



**SAN FRANCISCO  
STATE UNIVERSITY**

## **UNIVERSITY DEVELOPMENT OPPORTUNITY**

**Senior Director of Prospect Research and Management**



## Senior Director of Prospect Research and Management

The Senior Director of Prospect Research and Management (Senior Director, PRM) is a key member of the San Francisco State University Development team, with responsibility for leadership and direction of the University's robust prospect research and management program. The Senior Director, PRM is the business owner and leads the provision of comprehensive prospect research and relationship management services for all University gift officers, including setting the vision for these areas, guiding the program toward best-in-class services, and proactively identifying creative solutions to complex challenges, particularly through the lenses of campaign readiness and effective CRM utilization.

The Senior Director, PRM plans, organizes, and implements the operations of the PRM unit aligned with the University's fundraising goals, ensuring that University Development has a thriving prospect pipeline, gift officers' portfolios are continually refreshed, and information and data regarding major donors and prospects are provided and tracked. The Senior Director builds relationships across University Development and serves as a key partner to development officers by leading the unit in prospect development and management, including prospect identification and qualification, strategy development, major gift prospect analysis, data analytics, and project management.

The Senior Director provides leadership to the PRM team (currently two professionals), ensuring alignment with best practices and industry standards, and oversees the prospect management and tracking system using Raiser's Edge NXT. The Senior Director, PRM is a motivated, self-directed individual who works without close supervision to successfully lead PRM and support the achievement of the fundraising goals of the University.

### *Responsibilities:*

#### Prospect Research and Analysis

- Keeps current on constantly changing technology and trends in prospect research, including online research services, techniques, and analysis.
- Coordinates with Advancement Services on integration of computerized systems designed to maintain information on current and prospective donors.
- Participates and oversees research on potential candidates for the Foundation Board, campaign committees, and candidates for campaign feasibility studies.



#### Data Analytics

- Collaborates and provides strategic direction for segmenting, mining, modeling, and organizing data to enhance prospect identification and qualification processes and inform decisions regarding portfolio management, resource deployment and goal setting, and maximizing prospect/donor engagement.

- Evaluates and seeks resources to improve (e.g., automate) tools and reports for measuring progress towards University Development's annual and long-range goals, objectives and strategies, and gift officer performance metrics.

### Prospect Management and Tracking

- Develops and manages a systematic prospect management process to track and evaluate the progress of donor engagement and solicitation and implements accurate and timely reporting for prospect development activities.
- Is responsible for, along with the PRM team, the development, evaluation, maintenance, and rating of a qualified pool of prospects for campaigns, major gifts, planned gifts, and annual leadership gifts.
- Supports and collaborates on strategy around major donor solicitations of \$25,000 or greater.
- Leads and plans portfolio assignments, including review, refresh, and repopulation of portfolios.
- Serves as a campus resource for information on major prospects' statuses and activities.
- Leveraging a project management mindset and in collaboration with PRM staff, directs a program that provides identification, research, and analysis of potential major gift donors to maximize fundraising outcomes.
  - Provides research and analysis of biographical, philanthropic, professional, and financial information of donors and prospects, as well as the history and status of donor's or prospect's relationship with the University, including high quality, in-depth research profiles, due diligence reports, event bios, and qualified lists to support the cultivation of individuals.
  - Ensures that the most promising prospects within the campus's sphere of influence are identified.
  - Ensures that the research function concentrates its efforts on major gifts.
  - Provides quality assurance and training on best practices and creative techniques in research strategies.

### Campaigns

- Responsible for identification, screening/ rating, assignment, and tracking of prospects for campaigns conducted through the University Development.
  - Recommends and implements strategies for prospect identification and qualification.
  - Oversees all screening, modeling, analytics, and rating efforts, including electronic and face-to-face screening.
  - Collaborates with the campaign director in the assignment of prospects, as needed.
  - Ensures that systems are in place to track the progress of cultivation and solicitation initiatives with prospects.
- For unit campaigns, assists with the identification and screening of prospects.
- Works closely with Advancement Services to ensure that the fundraising database facilitates a strategic, integrated program for prospect identification, research, and donor management in support of the campaign.



