

Basilica of Saint Mary – Position Description

Title: Prospect Research Coordinator **Date:** December 16, 2022
Status: Exempt **Annual Schedule:** Full Time
Reports to: Director of Development **Department:** Development

Purpose of Position

Support the vision, mission and values of The Basilica of Saint Mary and The Basilica Landmark by conducting prospect research, managing the constituent database, executing fundraising appeals and developing donor cultivation strategies.

Scope of Position

- Reports to Director of Development.
- Director of Development assigns work and manages performance.

Position Qualifications

- College degree and experience in a development office, non-profit setting or comparable experience.
- Prospect Research experience.
- Database management experience, ideally Raiser's Edge 7 (RE7) / RENXT, Luminate or comparable database management and communication software.
- Capital Campaign experience preferred.
- Strong analytical skills.
- Strong interpersonal, organizational, and project management skills.
- Excellent written and oral communication skills.
- Proven ability to work independently.
- Ability to maintain confidentiality about research, and other department discussions.
- Demonstrated commitment to working in a collaborative environment with a variety of people and work styles in a small office environment.
- Experience with grants a plus.

Primary Functions / Duties and Major Activities

Develop and implement research strategies and set priorities to prepare for annual appeals and future capital campaigns.

- Work with the Director of Development to update and implement a research plan with priorities, timeline and budget.
- Identify prospective major and leadership donors for annual appeals and Capital Campaign efforts by using publicly available resources and subscription services including LexisNexis, WealthEngine, Omatic.
- Code, manage and generate reports for prospect lists.
- Maintain prospect and proposal fields in database.
- Enter information gained through research in RE7 / RENXT to maximize search ability.
- Invite and encourage development and parish staff to assist with critical data collection.

Work with the Director of Development, Pastor, Gift Officers and other staff to develop and implement cultivation and closing strategies for major / leadership donors and prospects.

- Identify and assign new prospects to Gift Officer's portfolios and participate in a regular review process to set priorities and determine strategies.

- Help determine what contacts, meetings, proposals and follow-up are needed for donor and prospect cultivation.
- Assist with scheduling and facilitating donor and prospect appointments.
- Prepare bios of key prospects and donors attending to Development events. Prepare prospect memos for Pastor, Director of Development, Development Officers, other staff and Landmark and Ambassador volunteers.
- Evaluate event attendees to identify future leadership and major donor prospects.

Coordinate print and electronic appeals to create the case and stories that invite people to donate to The Basilica of St. Mary, Saint Vincent de Paul, and The Basilica Landmark

- Manage appeal timeline, order materials and manage to budget and deadlines to achieve fundraising goals and conduct data analysis of appeals results.
- Collaborate with development staff, contracted designers, writers and printers to produce appeal collateral, including envelopes, letters, brochures and gift commitment forms.
- Generate mailing lists for department mailings and code accurately in RENXT database.

Manage appeal segmentation, prospect list management and reporting to achieve fundraising goals.

- Develop and produce queries, donor profiles, dashboards, action tracks, custom reports, and mailing lists for all campaigns and appeals and to support Gift Officers.
- Prepare appeal lists and reports that include ask amounts and assigned solicitors.
- Run reports on annual appeal and capital campaign status. Communicate with staff and volunteers to keep them updated on campaign progress.
- Establish coding protocols consistent with past campaigns, and train staff to use these coding systems.
- Oversee “Past Due” communications with donors.

Lead the research and writing of several selected grants a year

- Conduct research and coordinate with Basilica staff to prepare and submit grants.
- Complete reports and follow-up communication with grant providers.

Administrative Duties

- Maintain necessary queries in RE7.
- Coordinate data projects with the IT and Database Administrator.
- Assist with year-end donor report mailing (November/December), invitation and appeal mailings.
- Prepare annual tax letters and mail to donors each January.
- Assist with data entry, gift processing and gift acknowledgment in peak giving seasons and serve as back-up.
- Provide RENXT and Luminare assistance to development staff.

Basilica of Saint Mary – Staff Responsibilities

- Participate in weekly major gift strategy meetings and Development staff meetings.
- Attend Basilica “All Staff” meetings.
- Provide timely response to emails and voicemails.
- Take on additional responsibilities as assigned by the Director of Development.

Mental Demands

- Possess good listening skills and is able to work with people from diverse backgrounds.

- Able to follow instructions; work independently on routine and regular responsibilities to accomplish tasks within appropriate deadlines.
- Possess the ability to recognize the need for and to maintain confidentiality.
- Work well with others while maintaining a positive and helpful attitude at all times, even high intensity times.

Physical Demands

- Work 40 or more hours per week when needed.
- Able to lift 25 pounds.
- Able to walk up and down stairs.

Designation of essential functions

*Employment in and by the Church is substantially different from secular employment. Church employees must conduct themselves in a manner, which is consistent with and supportive of the mission and purpose of the Church. Their behavior must not violate the faith, morals or laws of the Church or the Archdiocese, such that it can embarrass the Church or give rise to scandal. This position *does not* require that the employee be a Catholic. It is expected, however, that non-Catholic employees will respect Catholic doctrine and religious practices. Reasonable accommodations for the religious practice of non-Catholics will similarly be provided.

Employee: I have reviewed this job description and agree it is an accurate representation of the responsibilities of my job. I understand that as an organization's needs change, my job description will change.

Signature of Employee _____ Date _____

Supervisor: I have reviewed this job description and agree that it is an accurate representation of responsibilities performed in this job.

Signature of Supervisor _____ Date _____