



Organization and Position Overview

Search for a Prospect Research and Data Analytics Officer

ORGANIZATION OVERVIEW

Established in 1996, the Calgary Health Trust (CHT) was formed to coordinate the efforts of the then many separate health care foundations attached to individual hospitals and healthcare centres.

As a Calgary-based charity, CHT has raised funds to transform health care in Alberta by funding state-of-the-art technology, innovative programs, research and education.

Through the incredible generosity of its donors, CHT has helped to raise more than \$427 million for health care. Funds raised benefit Foothills Medical Centre, Peter Lougheed Centre, Rockyview General Hospital, South Health Campus, many community health programs and 12 Carewest centres in the Calgary community.

Working closely with CHT partners, the CHT looks to identify the areas where philanthropy will have the greatest impact on health care within Calgary immediately and over the long-term.

CHT fundraising efforts focus on three healthcare priorities:

- developing world-class care;
- enhancing public and staff education about health care
- improving quality of life by accelerating research into action.

Health care touches all of us and CHT is proud to make a difference to the people they care about in particularly in the areas of:

- acute care;
- prevention and harm reduction;
- chronic pain clinic and outpatient care;
- palliative care; and
- labour and delivery and neonatal care.

CHT employs 26 dedicated professionals who work closely with Alberta Health Services (AHS) and community partners to identify key priorities where philanthropic supporters will ensure excellence.

THE ROLE

Reporting to the Director of Strategic Giving, the Prospect Researcher and Data Analytics Officer will be responsible for developing and actively managing Calgary Health Trust's donor pipeline.

This individual will work holistically to leverage insights gained through the position to positively influence and support the Calgary Health Trust's fund development initiatives: i.e. grateful patients, physician giving, annual giving, mid-level, major gifts, planned giving and events.

The Prospect Researcher and Data Analytics Officer will work closely with the Director of Development and Campaigns, the Vice President of Development, the CEO and the fundraising team (which includes volunteer fundraising cabinets and development councils) to proactively identify prospects and donors; uncover their financial capacity and the philanthropic desire to support important health funding priorities; and use the knowledge gained to drive to activate strategic pipeline management through monitoring, analysis and reporting.

REPORTING RELATIONSHIPS

Reports to: Director, Strategic Giving

Indirectly reports to: Vice President of Development, President and CEO,
Board/Board Committees/Fund Development Councils

KEY RESPONSIBILITIES

▪ **Prospect research and management:**

- Conduct in-depth research and data collection to systemically identify prospects for major, planned, and annual gift prospects using best-practices and methodologies. This includes the utilization of tools and techniques such as data mining, reviewing of contact reports and relationship leads with Development staff, and monitoring of industry news and trends
- Prepare concise, thorough, prospect research briefs, profiles and reports to support major gift activity, by clearly identifying the prospective donor's linkage, interest and ability
- Proactively identify and rank new prospects using both internal measures as well as external sources of insights to develop a comprehensive picture or profile of key donors
- Implement innovative processes to help the organization coordinate the assignment of donors to facilitate proper alignment of donor interest to organizational priorities.
- Ensure the appropriate data/information is recorded into the database on an ongoing basis and ensure strict adherence to the processes developed so as to maintain the integrity of the database and information available for prospect management

▪ **Data analysis:**

- Provide innovative ways to consistently analyze and design portfolio composition, size and capacity to meet organization goals
- Provide timely information to the fundraising teams, and ensure that each team member fully understands and is able to optimize their portfolio and perform according to established KPIs

- Prepare reports, build and maintain dash-boards in Raiser's Edge to ensure the organization is able to use data to prioritize actions and drive strategic decision making
- Lead innovation around forecasting and modeling to assist the team in budgeting and performance optimization
- **Pipeline administration:**
 - Investigate, analyze and synthesize large quantities of data into a user friendly and informative format for use by the team
 - Support development and maintenance of pipeline metrics and benchmarks
 - Monitor the pipeline in terms of the fundraising cycle and major gifts fundraising process to ensure active management of donors
 - Prepare reports on pipeline status and review results with major gifts team
 - Work in collaboration with operations team to support all data and reporting requirements
 - Track and report on KPIs
 - Enter and maintain research information and prospect updates in Raiser's Edge
- Other duties as assigned

EXPERIENCE, QUALIFICATIONS AND EDUCATION

- Bachelor degree in Library Sciences or Information Management is ideal or a combination of education and experience will be considered
- Minimum 3 years relevant research experience for a not-for-profit organization, doing major gifts research (work in the health sector is an asset but not necessary)
- Strong analytical skills with ability to provide concise written and verbal communication with exceptional attention to detail and accuracy
- CFRE designation is an asset but not necessary

ATTRIBUTES AND ABILITIES

- Demonstrated knowledge of commercial online and other research services and products, including SEDAR, D&B, BC Online, and EDGAR and Hoovers
- Understanding of relevant privacy legislation and ethical obligations under the Donor Bill of Rights and APRA's ethics and professional standards
- Demonstrated research skills - especially with the internet
- Firm grasp of major gifts fundraising operations and business practices
- Adept at using quantitative and qualitative assessments to draw conclusions
- Demonstrated expertise in Raiser's Edge database
- Strong working knowledge of MS office products (Word, Excel, PowerPoint, Outlook)
- Strong written and verbal communication skills
- Demonstrated success working collaboratively and cooperatively with teammates
- Outgoing and independent self-starter
- Enthusiastic, self-motivated and committed to excellence
- Capable of working well with a variety of personalities and leadership styles

- Results-oriented and capable of working on multiple of projects and priorities simultaneously

WORKING CONDITIONS

- Long periods of sedentary computer work required

FOR ADDITIONAL INFORMATION

- www.calgaryhealthtrust.ca
- To explore this opportunity further, please send your resume and cover letter, in confidence, no later than March 20, 2019 to:

Karen Longden
Manager, People Services
karen.longden@calgaryhealthtrust.ca

- The position will be filled as soon as a suitable candidate is identified.