

THE UNIVERSITY OF MANCHESTER

PARTICULARS OF APPOINTMENT

PROFESSIONAL SERVICES

DEVELOPMENT AND ALUMNI RELATIONS

SENIOR DEVELOPMENT RESEARCH OFFICER (PORTFOLIO MANAGEMENT)

VACANCY REF: PSX-019446

Salary:	Grade 6, £34,308 to £42,155 per annum, depending on relevant experience
Hours:	Full time
Duration:	Fixed term for 3 years
Location:	Oxford Road, Manchester

Enquiries about the vacancy, shortlisting and interviews:

Name: Oliver Taylor

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Job Description

We are preparing to launch our first ever major fundraising and engagement campaign while also pre-paring to mark our 200th anniversary in 2024. To make that happen, we're building an exceptional team of people to champion bold thinking that is rooted in impact.

At Manchester we don't just focus on what we're good at. We ask what we're good for.

Through our teaching we're educating a new kind of socially responsible graduate – tomorrow's thinkers, doers, and leaders of a better world. Through our research we are addressing the most pressing global challenges with bold and brilliant solutions. Through innovation we are turning ideas into reality, creating the jobs and industries that will sustain us in the future. And in the heart of the city and beyond, we are breaking down barriers to art, science and learning to build stronger, more resilient communities.

Manchester people are different. Not only do we share the values of integrity, being bold, being ambitious, and being collaborative, we also share a pioneering spirit and the courage to make a difference. If you have a fearless personality, boundless optimism and a desire to create a healthier, fairer and more sustainable world, we'd love to hear from you.

This is a three-year fixed term position to support the delivery of the campaign.

Overall Purpose of the Role

Reporting to the Development Research Manager, the Senior Development Research Officer (Portfolio Management) plays a vital role in the University's fundraising operation and the successful planning and delivery of the University's first Fundraising and Engagement Campaign.

Working with colleagues, you will be responsible for the optimisation of portfolios of potential philanthropic supporters across our fundraising team. You will conceive, implement and refine processes and moves management mechanisms to support the University's programme of identification and engagement of potential major donors. And you will oversee a comprehensive data auditing programme to ensure the integrity of the data we hold on potential donors.

You will develop close working relationships with individual fundraisers, and with colleagues in the Prospect Research and Development Operations Teams, to liaise about data visualisation and analysis requirements and to ensure that the University has the best chance of achieving its ambitious fundraising goals.

You will also be responsible for providing accurate and appropriate information relating to potential donors to the University, high net worth individuals, corporations and charitable foundations worldwide, and suggesting tailored strategies to reach and engage such donors.

You will also play a part in gift acceptance due diligence.

Key Responsibilities, Accountabilities and Duties:

- Responsible for overseeing the optimisation of University's portfolio of potential philanthropic donors, ensuring that the pool of potential supporters is organised and developed to create the maximum opportunity for fundraiser success.
- Accountable for collaboration with fundraising and operational colleagues in the Division of Development & Alumni Relations to ensure that the information held about our portfolio of potential supporters delivers on all counts, from boosting efficiency and informing top-level University fundraising strategy to prioritising fundraiser activity and being easy-of-use for the end user.
- Champion new processes and reports and see they are being used to best effect.
- In conjunction with the Development Research Manager, define knowledge management principles and oversee comprehensive data auditing programme to ensure integrity and quality of prospect data, making recommendations to support change where needed.
- Ensure that all relevant information relating to potential major donors is added to the database in a timely and accurate manner which will aid data quality in measurable ways.
- Provide research to supply information to Major Gifts fundraisers, the President and Vice-Chancellor and other senior academics and administrators in a range of formats (from detailed briefings to short biographies).
- Grow the portfolio of potential major donors at all levels. Identify and assess the capacity and propensity of potential major donors to make a major gift to the University, in line with the requirements of fundraising strategy.

