

Job Description

Job Title:	Prospect Research and Operations Manager	Department:	Development
Responsible To:	Director of Development	Salary:	£34,850
Location:	Pitlochry Festival Theatre, with opportunity to discuss hybrid or home working.	Position Type:	Permanent. Flexible/hybrid working options can be discussed.
Working Hours:	35 hours per week, over 7 days, mostly within core business hours (9.00am–5.00pm). Hours may flex to match workload and Theatre commitments.		
Key Relationships	Executive Team, Senior Management Team, Development Managers, Finance Team, Box Office, CRM and IT leads.		
Context	<p>Since 1951, Pitlochry Festival Theatre has been the artistic heart and soul of Highland Perthshire, attracting over 100,000 visitors every year. We're more than just a place to see a show; we're Scotland's leading producer of musical theatre, and the country's only rurally-located major arts organisation.</p> <p>Our purpose is to improve lives by sharing Pitlochry with the world and the world with Pitlochry. Our mission is to create life-changing experiences for as many people as possible through our theatre and our environments. We strive to inspire imaginations, foster new levels of understanding, and nurture well-being, growth, and connection.</p> <p>Pitlochry Festival Theatre's campus now comprises a 538 seat Auditorium, a 172 seat Studio theatre as well as our Amphitheatre in the theatre grounds. Our home is a glorious eleven-acre campus that includes the Explorers Garden.</p> <p>More than a place to come and see a show, we offer great theatre and art for everyone in an inspiring, creative atmosphere.</p>		
Purpose and Key Accountabilities	<p>This new role will strengthen the Theatre's fundraising infrastructure by managing prospect research, pipeline development, data management, and operational delivery across all income streams.</p> <p>The post-holder will lead on process development, be a tech advocate and analytics lead across fundraising streams to provide insight, systems support, and enable colleagues to identify, cultivate, solicit, and steward donors effectively.</p> <p>They will also play a key role in developing and managing cross-team fundraising processes, including moves management, research, reporting, including analysing return on investment. Additionally, operational support including event coordination, our Spectrix CRM oversight, compliance and due diligence are required, and contributing to fundraising event coordination.</p> <p>We are seeking a motivated professional with excellent analytical skills, an understanding of the fundraising cycle, and a collaborative approach to supporting income growth across the Theatre's fundraising portfolio. This will be a role that's instrumental on the Theatre building engagement and income growth from existing and new prospects, to be underpinned by robust systems and data insights.</p>		



About us

Our purpose and our values

Our Purpose

We improve lives by sharing Pitlochry with the world and the world with Pitlochry.

Our Vision

Pitlochry Festival Theatre is recognised as the nation's most impactful producing theatre, at home and beyond.

Our Mission

We will create life-changing experiences for as many people as possible in our many communities, through our theatre and our environments.

Our Values

Creative – We inspire and innovate in all our work.

Respectful – We value everyone and treat all with dignity.

Empowering – We enable and encourage others to reach their full potential.

Collaborative – We work together and support each other.

Our Guiding Principles

Place – Pitlochry is our home. We will continue to be inspired by Pitlochry and to celebrate our home through our work here and everywhere that we work in partnership, by sharing what we do 'Inside, Outside and Online'.

People – We nurture our own staff, the creative talent we bring to our stages, our partners, our supporters, and our audiences. We will continue to gather people together through our work and by serving global, human concerns.

Production – We perform at our best when we create theatre and deliver cultural activities related to theatre. We will continue to explore and extend how and where we share theatrical experiences of all kinds, for the benefit of all our communities.

Person Specification

Personal behaviours and style

We are looking for people who share our core values and can demonstrate their commitment to:

- Commitment to Excellence
- Teamwork
- Creativity
- Inspirational sense of belonging
- A nurturing environment

The successful candidate will need to be able to demonstrate the following skills, experience and attributes in both the written application and the interview process:



Pitlochry Festival Theatre | +44 (0)1796 484626
Registered Office: Port-Na-Craig, Pitlochry **PH16 5DR**
Company Limited by Guarantee: Registered in Scotland **SC029243**
Regulated by the Scottish Charity Regulator (OSCR) **SC013055**



Key Tasks:

