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Introduction

The review process has given us an opportunity to question and test our understanding of the role we may be expected to play into the future as well as to reflect on the progress that we have made over the years towards becoming more functional and effective in all that we do. In contemplating this we were very mindful of a divide that historically has existed between ‘administration’ and academia’. In our case we feel that this has been maintained largely through misunderstanding of expected roles but even more importantly through sometimes unrealistic perceptions and demands which have been made on us. So our own hope for the review process is that it will provide us with affirmation firstly, as to what the University expects us to do and secondly, what we should not be doing.

In preparing for the review, each of the section managers was asked to conduct their own self-evaluation within their section using criteria which were agreed to by the Division as a whole. This ensured that each member of the Division was given the opportunity to actively participate in the review process. Meetings within each section were held regularly and Section Managers met as a group on a weekly basis to discuss progress and to ensure that potentially conflicting outcomes were erased at an early stage. To further ensure consistency, one staff member was chosen to work with the Director in order to manage the process, and to prepare and present the final self evaluation report as a collaborative effort. This report is essentially a summary of the Sections own findings. However the extensive amount of detail which made up their reports has not been lost and each Section has reported that they have found the process to a valuable one and that the outcomes (assuming the University agrees with our recommendations) will form the basis of their future operational endeavours.

The role and purpose of the Division - how our activities support the Institutional Vision and Mission

The purpose of the Division is to support institutional needs and priorities through its relationship building activities with donors, alumni, students, staff, the press and the community in general. It does this through fundraising and stewardship, by using available opportunities to favourably position the achievements of the institution and its people in appropriate media and by doing all possible to enhance and protect the good name and image of the University. Put another way, the fundamental premise on which the Division’s activities are based is that by identifying, developing and nurturing relationships with key and appropriate stakeholders we reveal opportunities to advance the mission of the University.

The Divisions is organised into four focussed sections:

- Alumni Relations and Events
- Communications
- The Graphics Services Unit
- Development

The specific role of each section is as follows:
Alumni Relations and Events: The core responsibility of this section is twofold. Firstly, it is to develop and nurture relationships with the Alumni body. This relationship can then be leveraged for marketing, fundraising or for any other purposes that may be seen to be in the best interests of the University. Secondly their events management responsibilities are largely geared to ensuring that participants are providing with an enjoyable and memorable experience which in turn will reflect well on the University.

Communications: The purpose of this section is to build the profile of the University in key markets and to facilitate communications within the institution as well as between the institution and its external stakeholders. By providing an excellent service to external and internal customers it will enable Rhodes to attract high calibre staff and students in order to fulfil its teaching, research and community outreach goals as well as present an attractive funding destination.

The Graphics Services Unit: Provides a graphic and visual design and printing service to those who promote the institution. They do this by producing a wide range of material for use as promotional and teaching aids, at conferences and as a means of advertising. In effect the work of the Unit helps promote the work of the institution and its staff in a favourable and professional manner.

Development: The purpose of the Development Section is to fundraise for university priorities, enable faculty fundraising, to administer donations and to steward donors. This is done by identifying, building and thereafter managing the relationships with existing and potential donors.

Relationships Managed by the Division

In terms of specific activities of the Division which support the view that our purpose is to identify, nurture and manage relationships, we offer the following as examples:

Alumni Relations: We develop, maintain and nurture these relationships ultimately because we believe it will be of benefit to the University either through donations or through influence.

Donor Relations: In fundraising there are two so called ‘golden rules’: a) Donors give to people not causes and b) your current donors are most likely to be your next donors. So we develop relations (often personal relations) with our key donors, and in so doing building up a sense of trust and awareness by positioning the University’s needs in an appropriate manner. By looking after existing donors through our stewardship activities we are encouraging repeat contributions.

Media relations: In the absence of significant budgets we have to rely on goodwill together with established relationships with the media to obtain comprehensive and positive exposure of our brand promise and the achievements of the institution its staff its students and its alumni.
**Academic Relations:** Through ongoing contact and consultation our support services provide the academic community with communications and marketing, fundraising, and event opportunities which help support their own goals and ambitions.

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**Recommendations from 2002 Review**

In order to provide a logical starting point for our review we give a brief outline of progress made towards meeting recommendations made by the 2002 Review committee. *Note: at that stage the Divisions were separate entities.*

- **Communications Division**
  - a. Recommendations (i) (ii) and (iii) relate to Web related issues and are covered in the discussion on key outcomes in 2004 to date on page 5 below.
  - b. Recommendation (iv) relates to Graphic work and the confused responsibilities between GSU and the Division. This is covered in the introduction to the GSU review on page 20.
  - c. Recommendations (v) relates to a competitor analysis. We return to this matter in the Communications section on pages 16 to 18.
  - d. Recommendation (vi) relates to the request for an additional administrative post. With the re-merging of the two Divisions this aspect was resolved.

