

NOTES

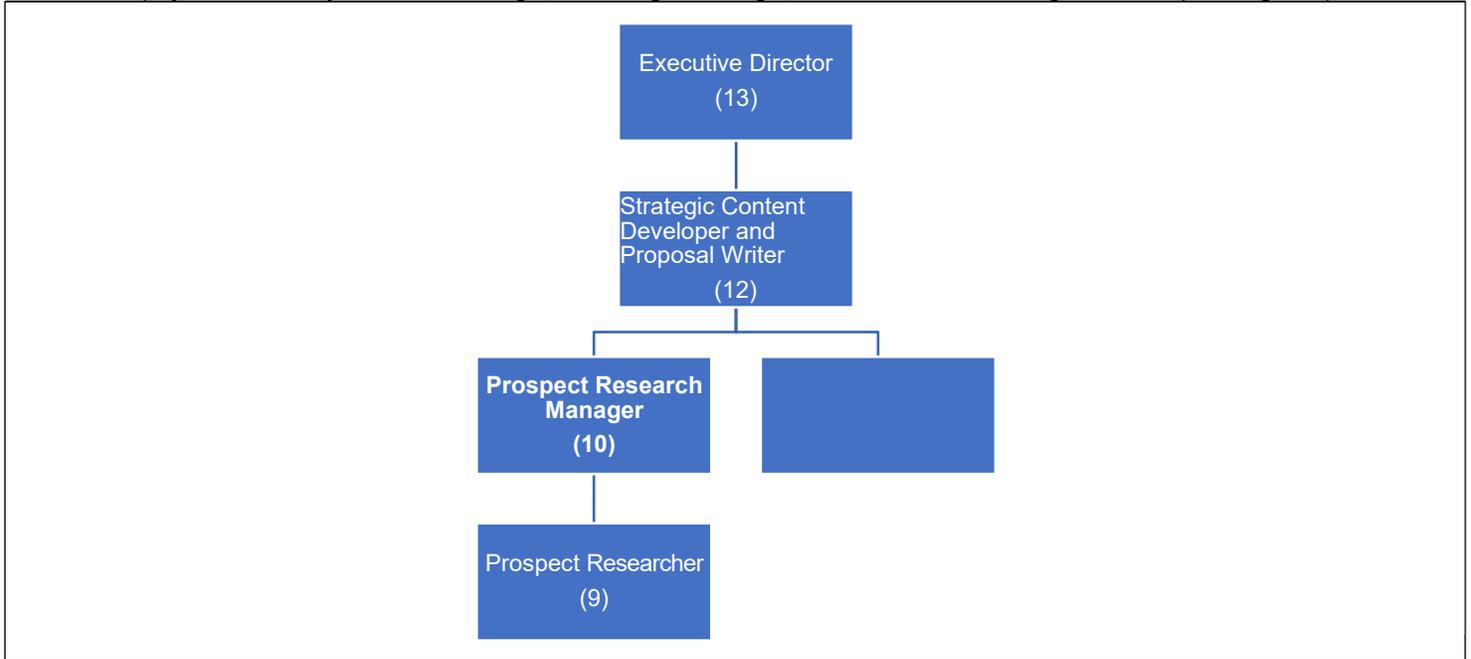
- Forms must be downloaded from the UCT website: <http://forms.uct.ac.za/forms.htm>
- This form serves as a template for the writing of position descriptions.
- A copy of this form is kept by the line manager and the position holder.

POSITION DETAILS

Position title	Prospect Research Manager		
Job title (HR Practitioner to provide)	Prospect Research Manager		
Position grade (if known)	10	Date last graded (if known)	
Academic faculty / PASS department	Development and Alumni Department (DAD)		
Academic department / PASS unit	Prospect Research		
Division / section	Fundraising		
Date of compilation	23 June 2021		

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 provide high-quality prospect research information to support executive University staff and staff involved in fundraising and relationship development; to source new prospective donors to support philanthropic fundraising; and to ensure the integrity of information input on the university's donor database.

