



Prospect Research Manager (Development & Alumni Relations)

Park End Street and Hayes House, Oxford

Grade 7: £38,674 - £46,913 per annum including the Oxford University Weighting of £1,500 per annum

Permanent, full time

Saïd Business School, University of Oxford



The role

Saïd Business School is home to one of the largest, most diverse and successful fundraising teams in Oxford outside of the Central University. The School has secured over £100m in philanthropic income in the last six years alone from major trusts and foundations, multinational corporations, alumni, and other HNWI's and UHNWI's who share our core values and missions as a global business school rooted in the ancient traditions and global excellence of Oxford University.

With the arrival of Professor Soumitra Dutta as the Schools' new Dean, and new a Chief Operating Officer, Manos Kapterian, an ambitious new School five-year plan has recently been agreed and Oxford Saïd is entering an exciting new phase in its evolution. Securing increased levels of philanthropic income and deep levels of alumni engagement will be a critical element in the successful delivery of the new strategy. In 2022, the School also welcomed Kate Foley as Director of Development and Alumni Relations, who together with an expanded Development and Alumni team and support from across the School will lead the School's efforts and delivery in this area.

Reporting to Associate Director, Operations the role of Prospect Researcher is a new addition to the team's busy operational sub-team, created to provide key support to our fundraising team at a crucial point in the School's development and the Development and Alumni team's expansion. With our major capital project redeveloping the former Osney Power Station to the Global Leadership Centre, research and growth ambitions, the relaunch of our flagship scholarship programme supported by the new Rewley Fund, and the arrival of our new Dean, the School has ambitious and exciting fundraising targets, and the Prospect Researcher will play a central role in identifying, building, and cultivating new and existing prospects and leads. This is an ideal opportunity for an experienced and driven development professional to sit at the heart of Oxford Saïd's successful fundraising operation.

The duties of the post are set out as they are envisaged at present, but it will be important for the person appointed to be flexible and adaptable, and able to contribute to the development of the fundraising function of the collegiate University. All staff operate as a team, and, while each has his or her own responsibilities, they are expected to assist each other in peak periods. The post holder will need to become conversant with the School and the wider University as a whole, especially with the numerous academic staff and volunteers.

Responsibilities

Research and due diligence

- Researching and writing briefings on people, companies, foundations and trusts, tailored to requests and completed to deadlines. These vary greatly in depth according to their purpose, and include in depth research for the use of the School's leadership, as well as colleagues in the Development and Alumni team. This research directly informs the School's decisions about its potential philanthropic engagements, and their potential financial value.
- Researching and identifying potential donors with whom the School will aim to develop significant philanthropic relationships. These will be drawn from several groups: high net-worth individuals (both alumni and non-alumni), the corporate sector, trusts and foundations and other bodies from which funding may be obtained.
- Providing background reports and wealth assessments using specialist research tools to maximise prospect insight and ensure appropriate due diligence and background information to inform each stage of the donor relationship.
- Researching and compiling information for the School's risk assessment and donations and funding acceptance process, including regular production of complex reports for a variety of stakeholders. This involves identifying and summarising potential legal, financial and reputational risks to the School which inform



decisions on whether the School will accept or reject major gifts and funding.

- Producing drafts for major gift proposals in partnership with senior fundraisers, academics and the Development Office's Proposals team, to facilitate production of formal applications and proposals on behalf of the University.
- Assisting with the briefing process for fundraisers and senior member of staff ahead of meetings with potential donors, liaising with other staff in the UODO and the collegiate University as necessary to build up the fullest possible picture of each potential donor in a timely manner.
- Working with the Student Funding team on regular report writing for existing major donors.

Line management

- Line management responsibilities for one person, currently the Development and Alumni Coordinator. Set objectives and monitor performance against a clear set of objectives and KPI's. Conduct professional reviews and appraisals and look to provide professional development opportunities, including identifying training opportunities and support where required. Take a lead role in recruitment as required.
- Work with the Associate Director, Operations to provide a set of clear KPI's for monitoring performance of prospect research activity and outputs e.g. numbers of profiles, numbers of impact reports produced, numbers of prospects identified, from those identified to those who become 3 qualified as major donors and value of stewardship activity in moving the donors through the donor cycle.
- Act as a centre of excellence for donor relations within the team and the School and model this behaviour for team members and external stakeholders, championing a positive team culture and adhering to best practice at all times.