- **Development Division**
  - a. Recommendation (i) relates to staffing issues. We cover this in the section under staff matters on page 30.
  - b. Recommendation (ii) relates to the need for closer cooperation between Divisions. With the re-merging of the two Divisions in 2004, this matter was resolved.
  - c. Recommendation (iii) is largely an expression of encouragement to the Division in its attempts to meet its stated goals. We are hopeful that this review committee will offer the same support!

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**Moving forward from 2002**

At the beginning of 2004 the two Divisions remerged and so it makes sense to look briefly at the Division(s) prior to this merge and then in the period subsequent to this.

- **2002 to 2003**
  This period was characterised by an almost complete focus by both Divisions on the Centenary campaign as they worked alongside fundraising consultants, DVA *Navion* in ensuring a successful completion of the Centenary Campaign. Without detracting from any of the myriad issues which were dealt with during this period, two significant events have to a great extent defined where we are today and therefore deserve special mention:

  - **The Centenary Campaign:**
    As has often been stated, this campaign was arguably the most successful University fundraising campaign ever undertaken by any South Africa or African University. Not only did it exceed its goal of R100 million by
raising over R152 million, it also introduced many new and innovative programmes to the fundraising armoury of the University, many of which are still being used today, for example Telemail fundraising, and the Give 5 Campaign. Additionally it alerted the University to the benefits of coordinated fundraising aligned to supporting strategic institutional priorities. It is important for the record to state clearly that the Division is not naïve enough to believe that the success of the Campaign was entirely due to its efforts. However in the post-campaign period we do believe that we have done much to capitalise on this experience which ultimately has been to the benefit of the institution as a whole. For example, one of the major lessons which we learnt was that uncoordinated fundraising which is not directly linked to University priorities may antagonise major donors and will result in vital projects going unfunded. Furthermore it can result in the University having to absorb unanticipated costs from under-funded projects. Developing appropriate systems in the time since the Campaign has been a large part of the Divisions work.

- Funding for Development Capacity Building
  As far as the Division is concerned one of the most significant donations received out of the campaign was a R3.8 million contribution made by The Atlantic Philanthropies which enabled the Development Division to gear-up to meet the demands of the Campaign. It would not be a stretch of the imagination to contend that without this, the Campaign would not have been as successful. It provided funding for additional staff, extended the period of consultancy of DVA Navion as well as provided additional operational budget which enabled us to increase significantly our fundraising capacity. The benefits of this funding continue to this day. Importantly, it also provided start-up funding (R400 000) for a University business development unit which was intended to help the University find and exploit possible income generation opportunities. The Unit (now known as the Centre for Entrepreneurship) continues to this day.

b) 2004 to date – some of the key outcomes

The decision to re-merge the two Divisions after a relatively short period of separation (2 years) came as a result of the view that this would realise underlying synergies. With organisational shifts of this nature there are always hurdles to cross and bridges to build and it took many months of tough and sensitive negotiation before we finally arrived at something approaching our current structure (annexure 5 attached). It should also be borne in mind that this process took place during the Centenary year during which time the Division was almost fully occupied in organising and managing many of the celebratory events.

Some of the key outcomes from the merger process include:

- The establishment of a presence in Johannesburg
  The remerge of the Divisions gave us the opportunity to position Kerry Swift in Johannesburg with one of his specific tasks being to build relationships with key stakeholders as well as to assist in our fundraising drive in this part of the country. This proved to be an inspired decision as
our contact with and resultant relationships with our Governors and key donors in particular have gone from strength to strength in this time. It is a concern that this presence will now be lost with Kerry’s resignation but with some re-alignment of responsibilities we aim to minimise this impact and capitalise on the potential already created.

- The Web Unit
  Prior to the unexpected ‘de-staffing’ of the Web Unit, work had begun on trying to improve our abilities to manage the Web channel more effectively (a recommendation from the 2002 Review Committee). This was done in cooperation with the IT Division who shared the concern that as an institution we were not using the power of the Web effectively. The outcome of the many workshops and discussions groups which took place was the move of the Web Unit to IT and in so doing removing the historical confusion as to whether it should have an IT focus or a communications focus. Whilst there is still a strong connection between the two Divisions, we are now able to focus (or at least will be once we are properly staffed) on specific communications related aspects of the Web. This will include Corporate Identity (look and feel) and primary content management of the home page and our own Divisional pages as well as those of groups such as our alumni associations. Once the ‘new’ Web Unit is fully staffed the University will be far better placed to capitalise on this important and cost effective communications tool and in effect the recommendations contained in the 2002 review will have been exceeded.

- There were significant changes made to the staffing of the merged Divisions including:
  - The appointment of Alumni Manager giving us far greater capabilities and focus in this area of great importance.
  - External Communications Manager vacancy
    Shortly after the remerge, the incumbent resigned. An unsuccessful attempt was made to replace her and it was eventually decided that with the skills available to us at that time in the form of Kerry Swift and Natasha Joseph, and, on trial basis we would leave the position vacant. Whilst we have had some successes within our communications channels such as the publication of the ‘special edition’ Rhodos magazines and the cooperative relationships we now enjoy with student groups such as the SRC, RMR and Activate, we have made very few inroads into exposing the University in a positive manner to key constituencies. In retrospect this is largely due to the focus we have had on Alumni Relations and Development activities. With Natasha having left and Kerry about to, we in effect will (until they are replaced) have no specialised or dedicated communications personnel within our establishment.
  - Re-structuring of Development
    A significant amount of work has been done in this area to align the work of Development with the University’s strategic imperatives. Key to this has been the introduction of our Advancement model (a copy of the model and its supporting documentation is attached as Annexure 3). The intention behind this initiative was firstly, to ensure that our fundraising team

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focusses on finding support for strategic University priorities and secondly to ensure that all proposed projects are critically tested by appropriate decision makers within the University. In effect these decisions inform the task of Development.

