Research Officer
Office of Philanthropic Partnerships and Alumni, External Relations

Closing date: 10 March 2019
Interview date: To be confirmed
Vacancy reference: 7392
INTRODUCTION

The Office of Philanthropic Partnerships and Alumni (OPPA) is the central support function at the University of York with responsibility for:

- forming transformational philanthropic partnerships with individual donors, charitable trusts and companies
- engaging York’s global alumni body in programmes to support current students and the University’s strategic priorities
- leading and managing volunteering opportunities within the University for our alumni and other friends.

In 2016 the University Executive Board agreed a plan to deliver the first fundraising and volunteering campaign for York. The University is in the early planning stages of the campaign which will provide an exciting, challenging and rewarding experience for all involved.

As Research Officer, you will co-ordinate and carry out two business-critical processes for OPPA under the direction of the Information and Philanthropy Operations Manager:

1. the ‘prospect pipeline’, where potential philanthropic partners are identified, researched and passed to fundraisers for them to approach and develop
2. ‘donor due diligence’, where partners are investigated for ethical conflicts and reputational risk to the University before their gifts are accepted.

You will carry out these roles with transparency, confidentiality and the highest standards of ethical judgement, fully respecting our commitments to the alumni community and relevant legal and regulatory frameworks. In so doing, you will personally make a vital contribution to both the initial approach and the final acceptance of most major philanthropic partnerships entered into by the University.

You will often be faced with competing priorities and commitments, requiring excellent time management skills as well as a strong focus on customer service. You will also be expected to contribute positively to the wider Operations and Experience Team, sharing the load during busy periods and pooling ideas and skills to improve the services received by your colleagues.
Main purpose of the role

- To provide an efficient, sophisticated, transparent and compliant prospect research and pipeline management service to the Individual Philanthropy Team at OPPA.
- To co-ordinate and conduct ethical and reputational due diligence processes for philanthropic partnerships with the University of York.

Key responsibilities

(Role holders will be required to undertake some or all of the duties below)

1. Identify and research prospects for the Individual Philanthropy Team.
   - Identify, score and prioritise fundraising prospects in the alumni CRM using a range of data-driven techniques.
   - Conduct additional desk research to proactively identify additional or higher priority prospects.
   - Regularly select and assign new prospects to each fundraiser, working to an agreed SLA (service level agreement).
   - Compile written profiles for each assigned prospect, to support initial contact and qualification stages.
   - Conduct an initial capacity and propensity assessment for each prospect, working to guidelines set by the Head of Individual Philanthropy.
   - Maintain and update prospect records to ensure effective pipeline co-ordination and reporting, working with the Information Officer.

2. Carry out due diligence into individuals and organisations as part of the University’s gift acceptance processes.
   - Conduct ethical and reputational due diligence research to agreed standards and policies.
   - Compile Due Diligence Reports summarising the results of due diligence processes, providing additional internal briefings as required.
   - Maintain a watching brief on previously approved donors, escalating potential issues to the Head of Operations and Experience.
   - Maintain accurate, auditable and secure records of OPPA due diligence activities.
   - Monitor compliance with the Due Diligence Policy and Process, reporting to the OPPA Due Diligence Officers.
   - Recommend and implement improvements to donor due diligence processes.

3. Act as the primary liaison between the Individual Philanthropy Team and the Data Team.
   - Lead regular pipeline review meetings with individual fundraisers.
   - Conduct data-driven desk research projects into industry sectors and locations, to inform development and alumni engagement planning.
   - Work with the Information Officer to progressively improve data and systems used by the Individual Philanthropy Team.
   - Advise on improvements to prospect prioritisation and management processes, showing due care and respect for transparency, regulation and ethical standards.

4. Write event attendee biographies and briefings for staff and volunteers.
   - Research, summarise and write up biographies of event attendees to support the OPPA events programme.
   - Produce engaging, well-presented briefings for event hosts, speakers and volunteers.
   - Contribute to the development and refinement of event briefing processes.

