



Moorfields  
Eye Charity



Job information pack

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# Prospect research manager (maternity leave cover)

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Registered Charity No 1140679



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# Welcome

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Thank you for your interest in the work of Moorfields Eye Charity. We believe that people's sight matters and wish to strengthen our committed and passionate staff team by appointing a [role title] to join our [team name] team.

We are the main fundraising and grant-making charity for Moorfields Eye Hospital NHS Foundation Trust (Moorfields) and its academic partner UCL (in particular the UCL Institute of Ophthalmology), two world-leading institutions. We invest in life changing eye health by funding innovative research, equipment, patient care and training – benefitting patients in the UK and around the world.

We have ambitious plans. We are putting into action a new five year business plan that will see us grow to expand from our current commitment to raise and fund around £6m annually to become a £10m a year charity. We're delighted to be growing our team to help us achieve this ambitious goal.

We have a phenomenal once-in-a-century opportunity to create Oriel, a new home for eye care, research and education, bringing together Moorfields and the UCL Institute of Ophthalmology. This new centre is expected to open in 2026-27 and will be located near St Pancras in London. Philanthropy will play a critical role in the delivery of Oriel and we're leading a fundraising campaign, in partnership with UCL, to raise £100m to support this.

We both joined Moorfields Eye Charity because we are passionate about eye health and wanted to support the pioneering work of the world-leading partnership between Moorfields and UCL. The years ahead will be a time of exciting transformation for our charity as we play a pivotal role in creating Oriel, embed a culture of philanthropy across the Moorfields family, increase our fundraising and grant-making, deliver our ambitious strategy and make a difference to people living with sight loss.

We hope you are as excited as we are by the opportunity to play a key role in that journey and thank you for your interest in joining our team.

**We look forward to hearing from you.**



Robert Dufton  
Chief executive

A handwritten signature in white ink that reads "Robert Dufton".



Rachel Jones  
Director of development

A handwritten signature in white ink that reads "Jones".

# Key information

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## Hours:

Full-time (37.5 hours per week)

## Contract type:

Fixed term contract (maternity leave cover)  
- 12 months

## Salary:

£48,986 to £57,150

## Annual leave entitlement:

27 days plus bank holidays, increasing after  
5 years and 10 years service

## Reports to:

Head of philanthropy

## Direct reports:

Prospect research officer (full-time)  
Prospect research assistant (part-time)  
Volunteers and interns, as required

## Probation period:

6 months

## Notice period:

3 months

## Place of work:

City Road EC1, with flexibility to work part of the  
week from home (agreed for each post  
individually, depending on the nature of the role)



# About the role

Impact report, 2022

The Prospect research manager will contribute to Moorfields Eye Charity's growing team by leading the prospect development function. They will be responsible for defining, articulating, implementing and delivering the prospect research strategy and, in collaboration with the Head of philanthropy and Director of development, create and implement effective systems, processes and management tools to embed new ways of working, ensuring the charity builds and strengthens its prospect pipeline to drive income growth in support of the charity's strategic priorities. They will line manage a full-time Prospect research officer and part-time Prospect research assistant and interns (as required).

They will work collaboratively across the charity's wider team to provide due diligence, insight, analysis and forecasts through the use of bespoke research and data analytics to support fundraising planning, activity, performance, reporting and growth.

The Prospect research manager will be responsible for fundraising systems and processes and, in collaboration with the charity's Information and data analyst and external suppliers, lead on the introduction of new CRM functionalities and ensure that the charity maximises the functionality of its fundraising systems. They will lead on the charity's best practice and compliance with fundraising data regulation including, but not limited to, GDPR and data sharing. They will have detailed knowledge of research tools, trends and innovations ensuring that the charity has the best tools to meet its prospecting needs.