## Advising

- In partnership with Advancement Services, plays a key role in evaluating vendors, technology platforms, and data sources, and represents University Development.
- Serves as subject matter expert for University Development in various areas of research and data, including manipulation, organization, analysis, and reporting.
- Meets regularly with development officers, both individually and with the University Development leadership, to monitor, review, prioritize, and collaborate on portfolio composition and proposals; recommends major donor/prospect cultivation/solicitation strategies, as indicated.

## Team Leadership and Development

- Leads, mentors, and develops a staff of PRM professionals.
- Fosters a collaborative and enthusiastic team culture that encourages innovation and professional growth.
- Provides regular feedback and conducts annual performance reviews.
- Additional responsibilities include making hiring decisions and determining future staffing needs.

## *Qualifications:*

- Bachelor's degree from an accredited institution.
- Seven or more years of development research and relationship management experience, or a combination of relevant fundraising and management experience, preferably within a higher education institution.
- Demonstrated understanding of major gifts fundraising, data analytics concepts, and the role of PRM in the University's fundraising efforts.
- Proven experience with library and research techniques and prospect management techniques and practices.
- Expertise working with online databases (e.g., Lexis Nexis, iWave, Foundation Directory, Dun & Bradstreet) and the internet, as well as corporate and government documents such as proxy statements, IRS Form 990, deeds, property tax assessments, salary estimates, and demographic assessments.
- Outstanding organizational and analytical skills; ability to organize and prioritize workload in order to complete assignments when faced with multiple deadlines and competing requirements.
- Ability to establish measurable goals and objectives and to develop and implement strategies to achieve them.
- Ability to apply good judgment, discretion, and a commitment to professional ethics and data security when dealing with highly confidential alumni, parent, student, family, donor, and prospect information.
- Experience with Raiser's Edge/Raiser's Edge NXT and Tableau is desirable.
- Excellent oral and presentation skills, writing, and editing skills. Ability to work effectively and communicate diplomatically with a diverse campus community.
- Familiarity with and adherence to APRA's Principles of Ethics and Compliance and AASP Best Practices.

## University Advancement

The primary objective of the Office of University Development is to foster strong relationships with internal and external partners in order to secure funding for University-identified priorities that advance SF State's academic, research, and public service mission. The office is responsible for helping to build a culture of philanthropy and support for SF State among alumni, students, parents, foundations, corporations, and friends.

University Advancement establishes and implements an overall advancement program, including coordinating fundraising, communications, events, marketing, and alumni programs.

Over the past five years, SF State has reported over \$145 million in private support. Fundraising has ranged from \$18 million to \$59.9 million annually, with a couple of years reflecting large campaign gifts. In 2020-21, SF State recorded \$16.6 million in support and \$18 million in 2021-2022. The University's endowment is currently valued at approximately \$185 million.

## University Advancement Leadership

### *Jeff Jackanicz, Ph.D., Vice President of University Advancement*



Dr. Jackanicz also serves as President of the SF State Foundation, the University's organization of extraordinary and dynamic volunteers dedicated to raising funds for and advocating on behalf of SF State. Before joining SF State in 2020, he served as Vice President of Institutional Advancement at Mills College and at UC Berkeley for over a decade in a range of advancement leadership positions. He earned a B.A. in English from the University of Chicago and a Ph.D. in English from the University of Texas at Austin.

### *Anjali Billa, MBA, CFRE, Associate Vice President of University Development*

Ms. Billa joined SF State in 2020 after serving for three years as Director of Development for the West Coast region of Jumpstart, the nationally recognized education organization. Previously, she served as Development Director at the YMCA of San Francisco and for 10 years with Citibank NA, India. Ms. Billa earned an MBA in finance from Delhi University and a B.A. in economics from Jodhpur University.



## San Francisco State Alumni

The San Francisco State University alumni network is vast. Its 275,000 former students are especially well-represented as leaders in city, state, and national government. They also have a significant presence in and have made important contributions to the arts, science, journalism, business, teaching, and more. The largest concentration of “Gators” is the 150,000 alumni who reside in the Bay Area; others are impacting their communities throughout the country and around the world.



The SF State Alumni Association engages with the University’s alumni to encourage their lifelong interest and support, which in turn are essential to advancing SF State’s mission. The Association and its staff are important partners for their colleagues working in development in both the central office and the individual colleges. All advancement professionals are committed to helping SF State alumni maintain relationships with their alma mater and with one another. Graduates are encouraged to join the SF State Alumni Association as formal members.