- Events to Alumni
  We merged the Events section with Alumni Relations as this seemed the best fit within the new Division.

- Contract staff – as mentioned above, the contribution made by The Atlantic Philanthropies assisted us to increase significantly our Development capability and, ultimately enabled us to help the University succeed in its Centenary Campaign ambitions. A substantial part of the donation was for staffing resources and a specific condition of the donation was that the University – having seen the benefits of greater staff resources – would then take over the costs of the additional staff at the end of the Centenary period. Unfortunately (and despite our many pleas in this regard) this commitment has yet to be realised and we currently sit with two contract staff members occupying important positions three years beyond the agreed term. (The case has again been put to the Administrative Staffing Committee)

- The Graphics Services Unit joined up with the Communications Division in 2002. When the Divisions were merged and we were looking at structures we quickly identified that the use of the so-called ‘Little John’ camera was sporadic at best. However the designers within the unit were not able to keep up with their workload. This resulted in the outsourcing of the Little John facility with the consequent retirement of the operator, John Keulder and the alteration of a half day designer post to a full-time one which led to the employment of Ms. Smit.

- The Move to Alumni House
  This was significant in that for the first time in the recent history of the Division – merged or otherwise, three of the four functional streams making up the Division were housed under one roof. Whilst on the surface this may not seem important it soon became clear to us how much more functional we could be as a team – particularly when one considers that much of our work is of a creative nature which relies on a high degree of interaction across the streams to be effective. This has also assisted us in developing greater awareness as to our activities as many committees, including Senior Management and the Deans/Admin group, now regularly use the facilities within the building.

- Restructuring of the Board of Governors (Document attached as Annexure 4)

  Development practice world-wide emphasises the important role which key volunteers can play in institutional fundraising programmes. In terms of the original mandate of the Board, they are appointed to oversee the Foundation monies as well as to help the University fund its strategic needs. Judging by the growth in the endowment there can be no doubt that the Investment Committee has done a wonderful job. However, it was clear that the second aspect of their mandate needed some attention. With the assistance of Governors Conrad Strauss and Trevor Evans together
with visiting Development professional, Bob Cashion, we were able to restructure their role by introducing two further sub committees;

a) The Rhodes Development Committee (RDC) whose primary purpose is to assist the Vice Chancellor in funding institutional priorities and is currently chaired by Mr Andre Jensen.

b) The Nominations and Governance Committee, who review attendance, suggest new governors etc. This ensures that there is ‘new blood’ entering the Board on a regular basis and that all Governors are clear on their responsibilities. This sub-committee is currently chaired by Mr Anthony Evans

- The UK and USA Trustees
  Similarly, we identified these two Boards as important volunteer groups and we now engage regularly with the respective chairs in an effort to ensure that we are working synergistically across all groups. The chair of the UK Trustees, Derek Jacobs, is ex officio a member of the Board of Governors. Mr Jacobs was instrumental in building the relationship with Mick Davis (OR) who heads up mining giant, Xstrata which eventually led to a R3.5 million donation to the Geology department. Donovan Neale-May, Chair of the USA Trust has led by example in making two significant donations to the University, the first a $100 000 contribution to start up the Rhodes Sports Foundation (RSF) and the second an annual contribution of R15 000 for the Nealen Locke coaching award.

On reflection the last three years can be characterised as follows:

2004 Centenary Events and re-structuring
2005 Design and implementation of systems and processes
2006 The Library Campaign, testing systems and processes, and relationship building

Whilst admittedly there have been enormous frustrations, particularly as far as the Library Project is concerned, we do believe that this period has been critical in setting up structures and processes which will in turn determine future fundraising success.
The review from the perspective of the Sections

Alumni Relations and Events

Background

In 2002 Alumni Relations was not an independent section of the Development Division but was positioned between the Individual Donor Manager and the Database Administrator and Database Assistant. There was very little communication with Alumni. The Events section was an independent part of the Communications Division which split from Development to stand alone and report to the Communications Director. During 2004 the two Divisions were remerged and after extensive internal consultation, a great deal of research and negotiation it was decided to establish the Alumni Relations and Events Section under the control of an experienced manager. This enabled us to focus intently on the relationship of the University with its Alumni body in the hope that this would eventually lead to their financial support – a trend apparent in institutions worldwide. Some of the activities which the section has focussed on post establishment include:

Database

The alumni section of the database has been redesigned and upgraded twice since 2002, leaving us with a functioning and useable system. There have been some great successes in refining the database as well as tracking or tracing our ‘lost’ alumni. Annexure 1 (attached) gives a clear indication of these successes which in effect mean we are now communicating and in contact with more alumni that at any time beforehand. Tracing the ‘losts’ is done in a number of ways including through the use of more regular communications, list brokers, regular reunions and the ‘find a friend program’. In effect the more alumni with whom we are able to communicate and develop relationships, the greater the chances for significant fundraising from this group.