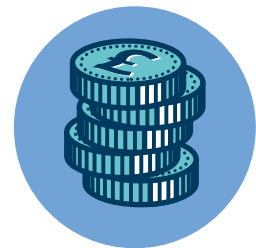
The Prospect research manager will work collaboratively with stakeholders across the wider Moorfields family and contribute to maximising cross-working opportunities across the organisation and the Moorfields network. The role involves innovation, problem-solving and process leadership alongside the Head of philanthropy and members of the charity's senior management team as required to pursue efficient ways of working.



**£8.1m income raised**



**Over £94,000 raised at our annual fundraising walks, Eye to Eye**



**£6.2m in new awards committed**





# Role description

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## Leadership and management

- › Provide leadership in the identification of prospects (high net worth individuals, trusts and foundations, and companies) who could give, or influence support, for Moorfields Eye Charity at the five, six and seven figure plus level.
- › Lead on GDPR implementation and compliance, as relevant to the philanthropy team and contribute to cross organisational project groups as required.
- › Provide leadership in the delivery of ethical screening and due diligence, working with the Head of philanthropy, the Director of development, Head of fundraising and engagement and other stakeholders to appropriately manage risks and escalate concerns as appropriate.
- › Line-manage a full-time Prospect research officer and a part-time Prospect research assistant, training, coaching and developing them and managing them in line with the charity's policies.
- › In collaboration with the Head of philanthropy, Director of development and Director of finance and resources (where appropriate), lead on developing management tools and reporting systems to support monitoring of performance against fundraising targets (both activity and financial) and campaigns (both capital and revenue).
- › Lead on organisational policies associated with due diligence, GDPR compliance and data sharing.

## Research and administration

- › Implement and deliver an effective prospect research strategy that supports the charity's philanthropic (both capital and revenue) funding priorities in collaboration with the Head of philanthropy and contribute to the wider programme growth in line with the charity's growth plans.
- › Provide prospect research and due diligence for the Fundraising and engagement programme and support the strategy led by the Head of Fundraising and engagement.
- › Lead the prospect research team to research and compile accurate and detailed profiles, briefing notes and other documents, as required, on existing donors, new prospects and influencers, and present results in a clear and well-structured manner.
- › Respond to specific research requests as required, ensuring appropriate systems to track and monitor requests and work activity; working to agreed personal targets and deliver an agreed activity plan annually.
- › Proactively identify prospects (high net worth individuals, trusts and foundations, and companies) who could give, or influence support, for Moorfields Eye Charity at the five, six and seven figure plus level.
- › Be responsible for active management of the prospect pipeline, working with Head of philanthropy to allocate prospects and ensure prospects are actively managed by the team.
- › Gather and disseminate information about networks of donors, prospects and influencers to establish who knows whom, how well and in what context; research and analyse high-net-worth individuals, trusts and foundations and companies.
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- › Work collaboratively with the philanthropy team, and other internal stakeholders as required, to assist in the development of donor engagement strategies.
- › Oversee reporting across the philanthropy team, (to include activity, financial, and other KPIs) supporting the Head of philanthropy and wider team with appropriate reports, analysis and segmentation.
- › Ensure the charity has the right systems, processes and information to deliver an effective and efficient prospect research function.
- › Monitor and manage expenditure relating to the prospect research function, working with the Head of philanthropy to support budget planning, monitoring and review of the prospect research expenditure stream.
- › Contribute to the implementation and coordination of the philanthropy team's overall strategy and targets.
- › Ensure that the charity's CRM is configured appropriately to meet the business requirements of the philanthropy team, contributing to cross organisational project groups as required.
- › Lead on GDPR implementation and compliance, as relevant to the philanthropy team, and contribute to cross organisational project groups as required.
- › Ensure full and timely records are kept on the database in adherence to set policies and procedures, with particular attention to current fundraising regulation, data protection and GDPR.
- › Stay up to date with research trends and proactively review and seek out new research tools and sources of prospects.
- › Undertake other tasks as necessary to Moorfields Eye Charity's objectives, including responsibility for data protection and information governance.

