



## **JOB DESCRIPTION - PROSPECT RESEARCH ASSOCIATE**

### **ABOUT US**

Climate Lead empowers philanthropic leaders everywhere to take immediate and far-reaching climate action with a curated portfolio of fully vetted and packaged solutions designed for tangible, scalable impact.

### **SUMMARY**

The Prospect Research Associate is instrumental in supporting the internal functions needed to mobilize Climate Lead's prospect strategy. This role works in close coordination with the Senior Analyst, Prospect Development. It is an important, temporary role that will work with us for 20 hours per week through December 2024 to help Climate Lead achieve its 2024 goals.

### **MANAGERIAL RESPONSIBILITIES**

This position does not have managerial responsibilities.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

#### Research (50%)

- Support Senior Analyst, Prospect Development in preparing comprehensive biographical and financial profiles of potential climate philanthropists (prospects).
- Add prospect information and analysis to Climate Lead's Salesforce database.
- Prepare draft briefing documents for Climate Lead events, donor engagement opportunities, and staff speaking engagements as requested.
- Track regular newsworthy and philanthropic updates on Climate Lead's top prospects and alerts relevant team members.

#### Data Maintenance (50%)

- Review and update prospect ratings using Climate Lead's process and norms.
- Update prospect biographies to ensure current information is readily available in Salesforce.
- Review, update and keep current philanthropic information for prospects in Salesforce using Climate Lead's processes and norms.

### **SUCCESS CRITERIA**

- Data Analytics - Aggregate, clean and present data in a format that is understandable and actionable, creating and distributing reporting, dashboards, and visualizations to understand performance, develop and use models to better support decisions and improve performance, deliver foresight and recommendations based on data to drive execution.
- Prospect Research - Work proficiently with databases, implement new research techniques, take potential major donors and delve into their backgrounds and curate the ultimate approach for each prospect.
- Relationship Management - Work closely with the Philanthropy Team to improve advising/fundraising strategies, use a tactful and ethical approach to fundraising relationships.

### **QUALIFICATIONS**

#### *Knowledge, Skills, Abilities*

- Understanding of philanthropy (mission, practice, trends) and fundraising practices (the development cycle, prospect management policies and practices).
- Thorough knowledge of prospect research techniques, tools, and data analysis.
- Strong technical skills to utilize and manipulate database, biographical, financial and other research systems and tools.

- Ability to extract information and generate reports from complex databases. Familiarity with research data interpretation such as SEC, Real Estate and Compensation documentation.
- Experience with Salesforce for Nonprofits preferred. Experience with similar CRM tools such as Ellucian Advance or Raiser's Edge a plus.
- Ability to think critically and develop tactical plans in response to strategic needs.
- Ability to absorb complex technical information and communicate effectively to both technical and non-technical audiences.
- Ability to adapt to changing circumstances through learning, flexibility and resilience.
- Ability to build strong customer relationships and work within a cross functional team.
- Ability to use technology to gather, interpret, and organize data.
- Excellent written, oral, and interpersonal communication skills; ability to interact effectively with diverse groups within a customer service-oriented environment.
- Organizational skills to handle several projects simultaneously, accommodate shifting priorities, and meet deadlines.

### ***Education and Experience***

- Bachelor's degree required.
- 3+ years experience in research or prospect management / prospect development required.
- Experience managing complex processes is preferred.
- Experience with database operations and usage, including CRM and other relational databases preferred.
- Experience researching international prospects preferred.

### **WORK ENVIRONMENT**

Climate Lead is headquartered in San Francisco, CA. The Prospect Research Associate operates in a hybrid environment out of our San Francisco office. There is an option for this position to be remote for candidates based in California or Washington, DC.

### **COMPENSATION RANGE**

The compensation range for this part-time position is \$55,000 - \$60,000 USD annually.

### **EMPLOYMENT PRACTICES**

At Climate Lead, we value diversity and always treat all employees and job applicants based on merit, qualifications, competence, and talent. We do not discriminate on the basis of or traits historically associated with race, color, religion, religious creed, national origin, ancestry, citizenship, physical or mental disability, medical condition, genetic information, marital status, sex, gender, gender identity, gender expression, age, sexual orientation, veteran and/or military status), domestic violence victim status, political affiliation, and any other status protected by state or federal law.