HR191	**POSITION DESCRIPTION**	UNIVERSITY OF CAPE TOWN IYUNIVESITHI YASEKAPA · UNIVERSITEIT VAN KAAPSTAD

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	Prospect Development Manager	
Job title (HR Business Partner to provide)	Alumni and Development Specialist	
Position grade (if known)	PC10	Date last graded (if known)
Academic faculty / PASS department	Development and Alumni	
Academic department / PASS unit	Operations	
Division / section	Prospect Research	
Date of compilation	March 2024	

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

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                    Executive Director:
                          DAD
                         PC13-3
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                    Head of Operations
                          PC12
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        |                  |                    |
 Prospect Development  Systems and Data    Finance Manager
      Manager             Manager              PC11
       PC10                PC11
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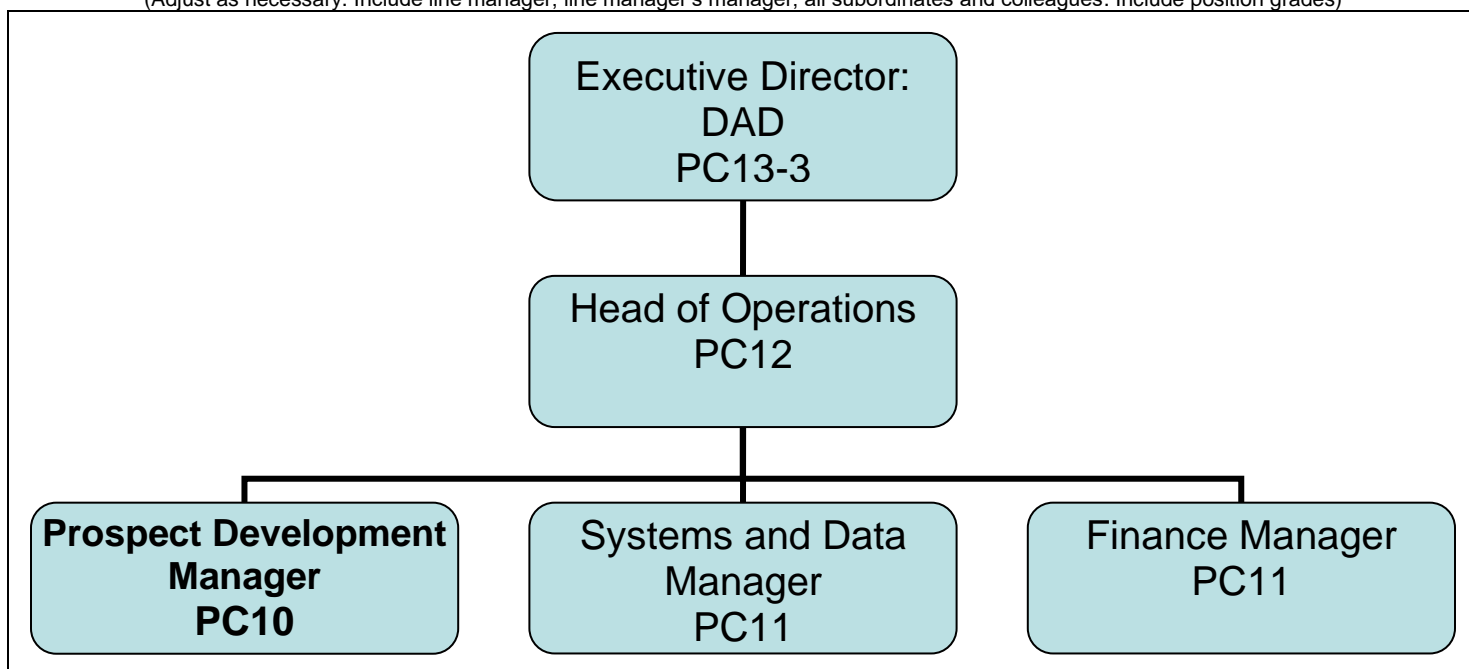
PURPOSE

The main purpose of this position is:

To provide strategic leadership in the planning and delivery a range of prospect activities, and to support the fundraisers in managing their prospect portfolios