Donor analytics and moves management	Develop, launch and administer a moves management process, in line with CRM capabilities to: provide insight on movement of donors through donor lifecycle; deliver qualitative and quantitative data on individual fundraising activity; and, other related reports.
	Lead on the reporting on moves management and informing the FR team of trends and provide regular updates to each individual member.
	Ensure the maintenance of up-to-date donor data that effectively tracks key information including cultivation activities and histories, solicitation and reporting calendars.
	Collaborate with team members to facilitate regular reporting on donor moves management, providing team with actionable leads.
	Report monthly against financial and other targets, providing insight on key trends.
	Create templates and systems to aid efficiency of above processes and assist the fundraising team to successfully cultivate and steward.
Prospect and donor research	Lead on the identification, research, and qualification of new fundraising prospects across individual, corporate, and trust income streams.
	Perform regular analysis of the entire database to maintain accurate and updated prospect data.
	Develop and operate a process that proactively researches donors and prospects with HNW to create a pool of qualified prospects, using data-informed analysis to help fine-tune donor cultivation and relationships.
	Conduct donor and prospect research and evaluation based on requests from the fundraising team helping to inform event invitees, create briefing notes for hosts and staff ahead of cultivation meetings and events.
	Manage relationships and contacts with CRM and donor/prospect research vendors and/or external contractors, regularly assessing new products, technologies and trends on prospect research practice.
Donation and data management	Lead on a process for ensuring all gifts are reconciled with the finance department.
	Take overall responsibility for setting in place systems to ensure fundraising team members record gifts received, and that donors are thanked in a timely manner. This should include recording of multi-year pledges, alongside stewardship and reporting plans.
	Work with the IVG Manager to ensure templates are in place to streamline communications with membership and regular givers.
	Develop the process and lead on mailing lists/data pulls for the fundraising team.
	Ensure the data for records is maintained and that fundraising team members regularly check for errors/necessary updates.
	Manage operational relationships with suppliers and campaign fulfilment partners.
Operational support	Oversee systems, policies, and processes that underpin fundraising, including data management, compliance, and reporting.
	Support the fundraising team in the development of high-quality and up to date fundraising collateral, ranging from pitch decks and engagement materials, through to stewardship report. Ensure materials are compliant and user friendly.
	Lead on the development of the CRM to support wider team activity.
	Assist the Head of Project Development in the delivery of the engagement programme for the team, including helping with guest lists, logistics and follow up reporting requirements.



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	Ensure Gift Aid processes are compliant, and communicated with donors.
	Assist the Director of Development to ensure a coordinate approach across the team for fundraising activity.
Financial oversight	Report monthly against financial and other targets, providing insight on key trends, supporting the Director of Development in the setting of fundraising budgets and results against forecast.
	Produce regular revenue and expenditure reports, demonstrating return on investment, success rates, and inform reports for the Director of Development and Trustees.
	Maintain efficient financial tracking systems: reconcile income with the Finance team ensuring accuracy of transactions, while working with colleagues to monitor expenditure across fundraising campaigns.
FR Compliance and ethical standards	Meet the standard of the Code of Fundraising Practice, adhere with GDPR compliance and maintain high ethical standards. Keep abreast of any updates and implications on practice, and attend training where necessary.
	Promote transparency and accountability in fundraising efforts to build trust among stakeholders and supporters.
Health and Safety	To support the Executive Director, as Chief Executive of the organisation, in their legislative duties under the Health and Safety at Work etc. Act 1974.
	Attend training as required to update knowledge and skills, and to be able to comply with relevant statutory requirements to a high standard.
Other	To champion and promote organisational values and behaviours and act as an ambassador for the Theatre.
	To always act in the best interests of the Theatre and in line with all company policies.
	Any other duties or projects required by the Executive Team or Trustees to ensure the general smooth and efficient operation of the buildings and organisation.
	Where required, participate in Theatre events which sometimes are out of standard core company hours.
	Support the Theatre to achieve its environmental sustainability ambitions.
	Actively promote staff welfare, development and training opportunities throughout the Theatre.

Experience & Attributes

Requirements	Essential	Desirable	Assessment Method
Qualifications and Knowledge	Educated to degree level or equivalent practical experience.		Application / Interview
	Knowledge of fundraising CRM systems		Application / Interview
	Strong knowledge of data protection particularly GDPR, and Code of Fundraising Practice to deliver compliant prospect		Application / Interview



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	research.		
Experience	Proven experience in prospect research, which has led to successful outcomes.		Application/Interview
	Experience in managing data, systems and pipelines to create insight and prioritization of activity for a fundraising team.		Application/Interview
	Experience working across teams to coordinate complex projects or campaigns, and present insights to team members.		
	Proven ability to analyse, interpret, and present information clearly.		
		Knowledge of fundraising practice across various income streams – private donors, trusts, corporates and through events	
		Experience in establishing new systems to deliver efficiency, and compliance across prospecting and wider fundraising operations.	
		Experience supporting donor events or campaign logistics.	
		Experience in a performing arts or cultural setting.	Application/Interview
Skills and Abilities	Excellent project management skills.		Application/Interview
	Strong written and verbal communication skills.		Application/Interview
	High level of accuracy and attention to detail.		Application/Interview
	Ability to prioritise, work flexibly, and meet deadlines.		Application/Interview
	Confident working with CRM databases and Microsoft Office suite.		Application/Interview
	Ability to think creatively and strategically		Application/Interview
Personal qualities	Affinity for the Theatre’s mission and enthusiasm for supporting its success.	An understanding of the Theatre’s role within its wider communities.	Application/Interview
	Collaborative team player with a proactive, solutions-focused approach.		Application/Interview
	Analytical thinker who enjoys improving systems and supporting others to succeed.		Application/Interview



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