

JOB DESCRIPTION

JOB TITLE	Bequest and Major Donor Officer
NUMBER OF INCUMBENTS DOING THIS JOB	1
APPROVED JOB GRADE	
NAME OF SUPERVISOR	Belinda Abraham

PRIMARY PURPOSE OF THE JOB

The position of Bequest and Major Donor Officer operates in the Communication and Resource Development Department and reports to the Manager of this department. A senior position within the department, the primary function of this position is to develop and nurture relationships with bequest donors, recruit new and prospective bequest donors and work with the department's manager in the identification, cultivation, solicitation and growth of trust, corporate and major donors of the Cape of Good Hope SPCA.

OUTPUT

- **Interact positively and effectively with senior representatives of grant making institutions and corporates, as well as current and prospective bequest donors.**
- **Achieve positive, regular growth and development of bequest donors**
- **Control expenditure within approved budgets**

KEY PERFORMANCE AREAS (KPA'S)

1. Financial Control
2. Estate Administration
3. Bequest Marketing
4. Trust, Foundation and Corporate Fundraising
5. Major Donor Fundraising
6. Team work and cooperation

POSITION IN THE ORGANIZATION

SUPERVISOR
(Second Level)

Moyo Ndukwana, CEO

SUPERVISOR

Belinda Abraham, Communications, Resource Dev. & Education
Joette Emerton

INCUMBENT

TOUCH
Internal

POINTS
External

<ul style="list-style-type: none"> • Department managers and staff • Departmental staff • Board of Directors 	<ul style="list-style-type: none"> • Donors and supporters • Bequest Donors • Trustees • Attorneys/Estate Administrators • Corporates • Volunteers • Patrons • NSPCA, other SPCAs
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Job Description

1. Key Performance Area: Financial Control

Key Activities	Key Result Indicators	Measurement of Performance
Proper and effective management of bequest, trust/foundation, corporate and major donor income.	<p>Accurate record keeping of income.</p> <p>Restricted income is allocated and utilised as intended by the donor.</p>	<p>Income spreadsheets and files are continuously updated and spreadsheets are submitted monthly to the Accountant.</p> <p>Income spreadsheets and income ledger are reconciled on a monthly basis.</p> <p>Income is recorded accurately on the database and income spreadsheets and income ledger match.</p> <p>Restricted income is recorded on income spreadsheets for accounting purposes.</p> <p>Control accounts are created when necessary to monitor</p>

	Assist Accountant with preparation and submission of end of year financials.	restricted income expenditure. Income spreadsheets and files are submitted in May for audit. Specific funding is listed in financial statements when required. All copies of Wills are compiled and submitted for NSPCA annual submission in July.
Management of Bequest Marketing budget.	Annual budget is compiled for Bequest Marketing activity. Bequest Marketing budget is allocated appropriately and budget is managed throughout the year.	Budget is submitted to Resource Development Manager in March for Board approval. All costs are kept within budget for the year.
Generate income to reach annual income targets.	Income targets are achieved by end of financial year.	R4,000,000.00 Bequest Income R3,300,000.00 Trust Income R300,000.00 Major Donor Income R105,217.53 Corporate Income

2. Key Performance Area: Estate Administration

Key Activities	Key Result Indicators	Measurement of Performance
Manage estate administration.	All estate correspondence from executors and attorneys is handled, filed and responded to in an efficient and professional manner. Acknowledgements are sent to executors, attorneys and next of kin.	Complete copies of Wills are obtained for each estate. Paper files are up to date and accurate. Bank statements are reviewed every Monday to identify bequest donations. Donations are acknowledged promptly each week.
Manage database records for bequest donors.	Bequest donors and estate late records are created correctly and updated accordingly.	Database records contain info on deceased (DOB/ID numbers/date of death) - if provided to us - bequest income is coded correctly and record is updated accordingly.

3. Key Performance Area: Bequest Marketing

Key Activities	Key Result Indicators	Measurement of Performance
Manage a portfolio of existing Animal Guardians and implement a supporter relationship programme to ensure highest levels of donor care and recognition is	Develop relationships with Animal Guardians through bespoke and mass communications, ensuring an appropriate level of regular communication is maintained.	Birthday cards are sent to Animal Guardians. Animal Guardians receive supporter/stewardship

demonstrated.	Encourage lifetime gifts from Animal Guardians where possible.	<p>communications regularly throughout the year.</p> <p>Positive feedback from Animal Guardians who feel looked after and valued by society.</p> <p>Relationships develop so that Animal Guardians are willing to be our Society's unofficial ambassadors.</p> <p>Events and bespoke visits/tours are held on request to cement their support and generate income through lifetime gifts.</p>
Implement a bequest prospect communication plan and identify and cultivate these donors.	<p>Encourage donors to leave gifts in their Wills and develop relationships with prospective bequest donors through bespoke and mass communications.</p> <p>Responsible for day to day contact for prospective bequest donor enquiries.</p>	<p>39 Bequest Considerers 23 Bequest Intenders 26 Animal Guardians are recruited in 2018/2019.</p> <p>Bequest considerers and Intenders receive supporter/stewardship communications regularly throughout the year.</p> <p>Existing bequest prospects move along the supporter journey i.e. from Bequest Considerer to Intender to Animal Guardian.</p> <p>Leads are followed up via email, phone, written requests, questionnaires and advertising, and information is sent in a timely manner.</p> <p>All legacy info requests are followed up after 2 months.</p>
Manage database records for bequest prospects.		Database records are created/updated with the correct bequest category and vital info (DOB/ID numbers) if provided.
Plan, organise and stage a cycle of events for stewardship and acquisition of bequest donors.	Events held to encourage donor retention and recruitment of new bequest donors all within defined budget.	<p>Successful staging of two events within or under budget: Animal Guardian Luncheon held in June and Behind the Scenes Event held in December.</p> <p>15 Considerers 5 Intenders 3 Animal Guardians are recruited at events in 2018 (these figures are included in</p>

