

## **THE CHICAGO SYMPHONY ORCHESTRA ASSOCIATION JOB DESCRIPTION**

**TITLE:** Prospect and Donor Research Specialist

**REVIEWED:** 7/1/2022

**FLSA STATUS:** Non-Exempt

**DEPARTMENT:** Development

### **GENERAL SUMMARY**

Expands the size and value of the Chicago Symphony Orchestra Association's prospect, donor and volunteer leadership base through the administration of research and prospect management functions, including the preparation of appropriate research profiles for all fundraising campaigns, coordination of Development's moves management system, analysis of fundraising data, acquisition of biographical information, tracking of prospects, and identification of new and underutilized funding sources.

### **PRINCIPAL DUTIES AND RESPONSIBILITIES**

1. Produce and maintain confidential individual, corporate, and foundation research profiles which outline current and historical relationships with the CSOA, as well as financial, professional, and personal information.
2. Prepare research profiles and demographic statistics on potential nominees to the CSOA's Board of Trustees and to the Negaunee Music Institute Board. Assist in preparing for Nominating and Governance Committee meetings; attend and participate in meetings.
3. Mine the CSOA's patron database for potential prospects for giving campaigns; research new prospects and lapsed donors; take initiative with identifying donors with potential for growth and increased involvement at the CSOA.
4. Uncover interests and social, financial, and political relationships among key members of the CSOA family, donors, and community prospects.
5. Develop in-depth research and recommendations for new or standing initiatives and major fundraising campaigns, including the current SEMPRE ALWAYS campaign.
6. Work in collaboration with department leaders to implement and maintain functional and realistic moves management expectations and metrics, utilizing Plans in Tessitura.
7. Provide strategies and support for portfolio management, including portfolio scrubs and strategic donor assignments.
8. Create or take proactive action to update biographical sketches on attendees to CSO events and meetings for use by CSOA leaders.
9. Working with the Development Operations team, contribute to the collection and analysis of data to better understand donor and patron populations to assist with developing cultivation and solicitation strategies for existing donors and new prospects.
10. Monitor research budget and department's print and electronic research library and subscriptions, keeping current with and making recommendations regarding new resources and advancing research technology.
11. Assist in the training of new Development staff members in Tessitura and provide support to existing staff, particularly as it relates to moves management and Plans in Tessitura. Participate in Tessitura users group and Association of Professional Researchers for Advancement meetings.
12. Attend and assist with Development-related events and concerts throughout the year.
13. Other duties as assigned.

## **THE CHICAGO SYMPHONY ORCHESTRA ASSOCIATION JOB DESCRIPTION**

CSOA is an equal opportunity employer where all qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, or national or ethnic origin. We value diversity and inclusion and seek to build and maintain a community and culture that celebrates and values diverse backgrounds, identities, and perspectives. We consider equivalent combinations of experience and education for jobs, and all candidates who believe they possess equivalent experience and education are encouraged to apply.

### **REPORTING RELATIONSHIPS**

1. Reports to the Director, Endowment Gifts and Planned Giving.
2. Works closely with Vice President for Development and Individual and Institutional fundraising officers, offices of the President and Music Director, Development Operations staff, Donor Engagement staff, and ISS staff.
3. Other contacts include Trustees, donors and potential donors; research librarians; volunteers; professional colleagues; and other Tessitura users.

### **KNOWLEDGE, SKILLS, AND EXPERIENCE REQUIRED**

1. Bachelor's degree.
2. A minimum of two years of Development work experience.
3. Knowledge of fundraising and research techniques.
4. Knowledge of Tessitura or other Windows-based fundraising software.
5. Versatility with LexisNexis, NOZA and other web-based search tools and functions.
6. Familiarity with research resource materials consistent with APRA Advanced Skills Set.
7. Computer literacy with working knowledge of Microsoft Word, Microsoft Access, Microsoft Excel (or software equivalents) and various on-line services.
8. Proven organizational skills and the capacity to manage complex projects under deadline.
9. Creativity, flexibility, and self-motivation.
10. Excellent verbal, written and organizational skills.

### **WORKING CONDITIONS**

Pleasant office environment.