	Key performance areas	% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
1	Develop and implement a prospect research strategic plan and associated systems and processes	5	• Create a comprehensive prospect research strategic plan outlining objectives, timelines, and key performance indicators. • Develop and maintain systems for managing all work undertaken by the prospect research team to ensure that it is of the highest quality and is produced in a timely manner according to the timeframe demands of DAD. This would include systems and processes for the commissioning of work, for prioritising workload and for tracking researcher performance. • Develop standardized processes for prospect identification, screening, and prioritization. • Implement tools and resources for efficient prospect tracking and management. • Establish protocols for regular review and update of prospect research methodologies to ensure relevance and effectiveness. • Oversee a system to create profiles outlining the philanthropic capacity and inclination of each potential donor, utilizing various research methods such as wealth screenings, social media analysis, and philanthropic databases. • Solicit feedback from fundraisers and prospect engagement outcomes to continuously refine and improve the system and for individual identification of prospects.	• A prospect research strategic plan with clear objectives, timelines, and key performance indicators that aligns and supports the Operations and overall DAD Strategy. • A transparent system in place for managing all prospect research with share repositories and tracking mechanisms. • Relevant and documented processes for prospect identification, screening, and prioritization. • Feedback from fundraisers on the information prepared. • Feedback from fundraisers in terms of new information on prospects
2	Oversee the workload and the performance of the Prospect Research Team as line manager	5	• Ensure that the Researcher has a comprehensive periodic (generally weekly) work plan in place. • Implement and monitor performance metrics and KPIs to track the productivity and quality of prospect research output. • Act as a sounding board and a mentor, and give advice to the Researcher in any aspect of their work • Provide regular feedback and coaching to the prospect researcher to support their professional development and performance improvement. • Identify and address any workload bottlenecks or resource constraints to ensure timely delivery of research projects. • Conduct regular performance evaluations and set clear goals and objectives for the prospect researcher.	• Deliverables against weekly/monthly workplans are achieved • Goals and targets set for reporting staff, with periodic monitoring, evaluation and feedback • KPIs and metrics in place to track performance against goals • Performance evaluations and development plans are in place

3	Undertake any relevant prospect research needed by the fundraising team and Alumni and Support Engagements (including senior leaders such as the Executive Director and Vice-Chancellor) according to DAD workload demands, including, where necessary, the writing of biographies and briefing notes	20	• Prioritize research requests based on fundraising team priorities and DAD workload demands. • Modelling high quality research products for the fundraisers and for the research team • Compile detailed research reports (including biographies and briefing notes) for fundraisers to effectively engage with prospects according to priorities and workload demands • Coordinate with fundraisers to gather additional insights and requirements for tailored research.	• Professional, accurate, informative and comprehensive Prospect Research delivered timeously (at least one week before an engagement with the prospect).
4	Conduct research to identify potential major donors and allocate them to fundraisers for engagement	40	• Develop criteria and methodologies for identifying potential major donors aligned with university priorities. • Conduct in-depth research on potential major donors, including wealth screening, philanthropic history, and affinity with university initiatives. • Maintain a database of qualified prospects and regularly update their profiles based on new information. • Allocate prospects to fundraisers based on DAD criteria including expertise, experience, capacity, fundraiser input and existing portfolio. • Hold regular meetings with fundraisers to share prospect information and to take feedback on solicitation efforts. • Monitor and evaluate the effectiveness of prospect allocation strategies, adjusting as necessary to optimize engagement.	• Potential major donors aligned with university priorities identified (number per annum?). • research conducted on potential major donors, including wealth screening, philanthropic history, and affinity with university initiatives delivered timeously • The database of qualified prospects is maintained ensuring that profiles are up to date an accurate. • Proposals of Prospect allocation to fundraisers - • regular meetings with fundraisers to share prospect information and to take feedback on solicitation efforts. • Occasional request for due diligence reports
5	Act as Subject Matter Expert for the prospect module of the CRM system	5	• Collaborate with the Systems and Data Manager to implement enhancements to the prospect module based on user feedback and industry best practices. • Provide ongoing support and training to fundraisers on the effective use of the prospect module. • Develop and maintain documentation and resources for the prospect module (including FAQs) • Periodic review of CRM system protocols and procedures, when required, to ensure alignment with evolving prospect management needs.	• Repository of training material and resources available on request • To ensure that the data on the system is accurate and up to date

| 6 | Ensure accurate and comprehensive prospect and donor records on the CRM system | 5 | • Work with the System and Data Team to establish data quality standards and protocols for maintaining accurate prospect and donor records.
• Conduct periodic checks of CRM data to identify and correct errors or inconsistencies.
• Implement procedures for verifying and updating prospect and donor information obtained through external sources.
• Monitor data integrity metrics and address any issues promptly to ensure the reliability of CRM data.
• Provide training and support to fundraisers on data entry best practices and CRM system usage.
• Work with the System and Data Team to adapt the CRM to incorporate all ratings and other prospect and donor assessment systems used and to ensure that the CRM includes a record of the whereabouts of all profiles and other intelligence on prospects and donors. | • Prospect records are maintained on the CRM system – are up to date, comprehensive and accurate
• Reports on data accuracy presented on a monthly basis
• The CRM system is aligned with the 'business' approach
• Training and support given to fundraisers |
| 7 | Colloborate with with the fundraising team, the Fundraising projects and priorities manager, and individual project leaders to coordinate and support solicitation strategies | 5 | • Collaborate with fundraisers to develop tailored solicitation strategies for individual prospects based on their interests and capacity.
• Provide research support to inform solicitation approaches, including donor preferences and giving history.
• Track solicitation activities and outcomes in the CRM system to assess effectiveness and inform future strategies.
• Conduct post-solicitation debriefs with fundraisers to evaluate successes, challenges, and lessons learned for continuous improvement.
• Develop relevant management reports and dashboards to track prospect engagement metrics, fundraising progress, and portfolio performance, enabling informed decision-making and strategic planning. | • Collaboration with fundraisers in developing solicitation strategies for individual prospects, with relevant research support
• Evaluation of efficacy of solicitation activities.
• Relevant management reports and dashboards in place to track prospect engagement metrics, fundraising progress, and portfolio performance |