Prospect allocations and identification

- Work with the Associate Director, Operations to develop new process to allocate prospects and manage criteria for assigning prospects to each portfolio based on experience, capacity etc
- Working to monthly targets proactively identify new donor prospects
- Analyse the alumni database to identify influential and senior alumni to build up a potential bak of alumni speakers.
- Support the Alumni and supporter engagement team's efforts to celebrate alumni professional success.

General and best practice

- Undertaking all work in compliance with departmental and University policies and procedures, and with relevant legislation such as Data Protection law (training will be given).
- Building successful relationships with staff in the Development Office and other colleagues working in development roles across the Collegiate University. Providing advice, guidance and training on research matters, which may be in a one-to-one or group setting.
- Using the Development and Alumni Relations database expertly (training is provided) to understand our relationships, create new opportunities, to capture information effectively, and to maintain the School's prospecting data.
- Monitoring the philanthropic and business environments, providing regular and ad hoc news updates.
- Maintaining and developing our research resources, and identifying new useful sources.
- Answering general enquiries from across the University relevant to the work of the team.



- Any other tasks according to the needs of the Development Office, commensurate with the level of this position.

Selection criteria

Essential selection criteria

- Educated to degree level or equivalent professional experience
- Experience of prospect research in a fundraising organisation OR experience in a research-focused or information-focused role in a business setting such as consultancy, law, banking or professional services
- Excellent standard of written and spoken English, good communication skills, and the ability to produce clear, accurate and concise reports
- Enjoyment of working collaboratively in a team, with the ability to build successful relationships within the team and beyond it
- Willingness to be flexible and adaptable, and capability of switching effectively between fast turnaround work and more in-depth work, whilst maintaining care and attention to detail
- Excellent research skills; the ability to plan a research strategy and to adopt creative approaches to research where useful
- Good knowledge of the overall business environment and of current affairs
- Numeracy and the ability to understand and explain financial information
- Tact and discretion

Desirable selection criteria

- Previous line management experience
- Experience of using online subscription-based news databases, such as Lexis-Nexis or Factiva, and company databases, together with advanced Internet searching skills

- Experience of major-gift fundraising, particularly within a Higher Education setting
- Familiarity with concepts involved in fundraising prospect research and prospect management

Pre-employment screening

Standard checks

If you are offered the post, the offer will be subject to standard pre-employment checks. You will be asked to provide: proof of your right-to-work in the UK; proof of your identity; and (if we haven't done so already) we will contact the referees you have nominated. You will also be asked to complete a health declaration so that you can tell us about any health conditions or disabilities for which you may need us to make appropriate adjustments.

Please read the candidate notes on the University's pre-employment screening procedures at <https://www.jobs.ox.ac.uk/pre-employment-checks>.



About the University of Oxford

Welcome to the University of Oxford. We aim to lead the world in research and education for the benefit of society both in the UK and globally. Oxford's researchers engage with academic, commercial and cultural partners across the world to stimulate high-quality research and enable innovation through a broad range of social, policy and economic impacts.

We believe our strengths lie both in empowering individuals and teams to address fundamental questions of global significance, while providing all our staff with a welcoming and inclusive workplace that enables everyone to develop and do their best work. Recognising that diversity is our strength, vital for innovation and creativity, we aspire to build a truly diverse community which values and respects every individual's unique contribution.

While we have long traditions of scholarship, we are also forward-looking, creative and cutting-edge. Oxford is one of Europe's most entrepreneurial universities and we rank first in the UK for university spin-outs, and in recent years we have spun out 15-20 new companies every year. We are also recognised as leaders in support for social enterprise.

Join us and you will find a unique, democratic and international community, a great range of staff benefits and access to a vibrant array of cultural activities in the beautiful city of Oxford. For more information, please visit www.ox.ac.uk/about/organisation.

