

Job Description



Job title:	Prospect Research Lead
Department:	Brand, Marketing and Fundraising
Reporting to:	Director of Philanthropy and Development
Salary:	£56,377
Hours:	35 hours per week
Location:	London
Contract type:	Permanent

Aim and influence

- To lead the development and implementation of prospect research and prospect management systems, processes and insight that underpin Crisis' high-value fundraising success across Philanthropy, Trusts, Corporate and Strategic Partnerships and Community Engagement.
- Work with the Director of Philanthropy & Development to ensure effective development and delivery of the high value prospect research strategy and delivery plan
- To oversee the delivery of an excellent prospect research and development function, with building a high-quality approach to pipeline management to enable strategic decision-making.
- Accountability for increasing the prospect pool to support high value income growth targets
- To work collaboratively with colleagues across Fundraising, Finance, Policy, Services and the Chief Executive's Office to support ambitious fundraising targets and campaigns.

Financial and supervisory responsibilities

- Line management of the Prospect Research Manager
- Matrix working across Philanthropy and Development and Partnerships and Community Fundraising.
- Responsible for managing the prospect research budget, ensuring effective planning and oversight of operational expenditure. Accountable for the development, effectiveness and continuous improvement of systems and tools that support high-value forecasting, portfolio management and pipeline tracking

- Accountability for ensuring high-value data and performance reporting is robust, timely and insightful.
- Oversee and manage relationships with suppliers and agencies, negotiating contracts to achieve best value for Crisis.
- Ensure all research and prospect management activity complies with relevant data protection/GDPR and privacy laws, with adherence to fundraising codes, laws and best practice, and in line with internal governance processes,

Role responsibilities

Prospect research, pipeline management and CRM

- Lead the development and management of high-value prospect pipelines, ensuring robust processes for tracking, analysis, and reporting.
- Lead the design and ongoing improvement of systems, processes and tools that enable high value relationship managers to segment, prioritise and advance high-value relationships.
- Lead the prospect research function, working with the prospect research manager to ensure delivery of biographical information, targeted research, insight and due diligence to support the high value fundraising and engagement programme.
- Maintain oversight of day-to-day research delivery, providing hands-on support on complex projects, due diligence, priority opportunities and during periods of peak demand where required
- Implementation of best practice in prospect management, moves management and CRM usage (Dynamics), including training and troubleshooting.
- Work with digital and data colleagues and the CRM Product Manager to ensure high-quality dashboards, insight and reports are available to teams and senior stakeholders
- Ensure integration between the high-value team and the CRM Product Manager to meet data needs and improve functionality.
- Working closely with stakeholders from across high value and the CRM Product Manager, ensure that the database meets the needs of high-value fundraising teams across BMF, enabling accurate pipeline cross-referencing, KPI reporting, activity and financial reporting and forecasting.
- Lead on building a diverse, warm, multi-year, high-value pipeline of qualified, high-quality prospects that ensures engagement activities and asks are coordinated across teams.

- Using data and insights from the CRM, to introduce relevant KPI, pipeline and financial reporting and forecasting across high-value teams and conduct appropriate insight, analysis and performance reviews.

Leadership and line management responsibility

- Line management of the Prospect Research Manager. Ensure that they have clear objectives and KPIs; hold regular feedback, 121s, and continuous conversations.
- Ensure the Prospect Research team delivers timely, responsive and high-quality support to internal stakeholders across the high-value fundraising function.
- Work closely with the Director of Philanthropy & Development and Head of Partnerships and Community Fundraising to develop, deliver and implement the prospect research plan and strategy.
- Work closely with the Compliance and finance teams to ensure all prospect research activity, particularly our prospect, research, pipeline and due diligence processes are robust and following relevant laws, codes, and best practice. Act as an internal champion across high value.
- Ensure strong collaboration across high-value teams, enabling matrix ways of working and clear ownership of shared responsibilities.
- Contribute to the ongoing development of Crisis' high-value strategy and team culture.
- Champion a learning approach, using data, feedback and evaluation to drive improvements across operations and fundraising.
- Be an active and engaged member of the Philanthropy and Development management team.
- Represent high value teams across specific project groups.

General responsibilities

- Pro-actively seek out opportunities to promote and support member involvement within Crisis.
- Develop and maintain an understanding of Crisis' work and the needs and circumstances of people facing homelessness.
- Comply with Crisis policies and procedures, including Health and Safety policies, for which all employees owe a duty of care both to themselves and others, in accordance with the Health and Safety at Work Act.
- Comply with all Crisis policies and procedures insofar as they relate to the provision of services, including Safeguarding and Equality, Diversity & Inclusion.

- Work collaboratively across departments to support Crisis' mission to end homelessness.
- Carry out any other duties reasonably associated with your role.

Person Specification

Essential

- Experience leading prospect research and insight functions in a fundraising or business development context.
- Experience developing and managing high-value fundraising pipelines and prospect systems.
- Experience of developing and implementing prospect research strategies that have resulted in income growth.
- Excellent knowledge of CRM databases (e.g. Microsoft Dynamics), reporting tools (e.g. Power BI) and related technologies, with experience of partnering with CRM and data teams to develop systems, processes and reporting that maximise prospect insight, support strategic fundraising decisions and improve high-value fundraising performance
- Excellent verbal and written communication skills with ability to synthesise and present complex information into clear, concise insight and reports for a range of audiences including senior stakeholders
- Experience of designing and developing due diligence processes with confidence to manage and escalate risk.
- Excellent planning, prioritisation and organisational skills, with the ability to manage competing priorities, oversee team workflows and ensure resources are focused on the highest-value opportunities and organisational priorities.
- Experience of leading cross-functional projects and influencing stakeholders within matrix environments.
- Highly numerate with ability to analyse and interpret data, identify trends, generate strategic insights and make recommendations.
- Excellent knowledge of data protection, GDPR, fundraising regulation, codes and best practice with confidence to advise colleagues and escalate risks where appropriate.
- Line management experience with ability to coach, develop and support team members.
- Commitment to Crisis' purpose and values including equality, social inclusion and ending homelessness.

Desirable

- Experience supporting or working on a capital campaign.
- Experience conducting or using wealth screening in a high-value fundraising context.