Job Description

Job title:	Prospect Research Manager
Department:	Brand, Marketing and Fundraising
Reporting to:	Prospect Research Lead
Salary:	£49,622
Hours:	35 hours per week
Location:	London
Contract type:	Permanent

Aim and influence

- Contribute to 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.
- To be responsible for delivery of an excellent prospect research and development function, helping to ensure a high-quality approach to pipeline management to enable strategic decision-making.
- 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

- Matrix working across Philanthropy and Development and Partnerships and Community Fundraising.
- Responsible for day to day maintenance and use of systems and tools that support high-value forecasting, portfolio management and pipeline tracking.
- Contribute to ensuring high-value data and performance reporting is robust, timely and insightful.
- Manage relationships with suppliers and agencies as required, 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

- Maintain an up to date research log and ensure research is delivered according to deadlines and priorities
- Deliver research and activities against agreed turnaround times and internal service level agreements
- Responsible for delivering biographical information, targeted research, insight to support the high value fundraising and engagement programme
- Undertake due diligence research in order to help Crisis meet our fundraising, and financial compliance requirements
- Contribute to the development and management of high-value prospect pipelines, ensuring robust processes for tracking, analysis, and reporting
- Contribute to the ongoing improvement of systems, processes and tools that enable high value relationship managers to segment, prioritise and advance high-value relationships
- Contribute to the 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
- 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
- Contribute to building a diverse, warm, multi-year, high-value pipeline of qualified, high-quality prospects that ensure 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

General responsibilities

- Be an active and engaged member of the Philanthropy and Development team.
- Represent high value teams across specific project groups.

- 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 delivering prospect research and insight in a fundraising or business development context.
- Experience of working with relationship managers to support prospect identification, qualification and portfolio development
- Excellent working knowledge of CRM databases (e.g. Microsoft Dynamics) and reporting tools (e.g. Power BI), with the ability to design and improve systems and processes.
- Excellent written communication skills with ability to synthesise and present complex information into clear, concise insight and reports
- Experience of undertaking due diligence and working within gift acceptance or ethical fundraising frameworks.
- Experience of working in matrix structures or cross-team project groups.
- Highly numerate with ability to analyse and interpret data, identify trends and make recommendations
- Excellent prioritisation and time management skills, with ability to work to multiple deadlines and maintain a strong attention to detail
- Proactive, with ability to work independently and with problem solving ability.

- Excellent knowledge of data protection, GDPR, fundraising regulation, codes and best practice.
- 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.