



## POSITION DESCRIPTION

Department:	Prospect Management and Research
Classification Title:	Administrator I
Working Title:	Director of Prospect Management and Research
FLSA Status:	<input type="checkbox"/> Non-Exempt <input checked="" type="checkbox"/> Exempt
Incumbent:	

### Position Summary

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California Polytechnic State University (Cal Poly) is a nationally ranked, four-year, comprehensive public university located in San Luis Obispo, California. The emphasis of the University is a "Learn by Doing" educational experience for its more than 20,000 students. The primarily undergraduate student body is attracted to the University's commitment to small class sizes, hands-on learning, and an emphasis on student success.

The role of the University Development and Alumni Engagement (UDAE) Division is to foster strong relationships with external partners while enhancing support for Cal Poly. University Development and Alumni Engagement does this by implementing an overall advancement program that includes alumni and parent engagement, community outreach, coordinated fundraising efforts, donor relations, gift processing, trust and endowment management, training and systems support for the donor database, and Cal Poly Foundation support and administration.

Equity, Diversity, and Inclusion are core values at Cal Poly and UDAE is committed to a continuous process of learning and updating practices to support systemic evolution toward equity, diversity, and inclusion for our team and constituents.

Reporting to the Executive Director of Development, the Director of Prospect Management and Research is responsible for oversight, supervision and leadership of the Prospect Management and Research team. This includes directing all prospect research, proactive prospecting, prospect management, and reporting activities in relation to the fundraising initiatives at Cal Poly.

The Director will serve as a campus contact and resource for information regarding major donors and prospects, while providing supervision to the Prospect Management and Research Specialist staff. The incumbent will work closely with development officers in the colleges and units across the campus to identify the most appropriate assignment for major gift prospects and to develop cultivation strategies, while utilizing prospect management skills to develop successful cultivation and solicitation strategies within the University.

### Duties and Responsibilities

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The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

**Essential Job Functions****Daily****90%**

1. Plan and execute strategies to identify sources of major gifts (\$25,000+).
2. Develop and evaluate portfolios on current donors and future prospects.
3. Identify and implement prospecting activities which build, evaluate, maintain and rate a qualified pool of prospects, including a formalized proactive research system for all identified prospects
4. Present and ensure timely delivery of accurate prospect research findings to support development officers in qualifying, cultivating and soliciting major gift prospects.
5. Manage workflow of prospect research and prospect management, including the supervision of prospect research staff in completing research and related projects
6. Contribute to the formulation of policies and procedures related to prospect management and research.
7. Oversee and support training programs to ensure development officers and other campus users understand the prospecting system and procedures.
8. Manage, mentor, coach and evaluate direct reports and ensure that the team provides a high level of service to all stakeholders and works collaboratively to meet UDAE and University goals.
9. Maintain currency in the trends of philanthropy, charitable giving and the central practices and policies of fundraising at Cal Poly and the CSU.
10. Work collaboratively with central University Development & Alumni Engagement partners including, but not limited to, Annual Giving, Gift Planning, Development Support Services, and Parent Philanthropy
11. Partner with Data and Systems and Development Support Services by providing feedback and updates on demographic information discovered during research and assisting with data integrity for the division's CRM.

**Related Job Functions****As Needed****10%**

1. Perform other job-related duties and special projects as assigned.
2. Maintain currency in the knowledge and skills necessary to facilitate industry-leading solutions.

**Required Education, Experience, and Credentials**

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## Education and Experience:

- Bachelor's Degree and a minimum of five years of progressively responsible professional experience in development, major gifts fundraising, donor relations, marketing, planned giving or other related professional experience with two years being direct fundraising experience.
- Additional qualifying experience may be substituted for the required education on a year-for-year basis.

## Licenses, Certificates, Credentials:

- Possession of a valid driver's license or the ability to obtain one by date of hire.

**Required Skills, Knowledge, and Abilities**

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- Previous capital campaign, major gift cultivation and/or donor solicitation experience.

- Experience and success in major gifts fundraising, marketing, planned giving, or other related professional field, preferably in a university setting or other fast paced and dynamic environment.
- Ability to perform record keeping, using principles of accounting, budgeting, etc.
- Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines. This involves a high level of independent thinking, creativity, sensitivity to changing priorities, an understanding of the principles of philanthropy and enthusiasm for a dynamic and changing work environment.
- Ability to interpret, communicate, and apply policies and procedures.
- Ability to analyze information and data from a variety of sources and present information and recommend solutions.
- Ability to use sound judgment, discretion, tact, and a willingness to take initiative.
- Ability to represent Cal Poly and University Development in a positive manner on campus and with external constituencies.
- Strong interpersonal skills and the ability to effectively interact and communicate with diverse constituencies both inside and outside the University, while maintaining a very high level of diplomacy and professionalism.
- Ability to maintain high standards of conduct and confidentiality dealing with various internal and external constituencies.
- Ability to participate in the execution of a complex fundraising program.
- Ability to work with a variety of internal and external stakeholders with competing priorities.
- Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.

### **Preferred Skills and Experience**

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- Demonstrated skills in an institutional/educational environment, utilizing a customer-oriented and service-centered attitude.
- Fundraising experience in a higher education or similar development setting.

### **Special Conditions**

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- Must be able to successfully pass a pre-employment background/fingerprint check.
- Must be able to work additional hours, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.
- Perform work involving regular physical activity which may require the ability to safely move up to 50 pounds.
- The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.
- This position is a "designated position" in the California State University's Conflict of Interest Code. The successful candidate accepting this position is required to file Conflict of Interest forms subject to the regulations of the Fair Political Practices Commission.
- Full-time MPP employees are required to disclose outside employment at time of hire or within 30 days of taking additional outside employment subsequent to time of hire.
- This position classification has been defined as "Exempt" and is not subject to the overtime provisions of the Fair Labor Standards Act (FLSA).

**INCUMBENT:** I have read this position description and understand its contents.

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INCUMBENT NAME	SIGNATURE	DATE
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**SUPERVISOR:** I certify that all statements on this form are complete and accurate.

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IMMEDIATE SUPERVISOR NAME AND SIGNATURE TITLE	DATE
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**DEPARTMENT HEAD:** I certify that all statements on this form are complete and accurate.

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DEPARTMENT HEAD NAME AND TITLE	SIGNATURE	DATE
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**HUMAN RESOURCES USE ONLY**

Employee ID#:	_____	REQUEST FOR:	CLASSIFICATION INFORMATION	
Position	_____	<input type="checkbox"/> Update Review for	Classification	Administrator I
Number:	_____	File	Title:	_____
FTE:	_____	<input type="checkbox"/> Classification	Class	3318
<input type="checkbox"/> Permanent		Review	Code/Range:	_____
<input type="checkbox"/> Temporary		<input type="checkbox"/> New Position	CBID:	M80
<input type="checkbox"/> COI Position		Recruitment	MPP Job	U-09-4
Recruitment		<input type="checkbox"/> Replacement	Code:	_____
Number:		Recruitment	Classifier	HR
			Initials:	_____
			Date:	09/24/25