations for system maintain and improvement. Ensure a high level of data integrity.
- Review and analyze system generated reports.
- Supervise data entry.
- Coordinate content of prospect management and tracking system utilizing divisional fundraising plans.

30% of Time



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3. Program and Prospect Analysis <ul style="list-style-type: none"> • Analyze collected assignment, contact, proposal, pledge and gift data to determine areas for program emphasis and enhancement. • Develop new reports and to evaluate, analyze, and articulate recommendations for the enhancement of the prospect management and tracking System. 	15% of Time
4. Department Liaison <ul style="list-style-type: none"> • Provides leadership in planning and achieving major and planned giving fundraising goals through research, data analysis and training. • Cultivate personal knowledge of University priorities and programs, research and fundraising Techniques. 	10% of Time
5. Stewardship <ul style="list-style-type: none"> • Oversee the creation and development of a stewardship services program. 	10% of Time

Supervisory Responsibilities: *Indicate the type and scope of supervisory responsibilities of this job. Check only one box. Note: this refers to supervision of other employees, not programs or tasks.*

- Not responsible for supervising employees.
- Supervises student workers only.
- Guides work of others who perform essentially the same work. May organize, set priorities, schedule and review work, but has no responsibility to hire, terminate, review performance or make pay decisions, e.g., Lead position.
- Supervises work of others, including planning, assigning and scheduling work, reviewing work and ensuring quality standards, training staff and overseeing their productivity. May offer recommendations for hiring, termination and pay adjustments, but does not have responsibility for making these decisions.
- Supervises work of others, including planning, assigning, scheduling and reviewing work, ensuring quality standards. Is responsible for hiring, terminating, training and developing, reviewing performance and administering corrective action for staff. Plans organizational structure and job content.
- Supervises student workers only



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Fiscal Responsibility:
<p>Do you have ultimate responsibility for the department's budget that includes but not limited to:</p> <ul style="list-style-type: none"> • Establishes the budget • Plans budget with Vice Presidents, Deans and UPRC <p>Yes <input checked="" type="checkbox"/> No</p> <p>If you answered no, please include any budget duties you perform in the "Duties and Responsibilities" section of this document.</p> <p>If you answered yes, indicate the dollar value of the budget :</p>

Education: <i>Indicate the minimum level of education generally necessary to effectively handle the job's duties and responsibilities..</i>	
Required	Preferred
<input type="checkbox"/>	<input type="checkbox"/> High school diploma or GED
<input type="checkbox"/>	<input type="checkbox"/> Vocational or technical training – Field of study:
<input type="checkbox"/>	<input type="checkbox"/> Associate's degree, or vocational or technical school degree – Field of study:
<input checked="" type="checkbox"/>	<input type="checkbox"/> Bachelor's degree – Field of study:
<input type="checkbox"/>	<input checked="" type="checkbox"/> Master's degree – Field of study:
<input type="checkbox"/>	<input type="checkbox"/> Doctoral degree – Field of study:
<input type="checkbox"/> Check here if experience may substitute for some of the above education and describe how:	
<i>Additional information (such as licensure, certifications, valid Driver's License, etc):</i>	

NOTE: This section is assessing the proficiency level necessary to perform in this job. You will have an opportunity to note your level of proficiency later on the form.

Work Experience: <i>Indicate the required level of work related experience required to effectively perform the job's responsibilities. This is not necessarily the same as your relevant experience. Check only one box.</i>				
<input type="checkbox"/> Less than 12 months	<input type="checkbox"/> 1-3 years	<input checked="" type="checkbox"/> 3-5 years	<input type="checkbox"/> 5 – 10 years	<input type="checkbox"/> More than 10 years – please specify _____



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NOTE: This section is assessing the proficiency level necessary to perform in this job. You will have an opportunity to note your level of information later on the form.

Knowledge: *Indicate the depth and breadth of knowledge within the job's field or specialty that is required to effectively perform the duties and responsibilities of this job. This is not necessarily the same as your relevant experience. Check only one box.*

- Specialized knowledge not required.
Fundamental working knowledge of concepts, practices and procedures and ability to apply in varied situations.
- Firm working knowledge of concepts, practices and procedures and ability to use in varied situations.
Comprehensive knowledge of theories, concepts and practices and ability to use in complex, difficult and/or unprecedented situations.