- Support and assist Major Gifts managers in the management of their portfolios of donors and potential donors, and proactively provide advice to them to help them contact, engage and involve such donors.
- Carry out in-depth, comprehensive due diligence research on prospective major donors (individuals, companies and trusts and foundations) and present conclusions in a balanced, comprehensible and logical report.
- Exhibit high degree of professionalism, ethical sensitivity, confidentiality and discretion; understand legal frameworks for treatment of personal information, including GDPR.
- Actively contribute to the values of the University and the Division of Development & Alumni Relations within your working practice and relationships.
- Undertake other duties as may be required from time to time as directed by the Development Research Manager and the Deputy Director, Development Services.

Person Specification – Essential Knowledge, Skills and Experience

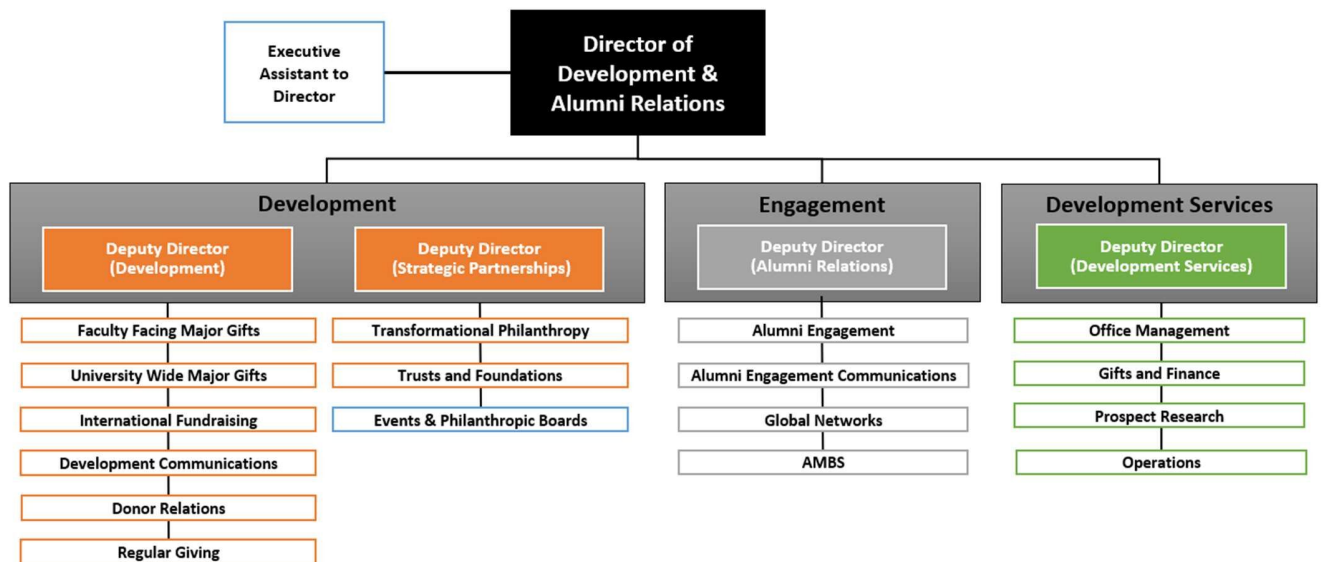
- Proven knowledge of portfolio management best practices and moves management concepts, with experience of systems and process design, implementation and evaluation, especially in the context of a major gifts fundraising environment.
- Ability to reconcile reporting requirements of different stakeholders, including fundraising and operational colleagues, and to liaise confidently with all parties to ensure needs are met.
- Drive and enthusiasm to take ownership and win buy-in for new innovations, and the emotional intelligence to manage expectations where required.
- Strong analytical skills, with ability to find, assimilate and interpret data from a wide variety of sources and to present this information in a range of formats as appropriate, sometimes with short deadlines.
- Advanced computer literacy and proficiency with all standard Microsoft Office products (Word, Excel, PowerPoint etc), and experience of using reporting and data visualisation tools e.g. Power BI, Tableau.
- Significant proven experience in the field of (preferably) fundraising/donor research or investigative, open-source research or journalistic research.
- Ability to work in an enquiring, curious, methodical but imaginative way, using facts and evidence to draw logical conclusions based on balance of probabilities.
- Outstanding communication skills, especially written, with the ability to write and present concise reports in short timescales which nevertheless maintain a high level of attention to detail and factual and linguistic accuracy.
- Project management and effective workload management skills. Able to prioritise and manage multiple, diverse, ongoing projects, showing a high degree of initiative in being able to work flexibly and unsupervised to manage deadlines and complete tasks across the Research Team.
- Able to work collaboratively, building productive relationships with colleagues and stakeholders.

