Job Related Information

This document includes information about the role for which you are applying and the information you will need to provide with your application.

1. Role Details

<table>
<thead>
<tr>
<th>Vacancy reference</th>
<th>14413</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job title:</td>
<td>Prospect Research Officer</td>
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<tr>
<td>Reports to:</td>
<td>Prospect Research Manager</td>
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<tr>
<td>Salary:</td>
<td>£26,495 – £31,604</td>
</tr>
<tr>
<td>Terms and conditions:</td>
<td>Secretarial &amp; Clerical</td>
</tr>
<tr>
<td>Grade</td>
<td>6</td>
</tr>
<tr>
<td>Duration of post:</td>
<td>To 31st July 2020</td>
</tr>
<tr>
<td>Working hours:</td>
<td>Full Time (37 hours per week)</td>
</tr>
<tr>
<td>Location:</td>
<td>Walton Hall, Milton Keynes</td>
</tr>
<tr>
<td>Closing date:</td>
<td>12 Noon, Thursday 5th April 2018</td>
</tr>
<tr>
<td>Type of application form accepted:</td>
<td>CV and Open University (OU) short application form with covering letter (no more than two sides of A4) detailing how you meet the required criteria in the person specification.</td>
</tr>
<tr>
<td>Number of referees required:</td>
<td>3</td>
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</tbody>
</table>
2. Summary of duties

Purpose of Role
The Prospect Research team’s primary responsibility is to identify and provide research on new prospects for the Philanthropy and Partnerships team, in order to support the generation of philanthropic income by the Development Office. Reporting to the Prospect Research Manager, the post holder will support the Prospect Research team in undertaking high quality, tailored prospect research for all functions.

- Philanthropy and Partnerships Team – including major donors, trusts and corporate partnerships
- Alumni Fundraising – including annual fund, mid value and legacy prospects
- Events – supporting regular high profile events

The post holder will also be the strategic research lead on special projects, including researching into international funders, in order to support the growth in fundraising propositions across the Development Office’s areas of concern.

Main Responsibilities
1. Prospect Research (70%)

To be the research lead on special projects such as international fundraising.

Assist in the collection, analysis, interpretation and documentation of information on individuals, corporations and foundations in support of University-wide development activities utilising a variety of resources, including biographical and financial databases, international news, University and city libraries and other sources.

Support the Prospect Research Manager in undertaking research to match potential funders to projects, working independently to identify and qualify prospects.

Work closely with the Prospect Research Manager to develop and implement strategies around new prospect identification.

Support the Prospect Research Manager in verifying, analysing and synthesising accumulated information to assess financial capacity, philanthropic tendencies and links to The Open University.

Support the Prospect Research Manager in preparing for strategically important events, through the identification of invitees and compilation of biographies.

Undertake due diligence on funders in line with the Development Office’s gift acceptance policy.

2. Data Management Systems (30%)

Ensure database systems are maintained accurately by retrieving, correcting and updating information on individuals, corporations and foundations.

Assist the Prospect Research Manager in the use and upkeep of the prospect research management system.

Undertake queries and run reports using the database to support the work of the research team.

3. Person specification
## Requirements  (E = Essential/ D = Desirable)

### Education, qualifications and training

- Educated to A level or equivalent **E**
- Educated to degree level or equivalent **D**

### Knowledge, work and other relevant experience

**Essential:**
- Relevant experience of collecting and analysing research data, using a variety of sources (online systems, specialist databases and informal networks) to produce high quality reports.
- High level of IT literacy, including familiarity with web search engines, plus an up-to-date knowledge of Microsoft Word and Excel.
- Experience of using databases to manage research findings.
- Experience of presenting research findings to a high standard in a readable, accessible format to meet the needs of colleagues.
- An interest in and understanding of higher education.

**Desirable:**
- Experience of undertaking prospect research in support of a fundraising team.
- Experience of undertaking international prospect research.

### Personal abilities and qualities

**Essential:**
- Superior attention to detail.
- Excellent written communication skills, with a high standard of written English and the ability to effectively present research to a lay audience.
- A proactive approach and an enquiring mind with an instinct for ‘detective work’.
- Ability to work well under pressure and meet deadlines.
- Excellent time management skills.
- Excellent analysis and problem solving skills.
- Ability to work independently as well as in a team.