5. Proactively support other roles and projects within the Operations and Experience Team.
## PERSON SPECIFICATION

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<tr>
<th>Qualifications</th>
<th>Essential / Desirable</th>
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<tbody>
<tr>
<td>Degree or equivalent experience</td>
<td>Essential</td>
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<tr>
<td>Minimum GCSE A*-C in Mathematics and English (or equivalent)</td>
<td>Essential</td>
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<td>Postgraduate qualification with a research component</td>
<td>Desirable</td>
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### Knowledge

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<th>Essential / Desirable</th>
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<tr>
<td>Understanding of the principles of prospect research in a fundraising or sales setting</td>
<td>Essential</td>
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<tr>
<td>Knowledge of fundraising processes and activities, including major gift fundraising</td>
<td>Essential</td>
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<td>Knowledge of data protection principles</td>
<td>Essential</td>
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<td>Understanding of business environments and corporate management structures</td>
<td>Essential</td>
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<td>Understanding of accounting practices and legal issues relevant to due diligence processes</td>
<td>Essential</td>
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<td>Basic understanding of qualitative and quantitative research principles</td>
<td>Desirable</td>
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### Skills, abilities and competencies

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<th>Essential / Desirable</th>
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<tr>
<td>High standard of written English, grammar and spelling; a fluent writer able to assimilate complex information and present it in an accessible and attractive manner</td>
<td>Essential</td>
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<td>Excellent standard of numeracy and literacy</td>
<td>Essential</td>
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<td>Excellent IT skills, with the ability to use Microsoft Office (including Word, Excel, PowerPoint and Access)</td>
<td>Essential</td>
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<td>Strong communication and relationship-building skills</td>
<td>Essential</td>
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<td>Ability to effectively use a CRM or equivalent complex database system</td>
<td>Essential</td>
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<td>Ability to handle sensitive confidential information to the highest standards of security and discretion</td>
<td>Essential</td>
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<td>Advanced Microsoft Excel and Access skills</td>
<td>Desirable</td>
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<td>Ability to prepare agendas and take and transcribe minutes</td>
<td>Desirable</td>
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<th>Essential/Desirable</th>
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<tr>
<td>Experience of carrying out desk research and reporting the results in writing</td>
<td>Essential</td>
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<td>Experience of producing clear and effective written communications</td>
<td>Essential</td>
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<td>Experience of analysing data and presenting summary information in a clear and concise format</td>
<td>Essential</td>
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<tr>
<td>Experience of implementing administrative processes in a complex organisation/situation</td>
<td>Essential</td>
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<td>Experience of conducting due diligence into individuals and organisations</td>
<td>Desirable</td>
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<td>Experience of prospect identification and research in a fundraising setting</td>
<td>Desirable</td>
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<td>Experience of using the Blackbaud suite of products including Raiser's Edge</td>
<td>Desirable</td>
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<td>Experience of working in higher education or the charitable sector</td>
<td>Desirable</td>
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### Personal attributes

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<tr>
<td>Exceptional levels of accuracy and attention to detail, including when working to tight deadlines</td>
<td>Essential</td>
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<td>Able to work independently, prioritise own work and achieve deadlines</td>
<td>Essential</td>
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<td>Customer service focus, including ability to manage expectations and workloads</td>
<td>Essential</td>
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<td>Highly organised with a proactive, self-starting approach to work</td>
<td>Essential</td>
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<td>Effective team-working</td>
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<td>Enthusiastic and resilient with an eagerness to develop and learn new techniques</td>
<td>Essential</td>
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<td>Positive attitude and flexibility under pressure</td>
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<td>Tactful and diplomatic</td>
<td>Essential</td>
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The Department is located within the External Relations Directorate which includes the Offices of Global Engagement, Student Recruitment and Admissions, Marketing, Centre for Lifelong Learning, Events and Public Engagement, Press and Media Relations. Colleagues work closely with Careers, the York Students’ Union and Academic Registry, among others, to deliver funding and volunteering programmes that support key objectives of the University.

Within the Office of Philanthropic Partnerships and Alumni responsibilities are divided across five teams:

- Institutional Philanthropy
- Individual Philanthropy
- Fundraising Programmes
- Volunteering and Alumni Programmes
- Operations and Experience

The activities of the Department are overseen by a Senior Management Team (SMT).

Upholding transparency, professionalism, due care and diligence and good care of our supporters is of primary importance in all that we do.

In order to deliver on our targets OPPA works with volunteers across the university and the alumni and donor community. Through their time, advocacy and support we are able to achieve our objectives by expanding our circles of influence, networks and access to information and resource. Within the University, this means close collaboration with heads of department, the colleges and the York Students’ Union.

A position such as this will suit an individual with a passion for higher education and belief in the transformational role of universities to society. The post holder will require a genuine desire to collaborate and to work across functions and departments. They must possess an ability to think creatively and to work independently when required. They will have the energy, drive and commitment to work towards ambitious targets and to help deliver a campaign for York.
THE UNIVERSITY

Founded on principles of excellence, equality and opportunity for all, the University of York opened in 1963 with just 230 students. In 2018 it is the home of more than 17,000 students across more than 30 academic departments and research centres. Since opening over fifty years ago, we have become one of the world’s leading universities and a member of the prestigious Russell Group.

