

HR191	POSITION DESCRIPTION	 UNIVERSITY OF CAPE TOWN IYUNIVESITHI YASEKAPA • UNIVERSITEIT VAN KAAPSTAD
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NOTES

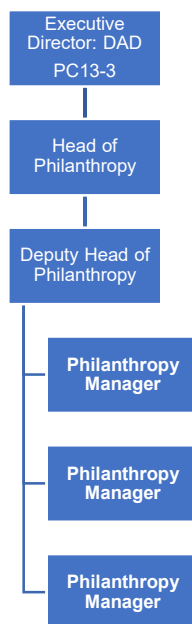
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Philanthropy Manager		
Job title (HR Business Partner to provide)	Senior Alumni and Development Specialist		
Position grade (if known)	11	Date last graded (if known)	
Academic faculty / PASS department	Development and Alumni Department		
Academic department / PASS unit	Philanthropy		
Division / section	Philanthropy		
Date of compilation	March 2024		

ORGANOGRAM

(Adjust as necessary. Include line manager, line manager's manager, all subordinates and colleagues. Include position grades)



PURPOSE

The main purpose of this position is:

To serve UCT's main focus areas of teaching and research, through focused activities to raise maximum funds from donors and other interest groups in conjunction with faculties and departments.
 To establish partnerships with donor community to address developmental needs and challenges of education.
 To advise and work with the University personnel and student groups in the assigned Faculties/Support departments on aspects of fundraising.
 To apply existing UCT policies and procedures of fundraising and stewardship and draft new policies, procedures and toolkits when required for assigned portfolio areas.

CONTENT			
Key performance areas	% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
E.g.		Takes, types up and distributes minutes and agendas for monthly departmental meeting. Greets visitors, enquires as to the nature of their visit and directs them to the appropriate staff member.	All staff members receive an electronic copy of accurate minutes and agendas, in the departmental template/format, a week before the meeting. Visitors are directed to appropriate staff member in a professional and efficient manner.
1	40	Utilising the key elements of moves management, progress prospects and donors to become ongoing supporters of UCT Cultivation • Collaborate with colleagues to assess the potential for prospect engagement, seeking input and insights to tailor cultivation approaches. • Develop a personalized Cultivation Plan for each prospect, incorporating engagement opportunities such as events, meetings, and communications. • Develop profiles of all prospects in collaboration with the prospect research team. • Execute regular prospect interactions, ensuring consistent and meaningful engagement to build trust and understanding of University priorities. Discovery • Undertake 'discovery' work to 'qualify' the prospect and move them into active cultivation. • Use creative ways to establish contact with new prospects with the aim of securing an initial face-to-face meeting within first 3 months of assignment. • At the right time, offer prospects the opportunity to support university fundraising priorities with a lifetime and/or bequest donation. • Draft Gift Agreements for donor signature, based on agreed templates provided by the Bequest and Gifts Administrator, and in accordance with university policy and general compliance requirements • Design, implement and manage a comprehensive, proactive annual development plan with identified annual outputs on expanding and enhancing by directing and coordinating activities related to obtaining financial support. • Set and pursue realistic targets for donations based on the previous years' achievements.	• An agreed plan in place for the portfolio segment guided by the Dept Strategic Plan for cultivation (annual target of prospects with planned events, meetings, and communications including approximate or actual timings/target timings) • Provide a monthly Dashboard report of progress moves management and prospect activity. • Relevant, accurate and up to date profiles loaded onto the CRM system for all qualified prospects in the portfolios • Secure an initial face to face meeting for at least 40% of all prospects within three months of assignment • Ensure that contact reports are prepared and uploaded to the CRM system, within one week, post the interaction • 35% of prospects are positively engaged and moved into the solicitation phase of the fundraising cycle. • Develop and send comprehensive, informed and compelling individual gift propositions to xxx prospects • To meet the agreed targets set on an annual basis wrt: ○ asks for lifetime and/or bequest donations per annum ○ bequest commitments ○ personal meetings with prospects ○ donations secured (from xxx prospects?) ○ donation amount secured ○ 8 and 9 figure donations ○ bequests realized ○ Moves through the pipeline – and indicators, per category of prospect • Finalise and send the legal draft gift agreement within 5 days from the time that the donor agrees on donation • The donation is received and receipted within xxx days of receipt • Personal letters of thanks sent to the donor within 2 days of receipt of the gift • Realise the team target??