Communications and Alumni Engagement

One of the major criticisms raised by Alumni during the two Centenary Telemail campaigns was that it was the first communication that many had received since graduating. Introducing an annual edition of Rhodos as an alumni newsletter has greatly helped us to re-establish contact with alumni and changed the impression that “we only contact them to ask for money”. In addition to this we introduced an electronic alumni news letter in May 2003 originally sent to over 6700 alumni. This useful medium now enables us to maintain regular contact with over 10,000 alumni worldwide. Other engagement activities which have been successful include the Find-a-friend and birthday cards programmes both of which show pleasing growth in their usage. (See Annexure 1)

The Web

Since 2002 the alumni web pages have been redesigned and upgraded twice by a staff member within the Division in an attempt to make the page more relevant. However, the current web page is far from ideal and we feel needs expert attention if it is to
serve as an effective communications and engagement tool. It is imperative that we move towards an interactive web presence with alumni able to start electronic chat groups and update their own news online. This upgrade will rely on the existence of professional help from a viable Web Unit as well as the dedicated attention of individuals within the Division. This resource is contemplated within the ‘new’ communications section.

Reunions

Reunions are an important way in which to encourage continued contact with the institution. They give alumni the opportunity to interact with old friends and to meet staff from the University. Over the years it has become customary for the Vice-Chancellor to attend these functions which enables him to personally interact with members of the alumni body.

In 2003 an Alumni Affairs Officer was appointed with the sole responsibility of organising reunions nationally and internationally.

Over the last two years we have encouraged staff travelling nationally and internationally to inform us prior to leaving in order to give us an opportunity for alumni to engage with senior staff. In addition we are exploring opportunities to put alumni in touch with fellow alumni through friendship and support programmes. The contention being that the more contact and communication we are able to encourage the more successful the prospects for support for the institution will be.

Bequests

The Rhodes University Bequest Association is now managed by the Senior Alumni Relations Officer with support from regional chair people located in Port Elizabeth, Grahamstown, Cape Town and Johannesburg. Bequests over the last few years have been the most successful form of fundraising internationally and whilst it may take many more years for us to see the returns on the investments made in this programme, we do believe that like many other institutions and not-for-profits, this will become a reliable and sustainable form of income for the University in time to come.

Our programme targets all Old Rhodians over the age of 65 encouraging them to leave bequests to the University. This message is reinforced through regular functions and correspondence with confirmed bequestors. Key to the success of the programme is the development of close personal relationships between the bequest officer and the individual bequestor. As can be seen from the Annexure 1 attached, the growth in numbers has been on a steady incline since inception of the programme in 2002.

Old Rhodian Union (ORU)

The ORU was established as a means of creating an ongoing linkage between the alumni and the University. Over the years it has enjoyed mixed fortunes. Divisional support for the ORU almost disappeared with the departure of Kay Wentworth in 2002. During this time the 150 Club lottery also ended and as a result the relationship with the ORU stagnated.
However with the appointment of the Senior Alumni Relations Officer in 2004, this relationship has been rejuvenated and this individual has taken on the responsibility for all administrative support to the ORU which includes:

- Administrative management of the “Lucky Pot” Lotto which is run by the Old Rhodian Fundraising Society. In 2006 this programme raised R25000 towards ORU bursaries.
- Secretarial support.
- Liaison between Communications and Development and the ORU to ensure coordination of activities.
- Assistance with the organisation of ORU functions including the Bursary Award Evening, AGM over Founders’ weekend and serving on the Founders’ Ball Committee.

From the perspective of the Division we felt that the ORU had an important role to play in the engagement of our Alumni body which is why we have spent a great deal of time rebuilding this relationship and are happy that this now presents us with opportunities to leverage this in support of University projects and priorities.

The Old Rhodian Awards

Coinciding with the 2004 Centenary celebrations and as acknowledgment of the importance of our alumni, we motivated to Senate for the introduction of a special Award to be given to Old Rhodians who, “through their individual actions and achievements, have enhanced the reputation of the University.” This Award is specifically intended to acknowledge Old Rhodians as role models in the communities in which they live and work.

Since its introduction 9 awards have been made and the number of nominations has shown a steady increase to the 14 submitted to this year’s review committee. The standard of the nominees is now so high that additional criteria may have to be introduced to assist the committee in their deliberations. The award ceremony now forms an important part of the University’s Founder weekend.

Give5

The Give 5 Campaign originated in 2004 to tie in with the University’s Centenary. The aim was to instil a sense of philanthropy within our students which could then be leveraged for fundraising purposes in the years to come. Since then, Give 5 has entrenched itself on the student calendar and every year there is great competition for committee places. With increasing participation by the students the programme is now highly successful and contributes significantly to the Division in terms of connectivity with the students.