- Demonstrable awareness and understanding of data protection in relation to fundraising, and show that confidential or sensitive information can be handled appropriately.

Desirable – Knowledge, Skills, Experience and Qualifications

- Experience within a major gift fundraising environment.
- Line management/supervisory experience.
- Experience in the use of the Raiser’s Edge database or other similar CRM.
- Understanding of the City, basic principles of company accounting, and key capital investment functions such as private equity, venture capital and fund management.

Reporting Structure for the Role



About The University of Manchester

The University of Manchester is part of the prestigious Russell Group of universities, with outstanding facilities and the widest range of courses. Our University is highly respected as a centre of teaching excellence and innovative research.

Our vision is to be recognised globally for the excellence of our people, research, learning and innovation, and for the benefits we bring to society and the environment.

With 25 Nobel Prize winners among our current and former staff and students, we have a history of world firsts and brilliant discoveries, from splitting the atom to giving the world graphene. We’re committed to world-class research, an outstanding learning and student experience, and social responsibility in everything we do.

The University of Manchester was the first and most eminent of the civic universities, furthering the frontiers of knowledge through research and teaching, but also contributing to the well-being of its region and society more widely.

You can read more about our University vision, values and strategic plan at www.manchester.ac.uk/discover/vision/

About the Division of Development and Alumni Relations

In the Division of Development and Alumni Relations, our aim is to help everyone connected to The University of Manchester to make a positive impact in the world.

- We help the brightest young people to fulfil their potential, regardless of their background.
- We help our researchers make new discoveries and breakthroughs to improve our world.
- We help alumni, donors and others to stay part of the Manchester story, wherever they might be.

The Division aims to provide an outstandingly communicative, engaging, stimulating and rewarding experience to donors and alumni who wish to play a partnership role in taking areas of shared interest forward. The University benefits from the interest and support of the UK's largest alumni community for a campus-based university, maintaining contact with over 500,000 alumni in over 190 countries.

Beyond philanthropy, we work with alumni volunteers who are engaged in programmes that bring current students and alumni together in order to enhance the student experience and take the University's commitment to Social Responsibility to new levels.

DDAR: Our Values



Working in Development and Alumni Relations at the University of Manchester is exciting, rewarding and fun. Our four values reflect who we are, how we do things, and what we want to achieve. Underpinning everything is our drive and commitment to make a positive impact and to make a difference.

As an equal opportunity employer, we welcome applications from all suitably qualified persons and all appointments will be made on merit. As we are committed to the principles of the Race

Equality Charter Mark, we would particularly welcome applications from the Black, Asian and Minority Ethnic (BAME) community who are currently under-represented at this level in this area.

Working for the University of Manchester

The University of Manchester strives to make our community a welcoming, caring and enthusiastic one, fuelling ambition with opportunities and support to help us all achieve our personal and professional goals.

Our diverse job opportunities include an attractive [benefits package](#) with family-friendly policies that provide for flexible working. We care deeply about career and personal development, offering a structured induction programme for new staff, an annual performance and development review, staff training for all career stages and mentoring opportunities to support your career development.

We have a genuine commitment to [equality of opportunity](#) for our staff and students, and are proud to employ a workforce that reflects the diverse community we serve.

As a global institution, situated at the heart of a lively, [culturally diverse city](#), we welcome applicants of all nationalities. To help international job applicants plan for life in the UK, we have put together some useful [information on passports and visas](#), travel to the UK, accommodation and a number of other practical considerations.