2	Stewardship and Relationship management	30	• Work with the Donor relations manager to develop and implement stewardship strategies that strengthen long term relationships with donor portfolios • Initiate the applicable stewardship process, special functions, personal contact and visits to campus and/or project sites. • Ensure that positive relationships are created and upheld by means of a professional approach during relationship building. • Draft and manage sponsorship projects contracts and negotiate benefits. • Retain and grow donor contributions for the portfolio. • Execute regular donor interactions, ensuring consistent and meaningful engagement to maintain ongoing and progressive donor contributions and understanding of University priorities. • Ensure that stewardship, grant management and reporting requirements are met to sustain successful partnerships. • Report on Foundation and Trust income at status meetings and maintain an updated Approach and Submission Status Record. • Advise the Executive potential risk mitigation, Vetting contracts (and prospective Donors).	• Execute bespoke stewardship strategies, including: ◦ personalized thank yous and donor communication, impact reports and regular updates on projects being supported, ◦ engagements such as one-on-one meetings, visits and events ◦ donor gifts and tokens of appreciation • Garner sponsorship for events and activities as identified by the Department
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3	Stakeholder engagement and management	10	• Build effective working relationships with key UCT colleagues, service providers and external stakeholders • Utilize effective communication and negotiation skills to articulate compelling cases for support, emphasizing the impact of donations on University initiatives. • Hold reactive and proactive collaborative engagements with academic groupings and departments, finalize briefing notes and share with DAD colleagues • Collaborate with internal stakeholders/academic colleagues to research and draft bespoke proposals and presentations, based on templates, that resonate with the interests and values of prospective donors. • Send appropriate letters of thanks to the donor, and acknowledge the gift in relevant forums • Establish and develop effective working relationships with staff in academic departments in relation to fundraising priorities and donations • Establish regular communication channels with relevant University departments to stay informed about their priorities and projects. • Provide training and resources to academic colleagues on effective engagement with donors, ensuring a coordinated and consistent approach.	• SMART measures • Debriefing meeting • Contact reports to be submitted within a week of the meeting • Give advice and guidance on fundraising policy and processes and resources to academic and other colleagues in their fundraising endeavors. • Communicate and hold regular (???) interactions with all prospects with purpose of ensuring that they are up to date with university priorities, initiatives and university developments. (How is trust and understanding measured?) • Draft and present a quarterly report to the Fundraising and broader DAD teams on philanthropic strategies and approaches, including feedback from donors
4	Information Management, Monitoring & Reporting	10	• Keep the database up to date with information relating to prospect pool • Regularly update the CRM with details of prospect interactions and gift conversations, ensuring accuracy of contact information, giving history, and engagement preferences. • Prepare Philanthropy reports and updates • Implement follow-up strategies to track progress and address any concerns or questions from donors, ensuring a positive and transparent solicitation process, and effectively closing the gift. • Evaluate and document the success of solicitation strategies, refining approaches based on lessons learned and feedback from donors. Share learning with colleagues. • Ensure that the Donations Processing team are in possession of all relevant information pertaining to donations from portfolio of donors, to ensure that donations are processed timeously	• Ensure the prospect information is up to date • Update the CRM system within 2 days pertaining to the prospect personal information, interactions, interaction outcomes, gift proposals, etc • Run exception reports in order to assess and monitor data accuracy • Maintain profile information on the system • Draft and present a quarterly report to the Fundraising and broader DAD teams on philanthropic strategies and approaches, including feedback from donors