## Cross-team working & collaboration

- › Work collaboratively with the philanthropy team, and other internal stakeholders as required, to assist in the development of donor engagement strategies.
- › Be the philanthropy team's primary point of contact for troubleshooting and provide guidance on CRM, processes, compliance and train all new members of the team on the above to enable them to carry out their work effectively.
- › Be responsible for managing relationships with external suppliers as required, working to negotiate best value, to manage contracts, minimise risk and ensure third parties comply with the charity's policies and relevant data, fundraising and other legislation.
- › In collaboration with the Head of philanthropy and Director of development, take an active role in the charity's collaboration and data sharing with the charity's fundraising partners.

## Other duties

- › Any other duties as may be requested from time to time by your line manager.
- › Ensure that all activities are compliant with law, best practice and the charity's policies and procedures.
- › Occasional evening and weekend work as required.
- › As a member of the charity team to conduct your work and self to a high standard of professionalism and timeliness, being responsible and polite with all stakeholders. To be collaborative with, and considerate and supportive of colleagues as we work together to meet the common goal of delivering the charity's strategy to maximum impact.

**A role description is a reflection of the current position and may change emphasis or detail in light of subsequent developments as the charity is a fast-paced environment. Duties may change from time to time, in consultation with the post holder.**

# The person

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Every role at Moorfields Eye Charity helps ensure our success and there are certain skills necessary to support this.

We're looking for someone who has the following experience or demonstrable transferable skills:

## Education, qualifications

- › Educated to degree level or equivalent experience.

## Knowledge

- › Proven experience of effective management of a prospect research function.
- › Detailed knowledge of data protection, GDPR, and relevant fundraising and other legislation.
- › A thorough understanding and current knowledge of the voluntary sector.
- › Demonstrable experience of developing and implementing administrative, prospect management or other systems.
- › Ability to work under own initiative and to identify additional sources of potential funding.

## Skills

- › Excellent research skills in major gift fundraising research with demonstrable experience in identifying and researching prospects at the six and seven figure level.
- › Strong analytic skills with a proven ability to make decisions and balance risk.
- › Ability to analyse and interpret financial or other data.
- › Excellent written communication skills and ability to prepare and deliver clear written reports.
- › Excellent interpersonal skills with the ability to work collaboratively and to communicate effectively across a range of audiences including to senior stakeholders.
- › Excellent IT skills with strong understanding of CRM databases (ThankQ desirable).

## Personal qualities

- › Positive and pro-active approach to work.
- › Well organised with excellent attention to detail.
- › Target driven and able to work to tight and competing deadlines.
- › Ability to work successfully as part of a team and under guidance of own initiative.
- › Interest in Moorfields core activities and commitment to the organisation.
- › A flexible proactive approach.



## **The following criteria would be desirable.**

- › Experience of prospect research for capital projects and/ or healthcare/ medical research.
- › Experience of researching international prospects; or knowledge/ experience of international philanthropic markets.
- › Experience of managing staff and / or volunteers.
- › Experience of budget setting and management.

## **Professional development**

**We're committed to your continuing learning and development. All of our team have personal learning and development plans in place that are reviewed, discussed and developed on a regular basis throughout the year. As a charity, we ensure that the time, resources and assistance are set aside to support you and maximise your potential and growth.**

# How to apply

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**Find out more and details of how to apply [here](#).**

Your application should include your CV and a supporting statement (of no more than 2 pages) which addresses the following points:

- › how your experience applies to the role
- › why this role specifically appeals to you
- › why you want to be part of the team at Moorfields Eye Charity

If you think you could do the role, but don't have all the desirable experience, we would still welcome an application from you.

If you would like to discuss this opportunity further or have any questions about the role, please contact Katharine Tinker-Switzer at [katharine.tinker-switzer@charitypeople.co.uk](mailto:katharine.tinker-switzer@charitypeople.co.uk)

Final shortlisted candidate(s) will normally have the opportunity to meet members of the team or wider organisation.