Provide additional information if desired:

Skills: *Describe the type and level of skills required to handle the job's responsibilities.*

Type	Level Required
<p>Analytical - Identify the component parts of a situation. Identifies the relationship among variables. <i>Describe:</i> Ability to analytically and strategically oversee the area of prospect management and research. Ability to analyze information and data to formulate strategies for the area.</p>	<p><input type="checkbox"/> Basic - Applies the fundamental skills necessary for position</p> <p><input type="checkbox"/> Intermediate - Applies some advanced skills that allow employee to adapt and meet some complex or non-routine situations</p> <p><input checked="" type="checkbox"/> Advanced - Applies highly proficient and specialized skills that allow employee to function in situations that are varied, complex, and/or non-routine</p> <p><input type="checkbox"/> N/A</p>
<p>Project/Process Management - Organizes the planning process. Develops detailed project schedules. <i>Describe:</i> Ability to manage multiple projects and processes concurrently.</p>	<p><input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced</p> <p><input type="checkbox"/> N/A</p>
<p>Computer/Technical - Uses word processing and data entry tools, and develops spreadsheets and presentations. Creates complex documents, spreadsheet analysis models and advanced graphics. <i>Describe:</i> Must have a strong working knowledge of donor data.</p>	<p><input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced</p> <p><input type="checkbox"/> N/A</p>
<p>Office/Administrative Support - drafts, edits, proofreads internal and external correspondence. Files department data and ensures files are organized. Perform data entry. Schedule meetings and appointments. Maintains and updates calendar(s) as appropriate. <i>Describe:</i> Must possess strong communication skills, both verbal and written. Organizational skills and ability to work with a variety of audiences is critical</p>	<p><input type="checkbox"/> Basic <input checked="" type="checkbox"/> Intermediate <input type="checkbox"/> Advanced</p> <p><input type="checkbox"/> N/A</p>



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<p>Equipment Operation - use common office equipment (computer, fax machine, copier, phone). Identify operational problems with common equipment and determine resolution. Repair and upgrade office and/or basic equipment. Operate specialized equipment requiring training. Identify operational problems with specialized equipment and determine resolution.</p> <p style="text-align: center;"><i>Describe:</i> Must possess a strong skill set in computer, phone, and other technical equipment.</p>	<p>X Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced</p> <p><input type="checkbox"/> N/A</p>
<p>Written and Oral Communications - Tailors communications to effectively reach an audience. Keeps written and verbal communications clear and straightforward.</p> <p style="text-align: center;"><i>Describe:</i> Strong communication and collaboration skills are essential. Ability to communicate and work with a variety of donors to accomplish a task or goal is important.</p>	<p><input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input checked="" type="checkbox"/> Advanced</p> <p><input type="checkbox"/> N/A</p>
<p>Other:</p> <p style="text-align: center;"><i>Describe:</i></p>	<p><input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced</p>
<p>Other:</p> <p style="text-align: center;"><i>Describe:</i></p>	<p><input type="checkbox"/> Basic <input type="checkbox"/> Intermediate <input type="checkbox"/> Advanced</p>

<p>Collaboration/Interaction: <i>Indicate the nature of collaboration and/or service to others required by the job and whether this occurs internally (with others at the organization) or externally (with general public, vendors, media, other organizations, etc.) Check all that apply.</i></p>		
Internal	External	
X	X	Exchange of routine, factual information and/or answering routine questions.
X	X	Exchange detailed information or resolve varied problems.
X	X	Access to and/or works with sensitive and/or confidential information.
X	X	Identify needs/concerns of others, determine potential solutions, resolve or redirect appropriately.
X	X	Persuade, gain cooperation and acceptance of ideas or collaborate on significant projects.
X	X	Resolve conflict, negotiate or collaborate on major projects.
X	X	Handle sensitive issues and facilitate collaboration at the highest level.
X	X	Develop and maintain relationships to enhance work flow and work quality.
<p><i>Provide additional information if desired:</i></p>		

<p>Decision Making: <i>Indicate the type of impact of the decisions typically made by this job. Check only one box.</i></p> <p><i>Example of the relationship of terms used herein to the areas they describe at Xavier:</i></p> <p>Functional area = Accounts Payable</p> <p>Department = Controllers Office</p> <p>Division = Financial Administration</p>	
<p><input type="checkbox"/></p> <p>X</p> <p><input type="checkbox"/></p>	<p>Decisions generally affect own job or specific functional area.</p> <p>Decisions may affect a work unit or area within a department. May contribute to business and operational decisions that affect the department.</p> <p>Decisions have major implications on the management and operations of an area within a department. Job may contribute to important strategy, operational and business decisions that affect the department.</p> <p>Decisions have significant, broad implications for the management and operations of a division. Job contributes to decisions on the overall strategy and direction of the entire organization.</p>
<p><i>Provide additional information if desired:</i></p>	



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Problem Solving: *Indicate the nature of problems regularly encountered by this job. Check only one box.*

Problems encountered are routine, somewhat repetitive and generally solved by following clear directions and procedures.

Problems are varied, requiring analysis or interpretation of the situation. Problems are solved using knowledge and skills, and general standards and past practices.

Problems are highly varied, complex and often non-recurring; require novel and creative approaches to resolution. New concepts and approaches may have to be developed.