Saïd Business School

Saïd Business School blends the best of new and old. We are a vibrant and innovative business school, but yet deeply embedded in an 800 year old world-class university. We create programmes and ideas that have global impact. We educate people for successful business careers, and as a community seek to tackle world-scale problems.

We deliver cutting-edge programmes, including the highly regarded MBA, Executive MBA, a number of specialist MScs, a portfolio of custom

and open programmes and accredited diplomas for executives, and we undertake ground-breaking research that transform individuals, organisations, business practice and society. We are an international and outward looking School with our programme participants coming from more than 50 countries.

We seek to be a world-class business school community, embedded in a world-class University, tackling world-scale problems.

Sustainability

Saïd Business School is committed to the highest standards of environmental sustainability, preserving the planet for future generations and acting in a socially sustainable manner. As an employee you are expected to uphold these commitments in accordance with our Environmental Policy. You can learn more about our organisation's sustainability efforts at: <https://www.sbs.ox.ac.uk/about-us/school/sustainability>.

Diversity and Inclusion

Oxford Saïd is committed to fostering an inclusive culture which promotes equality, values diversity and maintains a working, learning and social environment in which the rights and dignity of all its staff and students are respected. We recognise that the broad range of experiences that a diverse staff and student body brings strengthens our research and enhances our teaching, and that in order for Oxford to remain a world-leading institution we must continue to provide a diverse, inclusive, fair and open environment that allows everyone to grow and flourish.

Oxford Saïd holds a bronze Athena Swan award to recognise advancement of gender equality: representation, progression and success for all.



Our Values

To better understand our Values, what behaviours demonstrate them and how they are involved in your everyday work we have created the below descriptors.

Transformational

We challenge constructively, provoke thought, and influence and inspire others to develop.

Respectful

We are caring, supportive, appreciative, embrace difference and value each other's opinions.

Entrepreneurial

We embrace and encourage change and innovation. We are creative, flexible and brave.

Collaborative

We are stronger together. We are inclusive, approachable, listen to others and value good communication.

Purposeful

We are a community who believe in sustainable growth, and are responsible, principled and transparent.

Excellence

We are professional, focused and aligned, and have a responsibility to do the very best we can.

Wellbeing

Saïd Business School acknowledges the importance of wellbeing, in enabling people to thrive at work and ensure a work-life balance. It provides a number of initiatives to help support wellbeing and would encourage you to participate. At an individual level, wellbeing means recognising what helps us remain resilient and taking appropriate steps. If we experience difficulties, doing our best to rectify them and making our line manager aware of aspects that they could support us with.

Further information about Saïd Business School is available at www.sbs.oxford.edu.

Social Sciences

Oxford Saïd is a department within the Social Sciences Division, one of four academic Divisions in the University, each with considerable devolved budgetary and financial authority; and responsibility for providing a broad strategic focus across its constituent disciplines.

The Social Sciences Division represents the largest grouping of social sciences in the UK: home to a number of outstanding departments and to the internationally ranked Law Faculty; all are committed to research to develop a greater understanding of all aspects of society, from the impact of political, legal and economic systems on social and economic welfare to human rights and security. That research is disseminated through innovative graduate programmes and enhances undergraduate courses. For more information please visit <https://www.socsci.ox.ac.uk>.



How to apply

Applications are made through our e-recruitment system and you will find all the information you need about how to apply on our Jobs website <https://www.jobs.ox.ac.uk/how-to-apply>.

Your application will be judged solely on the basis of how you demonstrate that you meet the selection criteria stated in the job description. As part of your application you will be asked to provide details of two referees and indicate whether we can contact them now.

You will be asked to upload a CV and a supporting statement. The supporting statement must explain how you meet each of the selection criteria for the post using examples of your skills and experience. This may include experience gained in employment, education or during career breaks (such as time out to care for dependants). Please upload all documents **as PDF files** with your name and the document type in the filename.

All applications must be received by **midday** UK time on the closing date stated in the online advertisement.

If you need help

Help and support is available from <https://staff.web.ox.ac.uk/recruitment-support-faqs>. If you require any further assistance please email HR.Recruitment@sbs.ox.ac.uk. To return to the online application at any stage, please go to www.recruit.ox.ac.uk.