Give 5 – history and projections

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<th>2012 Projected</th>
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<tr>
<td>total participation</td>
<td>12%</td>
<td>32%</td>
<td>45%</td>
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<tr>
<td>total amount raised</td>
<td>R 11,885.90</td>
<td>R 20,119.46</td>
<td>R 30,000.00</td>
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Memorabilia

Memorabilia or corporate merchandise has for the last few years been attended to by an independently owned business, Campus Concepts. This relationship has not been entirely satisfactory and we are determined to improve the range and the reach of this important brand opportunity. Issues such as the lack of an online presence; poor memorabilia marketing (like business cards and brochures); a poor and unreliable service; the University's lack of brand protection and control; and the lack of an on-campus presence still persist and need to be conclusively addressed. The responsibility for this task will be taken on by the Publicity Coordinator.

Events

Through its activities the Events section showcases the University to, what in many cases, is an international and/or influential community. This includes Honorary Graduates, parents, donors, government ministers, ambassadors, influential academics and business leaders. By providing an exceptional and pleasant experience, the University is presented as professional and welcoming. The range of activities catered for by this section include, dinners at the Vice Chancellors Lodge, visits to campus by dignitaries, assisting with arrangements at the annual graduation ceremonies (especially with regard to travel and hosting of Honorary Graduates). In addition to its externally focussed activities, the section is also responsible for arranging internal functions such as the New Staff parties, long service award ceremonies, inaugural lectures and the Vice Chancellor’s forums which contribute greatly to a feeling of collegiality amongst the staff. Ensuring that events are organised properly enables participants to enjoy the functions and helps build positive relationships within our community.

Alumni Relations and Events Office

SWOT Analysis

Strengths

• Skilled and experienced team with clear focus on their roles
• Well established Events office providing consistently superior service
• Multi-faceted Alumni Engagement programmes focussed on an ever improving relationship between University and its graduates.
• Re-established relationship with ORU which can be leveraged to benefit the University
• Well established and growing Bequest Association.

Weaknesses

• Provision of an acceptable corporate memorabilia service remains a problem
• Budget restrictions lead to only selective printed communications with Alumni body (E.g. we currently only mail to the over 35 age groups)

Opportunities

• Better use of new media channels would lead to more effective interactions with alumni body.
• Attention focused on corporate memorabilia would enable better brand penetration as well as potential income generating possibilities.
• Move to an in-house database geared to our needs will enable greater and more selective interactions with alumni and will aid fundraising efforts in time to come
• Use of the Give 5 model to assist in the development of an alumni giving programme
• Continued development of the reunion programme throughout the world as a means to embrace more of the Old Rhodian community

Threats
• Lack of effective web presence, which may result in losing alumni to Facebook and other similar new media channels
• Retirement of Alumni Manager in 2 years

The next 5 years

The following is a brief outline of some of the goals we have for the section:

Alumni Relations

• An increasing number of self funded get-togethers in every corner of the world where Old Rhodians are found, together with well organised, well attended Official Reunions, with diverse attendance, in all major local centres.
• The establishment of a viable web presence which will include an interactive “platform” for Alumni to engage with the institution is absolutely imperative and will assist in tracing ‘lost’ Old Rhodians as well as profiling the activities of our Alumni and the institution as a whole.
• Increased contact with Old Rhodians through sponsored printed publications such as Rhodos.
• Continued development of the relationship with the ORU leading to the potential of using this body for peer-to-peer fundraising
• Continued growth of the Give 5 Campaign with a change in its focus from support for CSD projects to support for institutional priorities (e.g. Student Financial Aid)
• Establishment of professional corporate merchandise service
• We are in the process of forming an Alumni Affairs Forum comprised of various stakeholders all of whom interact with the Alumni in some way or other, e.g. the Old Rhodian Union, Old Rhodian Fundraising Society, Sports Trust, Give 5 Campaign Committee, Old Rhodian Golf Club, Communications and Development, the UK & USA Trusts, the SRC and the Journalism Alumni Officer. This Forum will be established to co-ordinate all Alumni fund-raising activities and to ensure that possible conflicts are eliminated

Events will continue to provide an excellent and efficient service to the Vice-Chancellor and the University community. In addition opportunities exist to utilise these resources to encourage sponsored events on campus. This will help promote the
University and its brand as well as provide entertainment opportunities for our students and create linkages with potential advertisers, donors and business in general.
Communications

Introduction

At the time of the remerge, the Communications Division included the Graphics Services Unit and the Web Unit, both of which reported directly to the Communications Director. With the re-merge it was decided to flatten the reporting structures within the new Division which resulted in the managers of all three sections reporting independently to the new Divisional Director. The intention of this was to enable the Communications Director/Manager to concentrate primarily on issues such as media relations, institutional imaging and strategic communications.