Provide additional information if desired:

Independence of Action: *Indicate the job's general degree of independence of action. Check only one box.*

Work is closely monitored by supervisor/manager; detailed instructions and procedures are generally provided.

Work progress is monitored by supervisor/manager; incumbent follows policies and procedures, and may set priorities and organizes work within general guidelines established by supervisor/manager.

Results are defined and existing practices are used as guidelines to determine specific work methods and carries out work activities independently; supervisor/manager is available to resolve problems.

Results are defined; incumbent sets own goals and determines how to accomplish results with few or no guidelines to follow, although past practices may exist; supervisor/manager provides broad guidance and overall direction.

Provide additional information if desired:

Physical/Environmental Demands: *Indicate the typical physical and/or environmental demands required to effectively handle the job responsibilities and their frequency.*

Office environment / no specific or unusual physical or environmental demands.

Specific physical requirements or environmental exposures. **Provide details on Addendum.**

Additional Information about Job: *Please describe as clearly and concisely as possible any additional information that would be important to fully understand the role, responsibilities, nature and scope of the job.*

The following two sections will allow you to expand upon your level of relevant proficiency of Knowledge and Job Experience in this job.

Incumbent's Relevant Work Experience: *Check only one box.*

Less than 12 months 1-3 years 3-5 years 5 – 10 years More than 10 years – please specify _____

Incumbent's Relevant Knowledge: *Check only one box.*

Specialized knowledge not required.

Fundamental working knowledge of concepts, practices and procedures and ability to apply in varied situations.

Firm working knowledge of concepts, practices and procedures and ability to use in varied situations.

Comprehensive knowledge of theories, concepts and practices and ability to use in complex, difficult and/or unprecedented situations.

Provide additional information if desired:

The statements in this position description are intended to describe the general nature and level of work being executed by employee(s) assigned to this job. They are not intended to be an exhaustive list of all responsibilities, duties and skills required of the job or individuals.



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ADDENDUM TO JOB DESCRIPTION

Physical Requirements

Please check the **level of frequency** that best describes the physical demands that are **required** for you to perform your job duties. Do not consider those parts of your job that, if you had a disability, a reasonable accommodation could be made. For example: If you were in a wheelchair, but had to occasionally move a box of paper, it would be a reasonable accommodation to have someone else move it for you. In that case, you would not consider moving the box as a required part of your job.

For each physical activity below, check the box that applies to your job.

Physical Activity	Frequency of Activity			
	Not Required	Seldom	Often	Nearly Continuously
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X
Repetitive hand motion (such as typing)	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
Hearing, listening	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	X
Talking	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
Standing	<input type="checkbox"/>	<input type="checkbox"/>	X	<input type="checkbox"/>
Walking	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Bending	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Stooping	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Climbing stairs	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Climbing ladders	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling, squatting	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Crouching	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Crawling	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balancing	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching overhead	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Pulling, pushing	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shoveling	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting – up to 10 pounds	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Lifting – up to 20 pounds	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Lifting – up to 30 pounds	<input type="checkbox"/>	X	<input type="checkbox"/>	<input type="checkbox"/>
Lifting – up to 50 pounds	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lifting – over 50 pounds	X	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Work Environment

This question describes your current working conditions. Check all the boxes that apply.

X	Office Environment: Employees are protected from weather conditions or contaminants, but not necessarily occasional temperature changes.
<input type="checkbox"/>	Outdoor Environment: Employees work outdoors and may not be protected from weather conditions.
<input type="checkbox"/>	Extreme Cold: Temperatures typically below 32 degrees for more than an hour.
<input type="checkbox"/>	Extreme Heat: Temperatures above 100 degrees for more than an hour.
<input type="checkbox"/>	Noise: There is sufficient noise to cause you to shout in order to be heard above the noise level.
<input type="checkbox"/>	Vibration: Exposure to oscillating movements of extremities or whole body.
<input type="checkbox"/>	Hazards: Includes a variety of physical conditions, such as proximity to moving mechanical parts, moving vehicles, electrical current, working on scaffolding and high places, or exposure to chemicals in work setting.
<input type="checkbox"/>	Oils: There is air or skin exposure to oils or other cutting fluids.
<input type="checkbox"/>	Infectious Diseases: Employees are frequently exposed to contagious or infectious diseases.
<input type="checkbox"/>	Atmospheric Conditions: Conditions that affect the respiratory system, such as fumes, odors, dusts, mists, gases, or poor ventilation.
<input type="checkbox"/>	Close Quarters: Employees are frequently required to work in crawl spaces, shafts, man holes, sewage and water line pipes, and other areas that could cause claustrophobia.

NOTE: SUPERVISOR AND EMPLOYEE SHOULD KEEP AN ELECTRONIC COPY AND HARD COPY OF THE COMPLETED POSITION DESCRIPTION.