CONTENT

Key performance areas	% of time spent	Inputs (Responsibilities / activities / processes/ methods used)	Outputs (Expected results)
<p align="center">PROSPECT RESEARCH</p>	<p align="center">65%</p>	<p>Objective: Undertake prospect research supporting Development and Alumni Department's (DAD's) fundraising that is timely, high- quality, accurate and concise</p> <ol style="list-style-type: none"> 1. Actively participate in prospect review and fundraising team meetings 2. Serve in an advisory capacity by communicating specialised knowledge on corporates, foundations/trusts and individuals to fundraising team. <p><u>On request: Profiles</u></p> <ol style="list-style-type: none"> 3. Ensure the preparation and completion of up-to-date prospect reports (including briefings, profiles and thumbnails) on prospects and current donors for the Fundraising Team, Senior Leadership Team and Trustees in advance of meetings, events and solicitations. 4. Coordinate the development of prospect lists on identified priority projects within DAD, utilizing scoring to develop lists for planned giving and direct mail. 5. Provide recommendations on the priority of prospects on lists based on research findings and analysis of those findings. 6. Track movement of prospect lists within fundraising team and ensure feedback is added to prospect records 7. Create and monitor news alerts on key prospects, donors, and UCT alumni; enter information into donor data base; forwarding these to appropriate Fundraiser. <p><u>Proactively: Prospecting</u></p> <ol style="list-style-type: none"> 8. Oversee review of publications, websites, email alerts and social media, identifying and tracking potential and existing funding sources, and recording potential for philanthropic support, giving capacity, areas of interest and affiliations. 9. Manage the development of research on a prospect pool that includes: <ol style="list-style-type: none"> a. Individuals (including high net worth individuals), trusts and foundations, and corporate sector funding sources b. Up-to-date information on existing and lapsed donors, as well as the identification of new prospects c. Both national and international locations (including UK, US, Australia, Canada and rest of Africa) d. Scoping of prospects aligning to key words relating to UCT's Vision 2030 and its thematic focus areas 	<p>Prospect research draws on a wide range of sources, including donor data base (donor data base), procured data bases and internet searches.</p> <p>Briefings, profiles and thumbnails:</p> <ul style="list-style-type: none"> • Contain valuable information for audience • Comply with legislative and privacy requirements <p>Fundraisers have an adequate cold and warm prospect pipeline for priority projects</p> <p>System in place for regular updating of prospect research outputs with feedback received from fundraisers and project leaders</p> <p>Demonstrable pool of new prospects and updated records on existing or lapsed donors</p> <p>Prospect pool produces lists that can be used for tailored searches with geographical or thematic focus, as well as type of prospect/funder</p>

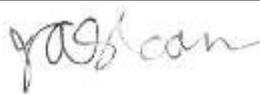
2	PROSPECT MANAGEMENT	20%	<p>Objective: Develop and maintain policies, procedures and systems related to prospect research and prospect management, including:</p> <ol style="list-style-type: none"> 1. Adhere to data protection guidelines, and ensure consistency and integrity of research reports and data entry 2. Ensure regular and accessible storage of prospect research findings on donor data base. 3. Select/maintain research resources for DAD and interact with multiple vendors for database, scoring, wealth screening, research tools, and print subscriptions. 4. Establish job requirements and goals for prospect research team members, encouraging staff involvement in this process. 5. Facilitate prospect strategy/management meetings (large group and one-on-one) by establishing agenda and providing base reports 6. Serve as prospect clearing advisor for incoming correspondence for campaigns and projects related to specified fundraising efforts. 7. Represent the department at public, private, and University functions as needed. 	<p>Clear work-flow process and systems in place</p> <p>All information is managed ethically, accurately and confidentially.</p> <p>Donor data base is consistently used to store accurate prospect reports and analysis</p> <p>Resources provide demonstrable added value</p> <p>Team is managed smoothly</p> <p>Development of additional capacity in prospect research within UCT</p>
3	PROSPECT RESEARCH STRATEGY AND REPORTING	10%	<p>Objective: Provide strategic direction and reporting on prospect research to support the work of DAD</p> <ol style="list-style-type: none"> 1. Develop, review and update prospect research strategy 2. Develop annual plan for prospect research, including resourcing requirements 3. Prepare progress and review reports on prospect research. 4. Devise strategies for the procurement of data from publicly available sources such as news, Google alerts, etc. for new profiles and updates to existing profiles 5. Identify and develop strategies to harness new and emerging trends, innovations and best practices in the field of prospect research and build these into work (including through reviewing professional publications and monitoring listservs) 6. Develop, test and refine criteria for scoring of donor profiles and prospect wealth assessment 7. Develop a monitoring system that benchmarks DAD's prospect research strategies 8. Track the outcomes of prospect research strategies and provide reporting and recommendations for future adjustment of strategies where required 9. Monitor prospect research budget, ensuring activities stay within budget each year, are in line with procurement policy and financial plans, and that agreed new developments are fully costed and built into future budgets 	<p>Existence of:</p> <ul style="list-style-type: none"> • Prospect research strategy • Prospect research annual plan • Prospect research reports <p>Annual review of data sources and innovations, and record of recommendations for DAD Prospect Research</p> <p>Scoring system for donor profiles and prospect wealth assessment criteria in place</p> <p>Outcome-based reporting evidences innovative approaches and demonstrates success of prospect research strategies.</p> <p>Projects are completed within budget.</p>