6	Team Contribution and Professionalism	• To demonstrate institutional citizenship through commitment to the values, mission, and goals of the organization and adhering to organizational policies and procedures, promoting a culture of inclusivity and respect, and representing the organization positively. • Work with team members to achieve team philanthropy goals?? • Be a brand custodian for DAD and UCT in every interaction • Identify emerging industry trends to inform the development and facilitate the management of cultivation strategies for current, lapsed and prospective donors. • Initiate and communicate opportunities for faculties, deans and directors to interpret relevant interests in University constituencies. • Work directly with project leaders to develop and project action plans and manage funding approaches for projects assigned via the prioritisation process. • Advise faculty and project leaders on the prospect's requirements and criteria. • Identify and initiate opportunities for strategic partnerships and relationships on the executive level between the university and relevant external entities. • Work closely with the Proposal writer and project leaders to develop highly competitive documents such as cases of support, proposals, budgets and other communications instruments to leverage diverse preferences in conjunction with University goals. • Work closely with project leaders and donors to provide the required due diligence and equivalency documents for the relevant donor • Assist colleagues with donor meetings and stewardship functions on request. • Manage specific and ad hoc projects on request as agreed. • Mentor and coach intermediate and junior Development Officers to grow skills and experience	• To be accountable i.e.to take full responsibility for actions, behaviours, performance and decisions. • To problem-solve: to identify issues, analyze situations, and develop practical solutions. • Effectively communicating - to clearly convey information, actively listen to others, and maintain professional correspondence through various channels such as emails, meetings, and presentations. • To manage time effectively: - to meet deadlines, prioritize tasks, and maximize productivity, through setting goals, planning schedules, and allocating resources effectively. • To work effectively in the team by contributing to group goals, respecting diverse perspectives, and communicating constructively to achieve common objectives. • To be adaptable: to embrace change, learn new skills, and adjust to evolving circumstances.
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MINIMUM REQUIREMENTS

Minimum qualifications	NQF Level 7			
Minimum experience (type and years)	5 years relevant industry experience - Significant major and principal gift fundraising experience, nationally and internationally - Contributing to strategic discussions and decision making - Experience in successful and substantial fundraising campaigns - Evidence of being able to lead and motivate others involved in fundraising - Experience in higher education fundraising is advantageous - A demonstrated record of success in planning and managing work programs from inception to completion and delivered on target			
Skills	- Excellent literary and communication skills, both oral and written - Proven ability to develop good working relationships with all constituencies and stakeholders - A proven ability to work well under pressure in a complex and demanding environment - Capacity to apply innovative and practical problem-solving skills to the challenges at hand - The ability to represent the University of Cape Town with a range of external stakeholders and constituencies - The ability to think strategically - The ability to be highly opportunistic and take initiative when the situation demands it. - The ability to develop, apply and manage performance linked metrics and targets			
Knowledge	Knowledge of the Higher Education landscape – locally and abroad			
Professional registration or license requirements				
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Ability to handle cash or finances'.)				
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Building interpersonal relationships	2	Analytical thinking / Problem Solving	2
	Communication	2	Planning and organizing	2
	Teamwork – collaboration	2	Sales ability	2
	Initiating action	2	University awareness	2

SCOPE OF RESPONSIBILITY

Functions responsible for	To serve UCT's main focus areas of teaching and research, through focused activities to raise maximum funds from donors and other interest groups in conjunction with faculties and departments. To establish partnerships with donor community to address developmental needs and challenges of education. To advise and work with the University personnel and student groups in the assigned Faculties/Support departments on aspects of fundraising. To apply existing UCT policies and procedures of fundraising and stewardship and draft new policies, procedures and toolkits when required for assigned portfolio areas.
Amount and kind of supervision received	Expected to initiate and carry out tasks as required by the position description with input from the Deputy Head of Philanthropy and Head of Philanthropy
Amount and kind of supervision exercised	n/a
Decisions which can be made	Decisions in line with KPAs
Decisions which must be referred	Any matters which must be escalated to the Head of Philanthropy and Deputy Head of Philanthropy

CONTACTS AND RELATIONSHIPS

Internal to UCT	All project leaders within Faculties including Deans and HODs, DSA, Research Office
External to UCT	Alumni and donors, including prospective corporate, government, foundation and individuals donors