	Securing sponsorship for events.	<p>overall figures above)</p> <p>Positive feedback received from attendees.</p> <p>Existing bequest prospects move along the supporter journey i.e. from Bequest Considerer to Intender to Animal Guardian.</p> <p>Reduced expenditure.</p>
Promotion of gifts in Wills.	<p>Legacy messaging in publications (internal/external).</p> <p>Develop and manage existing gifts in Wills content (website and booklet).</p> <p>Use National Wills Week (NWW) to engage and build awareness with donors and attorneys.</p>	<p>Bequest articles, ads or messaging are featured regularly in supporter communications.</p> <p>Online content and Gifts in Wills material is up to date and sufficient quantity of booklets in stock.</p> <p>Donors and supporters are made aware of NWW and participating Attorneys are aware of our cause for referring clients.</p>

4. Key Performance Area: Trust, Foundation and Corporate Fundraising

Key Activities	Key Result Indicators	Measurement of Performance
Cultivate relationships with Trusts/Foundation and Corporates to secure funding.	<p>Develop appropriate cases for support and apply to grant making bodies, Corporates and Trusts.</p> <p>Develop relationships with Trusts/Foundation and Corporates through bespoke and mass communications.</p> <p>Promote positive, professional image of our Society by communicating efficiently and professionally.</p>	<p>12 grant applications made in 2018.</p> <p>12 proposals (for funding or gifts in kind) made to Corporates in 2018.</p> <p>Grant applications, proposals and reports are submitted on time and meet the requirements laid out by grant making bodies.</p> <p>Trusts/Foundation and Corporates receive supporter/stewardship communications regularly throughout the year.</p> <p>Bank statements are reviewed every Monday to identify trust and corporate donations. Donations are acknowledged promptly each week.</p> <p>Tours of our facility are given as and when required and meetings attended when</p>

		requested by prospective donors.
Develop and maintain the Funding Application Plan to ensure effective and efficient record keeping of grants and reports.	A network of Trusts and Corporates is created and managed in an efficient manner.	2 potential new donors are researched each month. Funding criteria and priorities are recorded for trust and corporate prospects. Funding Application Plan is always up to date with actions taken, donations received and relevant notes.

5. Key Performance Area: Major Donor Fundraising

Key Activities	Key Result Indicators	Measurement of Performance
Cultivate relationships with Major Donors to secure funding.	<p>Cultivation plans are created for prospective major donors to develop relationships through bespoke and mass communications.</p> <p>Promote positive, professional image of our Society by communicating efficiently and professionally.</p>	<p>Major donor prospects receive regular contact supporter/stewardship communications, bespoke updates, meetings etc.</p> <p>Proposals and reports are submitted as necessary.</p> <p>Bank statements are reviewed every Monday to identify major donor donations. Donations are acknowledged promptly each week.</p> <p>Major Donor Stewardship plan is adhered to - personal acknowledgements are sent by multiple people in multiple ways.</p> <p>Tours of our facility are given as and when required and meetings with prospective donors attended as necessary.</p>
Develop and maintain the Funding Application Plan to ensure effective and efficient record keeping of proposals and reports.	A network of major donors is created and managed in an efficient manner.	<p>40 prospective major donors are identified, researched and rated on their propensity.</p> <p>Funding Application Plan is always up to date with actions taken, donations received and relevant notes.</p>

6. Key Performance Area: Teamwork and Cooperation

Key Activities	Key Result Indicators	Measurement of Performance
Promote positive professional image of department by creating and maintaining	Strive to maintain agreeable personal relationships with staff by setting a positive	Cooperative working environment where staff respect and value each other

harmonious relationship with staff for greater cooperation.	example of teamwork. Ensure that all departments are informed when high value donors are on site.	and are supportive and work as a team. All departments are well-presented and staff are prepared for visitors.
Support other staff in the execution of departmental activities towards the goal of achieving greater efficiency and professionalism.		Assist at SPCA public events. Perform managerial duties when Resource Development Manager is absent.

QUALIFICATIONS / EXPERIENCE

1. Excellent interpersonal skills with an ability to communicate and develop relationships people on all levels - senior representatives of grant making institutions, corporates and bequest donors.
2. Strong verbal communication skills - ability to prepare and give presentations to prospective bequest donors.
3. Very good writing skills (strong command of English) with experience in grant writing for non-profit organisations an added advantage.
4. Good administrative skills with natural attention to detail.
5. An understanding of how the grant making process works and how to effectively prepare and structure grant proposals, will be an added advantage.
6. Good organisation skills with an ability to plan bequest events and delegate functions to other team members.
7. Self-starter - ability to work independently and be accountable.
8. Good track record as an effective team player within a non-profit environment.
9. Ability to converse in Afrikaans (fluency an added advantage).
10. Driver license a requirement.

PERSON SPECIFICATION / PROFILE:

- Deep compassion for animals and their welfare essential
- Excellent interpersonal skills
- Self-starter - ability to work independently and be accountable
- Strong understanding of how non-profit organisations function and an ability to operate harmoniously within this structure.
- Strong awareness of the need to respect that we are a beneficiary of public funding.

Job content agreed by incumbents: Date:

Approved by Departmental Head : Date: