

## JOB DESCRIPTION

<b>Job title</b>	Prospect and Stakeholder Research Manager
<b>Department/Unit</b>	External Relations / Engagement Services
<b>Job Type</b>	Permanent – Full Time
<b>Grade</b>	Grade 6
<b>Accountable to</b>	Head of Engagement Services
<b>Accountable for</b>	N/A
<b>HERA Code</b>	
<b>Vacancy reference</b>	SRF47240

### Purpose

At the University of Reading we are committed, as a community, to working together to address the world's biggest challenges. We are proud to be one of the UK's leading research-intensive universities, ranked among the top 200 universities in the world (2023 Times Higher Education World University Rankings).

Operating in a highly competitive, global market – it has never been so challenging to attract research income, students, academic and professional staff. It is the role of the External Relations directorate to provide expert, professional marketing, engagement and communication strategy and delivery. External Relations works in a matrix management model to build the University's reputation, brand and profile, and deliver robust, innovative and global campaigns to support recruitment, brand building and engagement goals. Critical to the mission of External Relations is the ongoing development of robust systems and processes to ensure the effective, secure and compliant management of all stakeholder relationship data.

The Prospect and Stakeholder Research Manager role sits within the Engagement Services team which is part of the External Relations directorate. The Engagement Services team supports fundraising, and alumni and stakeholder engagement activities across the University, including the Henley Business School.

This position is responsible for ensuring fundraisers are able to establish and develop strong personal relationships with prospective donors in order to generate significant levels of philanthropic financial support for the University's teaching, learning and research priorities. As the primary research professional they will enable high quality fundraising at leadership, major and principal giving levels. These are currently defined as being between £1,000 - £50,000, £50,000 - £500,000 and £500,000+ respectively.

This position is also responsible for providing data sets and detailed research reports of alumni and stakeholders in support of targeted engagement and partnership-building initiatives, thus ensuring External Relations colleagues are able to achieve advocacy and volunteering goals and develop strong relationships with key contacts.

## **Main duties and responsibilities**

### **Research Strategy and Prospect Management**

- Taking ownership of the prospect tracking and management systems, working with the Head of Engagement Services, the fundraisers, and Gift Administration Officer to ensure information is recorded and retrieved in the most efficient way possible on the alumni and stakeholder CRM (currently Raiser's Edge).
- Analysing trends and available data, using the outcomes of this to develop and implement appropriate research strategies and identify high quality donor and engaged prospects.
- Managing the identification and allocation of prospects on the alumni and stakeholder CRM to fundraising staff, working closely with the fundraisers to develop and prioritise the prospect pipeline.
- Training other users on how to record information when identifying and managing prospects on the alumni and stakeholder CRM.
- Working with the team in order to troubleshoot and initiate solutions to any potential problems within the prospect pipeline and associated strategies.

### **Prospect Research**

- Proactively researching, identifying and profiling prospective and current leadership, major and principal gift donors (currently between £1,000 - £50,000, £50,000 - £500,000 and £500,000+ respectively).
- Managing the team's strategy and procedure for identifying, allocating, researching and tracking fundraising activity with prospective leadership, major and principal gift and monitoring performance.
- Identifying connections between the University and our current and prospective major and principal donors, including alumni, other high net worth individuals, companies, trusts, contact networks and other bodies.
- Conducting industry specific research, particularly focussing on the salaries and positions offered within each sector.
- Maintaining a comprehensive information management system of research materials to support the research function.

### **Research Briefings/Reporting**

- Managing the production of accurate and detailed individual and organisation briefings for the fundraising team, and External Relations colleagues, senior individuals within the University and other stakeholders as required.
- Using own initiative and judgement in deciding on the detail and complexity of the information to include in different briefings and reports.
- Working with relevant individuals across the university to identify reporting needs and producing required analysis, using a combination of tools built into the alumni and stakeholder CRM, statistical analysis and other tools as appropriate.

### **Other related duties**

- Assisting in maintaining the accuracy and integrity of data stored on the alumni and stakeholder CRM.
- Managing the due diligence process, performing research to ensure guidelines set forth in the University Gift Acceptance Policy are met.

- Maintaining and developing relationships with other professionals in order to share and develop knowledge in prospect research and management.
- Recognised as the main point of contact for alumni and stakeholder due diligence within External Relations and across the University, providing advice to colleagues, or other areas of the University.
- Any other duties as determined by the Head of Engagement Services.

