

<b>HR191</b>	<b>POSITION DESCRIPTION</b>	
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**NOTES**

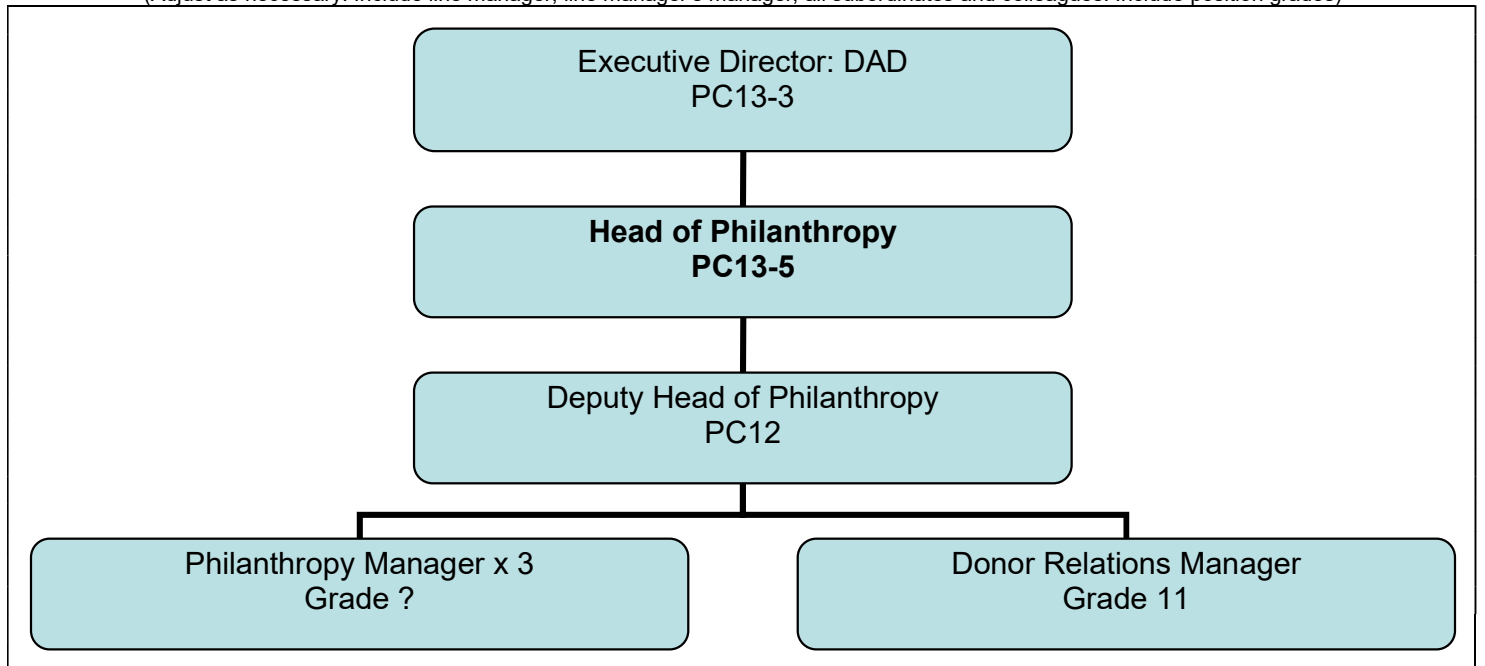
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

**POSITION DETAILS**

Position title	Head of Philanthropy		
Job title (HR Business Partner to provide)	Principal Alumni and Development Specialist		
Position grade (if known)	PC13-5	Date last graded (if known)	
Academic faculty / PASS department	Development and Alumni		
Academic department / PASS unit	Philanthropy		
Division / section	Philanthropy		
Date of compilation	September 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:

The Head of Philanthropy leads a team of national and international fundraisers to secure philanthropic support from individuals, trusts, foundations and corporations in support of institutional strategic priorities.