Background

Looking back on the years since the re-merge we believe we have enjoyed mixed fortunes but that our efforts have been driven more by the capabilities of the available staff rather than any particular structure or strategy. Whilst there have been great successes in both the presentation of material as well as increased efficiencies in various areas we have yet to make significant inroads as far as our primary aspirations or purpose is concerned.

Some of the key outcomes in this time include:

- Integrating the work of the Communications Division with that of Development has been successful in that we managed to produce 3 special editions of the Alumni publication *Rhodos* which has been received with much acclaim by recipients. In general terms alumni can no longer complain that their institution is not communicating with them which in turn establishes a good foundation for fundraising in the years to come.

- The use of student reporters and photographers to help produce the staff editions of Rhodos is another area of success as it has enabled us to broaden the scope of our reporting whilst giving students an opportunity to participate in a ‘live’ publication. An added benefit has been to expose the brand ‘Rhodos’ to some of our future alumni.

- In our efforts to embrace the student community we established the weekly broadsheet, *This week @ Rhodes*. This was done in response to a perception that the University was not communicating issues of institutional importance on a regular basis to its student body. Content-light and resource heavy, the idea was a good one but delivery of a consistently interesting publication proved impossible. Additionally we felt after reviewing the paper that the medium (print) may not be the best one for this section of our community and that new media channels may be more appropriate – this is contemplated in our suggested structure.

- As mentioned above, the talents of individuals such as Natasha Joseph often drove our work focus. As a young, newly graduated Old Rhodian, she was well placed to develop strong ties with student based media such as *Activate*.
and later, *Oppie News*. With some advertising and content support from the Division the relationship with these channels is a very good and one which we feel should be nurtured and developed as part of the core responsibilities of her replacement.

- Corporate Identity (CI) and branding remain contentious issues in the University with little consistency and an almost complete lack of understanding as to the need to protect and enhance our brand. Attending to this MUST be a key focus of the Division going forward and will involve education as to why it is important and then enforcement for those who persist in ‘doing their own thing”. Efforts where made to update CI but this met with mixed reactions and as a result we are carrying two official visual branding images at present. This important issue will require review as part of some sort of ‘brand discovery’ exercise which we feel the University should undertake.

- Steps were taken to support departments and individuals with specific messages which they needed to convey. For example, it was determined that the CPU had image problems as a result of a spate of rapes. This led to a consultation which resulted in the establishment and subsequent publicity of the BLUE ROUTE through brochures, e-mail distribution and a web site, Communications with students was also enhanced by the introduction of ‘Info-zone’ – the official student e-mail distribution list.

- As far as external communications is concerned, as has been the case in the past, Rhodes does not feature prominently in the press which supports the view that we fly ‘beneath the radar.’ Whilst the bulk of this can be attributed to our remote geographical location, budget restrictions and the lack of clear marketing objectives need to be addressed if we are to be seen as an institution with an enviable (and competitive) national and international profile.

**SWOT ANALYSIS OF COMMUNICATIONS**

**Strengths**
- Better focused Internal Communications
- Brand Rhodes, despite the odds, appears to remain strong

**Weaknesses**
- Vacant posts – loss of communications expertise
- No specialised externally focussed communications/marketing person
- Budget not suited to task
- Poor web presence

**Opportunities**
- Using the Journalism department as a resource
- Outsourcing for specific campaigns or tasks
- Exploit the use of new media as a cost-effective medial channel

**Threats**
Brand building/awareness almost completely absent
Institutional apathy
Desired image of Rhodes not yet clearly defined
Robust competition for staff and students
Limited marketing

The review and marketing

One of the major benefits stemming from this review has been that it has compelled us to question seriously the role that we can play as far as marketing, communications, brand building, advertising and public relations is concerned. To a greater or lesser extent the institutional responsibility for these disciplines currently appears to reside within this Division. However we believe that for a number of reasons we are largely ineffectual in this regard. Budgetary constraints and our unfocussed structures have not been conducive to meaningful progress in many of these areas. What follows is an attempt to support these contentions together with a recommendation as to how to address what we believe is a growing and very real threat to our organisation.

It is our view that perhaps the only marketing which currently takes place which can be classified as formal or programmed is performed by our student recruiters. Certainly with the monetary and manpower resources available to the Division added to that oft expressed view “Rhodes does not need to market itself,” no structured, targeted or measured marketing has or is taking place. However, there appears to be a perception that this Division is responsible for all other marketing as there are elements of our responsibilities which appear to nestle more comfortably here than within any other structure. For example:

- **We administer** the Academic Marketing Budget. However, each department is free to choose exactly how they wish to market and what they wish to market. Therefore these choices are not made as part of a consolidated marketing plan and are often skewed to individual need not institutional or departmental imperative. The impact of this spend is often localised and in many cases of little benefit to the institution as a whole. It has been our contention for a number of years that the marketing spend (such as it is) should be directly linked to institutional branding, recruitment and PR objectives. However on an amount of R600 000 per annum we are in no position to make any discernable market impact – certainly not at an institutional level. Due to these concerns it was decided that for the first time this year we would split this budget into an allocated one on the one hand and a discretionary amount on the other. The former would be distributed to departments as before with the latter being retained and spent in areas which management we felt would support institutional priorities in some meaningful manner.