### **Supervision received**

The Prospect and Stakeholder Research Manager will report to the Head of Engagement Services.

### **Supervision given**

None

### **Contact**

The Prospect and Stakeholder Research Manager will work closely with fellow members of the External Relations team, colleagues within the Henley Business School and Reading Real Estate Foundation, and, as required, with senior members of the University's academic community.

The majority of their external contacts are colleagues at other HE institutions in the UK and abroad through professional bodies such as CASE (Council for Advancement & Support of Education) and CIOF RiF (Chartered Institute of Fundraising Researchers in Fundraising).

### **Terms and conditions**

This appointment is full-time. The post holder is expected to work the hours necessary to deliver agreed outcomes. The post requires a high degree of initiative and independent working, and the ability to turn around a high volume of work at short notice.

This document outlines the duties required for the time being of the post to indicate the level of responsibility. It is not a comprehensive or exhaustive list and the line manager may vary duties from time to time which do not change the general character of the job or the level of responsibility entailed.

**Date assessed: May 2024**

# Person Specification

Job Title	School/Department
Prospect and Stakeholder Research Manager	External Relations

## Which stage these Criteria be assessed:

A = Application

I = Interview

P = Presentation/Pre task/Other (delete and amend as appropriate)

Criteria	Essential	Desirable
<b>Skills Required</b>	<ul style="list-style-type: none"> <li>Outstanding prioritisation, organisational and administrative skills (A and I)</li> <li>Exceptional levels of accuracy and attention to detail (A, P and I)</li> <li>Ability to engage audiences using a range of communication tools – writing and responding to email; writing proposals and reports; telephone, virtual and face to face meetings as well as presenting to people virtually and in person. (A, P and I)</li> <li>High IT literacy, especially Microsoft Office (I)</li> <li>Strong ability to manage high volumes of information and data (A and I)</li> <li>Well-practiced qualitative and quantitative research skills (A and I)</li> </ul>	<ul style="list-style-type: none"> <li>Project management and strategic planning skills (A and I)</li> </ul>
<b>Knowledge</b>	<ul style="list-style-type: none"> <li>Comprehensive knowledge of data protection legislation (A and I)</li> <li>An excellent understanding of wealth profiling (A, P and I)</li> <li>A strong understanding the principles of major donor fundraising (A, P and I)</li> </ul>	<ul style="list-style-type: none"> <li>A strong awareness of current trends and best practices in prospect research and management (I)</li> </ul>
<b>Relevant Experience</b>	<ul style="list-style-type: none"> <li>Experience of wealth or debt profiling (A and I)</li> <li>Experience of undertaking research on individuals and organisations from a variety of sources (A and I)</li> <li>Experience of processing and manipulating large data sets (A and I)</li> <li>Experience of using and maintaining CRM databases (A and I)</li> <li>Experience of training and updating new and existing users with new systems and approaches to work (A and I)</li> </ul>	<ul style="list-style-type: none"> <li>Experience conducting due diligence research (A and I)</li> <li>Experience with Raiser's Edge (A and I)</li> <li>Experience of online research tools (A and I)</li> <li>Experience in predictive analytics (A and I)</li> <li>Experience of working in a fundraising environment (A and I)</li> </ul>

	<ul style="list-style-type: none"> <li>• Experience of reviewing, streamlining and developing business processes (A and I)</li> <li>• Experience in a stakeholder management or customer-facing role (A and I)</li> </ul>	
<p><b>Other</b></p>	<ul style="list-style-type: none"> <li>• Ability to handle confidential or sensitive information (A and I)</li> <li>• A strong interest in prospect research and management (A)</li> <li>• Enjoys investigating new information (A and I)</li> <li>• Flexible and comfortable balancing multiple priorities and deadlines (A and I)</li> <li>• Proactive approach to tasks (I)</li> <li>• Ability to perform autonomously, within a team setting (A and I)</li> <li>• Ability to plan and prioritise own work activities for the weeks and months ahead, adjusting priorities as appropriate to manage non-standard work requests (A and I)</li> <li>• Commitment to fundraising and development of Higher Education (A and I)</li> <li>• Demonstrable commitment to CPD and a willingness to undertake further training (A)</li> </ul>	

**Completed By: Jenny O'Donoghue**

**Date: May 2024**