**Additional requirements**
- Some UK travel – for example to alumni fundraising and graduation events.

**Desirable:**
- Commitment to the non-profit sector.

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4. **Role specific requirements e.g. Shift working**
5. About the unit/department

The Development Office is a part of the External Engagement Group

The key roles of the External Engagement Group (EEG) are to help the University to respond to the opportunities in the external environment and to project the University effectively to that outside world, to contribute to the successful delivery of the University’s Mission, Vision and Strategic objectives.

Under the leadership of the External Engagement Director, the External Engagement Group (EEG) comprises the University’s principal externally-facing Units – the Marketing Unit, Business Development Unit, Development Office, International Development Office and Communications Unit.

The Development Office

The Fundraising Team is led by the Director of Development who is responsible for securing philanthropic donations for the University, in support of the OU’s strategic plan.

There are two sub-teams:

**The Partnerships and Philanthropy Team** specialises in major gift donations; seeking to secure donations of £50,000+ for The Open University. This funding is secured from mixed portfolios comprising of individuals, trusts and foundations, corporations and institutional grant makers. As well as identifying and securing gifts via a mix of face-to-face meetings and comprehensive proposal writing, the team are also responsible for all stewardship, managing all reporting and invoicing following the initial gift. Other duties in the team include organising and running high-profile fundraising events; undertaking all prospect research and due diligence; and working across the university to identify and articulate key funding needs.

**The Alumni Fundraising Teams** seek support primarily from the OU’s alumni body (but also students, staff and others) and includes:

- **Legacy Fundraising**
  Secures support from people leaving gifts in their Will.

- **Annual Fund**
  Seeks one off and regular donations, usually up to £10,000 and includes an in-house telephone fundraising team.

- **Mid Value Programme**
  Raises gifts from £10 – 50,000.

The Development Office is also responsible for running and managing the OU’s first fundraising campaign ‘Open Up the Future’; securing £50 million in further philanthropic donations by 2019. It also responsible for managing the OU’s wider commemorative 50th Anniversary campaign.

The fundraising team is supported by colleagues working in finance, operations and database teams.

6. How to obtain more information about the role or application process

If you would like to discuss the particulars of this role before making an application or have any questions regarding the application process please contact Claire Nappin, Staffing and Resources Coordinator, email OUDO@open.ac.uk
7. The application process and where to send completed applications

<table>
<thead>
<tr>
<th>Please ensure that your application reaches the University by:</th>
<th>12 noon Thursday 5th April 2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Post it to:</td>
<td>Claire Nappin</td>
</tr>
<tr>
<td>Name/Job title:</td>
<td>Recruitment Co-ordinator</td>
</tr>
<tr>
<td>Department/Unit:</td>
<td>Development Office</td>
</tr>
<tr>
<td>Address:</td>
<td>The Open University 1st Floor Jim Burrows Building Walton Hall Milton Keynes Buckinghamshire</td>
</tr>
<tr>
<td>Post Code:</td>
<td>MK7 6AA</td>
</tr>
<tr>
<td>Or e-mail your application to:</td>
<td><a href="mailto:OUDO@open.ac.uk">OUDO@open.ac.uk</a></td>
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8. Selection process and date of interview

<table>
<thead>
<tr>
<th>The interview panel will be chaired by:</th>
<th>Clare Davenport-Johnson - Head of Corporate Partnerships &amp; Research</th>
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<tbody>
<tr>
<td>The other members of the interview panel will be:</td>
<td>Mark Parsons – Annual Fund Manager Sarah Davidson – Prospect Research Manager</td>
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<tr>
<td>The interviews will take place on:</td>
<td>Thursday 19th April 2018</td>
</tr>
<tr>
<td>The selection process for this post will include</td>
<td>Interview and job related task.</td>
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</table>

We will let you know as soon as possible after the closing date whether you have been shortlisted for interview. Further details on the selection process will also be sent to shortlisted candidates. Applications received after the closing date will not be accepted.