Please note that you will receive an automated email from our e-recruitment system to confirm receipt of your application. **Please check your spam/junk mail** if you do not receive this email.



Important information for candidates

Data Privacy

Please note that any personal data submitted to the University as part of the job application process will be processed in accordance with the GDPR and related UK data protection legislation. For further information, please see the University's Privacy Notice for Job Applicants at <https://compliance.admin.ox.ac.uk/job-applicant-privacy-policy>.

The University's Policy on Data Protection is available at <https://compliance.admin.ox.ac.uk/data-protection-policy>.

The University's policy on retirement

The University operates an Employer Justified Retirement Age (EJRA) for very senior research posts at **grade RSIV/D35 and clinical equivalents E62 and E82** of 30 September before the 70th birthday. The justification for this is explained at <https://hr.admin.ox.ac.uk/the-ejra>.

For **existing** employees, any employment beyond the retirement age is subject to approval through the procedures <https://hr.admin.ox.ac.uk/the-ejra>.

There is no normal or fixed age at which staff in posts at other grades have to retire. Staff at these grades may elect to retire in accordance with the rules of the applicable pension scheme, as may be amended from time to time.

Equality of opportunity

Entry into employment with the University and progression within employment will be determined only by personal merit and the application of criteria which are related to the duties of each particular post and the relevant salary structure. In all cases, ability to perform the job will be the primary consideration. No applicant or member of staff shall be discriminated against because of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex or sexual orientation.



Oxford Saïd Exclusive Benefits

Wellbeing initiatives

Oxford Saïd runs an annual Wellbeing Day for all staff. In addition to this, there is yoga, healthy food deliveries, health MOTs and a range of other ad hoc programmes. Our excellent catering facilities provide a high standard of food, including healthy eating and vegetarian options at a subsidised cost.

Staff Summer and Christmas parties

Oxford Saïd like to reward all of their staff for their great work and their Christmas and Summer parties are our way of saying thank you. The Christmas party is for all staff and the summer party is for staff and their immediate family members, because we know how important family is to all of us.

Employee Assistance provider

Validium is an employee assistance and wellbeing consultancy that works in partnership with the Business School to provide staff and their immediate family with a free 24-hour per day helpline providing confidential information and counselling services on personal issues.

University of Oxford Benefits

Annual leave

38 days (inc. public holidays). Long service additional annual leave – up to 5 days per annum, pro rata for part time employees. Previous service within higher education sector can be recognised. An additional scheme enables staff to request to purchase up to 10 additional days in each holiday year.

Salary and salary sacrifice schemes

The University salary and grading structure allows for annual incremental progression until a scale-bar point is reached. This incremental progression is automatic. Additionally, there are salary sacrifice schemes for bicycles and electric cars. See <https://hr.admin.ox.ac.uk/staff-benefits>.

Pension

If you are on an academic or academic related pay scale (grade 6 or above), you are automatically a member of USS. Employer contribution is 14.5% and Employee contribution is 6.1%.

If you are on a pay scale other than academic or academic related (grade 1-5) you are automatically a member of OSPS. Employee contribution can be between 4%- 8% and Employer contribution 6%-10%.

University discounts

All University staff can purchase a NUS Extra discount card for £12 for 12 months (£22 for 2 years, £32 for 3 years) which gives access to numerous exclusive offers and discounts from many popular retailers. There are a wide range of other discounts from external companies available using a university card.

University Club

Membership of the University Club is free for all University staff. The University Club offers social, sporting and hospitality facilities. Staff can also use the University Sports Centre on Iffley Road at discounted rates, including a fitness centre, powerlifting room and swimming pool. See www.club.ox.ac.uk and <https://www.sport.ox.ac.uk/>.

Access to Oxford buildings

Free access to a number of Oxford colleges, Botanic Gardens, Harcourt Arboretum, Wytham Woods and discount at numerous restaurants/shops.





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www.sbs.oxford.edu

All information is correct at the time of going to press.

Please check our website for the most up-to-date information.

Saïd Business School, University of Oxford