



CANDIDATE PROFILE  
Manager of Research & Prospect Management  
Advancement Services

2019

## About Upper Canada College

From its founding in 1829, UCC has been educating the next generation of leaders and innovators, inspiring them to make a positive impact on their world. UCC is in a unique position to provide this to the most promising boys — regardless of where or what background they come from. With a sector-leading commitment to financial assistance and world-class facilities, UCC attracts and supports boys of the highest potential from both Canada and abroad. UCC honours its progressive past by looking forward, embracing a culture of courage and innovation, striving for excellence and advancing the common good.

Located in central Toronto, the College has more than 1,150 students from Senior Kindergarten through Year 12, including 88 boarding students representing 25 countries. With 10,000 alumni in more than 75 countries, the school will celebrate its 200th anniversary in 2029.

### Office of Advancement at UCC

UCC's Office of Advancement enhances the College's mission by engaging its global community of alumni, parents, students and friends in philanthropic support of its strategic directions and priorities. With an Advancement team of over 18 staff, new leadership, and the learnings from a recently achieved \$100M campaign, UCC is poised to mark its bicentennial with several significant initiatives that will fulfill its aspiration to be a global leader in the education of boys.

UCC is a collaborative and supportive environment that encourages staff development and education.

### Vision, Mission, Values

**Vision** - UCC values each boy and inspires him to be his best self. A UCC experience reflects the pluralism and promise of Canada and identifies the College as a global leader in the education of boys. **Mission** - UCC provides transformational learning experiences that foster the development of head, heart and humanity, and inspire each boy to make a lasting and positive impact on his world. **Values** - UCC's values build on our rich history and traditions and serve to inform how we interact with each other and with our world. At UCC we value: learning, pluralism, service, community, and wellbeing.

[www.ucc.on.ca](http://www.ucc.on.ca)

## The Opportunity

To be on the ground floor of a significant capital campaign. The Manager of Research & Prospect Management will work closely with the major gift team and will have the opportunity to expand their fundraising skills and be pivotal in managing the donor prospect pipeline. UCC is a collegial and supportive working environment.

## The Role

Reporting to the Director of Advancement Operations, the Manager of Research & Prospect Management is responsible for supporting UCC's Major Gift and advancement staff by conducting prospect research, assessing and compiling data on current and potential prospects, including alumni parents, corporations, foundations and friends.

Prospect Research – 35%

Prospect Pipeline Management – 35%

Data Entry & Admin – 15%

Attending Prospect Meetings – 15%

## Key Responsibilities

### Prospect Research

- Conduct biographical and financial research on donors utilizing internal information and a variety of online, electronic and printed sources.
- Support the Director, Advancement Operations in developing new strategies for enhanced prospecting activities and ensure development of the prospect pipeline.
- Prepare briefings for events.

- Monitors media for news events relating to donors and prospects.
- Work with Alumni Relations team to reconnect with Old Boys.
- Responsible for coding donor and prospect updates found via research.
- Support Advancement Operations team in ensuring constituent data in Raiser's Edge is accurate and current.

### Prospect Management

- Identify and qualify potential major gift prospects using industry best practices
- Coordinate and track development team progress through regular monthly moves management meetings, identifying areas for attention and assisting in accountability reporting.
- Coordinate the prospect clearance process to support the fundraising team.
- Rate donors and prospects in terms of inclination and capacity to support cultivation and solicitation strategies.

## Personal Attributes

Personal attributes necessary in the role include individuals who are detailed, resourceful and can work independently. Being flexible and responsive to last minute requests and deadlines is imperative in the role. Individuals successful in the UCC culture are creative, collaborative and respect the views of others.

## The Ideal Candidate

The ideal candidate is a team-oriented individual with strong customer service and communication skills. They work under pressure well and thrive in an environment with multiple deadlines and goals. A creative individual, the Manager of Research & Prospect Management enjoys making the connection between the donor's motivations and the needs of the organization and communicating that effectively to staff and volunteers. Being highly organized and resourceful will be important in the role. Career driven individuals who are interested in growing their fundraising careers are most welcome to apply.

## Core Competencies

- At least three years of experience, ideally as part of a fundraising/major gift team.
- Experience with Raiser's Edge database an asset.
- A high degree of computer literacy including MS Office including Microsoft Word, Microsoft Excel (including Pivot Tables).
- Knowledge of research resources including subscriptions, databases and other online sources.
- Ability to assess and prioritize incoming correspondence and calls, determine appropriate format and content for response or redirect, and follow-up to ensure completion.
- Ability to represent the school in a positive and welcoming manner to visitors, callers, Board and Committee members, parents, staff and students.
- Ability to work independently and as a team member, to coordinate and/or participate in advancement activities.

- Ability to establish good working relationships across the school.

## How To Apply

We thank all candidates in advance. We will, however, contact only those selected for an interview. To apply, please submit, in confidence, a resume along with cover letter which sets out your interest in the role and highlights the experience you have relevant to the role. The preferred method of application is online at [searchsmartconnect.com/jobs](https://searchsmartconnect.com/jobs)

## Contact Details

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