

Operational / External Title: Prospect Research Manager	
Role Title:	Partnership Insight Manager
Date of JD Review:	June 2025
Department:	Funding
Team:	Philanthropy and Partnerships
Tenure:	Full time- Fixed-Term]
Band & Range:	Band D
Location:	London Hybrid
Reports to:	Head of Strategic Funding and Insight
DBS check required:	Yes [DBS Roles]
Role requires travel:	No
Budget Holder	No
Direct Reports:	Yes
Indirect Reports:	Yes/No
Dotted line reports:	Yes/No
Does This role require International Travel:	No
<p>Internal Key Contacts: Data Protection, Philanthropy and Partnerships team, including account managers in Trusts and New Markets; Philanthropy (major donors); and Private Sector Partnerships; Data team; Finance; Payments; Compliance and Monitoring</p> <p>External Key Contacts: Freelancers, due diligence providers, data screening providers, research resource providers such as business intelligence databases.</p>	

Purpose Of the Role:

The Prospect Research Manager will play a leading role in the development and implementation of the prospect research strategy, evolving and implementing systems, processes and management tools to build and strengthen the prospect pipeline. The role will drive increased income through effective pipeline management and strategically aligned prospect research, to enable the P&P team to maximise their engagement with donors and prospects effectively.

The Prospect Research Manager will line manage a Partnerships Insight Officer, and work across the Philanthropy & Partnerships team to provide new business opportunities, insight, analysis, due diligence, pool management and KPI reporting. The role will champion the team's use of the Customer Relationship Management (CRM) database, and lead on the team's best practice and compliance with fundraising regulations and data protection

Main Accountabilities:

Team Working and Line management

- To line manage the Partnerships Insight Officer to deliver against KPIs, recruiting talent, ensuring the right skills and tools, having regular 1:1's focusing on performance, objective setting and development opportunities, and pro-actively managing any sickness absence and performance management issues.
- To manage the workflow of research requests into the team and effectively coordinate and delegate research to the Partnerships Insight Officer.
- Engage with and demonstrate commitment to AAUK's mission, vision, values and strategic aims, and 'My Feminist Behaviours' (including adherence to our Code of Conduct).
- To undertake any other duties appropriate to the level in accordance to agreed procedures and guidelines.
- Proactively engage with the performance development approach, taking responsibility for seeking appropriate development opportunities and taking part in learning.

Prospect Research Strategy

- In partnership with the Head of Strategic Funding & Insight, develop and execute the strategic direction for the Prospect Research function.
- To work collaboratively with the Trusts and Global Markets and Philanthropy teams to develop prospecting strategies inline with the multi-year growth targets, ensuring that high quality donor intelligence is delivered to support this.
- To oversee and advise on new trends in philanthropy, such as leading on co-ordination of a wealth advisors' strategy.
- To coordinate regular prospecting meetings with members of the research team.
- To represent AAUK at external prospect research groups, events and conferences to raise AA's profile and keep track of peer activity in high value fundraising.

Prospect Identification and Management

- To ensure effective identification, research and allocation of prospects for management, developing techniques and systems for segmenting, identifying and targeting donors.
- To complete extensive network mapping projects on current donors, key contacts and top prospects.
- To manage and develop specific prospecting projects from inception to completion for the team.
- To continually develop and execute rating systems for segmenting, identifying and targeting donors by factors such as wealth and warmth.
- To lead on prospect allocations for the Trusts and Global Markets and Philanthropy teams,
- Actively manage the prospect pipeline and support P&P fundraisers to manage their prospect pools via regular discussion forums and 1:1 meetings.
- To maintain the prospect pipeline system to track prospects through stages of cultivation, overseeing moves management for the team.
- To develop and implement the prospect management system, monitoring to ensure prospect development and pipeline data are integrated with financial and business planning and reporting, and checking the quality of pipeline data, working with key workers to address any prospects without a pipeline status.

Data protection, compliance, due diligence and data management

- To work closely with compliance teams to ensure adherence to legal and sectoral guidelines, inputting into internal working groups as necessary to

maximise the value of prospect research within these parameters. Ensure that that policy and practices are adopted by P&P, so that the team is fully compliant with data protection laws and guidelines.

- To ensure team compliance with due diligence guidelines and to produce regular reports for the Deputy Director to escalate to the Executive Leadership Team and the Board as needed.
- To lead on the departmental approach to AA's donor due diligence policy and Corporate Engagement Framework, manage and execute the due diligence and screening process and advise on approvals in line with policies.
- To produce team KPI reports for the Heads of Team to monitor performance and input into reporting and internal strategy discussions.
- Lead on the P&P approach to the CRM (MS Dynamics) in terms of design, testing, training, feedback, ongoing development, advise on its optimal use and understand and communicate how it is used across P&P's operations.
- Ensure the team is making the best use of the CRM through improving guidelines and ways of storing information, and being an advocate for its use across the division.

EXPERIENCE, KNOWLEDGE & EXPERTISE

Essential Criteria:

- Commitment to AA's vision, [mission](#) and values, including a commitment to [feminist principles](#), safeguarding, and working in an organisation committed to working for the rights of women and girls.
- Commitment to AA's values of Equality, Diversity & Inclusion and upholding the values of becoming an anti-racist decolonised INGO.
- ActionAid UK is committed to preventing any form of sexual harassment, exploitation, and abuse (including child abuse and adult at-risk abuse) and responding robustly when these harms take place. We expect all ActionAid UK Staff and ActionAid UK Associated Personnel to share this commitment.
- Commitment to continually improving your digital skills and knowledge within the working environment.
- Experience in developing and implementing a prospect research strategy
- Experience of managing prospect pipelines
- Experienced and highly competent prospect researcher with experience of working in high value fundraising teams
- Proven experience of, and in-depth knowledge, of Raiser's Edge, MS Dynamics or a similar database

- Strong understanding of data-protection legislation, new and emerging legislation and compliance guidelines and how they impact research
- Understanding of current trends in major giving and philanthropy, e.g. Venture Philanthropy/ Principal Giving
- Excellent communication and analytical skills Highly accurate with a strong attention to detail
- Effective communicator who can build positive working relationships with colleagues, other teams, senior staff and external suppliers

Desirable Criteria:

- Experience of living and working in the “Global South”, especially regions where we are funding programmes & projects
- Experience of working for an INGO
- Line Management Experience

It is expected that everyone at ActionAid UK will work to support and strengthen our desired culture of being bold, connected, diverse, optimistic, open and respectful through the way they approach and deliver their work by:

- Being accountable and responsible – your individual way of working
- Being innovative and collaborative – how you get things done
- Being empowering and trusting – how you build and sustain relationships.