## About San Francisco State University

A component of the California State University system, San Francisco State University is a major public urban university located in one of the world's most scenic, vibrant, and inspiring cities. Building on its 123-year commitment to quality teaching and broad access to undergraduate and graduate education, SF State offers comprehensive, rigorous, and integrated academic programs that require students to engage in open-minded inquiry and reflection. SF State urges its students, faculty, and staff to participate fully with the greater San Francisco community and to share their skills, talents, and time.



**Academics:** At SF State, bachelor's degrees are awarded in 79 academic areas and master's degrees in 62 more. At the doctoral level, degrees are granted for the Doctor of Education (Ed.D.) in Educational Leadership, the Doctor of Philosophy in Education (Ph.D.), and the Doctor of Physical Therapy (D.P.T.) that is awarded jointly with UC-San Francisco. There are also 16 credential programs and 41 certificate programs. SF State's reach is further expanded locally and globally by its College of Extended Learning.

The University has received high honors for encouraging innovations that have placed it at the forefront of academia. As home to the nation's first and only College of Ethnic Studies, SF State



is consistently ranked among the top ten most diverse universities by *U.S. News & World Report's Best Colleges*, *Forbes*, *Priceonomics*, and several other media outlets. Both *Variety* and *The Hollywood Reporter* have cited the School of Cinema as one of the top film programs in the country. And with a nearby Estuary & Ocean Science Center, San Francisco State is the only university with a marine science laboratory on San Francisco Bay.

**Commitment to Diversity:** Inspired by its own diverse community—which includes many first-generation college students—and by the courage of an academic community that strives to break down traditional boundaries, SF State equips its students to meet the challenges of the 21<sup>st</sup> century. With its unwavering commitment to social justice that is central to the work of the University, SF State prepares its students to become productive, ethical, active citizens with a global perspective. SF State is a long-recognized leader in addressing issues both global and close to home.

San Francisco State was ranked #8 by *U.S. News and World Report* for upward social mobility and was ranked 3rd in the nation for diversity by the *Wall Street Journal/Times Higher Education Colleges Ranking* and is a Hispanic & Minority-Serving Institution. The vast majority of the University’s students come from the Bay Area and California, with 21% of students from Alameda and Contra Costa counties (East Bay) and 18% from San Francisco. The University has 268,000 alumni. Most (83%) of the University’s alumni live in California, 64% reside in the San Francisco Bay Area, and 23% live in Contra Costa and Alameda counties.

**Enrollment:** Current student enrollment across all SF State undergraduate and graduate programs and locations is currently 21,000. In recent years, the University has conferred approximately 7,500 degrees annually. Undergraduate programs with the highest enrollments include: business, computer science, engineering, biology, psychology, and cinema. Approximately one-third of SF State students are the first in their family to attend college, two-thirds receive financial aid, and 39% receive Pell Grants.





**Campus:** The main campus is located near Lake Merced in southwest San Francisco, just two miles from the Pacific Ocean. Some SF State programs are based in additional locations, including the Downtown Campus (MBA and Executive MBA programs, the College of Extended Learning, and the Master of Public Administration program) and the Paul F. Romberg Center for Environmental Studies across the Bay in Tiburon.

**SF State Hybrid Work Arrangement:** SF State is committed to a flexible working arrangement that allows for a hybrid structure of 3 days of in-person work on campus combined with 2 days of remote work.

## Applications and Nominations

AGB Search is pleased to manage the recruitment process. Applications will be reviewed as they are received, and the position will remain open until filled. Candidates are requested to submit the following application materials:

1. Resume
2. Letter of interest
3. Contact information for five professional references (to be contacted at a later stage in the search and only with the candidate's permission)

Please submit your application materials (PDF) electronically to: <https://bit.ly/4cwVYbp>

Please direct your nominations, expressions of interest, or questions to one of AGB Search's consultants:

**David Beacham, Executive Search Consultant, AGB Search**

david.beacham@agbsearch.com / 864.809.3248

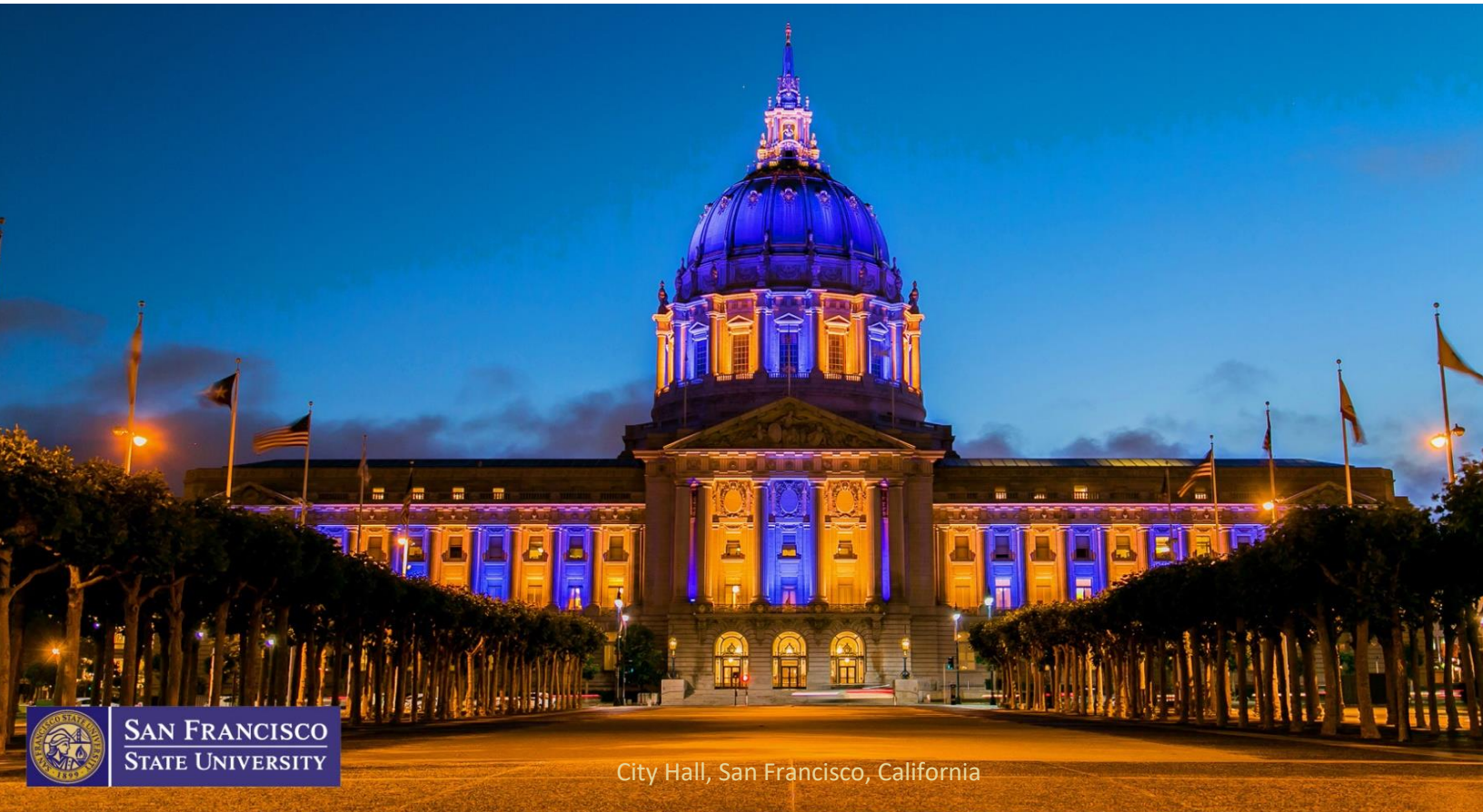
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San Francisco State is an Equal Opportunity Employer and does not discriminate against persons on the basis of race, religion, color, ancestry, age, disability, genetic information, gender, gender identity, gender expression, marital status, medical condition, National origin, sex, sexual orientation, covered veteran status, or any other protected status. Reasonable accommodations will be provided for qualified applicants with disabilities who self-disclose by contacting the Senior Human Resources Manager.

The California State University complies with the requirements of Title IV of the Civil Rights Act of 1964 and the Americans with Disabilities Act and the regulations adopted thereunder. No person shall, on the grounds of race, color, national origin, sexual orientation, or disability be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination, including harassment, under any program of The California State University. Under Title VI, San Francisco State University is obligated to investigate all discrimination complaints, including harassment in an unbiased, thorough manner.