

YORK UNIVERSITY
DEPARTMENT OF HUMAN RESOURCES

JOB POSTING

For All YUSA Full Time, Part Time, Sessional and Limited Term Positions

JOB TITLE : [Advancement Research Analyst]	JOB CODE : [952296]
DEPARTMENT/FACULTY : [Advancement Services & Operations, Division of Advancement]	SALARY BAND : 13

JOB PURPOSE:

[Advancement at York leads and inspires meaningful engagement and philanthropic support from alumni and friends to advance the University's mission. We are also deeply committed to building the reputation of York University as a leading, progressive, research-intensive University uniquely positioned for the betterment of society in the 21st century.

Our division is comprised of four departments:

- Advancement Services & Operations is the administrative and technology support unit for all Advancement activities
- Alumni Engagement provides programs, services, and engagement to over 360,000 York alumni worldwide
- Development leads efforts to promote and secure philanthropic support from alumni, donors, friends, corporations, and foundations
- Advancement Communications & Marketing works to promote and communicate alumni and donor messages along with direct marketing services for alumni and donor engagement

Under the direction of the Director, Prospect Research and Analytics, the Advancement Research Analyst supports this mission by providing research and support of the prospect management system in Advancement. The incumbent provides support to the Senior Development Officers and senior leadership team to assist with the identification and profiling donors and supports the prospect function for the Development team to align with fundraising objectives

MAJOR AREAS OF RESPONSIBILITY:

1. [Prepares information to support campaign activity 40]
Percentage of time: 40%

- A. Provides ongoing opportunities for alumni and fundraising touch points by identifying contact opportunities through life milestones i.e. appointments, awards, births, deaths and any other significant achievement or development pertaining to prospects, donors, alumni and volunteers. Identify and qualify potential fundraising volunteers for leadership positions, Board of Governors and campaign/Advancement committees.
- B. Identifies, researches, and analyzes high net worth individuals, trusts and foundations, and grant and sponsorship applications for new sources of funding, as well as relationship development opportunities to ensure the ongoing growth and renewal of the prospect based. Maintains the Division's database and

circulate pertinent details to the Senior Development Officers and senior management at the Division and University to help further the constituent's relationship with University.

- C. Provides research to support nomination for board memberships, honorary doctorates and alumni awards requirements by board members and senior management as well as information for networking events.
- D. Performs analysis of the database to identify segmentation for project support.
- E. Performs best practice review of prospecting tools and online resources to recommend for purchase. Proactively learns about developments, trends, and tools in donor research. Seeks out new tools and processes.
- F. Acts as a subject matter expert to proofread other Analyst's documents for quality assurance.

Contacts: Direct Manager, Development and Advancement staff, President's Office and Deans

Reason for Contact: To gather requirements and present findings and/or reports. To work with the manager to identify performance reviews, goal setting and project deliverables.

2. Prospect Management System and Pipeline Support]

Percentage of time: 25 %

- A. Provides back up for the Prospect Analyst on tasks with an immediate deadline.
- B. Completes all records systems maintenance activities related to prospect management including creating and updating records as required.
- C. Acts as a subject matter expert to train and support users on the prospect management systems.
- D. Monitors the prospect management system and assist Senior Development Officers in adhering to the process. Assignment conflicts are flagged to the AD and the AVP, Development to ensure corrective action is taken when required.
- E. Works with the Information Services (IS) team to ensure that processes align with reporting requirements. Meets regularly with the Senior Development Officers to discuss and provide input on pipeline planning as well as serves ad hoc research requests. Participates in discussions related to major gift and campaign planning.]

Contacts: Direct Manager, Development and Advancement staff, President's Office and Deans

Reason for Contact: To receive direction and obtain clarification. To gather and provide information.]

3. Records Management and Best Practices]

Percentage of time: 20%

- A. Ensures that all key processes are properly documented and available in an appropriate format for both prospect management staff as well as other Development Office staff.
- B. Acts as a subject matter expert to guide members of the Development team on the use of certain modules and reports within the database as required.
- C. Builds and fosters strong and collaborative working relationships with stakeholders across the Division by leading and supporting a culture of good contact management. Disseminates best practice for record management by hosting a user group forum to address issues.]

Contacts: [Direct Manager, Development and Advancement staff, President's Office and Deans]

Reason for Contact: [To receive direction and obtain clarification. To gather and provide information.]

4. [Workflow coordination]

Percentage of time: [10%]

- A. Under the direction of the Director and in compliance with University and Divisional policies, procedures and protocols: Coordinates recruitment of student hire(s) within the Research unit to include responding to applicant queries and provides support to student applicants as required. Tracks, documents and prints applications, schedules interview time(s) and provides other administrative support with respect to student recruitment. Acts as a subject matter expert by assisting the manager to sort and review student applicants based on the criteria set by management.
- B. Coordinates online & in-person training and all associated onboarding processes; Conducts in-person training and updates documentation & training material as required.
- C. Coordinates the work of student/casuals supporting the Research unit with general clerical tasks, such as, tracing contact information of key constituents. This includes coordinating schedules, assessing/reporting quality of work, maintaining attendance records, reviewing and validating hours worked in TRT (Time Reporting Tool), assisting with orientation and training.
- D. Assists students in understanding Divisional and Research objectives and operational requirements.
- E. Serves as a point of escalation for students/casuals for more inquiries requiring more in-depth response to determine the appropriate action.]