**CONTENT**

<b>Key performance areas</b>		<b>% of time spent</b>	<b>Inputs</b> (Responsibilities / activities / processes/ methods used)	<b>Outputs</b> (Expected results)
E.g.	General and office administration	25%	Takes, types up and distributes minutes and agendas for monthly departmental meeting.  Greet 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	Shape, develop and implement strategies to secure philanthropic funding	20	<ul style="list-style-type: none"> <li>Conduct a comprehensive assessment of current fundraising strategy and identify areas for improvement.</li> <li>Develop tailored fundraising strategies for different donor types (individuals, corporations, foundations, etc.), regions, gift types (lifetime and bequests), and fundraising priorities.</li> <li>Identify barriers to fundraising success and implement initiatives to mitigate</li> <li>Establish partnerships and collaborations with other departments or organizations to expand fundraising reach and impact.</li> <li>Regularly evaluate the effectiveness of fundraising strategies and adjust tactics as needed to ensure alignment with university priorities and donor interests.</li> </ul>	<ul style="list-style-type: none"> <li>A detailed report outlining strengths, weaknesses, opportunities, and threats (SWOT analysis) of the current fundraising strategy along with clear recommendations for improvement, including specific actionable steps.</li> <li>A comprehensive fundraising plan outlining specific strategies tailored to each donor type, region, gift type, and fundraising priority, complete with messaging frameworks, communication plans, and suggested fundraising activities.</li> <li>A barrier analysis report detailing obstacles hindering fundraising success along with proposed initiatives to overcome these barriers. This may include changes to processes, resource allocation, technology enhancements, or staff training programs.</li> <li>A partnership proposal outlining potential collaborations with other departments or external organizations to leverage resources, networks, and expertise for fundraising purposes.</li> <li>A quarterly or annual fundraising performance report analyzing key metrics such as donor acquisition, retention, gift size, and overall fundraising revenue. This report should include insights into what worked well, areas for improvement, and recommended adjustments to tactics or strategies.</li> </ul>
2	Manage the team of national and international fundraisers in maximizing philanthropy across the fundraising portfolios	10	<ul style="list-style-type: none"> <li>Oversee the management of a high-performing team of fundraisers</li> <li>Ensure the team have effective induction and performance expectations are clear</li> <li>Ensure the provision of ongoing training and professional development opportunities for fundraising staff to enhance their skills and knowledge.</li> <li>Foster a culture of teamwork and collaboration within the fundraising team to maximize collective impact.</li> <li>Implement performance metrics and regular evaluations to identify top performers and areas for</li> </ul>	<ul style="list-style-type: none"> <li>Quarterly performance reviews for each team member, providing constructive feedback and identifying areas for growth and improvement.</li> <li>A comprehensive onboarding program for new appointments, including clear documentation of performance expectations and key performance indicators (KPIs).</li> <li>Monthly training sessions or workshops on topics relevant to fundraising, such as donor relationship management, grant writing, use of CRM systems, and effective communication strategies.</li> <li>Initiatives in place aimed at strengthening relationships among team members and</li> </ul>