8	Analyse data to evaluate effectiveness and identify trends.	5	• Collaborate with relevant stakeholders to determine the necessary metrics to track the performance of prospect research efforts • Collect and analyse data on prospect engagement, conversion rates, and fundraising outcomes to assess the impact of research efforts. • Generate regular reports and dashboards to communicate findings and insights to stakeholders, including fundraising leadership and development teams. • Identify patterns and trends within prospect data to inform strategic decision-making. • Collaborate with all relevant stakeholders to translate data insights into	• Analysis and presentation of data on prospect engagement, conversion rates, and fundraising outcomes to assess the impact of research efforts. • Present insights gathered from within prospect data for continuous improvement of strategies
9	Collaborate with relevant stakeholders to develop policies, systems and processes for pertinent compliance matters, including data protection and due diligence**.**	5	• To assist the Head of Operations in conducting a comprehensive review of existing compliance frameworks and policies and identify areas for improvement or enhancement. • Provide training and guidance to all relevant DAD staff on compliance requirements and best practices for prospect research. • To assist the Head of Operations in implementing systems and tools to facilitate compliance monitoring and reporting, including regular audits and assessments, in line with university due diligence and governance policies and procedures.	• Policies, systems and processes in place to ensure compliance with policies and procedures including data protection • Keeping abreast of internal data privacy laws
10	Continuously monitor and analyse advancements and emerging trends across the prospect research landscape, including new tools, sources and management methodologies, particularly within the technological domain, to inform and implement innovative strategies for prospect development	2,5	• Keep abreast of advancements in prospect research tools, techniques, and methodologies. • Collaborate with IT and data management teams in the implementation of new technologies and tools for prospect research and management when approved and appropriate. • Experiment with innovative approaches and methodologies to optimize prospect identification, profiling, and engagement processes.	• Up to date with advancements in prospect research methodologies and techniques • Implement innovative strategies for prospect development including tools, systems and management methodologies to advance • Keep abreast of philanthropic trends in accordance with different fundraising portfolios e.g. attendance of conferences

11	Team building and support at an executive support level	2,5	• Build, maintain, grow and enable cohesion across the executive support team of four	• Confidential, open, constructive and supportive conversations • To provide and take feedback and use for continuous improvement

Minimum qualifications	NQF Level 8 Relevant Qualification
Minimum experience (type and years)	• 5 years of research and development experience in multiple areas of prospect and market research in development, academic, non-profit or corporate environments. An equivalent combination of experience and education may be considered.
Skills	• High level of skill in navigating repositories of prospect data and in weighting information for strategically relevant content • Excellent written communication skills, including skill in adapting the presentation of research for different audiences • Strong presentation and project management skills, including planning and organizing • Strong capacity in decision-making, information management, and high-quality output • A problem-solving, results-oriented, and client-centred approach. • A demonstrated record of success in planning and managing work programs from inception to completion and delivered on target • Proven ability to inspire and motivate a team and foster enthusiasm and innovation
Knowledge	Advanced knowledge regarding desk research skills
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
	Team Management	3	Quality Commitment	3
	Professional knowledge and skill	3	Client/student service and support	2
	Planning and organizing / work management	2	Decision making / Judgement	3
	Information Management	3	Written communication	2
	Results Focus	2	University Awareness	2

SCOPE OF RESPONSIBILITY

Functions responsible for	• Provide strategic alignment with department for prospect research • Undertake prospect research supporting DAD's fundraising that is timely, high-quality, accurate and concise • Develop and maintain policies, procedures and systems related to prospect research and prospect management • Increase capacity within Prospect Research team and beyond in critical skills relating to prospect research
Amount and kind of supervision received	Broad
Amount and kind of supervision exercised	Weekly planning and review meetings with prospect researcher
Decisions which can be made	Deterministic, process, systems
Decisions which must be referred	

CONTACTS AND RELATIONSHIPS

Internal to UCT	UCT project leaders; DAD Fundraising team; DAD Alumni and Stakeholder Engagement team; VC's office; DAD international offices; DAD Operations team, UCT ICTS, UCT Research Office
External to UCT	Potential sources of prospect research information and expansion of knowledge base