Contacts: [Direct Manager, Development and Advancement staff, President's Office and Deans]

Reason for Contact: [To receive direction and obtain clarification. To gather and provide information.]

5. Other duties as assigned

Percentage of time: 5%

COMMUNICATIONS:

	Level English
Basic reading skills (e.g., scanning text, reading forms, etc.)	<input type="checkbox"/>
Basic writing skills (e.g., writing brief notes, completing forms, etc.)	<input type="checkbox"/>
Basic speaking skills (e.g., asking & answering simple or repetitive questions, etc.)	<input type="checkbox"/>
Comprehends written material (e.g., extracting information/details, reading reports/correspondence, etc.)	<input type="checkbox"/>
Writes non-complex documents (e.g., composing factual information/short routine correspondence, taking minutes, etc.)	<input type="checkbox"/>
Sustains conversation on specific topics (e.g., explains standard policies/procedures/services, etc.)	<input type="checkbox"/>
Comprehends complex texts (e.g., reading & interpreting policy papers/research papers/technical reports, etc.)	<input type="checkbox"/>
Composes documents (e.g., drafting reports/recommendations/research papers/summaries, etc.)	<input type="checkbox"/>
Sustains in-depth conversation (e.g., interpreting & expressing complicated ideas, making presentations, etc.)	<input type="checkbox"/>

PHYSICAL & SENSORY DEMANDS/ENVIRONMENTAL CONDITIONS:

<input type="checkbox"/> VDT Use	70%	<input type="checkbox"/> Bending	5%
<input type="checkbox"/> Prolonged visual attention	50%	<input type="checkbox"/> Walking/mobility	5%
<input type="checkbox"/> Prolonged audio attention	20%		
<input type="checkbox"/> Hand/finger dexterity	50%		
<input type="checkbox"/> Prolonged sitting	65%		

RESPONSIBILITY FOR OTHERS:

	Casuals
<input checked="" type="checkbox"/> Gives direction or instructions]	#4
<input checked="" type="checkbox"/> Decides what tasks/projects other should do first]	#4
<input checked="" type="checkbox"/> Arranges work schedules, coordinates work flow & reviews completed work]	#4
<input checked="" type="checkbox"/> Trains others in new tasks or estimates training needs]	#4

QUALIFICATIONS:

Minimum level of formal education required:

[At least a university degree in Business, Commerce, Library Science, Information Management. Equivalent education and experience includes college diploma in similar disciplines plus 1 year practical related experience in addition to the minimum years of work experience required or 4 years recent experience (defined as within the last five years) working at York University performing the same or similar task. This education equivalency is in addition to the experiential requirements outlined below.]

Minimum number of years and type of relevant work experience required:

[Three (3) years recent and related work experience to include:

- Online advancement tools as Pro-Online, Big Database and such services as Factiva & Lexis Nexis.
- Preparing research profiles on Individuals, Corporations and Foundations, and in preparing Wealth Indicators. Includes reviewing financial and giving details and providing information and recommendations on potential philanthropic capacity.
- Preparing prospecting lists of potential leads for fundraising and other advancement initiatives, programs and regional trips. Knowledge of prospect management systems an asset.
- Conducting media reviews and identifying opportunities for distribution to advancement colleagues or for additional research.
- Using relational databases; experience in extracting, uploading, and operating basic reporting tools; demonstrated ability to analyze data for potential trends.
- Working with records management system(s) is an asset; in hard copy file plans, share folders and email systems.
- Knowledge of PIPEDA and best practices in privacy-related policies are an asset.]

Skill(s) required:

[Demonstrated skills including:

- Researching skills; in a number of different formats: including electronic, online, web-based databases and print.
- Written and oral communication skills to understand key aspects of a research and/or prospecting request. To write and summarize information into precise, clearly understood documents.
- Organizational skills to work effectively under pressure of high volume and meeting daily deadlines.
- Ability to conduct filing and records keeping activities.
- Ability to be attentive to detail.
- Customer service orientation.
- Ability to work independently and exercise good judgment.

- Ability to maintain confidentiality and comply with privacy protocols and practices.

Demonstrated computer skills including:

- Intermediate Word processing (MS Word)
- Intermediate spreadsheets (MS Excel)
- Intermediate Database (MS Excel)
- Advancement / Fundraising software (AWA or equivalent)

]

Please note: This position requires the candidate to produce a verification of degree(s), credentials(s), or equivalencies from accredited institutions and/or international equivalents at the time of interview.

JOB SPECIFICATIONS:

Hours of work: [Hours of work: 8:30 am – 4:30 pm or 9:00 am-5:00 pm]

Occasional overtime will be available

Vacation restriction: [Vacation may be restricted due to operational requirements and / or other staff approved absences.]