3	Oversee the Regional Directors to leverage major gift opportunities and volunteer support	10	<p>improvement.</p> <ul style="list-style-type: none"> <li>Optimize resource allocation and workload distribution to ensure equitable support for all fundraising portfolios.</li> <li>Facilitate regular communication and coordination among team members to share best practices and align efforts towards common goals.</li> <li>Work closely with prospect research manager to identify and allocate prospects to each fundraiser portfolio</li> </ul>	<ul style="list-style-type: none"> <li>encouraging cross-functional collaboration.</li> <li>A customized performance dashboard tracking key metrics such as donor retention rates, moves along the donor pipeline, funds raised per fundraiser, and success rates of fundraising campaigns, and review it with the team on a bi-monthly basis.</li> <li>Workload analyses that identify imbalances or gaps in resource allocation, and adjust assignments or responsibilities accordingly</li> <li>Establish team meeting where members can discuss ongoing projects, share success stories, and seek advice or assistance from colleagues, fostering a culture of open communication and knowledge-sharing.</li> </ul>
			<ul style="list-style-type: none"> <li>Develop a standardized framework for identifying and cultivating major gift opportunities within each region.</li> <li>Define and provide support to Regional Directors from across the DAD team (eg with respect to prospect research, portfolio management, data sharing, gift administration, donor relations, event support etc)</li> <li>Work closely with the regional Board to leverage fundraising opportunities and volunteer support in fundraising activities</li> <li>Provide ongoing guidance and support to Regional Directors in implementing effective major gift strategies, including in setting and monitoring appropriate KPIs and targets for revenue</li> <li>Foster strong relationships with key volunteers and community leaders to enhance support for major gift initiatives.</li> <li>Coordinate cross-regional collaborations and initiatives to leverage resources and maximize impact.</li> <li>Establish clear communication channels and reporting mechanisms to track progress and share successes across regions.</li> </ul>	<ul style="list-style-type: none"> <li>A 'guidebook' that outlines a systematic approach for identifying potential major donors, including criteria for qualification, prospect research methods, cultivation strategies, and stewardship tactics tailored to each regional context.</li> <li>A support package including tools, templates, and resources for prospect research, portfolio management, data sharing protocols, gift administration procedures, donor relations best practices, event support guidelines, and other relevant materials necessary for effective fundraising operations.</li> <li>A plan outlining strategy for engaging regional boards in fundraising efforts, identifies key fundraising opportunities within each region, with recommendations for leveraging volunteer support.</li> <li>A toolkit that includes step-by-step guides, training modules, and resources for Regional Directors to develop and execute major gift strategies, including setting and monitoring KPIs and revenue targets, conducting donor meetings, making asks, and stewarding donors.</li> <li>Implementation of a plan to build and maintain relationships with key volunteers and community leaders, including communication strategies, engagement opportunities, recognition programs, and collaboration initiatives to support major gift initiatives.</li> <li>A framework of protocols and guidelines for identifying collaborative opportunities, coordinating efforts, sharing resources, and maximizing impact across regions to achieve common fundraising goals and objectives.</li> <li>A communication protocol for tracking progress and</li> </ul>

	4	Build and assign prospect portfolio for fundraising team	10	<ul style="list-style-type: none"> <li>• Work with the Executive Director DAD, Prospect management team, Deputy Head of Philanthropy and Global Leadership Giving Manager and direct line reports to develop and implement: <ul style="list-style-type: none"> <li>◦ a pipeline of national and international donors encompassing all levels of giving, from annual fund to major gift (including legacies)</li> <li>◦ strategies and fundraising plans for major prospects, including prospect allocation and coordination</li> <li>◦ prospect lists and gift tables for current fundraising priorities and for the planned new campaign</li> </ul> </li> <li>• Develop and actively manage their own portfolio of global major gifts donors and prospects, working closely with the Executive Director DAD, and fundraising team</li> <li>• Develop key working relationships within the different DAD teams and colleagues</li> <li>• Work with the direct reports and the DAD Senior Team to ensure that there is good communication and teamwork between the DAD Office and the academic faculties and departments and PASS Departments of the University.</li> <li>• Ensure awareness of university projects and fundraising priorities. This will involve developing and maintaining excellent collaborative relationships with the UCT Executive Team, Deans and Executive Directors and academic fundraisers and liaising with them to ensure that any contact with prospective donors is well co-ordinated and followed through in an efficient and consistent manner.</li> </ul>	<p>sharing successes across regions.</p> <ul style="list-style-type: none"> <li>• A list of prospects is in place and constantly grown</li> <li>• Build a pipeline of national and international donors</li> <li>• An agreed portfolio of global gift donors is managed and stewarded with the goal of achieving gift targets</li> <li>• Constructive relationships with team members and communication structures are in place to for effective alignment and team work across the different portfolios</li> <li>• Knowledge and understanding of all UCT priority projects</li> <li>• Direct connection with DVCs, Deans and Executive Directors</li> </ul>
	5	Develop and maintain a compelling program of giving opportunities in support of strategic priorities, working across the university and with senior university leadership	10	<ul style="list-style-type: none"> <li>• Collaborate with senior university leadership to identify compelling giving opportunities</li> <li>• Seek prospect, donor and senior volunteer feedback on proposed giving opportunities to ensure they resonate with the HNW philanthropic community</li> <li>• Direct and oversee the work of the Fundraising Priorities and Projects Manager in developing creative and impactful giving opportunities that inspire donors to contribute to university initiatives.</li> <li>• Ensure that fundraisers have a range of giving opportunities to share with prospects and that they are briefed in how to communicate these in the most compelling way</li> </ul>	<ul style="list-style-type: none"> <li>• An up to date and comprehensive list of potential giving opportunities, including detailed descriptions and estimated funding needs, to present to senior university leadership for final approval.</li> <li>• a report outlining key insights and recommendations for refining the opportunities to better align with the interests and preferences of the high-net-worth philanthropic community.</li> <li>• Creative, impactful proposals and aligned with university priorities.</li> <li>• A comprehensive catalog or portfolio of giving opportunities categorized by donor interests and funding levels, conduct training sessions or provide resources to fundraisers on effectively</li> </ul>

			<ul style="list-style-type: none"> <li>Monitor donor feedback and adjust giving opportunities as needed to maximize donor satisfaction and retention.</li> </ul>	<p>communicating the opportunities to prospects, and regularly update fundraisers on new opportunities and best practices for engagement.</p> <ul style="list-style-type: none"> <li>A system for collecting and analyzing donor feedback on giving opportunities, regularly review feedback data to identify trends and areas for improvement, collaborate with relevant stakeholders to implement changes or adjustments to existing opportunities based on feedback, and track the impact of these adjustments on donor satisfaction and retention metrics.</li> </ul>
6	<p>Manage a personal pool of National and International HNW prospects to cultivate and advance relationships with to secure major and principal gifts</p>	25	<ul style="list-style-type: none"> <li>Manage a small pool of National and International HNW prospects (approx. 50% of a full-time fundraiser portfolio) to ensure leadership and capacity building by example</li> <li>Develop relationships with those prospects and secure donations for university fundraising priorities</li> <li>Meet personal targets for fundraising revenue.</li> </ul>	<ul style="list-style-type: none"> <li>Develop personalized stewardship plans for each prospect, outlining engagement strategies, communication frequency, and tailored cultivation activities.</li> <li>Submit at least one ask per HNW per annum (or a percentage of the prospects???)</li> <li>Secure a minimum of [specific monetary target] in donations from the managed HNW prospect pool within [specified time frame], utilizing personalized cultivation strategies and leveraging university fundraising priorities.</li> </ul>
7	<p>Monitor and analyse individual and team metrics to measure effectiveness and progress.</p>	5	<ul style="list-style-type: none"> <li>Work with the Director of Operations, and the Executive Director to define and implement a team and individual performance management framework</li> <li>Work with the Director of Operations and the Executive Director to set and monitor team and individual annual targets</li> <li>Work with the Director of Operations and Prospect Development Manager to ensure there is an effective pipeline of prospects and to regularly monitor and forecast results using pipeline data</li> <li>Work with the Director of Operations to ensure the CRM system is an effective tool in providing data to track and analyse fundraising performance</li> <li>Ensure all Philanthropy team members are using the CRM system effectively and regularly to track and record activity</li> <li>Analyse fundraising data regularly to identify trends, strengths, and areas for improvement.</li> </ul>	<ul style="list-style-type: none"> <li>A detailed performance management framework document outlining key performance indicators (KPIs), measurement methodologies, and performance evaluation processes.</li> <li>SMART (Specific, Measurable, Achievable, Relevant, Time-bound) annual targets document for both team and individual members, with clear metrics and timelines for monitoring progress.</li> <li>A comprehensive prospect pipeline strategy document in collaboration with the Prospect Development Manager, including criteria for prospect identification, cultivation, and conversion, along with regular pipeline monitoring reports and forecasting models.</li> <li>Optimal functionality of the CRM system for efficient data tracking and analysis for fundraising performance evaluation.</li> <li>A CRM training program tailored to Philanthropy team members' needs, including user guides and hands-on workshops, and monitor CRM usage compliance through regular progress reports.</li> <li>comprehensive fundraising data analysis reports on a monthly/quarterly basis, highlighting key trends, identifying successful strategies, and recommending areas for improvement to enhance fundraising effectiveness.</li> </ul>

