

Operational / External Title: Prospect Research Officer	
Role Title:	Partnerships Insight Officer
Date of JD Review:	May 2025
Department:	Funding
Team:	Philanthropy & Partnerships, Strategic Funding & Insight
Tenure:	Full time Permanent
Band & Range:	Band B
Location:	London/ Hybrid
Reports to:	Partnerships Insight Manager
DBS check required:	No <a href="#">[DBS Roles]</a>
Role requires travel:	No
Budget Holder	No
Direct Reports:	No
Indirect Reports:	No
Dotted line reports:	No
Does This role require International Travel:	No
<p>Internal Key Contacts: Other Philanthropy &amp; Partnerships teams (Philanthropy, Trusts &amp; Global Markets, Private Sector Partnerships &amp; Engagement); Supporter Contact, Individual Giving, Data, Events &amp; Community Engagement, Finance, Payments.</p> <p>External Key Contacts: None.</p>	

## **Purpose Of the Role:**

To support the Philanthropy & Partnerships (P&P) team with strategically aligned research and insight to build robust donor portfolios, providing a pipeline of prospective supporters, and enabling major donor, trust & foundation, and corporate fundraisers to maximise their engagement with current and prospective supporters effectively. To play a key role in our donation acceptance approach and maximise compliant use of supporter data, encouraging best practice engagement with the customer relationship management system (CRM).

## **Main Accountabilities:**

### **Team Working**

- 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 with agreed procedures and guidelines.
- Proactively engage with the performance development approach, taking responsibility for seeking appropriate development opportunities and taking part in learning.

### **Prospect identification, supporter research and due diligence**

- Identify and evaluate potential high value supporters in the UK, and beyond, for our major donor, trust & foundation, and corporate fundraising teams, in accordance with P&P's strategy.
- Research and write a range of support materials ranging from biographies for events, top line and in-depth research profiles offering insights into potential supporters, business sectors or markets.
- Support account managers to manage their portfolios of current and potential supporters, providing actionable insight to inform prioritisation and engagement strategies.
- Conduct ethical and reputational risk assessment and due diligence on potential high value supporters according to our donations acceptance policies.
- Work with colleagues in P&P and other teams where fundraising activity can be enhanced, for example network mapping, new sources of potential supporters or new markets.
- Monitor news and other information sources for relevant and timely information about current and potential supporters, and developments and trends relating to wealth, philanthropy, and corporate sustainability agendas, and brief to P&P team members.

## **Data management and compliance**

- Conduct all work in accordance with our policies relating to data protection, charity regulation and fundraising regulation, and to assist P&P to do the same.
- Use the CRM to develop and effectively manage prospect pipelines.
- Support P&P in its use of the CRM, MS Dynamics, updating records where necessary, running reports and assisting in developing the way we use it.
- Work with P&P to develop the CRM systems and processes and support the establishment of new ways of working and promoting good practice.
- Support P&P to monitor and track pledges and income during humanitarian emergencies.

## **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 International Non-Governmental Organisation (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 of prospect research in a high-value fundraising context.
- Experience, knowledge and understanding of the role research and insight plays in successful fundraising from major donors, trusts and foundations, and companies.
- Experience, knowledge and understanding of prospect research methods, standards, criteria and tools.
- Experience of producing evidenced and persuasive research briefings.
- Strong analytical and research skills and the ability to present information clearly.
- Sensitivity and discretion in dealing with confidential information.
- Effective communicator able to build positive working relationships with colleagues, other teams, and senior staff.
- Understanding of data protection legislation and other sectoral guidelines and how they impact fundraising research.
- Proven ability to prioritise and manage a varied workload, taking initiative and meeting deadlines.

### **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
- Experience of using a relationship management database.
- Experience of working in a fast-paced environment and managing and prioritising work to meet agreed deadlines.
- Experience of working in a cooperative and flexible way as part of a busy team.

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.