We are consistently recognised as one of the leading Higher Education Institutes and are ranked 16th in the Times & Sunday Times league table (2017). The University of York has won six Times Higher Education (THE) Awards and five Queen’s Anniversary Prizes.

The University is proud of its association with Athena SWAN, holding 12 awards in support of gender equality, representation and success for all, with gold awards for Chemistry and Biology and a University-wide bronze award.

Of 154 universities that took part in the Research Excellence Framework (REF) in 2014, The University of York ranked 14th overall and 10th for the impact of our research. The University is consistently in the top ten UK research universities and attracts over £60m a year of funding from research alone.

Our vision is to make the University of York a world leader in the creation of knowledge through fundamental and applied research, the sharing of knowledge by teaching students from varied backgrounds and the application of knowledge for the health, prosperity and well-being of people and society.
Attractive workplace

Centred around the picturesque village of Heslington on the edge of the city of York, our colleges are set in an attractive landscaped campus. York enjoys a safe, friendly atmosphere with facilities including bars, shops, theatres and concert halls all within easy walking distance.

The University has undergone an unprecedented period of expansion and renewal since 2000. We have invested in twenty new buildings on the original campus and have completed the first and second phases of a £750m campus expansion. Our investment in new colleges, teaching and learning spaces, laboratories, research facilities and a new sports village mean there has never been a better time to join us.

During this period of change we’ve worked hard to retain our friendly, informal and collegiate atmosphere, which is important to our core values of inclusivity and interdisciplinarity.

We have a thriving international community and are committed to providing staff moving to York with as much support as possible through our Relocation Package and Welcome Officers.

The University is committed to promoting a diverse and inclusive community - a place where we can all be ourselves and succeed on merit. We offer a range of family friendly, inclusive employment policies, flexible working arrangements, staff engagement forums, campus facilities and services to support staff from different backgrounds.

For further information please visit our employee benefit pages.
THE CITY AND THE REGION

The City of York

Internationally acclaimed for its rich heritage and historic architecture, York's bustling streets are filled with visitors from all over the world. Within its medieval walls you will find the iconic gothic Minster, Clifford's Tower and the Shambles - just a few of the many attractions.

But York isn’t just a great place to visit - it’s also a great place to live and work. While nourishing a vibrant cosmopolitan atmosphere, York still maintains the friendly sense of community unique to a small city.

Visit www.visityork.org for more information on the city of York

Shopping, culture and entertainment

York boasts specialist and unique boutiques but also all the high street stores on its busy shopping streets. Alongside them you will find cinemas, theatres, an opera house, art galleries, a vast range of restaurants, live music venues and clubs. York is particularly renowned for its multitude of pubs and bars, from the modern to the medieval.

Housing and schools

Whether you choose to live close to the city, in one of the surrounding villages or further afield, you will find a wide range of housing within comfortable distance of York and the University. For families, the area has a range of excellent schools both in the state and independent sector.

Great location

York is one of Britain’s best-connected cities. Halfway between London and Edinburgh on the East Coast mainline, on intercity trains you can reach London King’s Cross in less than two hours and Edinburgh in two and a half hours. York is also well served by road links, and it is easily accessible from the A1, M1 and the M62.

For those travelling from overseas, Manchester Airport is two hours away and Heathrow Airport just three and a half. Flights from nearby Leeds Bradford Airport provide easy access to mainland Europe. By Eurostar from London St Pancras, Paris is just over six hours away.

Yorkshire

The Lonely Planet guide recently declared Yorkshire the third best region in the world to visit. There is something to cater to every taste, whether it be the rugged landscapes of the Moors or the Dales, the picturesque seaside towns of Scarborough and Robin Hoods Bay, the gothic architecture of Whitby or the vibrancy of cosmopolitan Leeds.
Apply online

- Go to https://jobs.york.ac.uk
- Find this job using reference 7392
- Complete the online application form

You will need to submit your completed application by midnight (local UK time) on 10 March 2019

What will I need?

We will ask you for details of:

- your employment history
- relevant qualifications
- two referees

You need to be ready to show us how you meet the requirements of the job, either in a written statement and/or by answering questions.

Help and assistance

Direct any informal queries to chris.barnes@york.ac.uk

If you have any questions about your application, contact the HR Services team:

recruitment@york.ac.uk
+44 (0)1904 324835