8	Manage strategic projects that have the ability to create a step change in the effective and efficient operations of the unit and/or broader department	5	<ul style="list-style-type: none"> <li>• Identify potential strategic projects through analysis and consultation with stakeholders.</li> <li>• Develop detailed project plans outlining objectives, timelines, resource requirements, and key milestones.</li> <li>• Collaborate with cross-functional teams to ensure alignment and integration of the project with broader departmental goals.</li> <li>• Oversee the execution of the project, providing leadership, guidance, and support to project teams.</li> <li>• Continuously monitor progress, identify potential risks or barriers, and make necessary adjustments to ensure successful project delivery.</li> </ul>	<ul style="list-style-type: none"> <li>• Delivery of at least one strategic project a year that has the ability to create a step change in the effective and efficient operations of the unit and/or broader department</li> </ul>
9	Team building and support at an executive support level	5	<ul style="list-style-type: none"> <li>• Build, maintain, grow and enable cohesion across the executive support team of four</li> </ul>	<ul style="list-style-type: none"> <li>• Confidential, open, constructive and supportive conversations</li> <li>• To provide and take feedback and use for continuous improvement</li> </ul>

### MINIMUM REQUIREMENTS

Minimum qualifications	A relevant NQF7 qualification with at least 10 years of experience in the national and international fundraising market.			
Minimum experience (type and years)	<ul style="list-style-type: none"> <li>• At least 10 years of experience in the national and international fundraising market</li> <li>• Proven experience in developing philanthropy fund raising strategies and implementation</li> <li>• Significant major and principal gift fundraising experience, nationally and internationally</li> <li>• Experience of fundraising in national and international environments will be advantageous</li> <li>• Evidence of being able to lead and motivate others involved in fundraising</li> <li>• Experience in higher education fundraising</li> </ul>			
Skills	<ul style="list-style-type: none"> <li>• Excellent literary and communication skills, both oral and written</li> <li>• Proven ability to develop good working relationships with all constituencies and stakeholders</li> <li>• A proven ability to work well under pressure in a complex and demanding environment</li> <li>• Capacity to apply innovative and practical problem-solving skills to the challenges at hand</li> <li>• The ability to represent the University of Cape Town with a range of external stakeholders and constituencies</li> <li>• The ability to think strategically</li> <li>• The ability to be highly opportunistic and take initiative when the situation demands it.</li> <li>• The ability to develop, apply and manage performance linked metrics and targets</li> </ul>			
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 <a href="#">UCT Competency Framework</a> )	Competence	Level	Competence	Level
	Building partnerships	3	Resource management	3
	Analytical thinking	3	Resilience	3
	University Awareness	3	Building interpersonal relationships	3
	Individual Leadership	3	Managing conflict	3
	Planning and organizing	3	Professional knowledge and skill	3
	Strategic Leadership	3	People management	3
	Teamwork – collaboration	3		

### SCOPE OF RESPONSIBILITY

Functions responsible for	Head of Philanthropy will be accountable for deliverables of the full philanthropy team – international and national - and will lead in implementing the global philanthropy strategy, working closely with the ED and Heads of Alumni & Supporter Engagement and Operations
Amount and kind of supervision received	Expected to initiate and carry out tasks independently with input from the Executive Director
Amount and kind of supervision exercised	Manage and oversee the staff and operations of the Philanthropy department and management and rollout of strategic plan
Decisions which can be made	Decisions in line with KPAs
Decisions which must be referred	Any matters which must be escalated to the Executive Director

### CONTACTS AND RELATIONSHIPS

Internal to UCT	Vice Chancellors Office, Communications and Marketing, IAPO, Research Office, DSA, all faculties and department heads.
External to UCT	Boards of Regional and International Volunteer Leaders, donors and prospects and volunteer leaders and friends

### AGREED BY