**MERTON COLLEGE, OXFORD**

**Database, Information & Research Officer**

**FURTHER PARTICULARS**

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**Merton College**

Merton College was founded in 1264, and is the third oldest College in Oxford. It is well known for the outstanding achievements of its undergraduates, and the high performance of its graduates. Its buildings and grounds are widely acknowledged as among the most beautiful in Oxford. It has a strong sense of identity and is known to be a very friendly College. The College has some 300 undergraduates and a similar number of graduate students. It has a Governing Body of over 70 Fellows, supported by more than a hundred staff.

The post-holder joins the Development Office at a particularly exciting time in the College's history, three years after the College’s 750th Anniversary Year and the culmination of its 750th Anniversary Campaign which raised over £30 million in support of the College and its community. Merton is currently setting out clear goals for the years ahead: to attract the most outstanding people in the world, as undergraduates, graduates and Fellows, to serve the common good and is working on an updated Case for Support.

More information on Merton can be found on the website [www.merton.ox.ac.uk](http://www.merton.ox.ac.uk).

**The Post**

This is a central role within the Development Office team and the College is seeking to recruit an enthusiastic database specialist with an interest in working alongside colleagues across the College in support of various fundraising priorities and alumni relations initiatives.

The Database, Information and Research Officer will analyse data, write complex queries, prepare reports and provide support for Merton’s very busy and successful fundraising and alumni office. He/she will manage the Development and Alumni Relations System (DARS) on behalf of the College and liaise with the Central University DARS team regarding system issues and improvements. He/she will maintain and develop Merton’s NetCommunity presence, perform the gift processing function ensuring that donations are accurately recorded and
acknowledged, conduct research, write briefing notes and produce profiles of our current and prospective donors.

The successful candidate will be educated to degree level or equivalent, have a strong track record using a relationship management system (ideally DARS or Raiser’s Edge), excellent IT skills (especially Excel), numeric, logical, problem-solving and communication skills as well as prospect research experience in a non-profit environment. An exceptionally high level of accuracy is essential, as is flexibility.

Key relationships

- Development Director & Fellow (line manager)
- Members of the Development team: Deputy Development Director, Development Officer, Alumni Relations Officer, Alumni Communications Officer, Development Coordinator
- Fellows, College Officers and College staff
- Donors, alumni and friends of the College

Main duties and responsibilities

Data management and processes
1. To maintain the College’s alumni database of 11,000 records, continually cleaning and improving the accuracy of all data
2. To be an ‘expert user’ of the DARS system and be familiar with all data entry, setup and reporting functions to help and facilitate other team members’ needs in their areas of work
3. To help to devise new systems and processes to enable the work of the office to be carried out with ever greater efficiency and effectiveness
4. To assist with fundraising and alumni relations projects and support other members of the team to utilise the database effectively to enhance their work
5. To prepare queries and data for all mailings (including email), publications and fundraising appeals, including the annual telethon
6. To provide accurate data and honour roll lists for the annual Donor Report
7. To arrange data imports as required, e.g. following the telethon or other data collection projects
8. To maintain and develop the College’s NetCommunity site together with other members of the team, encouraging alumni to register and participate, and to develop new functionality to serve the online community
9. To manage alumni events registration pages in NetCommunity and to reconcile online event payments with the College’s Bursary staff

Gift and revenue administration
1. To be responsible for the accuracy of donation information, processing pledges, recurring gifts and payments and ensuring donations are acknowledged in a timely manner
2. To process Gift Aid claims for the College
3. To work closely with the Bursary team in ensuring that all philanthropic revenue is recorded in DARS and to support the Bursary in managing the College’s annual audit and the work of the Benefactions Committee
4. To produce regular reports on outstanding pledges for the Development Director and Deputy Development Director

**Data compliance and quality**
1. To be responsible for Data Protection, Information Security, Privacy and Electronic Communications Regulations compliance within the Development Office and to work with the College’s Data Officer and other colleagues involved in compliance issues on behalf of Merton
2. To proactively manage the quality of information in the database and to suggest new methods to improve information collection within the parameters of current legislation
3. To work closely with the University DARS team to ensure the security of the data held on the database and to resolve any system issues as well as help develop the system
4. To complete all DARS training modules to become the Merton DARS ‘Super User’ and to participate actively in extended DARS training and engage with the DARS community through relevant special interest groups
5. To co-ordinate the access and training of DARS users across the College and co-ordinate the access of third party and volunteer users to the data under the DARS Confidentiality Agreement requirements
6. To create and maintain the database and data-related elements of the Development Office’s Policies and Procedures documents and to oversee the upkeep of the document

