

JOB DESCRIPTION

Job Title:	Research & Data Insights Lead
Department:	Income Generation & Marketing
Hospice Band:	Band E
Reports to:	Head of Philanthropy
Responsible for:	N/A
DBS Required	Basic

Job Purpose

The Research & Data Insights Lead will create the analytical and intelligence capacity required to underpin strategic income growth and improve ROI across fundraising activities. This post will provide the evidence and data needed to identify new funding opportunities and acquire new donors, by segmenting and targeting more effectively, to improve overall fundraising efficiency and impact.

This role will generate significant return on investment by strengthening campaign targeting and performance, accelerating growth in major donor fundraising, increasing grant success rates, and enhancing the effectiveness of donor stewardship through robust data analysis and actionable insights.

Main Duties and Responsibilities

Prospect research and fundraising intelligence

- Conduct detailed research to identify and qualify new prospects across grants, trusts, major donors, and corporate foundations.
- Support the Grants & Trusts Manager with pipeline development and bid preparation by identifying funding sources and analysing giving trends.
- Undertake wealth screening and philanthropic profiling to support the development of a Major Donor Strategy.
- Maintain and develop a central database of prospects with prioritisation by potential value, fit, and likelihood.
- Prepare concise, accurate research briefs and prospect reports for fundraising colleagues and senior leadership.

Data insight and analysis

- Extract, analyse and interpret data from the CRM and other systems to produce actionable insights.
- Support campaign planning by providing segmentation, supporter profiling and targeting recommendations.
- Produce regular reports and dashboards showing income trends, donor retention, acquisition, and campaign ROI.

- Monitor and analyse donor journeys to identify opportunities for improved engagement and giving.
- Support the wider fundraising and marketing teams with data to inform supporter journeys and personalised communications.

Performance measurement and reporting

- Design and maintain standardised fundraising KPIs and performance dashboards.
- Provide insight reports to the Income Generation Director and EMT to inform strategic planning.
- Evaluate campaigns post-delivery to provide learning and recommendations for improvement.

Data management and compliance

- Work closely with the Supporter Experience Team to ensure data accuracy and compliance with GDPR.
- Develop and maintain reporting templates to improve data integrity and consistency.
- Conduct regular fundraising data audits to assess data quality, identify gaps or risks, and implement improvements that strengthen compliance and reporting accuracy.
- Train fundraising colleagues in best practice around data entry and use of insight reports.

Market and sector intelligence

- Monitor giving trends, benchmarking data and sector research to inform strategy.
- Share knowledge with fundraising colleagues through written reports and presentations.
- Track competitor activity and identify emerging fundraising opportunities.
- Provide regular summaries of philanthropic and funding landscape developments.

Brand Development and Reputation

- Adhere to and promote the Birmingham Hospice brand, following brand guidelines and marketing SOPs
- Conduct regular fundraising data audits to assess data quality, identify gaps or risks, and implement improvements that strengthen compliance and reporting accuracy.
- Keep up to date with developments and trends in fundraising and use this insight to develop our portfolio to ensure it is engaging and competitively positioned

Expectations

- Ability to travel to external meetings
- Ability to work across both hospice sites
- Assist at fundraising events and activities where appropriate and necessary
- Undertake any other duties as may be required by the Income Generation Director.

General Duties

Confidentiality

- All employees are required to uphold the confidentiality of all information records in whatever format, encountered in the course of employment and after it.

- All employees are bound by the requirements of the General Data Protection Regulations when, in the course of their employment, they deal with information records relating to individuals

Equality and Diversity

- The Hospice is committed to promoting an environment that values diversity. All staff are responsible for ensuring that they treat individuals equally and fairly and do not discriminate on the grounds of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex and sexual orientation. The Hospice expects all staff to behave in a way that recognises and respects diversity in line with the appropriate standards.

Health and Safety

- All employees have a responsibility under the terms of the Health and Safety at Work Act 1974 to protect and promote their own health and that of others in the workplace
- All employees must comply with all Hospice Health and Safety Procedures

Infection Control

- The prevention and control of infection is the responsibility of everyone who is employed by the Hospice. Employees must be aware of infection control policies, procedures and the importance of protecting themselves and their clients in maintaining a clean and healthy environment.

Information Governance

- All employees are responsible for ensuring they undertake any training relating to information governance, read the Hospice's policies, procedures and guidance documents relating to information governance, and understanding how this affects them in their role.

Professional Development

- All employees must participate in an annual appraisal and develop a personal development plan with their Line Manager
- All employees are responsible for maintaining their statutory and mandatory training.

Safeguarding Children, Young People and Vulnerable Adults

- The Hospice is committed to safeguarding and promoting the welfare of children, young people and vulnerable adults. All employees and volunteers are therefore expected to behave in such a way that supports this commitment.

The job description is not exhaustive and may be amended following appropriate consultation in the light of business needs

PERSON SPECIFICATION

Job Title:	Research & Data Insights Lead
Department:	Income Generation & Marketing
Band:	Band E

Requirements	Essential	Desirable	How identified
Education and Qualifications	<ul style="list-style-type: none"> • Educated to A level or equivalent in a relevant area or • Specialist underpinning theoretical knowledge supported by extensive relevant practical experience. 		C, A
Knowledge and Experience	<ul style="list-style-type: none"> • Experience in a nonprofit, charity, or higher education fundraising environment. • Proficiency in CRM systems • Experience in prospect research, fundraising analysis, and data insight and data segmentation • Awareness of third sector fundraising streams and the complex charity fundraising climate • Understanding of data protection and confidentiality requirements. 	<ul style="list-style-type: none"> • Previous use of Beacon database and/or Donorflex • Knowledge of wealth screening tools and prospect research platforms. • Understanding of fundraising regulations and compliance frameworks. 	A, I

<p>Personal skills and attributes</p>	<ul style="list-style-type: none"> • Strong analytical skills with the ability to interpret complex data sets. • Advanced Excel skills and experience using data visualization tools such as PBI • Excellent written communication skills for producing clear research briefings and reports. • Ability to manage multiple, sometimes conflicting, priorities. • Ability to analyse sector specific information from a variety of sources and translate key findings to inform future strategy • Impact focused and results driven • High attention to detail and strong organisational skills. • Evidence of highly developed verbal communication skills • Ability to build effective internal relationships across all income generation teams • Numeracy skills to manage budgets and targets • Ability to manage a complex and demanding workload • Operate with high levels of integrity • Listens to and shares information, opinions and ideas • Understands stakeholder needs and responds appropriately • Has personal resilience and emotional intelligence to deal with occasional 		<p>A, I</p>
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	<p>exposure to the emotional situations of our patients, families and carers before and after bereavement.</p> <ul style="list-style-type: none"> • Some flexibility around work location and hours in order to support the wider fundraising team across both hospice sites. • 		
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A= Application form

I=Interview

T=Test

C=Certificate