4	PROFESSIONAL DEVELOPMENT (RESEARCH AND LEADERSHIP)	5%	<p>Objective: Increase capacity within Prospect Research team and beyond in critical skills relating to prospect research</p> <ul style="list-style-type: none"> • Train prospect research team in good data practices and use of available research resources. • Train prospect research team to run designated reports/queries for fundraising meetings and also to assist with Advanced Selection criterion for extracting data on donor data base as needed. • Serve as resource/trainer for other faculties/department fundraising staff members on both data issues and project planning related to Prospect Research. • Participate in relevant conferences, webinars, exchange visits and leadership training • Maintain active awareness of important news and events related to philanthropy. 	<p>Prospect research team can run designated reports/queries for fundraising meetings and use advanced methods for extracting data on donor data base</p> <p>Exposure to best practice in prospect researching</p> <p>Up-to-date news on philanthropy</p>
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REQUIREMENTS

Qualifications	A relevant NQF7 qualification			
Experience (type and years)	Three (3) 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	<ul style="list-style-type: none"> • 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 organising • Strong capacity in decision-making, information management, and high-quality output • A problem-solving, results-oriented, and client-centred approach. 			
Knowledge	Advanced knowledge regarding desk research skills			
Professional registration or license requirements	None			
Other requirements (If the position requires the handling of cash or finances, other requirements must include 'Honesty to handle cash or finances'.)	None			
Competencies (Refer to UCT Competency Framework)	Competence	Level	Competence	Level
	Analytical thinking /Problem solving	2	Quality commitment/work standards	3
	Client/student service and support	2	Results focus	2
	Decision-making/Judgement	2	Teamwork / collaboration	2
	Information management	3	University awareness	2
	Planning and organising / work management	2	Written communication	2

AGREED BY

	PRINT NAME	SIGNATURE	CONTACT NO.	DATE
Job Holder	Position vacant as from 17 March 2021			
Line Manager	Jill Sloan		076 931 5276	24 Aug. 2021
HOD	Sidney van Heerden			25.08.2021

SCOPE OF RESPONSIBILITY

<p>Functions responsible for</p>	<ul style="list-style-type: none"> • 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 • Provide strategic direction and reporting on prospect research • Increase capacity within Prospect Research team and beyond in critical skills relating to prospect research
<p>Amount and kind of supervision received</p>	<p>Reports directly to Strategic Content Developer with weekly one-on-one meetings; attends the weekly fundraising team meetings chaired by the Head of Fundraising and the Ops meeting chaired by the DAD Executive Director</p>
<p>Amount and kind of supervision exercised</p>	<p>Weekly planning and review meetings with prospect researcher</p>

Decisions which can be made	Sources to be consulted in developing prospect research; Allocation of priorities with prospect research team; Reaching out to project leaders within university community for information; Weighting of information for inclusion/exclusion on documents addressing prospects
Decisions which must be referred	Sign-off of completed prospect research outputs before distribution to UCT stakeholders outside the DAD office

CONTACTS AND RELATIONSHIPS

Internal to UCT	UCT project leaders; DAD Fundraising team; DAD Alumni Relations team; VC's office; DAD international offices (UK, USA, Australia and Canada); DAD Systems team
External to UCT	Corporates, foundations and individuals identified for prospect research