**Prospect identification and research**
1. To undertake prospect research using a variety of sources
2. To identify new potential prospects and make initial assessments of their giving capacity, inclination and affinity
3. To write and update research briefs and detailed biographies on prospective and current donors attending events with the Warden, Development Director or others
4. To create guest lists for cultivation and stewardship events based on prospect research
5. To work with the Development Director and Deputy Development Director to establish and maintain an effective and dynamic prospect management system

**Reporting and stewardship**
1. To produce regular financial reports on campaign and fundraising progress for internal and external committees
2. To prepare and compile data for annual benchmarking surveys
3. To write complex queries and reports in support of other team members as required
4. To assist fundraisers in defining their strategy for management of key donors
5. To produce data for annual stewardship reports for major benefactors and giving clubs in collaboration with the Deputy Development Director
6. To assist with creating contact lists for various programmes and events
Other
1. To take an active role in the Development Office by contributing to wider departmental plans and strategy as appropriate
2. To be available to work flexibly in order to attend events and meetings as required
3. To undertake any other duties that may reasonably be requested by the Development Director appropriate to the level of the post
4. To maintain confidentiality at all times

Person specification: Skills, Qualifications and Experience

1. The successful candidate will have:
   a. Excellent IT skills including Microsoft Office (Outlook, Word, Excel and Powerpoint) and highly-skilled in DARS or Raiser’s Edge – or equivalent relationship/fundraising database – and their related applications (e.g. NetCommunity)
   b. Excellent working knowledge of the Data Protection Act, the upcoming GDPR, PECR and tax-efficient giving and their implications in development work
   c. Good knowledge of the Institute of Fundraising’s Codes of Fundraising Practice or equivalent
   d. Proven project management skills and experience of developing and implementing new systems and processes to support external relations activities, gaining stakeholders’ buy-in
   e. Excellent oral communication skills with the ability to advise staff from across the College on the use of DARS and how it can be used effectively to support external relations activities
   f. Excellent written skills with the ability to translate technical processes into standard English and interpret administrative processes into technical functionality and write analytical reports and briefings

2. The successful candidate must be:
   a. Educated to degree level or equivalent
   b. Able to lead on the analysis of numerical data and the synthesis of data and research from a wide variety of sources and the ability to make strategic recommendations based on these
   c. Able to organise and manage a diverse range of assignments and projects with high efficiency, yet excellent attention to detail
   d. Able to handle sensitive and confidential information appropriately and with discretion
   e. Able to use their own initiative and work without supervision.

Salary and benefits

The salary offered for full-time appointment to this job will be negotiable but will be c.£32,000 per annum depending on qualifications and experience. There is an annual 'cost-of-living’ salary review, which normally takes place in summer each
year. In addition to the normal English bank and public holidays the post-holder will be entitled to 30 working days’ holiday.

The appointment is subject to satisfactory completion of a six-month trial period, during which the notice period will be four weeks on either side. Once the appointment has been confirmed, the notice period will be three months on either side.

The post holder is eligible for membership of the University of Oxford Staff Pension Scheme (OSPS), which is a contributory scheme, and free medical insurance. Meals in College are provided free of charge when on duty.

**Application Process**

Those wishing to apply for this post should complete the online application at [www.merton.ox.ac.uk/jobs](http://www.merton.ox.ac.uk/jobs) and upload the following documents by **09:00 on Monday 20 November 2017**:

- A detailed covering letter outlining their motivation for applying and how their skills and experience equip them to undertake the role.

- A CV.

- An Equal Opportunities Recruitment Monitoring form. The information collected on the equal opportunities recruitment monitoring form does **not** form part of the selection process and will **not** be circulated to the selection panel. It will be used solely to monitor the effectiveness of the College’s Single Equality Scheme which is published at [www.merton.ox.ac.uk/about/college-policies](http://www.merton.ox.ac.uk/about/college-policies).

It is anticipated that interviews will be held in the week of **27 November 2017**.

For an informal discussion about the role before application please contact Duncan Barker, Development Director, on +44(0)1865 276316 or duncan.barker@merton.ox.ac.uk.

This appointment will be determined only by personal merit and the application of criteria related to the duties of the post. No applicant will be treated less favourably than another because of his or her sex, marital status, racial group, disability, age, religion and beliefs or sexual orientation.

**Merton College is an equal opportunities employer**

Merton College is a registered charity (1139022)