**Recommendation:** We propose that, under the wing of the new Communications Manager that this entire budget be retained and that a system of allocation be introduced which ensures a wise ‘spend’ of available monies.

- **We manage** the institutions corporate identity. However, this is merely a visual policing exercise and is NOT about branding or brand positioning. We
attempted to address these concerns in 2004 by inviting a leading brand consultant (Interbrand Sampson) to present some ideas on the need for brand positioning and consistent and constant attention to brand awareness in general. However senior management at that time dismissed this identified need out of hand and as a result we have a brand that has not been formally tested in the market since 1996 – much has changed since then! It is our contention that it impossible to have a comprehensive and achievable institutional strategic plan without having an understanding of the perceptions of your stakeholders. For example: if our donors believe we are irrelevant and too remote to be a useful educator, how does this affect our chances of future support from these quarters? In the previous review a plea was again made for market research and it was suggested that we do this ‘in-house.’ With respect, and apart from the obvious lack of internal resources and applicable skills, we feel that this exercise is of such importance that the University should be prepared to invest as a means of establishing our current competitiveness as well as identifying changes that need to be introduced in order to maintain this into the future.

**Recommendation:** We suggest that the Division be authorised to employ a professional market research organisation tasked to test stakeholder perceptions of the institution and to make recommendations as to how to modify these perceptions to the advantage of the University. In addition this would be an ideal opportunity to review the relevance and suitability of the University’s corporate identity offering.

- **We arrange** externally focussed events on campus. However, these are mostly reactive in nature and not conducted in support of a marketing programme or strategy. With the addition of sponsorship to our responsibilities there is scope to use events or functions to assist with presentation of the University – provided suitable resources and structure are made available. We are presently re-aligning the work of the Section to accommodate this opportunity.

- **We design and place** corporate advertisements. Again this is done largely on request and whilst we do try and test each placement as to whether it appropriately addresses its target market it is ad hoc and reactive. In addition budget restrictions prevent any form of market saturation -2007 budget: R190 000; a half page advertisement in a national magazine cost upwards of R35 000.

**Recommendation:** We are of the opinion that whilst it is critical that the University is more visible we do not believe the monies allocated to corporate advertising are sufficient to make this possible. On receipt of the outcomes of the market research mentioned above, we believe we would be in a far better position to recommend a more effective spend of available budget or alternatively motivate for an increased allocation.

**The impact of the lack of marketing programmes and/or budgets**

We believe the situation outlined above should be of significant concern to the University. Reasons which have been given for not actively marketing our institution over the past few years include the fact that we are oversubscribed (whether these are the students we have targeted does not appear to be questioned!) Added to that a
degree of institutional apathy appeared as a result of the fact that many of our competitor institutions were locked in mergers and were far worse off than us as they had, in many cases, to build new brands. However this situation has changed. With significant funding from Government, millions of Rand is now being poured into both brand building as well as comprehensive marketing and advertising campaigns. The table below is a comparative indication of this. If we assume that many of these organisations share similar objectives to our own e.g. they want to recruit more SA black students and they want to improve post graduate to under graduate ratios, their budget spend combined with their proximity to market will give them a competitive advantage in cornering this market. Whilst we are a unique institution with particular strengths we also have unique complexities e.g. we are small, we are rural, we have limited financial resources and it costs a lot to live here. So if we want to compete and if we want to be world class we are going to have to make every effort to actively position the strengths and advantages of being at or supporting Rhodes. And this is not just about money - it is about survival as it impacts on everything we do: the number and quality of students who come here, the academics who want to teach and research here and the support staff who wish to work here. It may also determine how our donors and investors will support us in years to come. Failure to address these issues in the short-term will result in exponentially greater difficulties in time to come. Marketing in all its guises is not a cost but an investment and we are currently not investing anything in our brand and in effect are losing our ability to compete regionally, nationally and internationally.

Comparative marketing and communications spend (regional)

<table>
<thead>
<tr>
<th>University</th>
<th>Budget</th>
<th>People resources</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>NMMU</td>
<td>R2 675 000</td>
<td>11</td>
<td>Advertising and graphic design is outsourced</td>
</tr>
<tr>
<td>Fort Hare</td>
<td>R4 500 000</td>
<td>5</td>
<td>Advertising and graphic design and web is outsourced</td>
</tr>
<tr>
<td>WSU</td>
<td>R2 000 000</td>
<td>13</td>
<td>People allocated to different campuses. Discretionary budget also available. Advertising and publications outsourced</td>
</tr>
<tr>
<td>Rhodes</td>
<td>R1 487 000</td>
<td>6</td>
<td>Includes GSU (3) and limited outsourcing</td>
</tr>
</tbody>
</table>

Future initiatives and recommendations:

Assuming the review committee is in agreement that one of the most practical roles which we can play in supporting the mission of the institution is by introducing and
managing programmes aimed at enhancing its image we would recommend the following structures:

a) In order to ensure that greater focus is brought to bear on boosting the image of the institution – particularly externally – we are currently attempting to replace Mr Swift’s position by a skilled and experienced corporate communications individual. The effect of this is:
   a. We retain the ability to produce externally focussed publications such as the Special Edition Rhodos
   b. We materially enhance our abilities to promote the favourable image of the institution externally
   c. The Divisions Director is therefore freed up from the above responsibilities in order to take over the relationship-management tasks of the position vacated by Mr Swift
   d. We have the ability to manage market research activities aimed at presenting a marketing solution to the University and thereafter managing this solution.
   e. We have a skilled University spokesperson who would deal with media enquiries pro and reactively.

b) We are in the process of employing a replacement for Natasha Joseph – the focus of this individual will be on developing and maintaining effective internal communications structures aimed at promoting interactions by our internal communities including:
   a. Language and diversity issues
   b. E-mail distribution lists
   c. Newsletters
   d. Student communications
   e. Forums and discussion groups
   f. Events coverage
   g. Assisting in the development of communications solutions on behalf of the University community.

c) Development Communications: one of the significant shortcomings we have identified is communications support for our relationship building activities within Alumni Affairs and Development. The focus of our communications effort has largely been on supporting other university departments’ plans and goals as opposed to our own. We believe that the two positions outlined above cater for initiatives which are University wide and we would now recommend the re-shaping of the Communications and Publicity Co-ordinators post to take on the role of assisting in the field commonly known as ‘Development Communications’. This would necessitate some minor internal workload shuffling but we do not foresee the need for additional staff. The benefit of this would be that work will be more appropriately placed and shared and additionally, we would be able to capitalise on the ever expanding sponsorship opportunities which are being presented to the University. With the recent resignation of Cherie Wille this provides us with a good opportunity to review this position.
d) Administrative support for this section would come from the central Administration Assistant. This would ensure that our three core communications people would be able to focus on their primary roles.
The Graphics Services Unit

The Graphics Services Unit joined the old Communications Division in 2002. The positive and cooperative relationship which the Unit enjoys with the rest of the Division has largely removed many of the tensions and duplications of functions which previously existed. Whilst there are still occasional overlaps these are not significant and are quickly resolved. As already mentioned, a significant change which occurred subsequent to the merge was the disestablishment of the Little John Camera service and the conversion of the half day Graphic Designer post to a full time position.

The GSU was originally established to serve the academic community of the University with their teaching, research and publication needs, and providing a top quality design service to the academic and postgraduate sector remains its core activity. However the following table shows how the numbers in these groups has increased since 2002 which has had a direct effect on the increasing workload experienced by members of the Unit

_Growth of Academic and Postgraduate numbers 2002 – 2007_

As the University continues to grow, particularly as far as post-graduate students are concerned, so to have the demands on the Unit, both in terms of the range of academic and non-academic clients requiring assistance and also in the variety of services sought.

Of concern is that a great deal of growth has occurred in the non-academic sector, to include the Deans of Students, Research, and the International Office, Conferencing, Estates, Housekeeping, Grounds and Gardens and our colleagues in Communications and Development. This has resulted in a change of emphasis in the type of work produced. However, apart from the conversion of a half day post to a full day post, _the number of staff in the Unit has not increased during this time._
MANAGEMENT and REPORTING:

Whilst the Unit nestles comfortably within the Division and it enjoys very good relationships with the other sections we do believe that there is merit in debating as to whether this is the best reporting line for the Unit given that its role is of a service nature to the entire institution. A possible alternative might be to establish a Services Cluster to include other departments such as Printing, EMU, IT and Electronic Services in a loose association and determine a new reporting strategy for them.

STAFF:
With the growth of the University demands upon the Unit have increased accordingly. It has become critical that another full time post be established in the Unit. (A proposal has already been submitted to the staffing committee). Failure to maintain and improve current levels of service will have a significant impact upon Rhodes in such fields as:

- Presentation and publication of research in print and at conferences
- The quality of teaching materials used by the academic staff
- The presentation of courses to outside organisations by for e.g.: RIBS and the Management Department
- The effective use of and respect for the Corporate ID
- Advertising of the institution nationally and globally

In order to be able to expand the functions of the Unit further to include the production of major publications as well as the smaller ones produced at present, suitably qualified and dedicated staff would be needed to do this.
COMPARISON WITH OTHER SOUTH AFRICAN INSTITUTIONS:

University of Cape Town
No longer has a single, dedicated graphics facility. Outsourcing is generally practiced and has resulted in frustration at long turn-around times and lack of quality control. The wide range of graphics and printing companies in the city are an advantage, but the general response to questioning was that it would be easier and less expensive to have a centralised facility again.

University of Stellenbosch
No longer has a centralised facility but all production and printing is done through a single company in the town, with the result that adherence to corporate ID is excellent and all published material is uniformly elegant and recognisable, from the web-site to simple pamphlets. However this may come at some expense as market related charges may apply.

Free State University:
Has a dedicated Unit very similar to the GSU, both in terms of its staffing, core functions and challenges.

Contact was made with three British Universities, all much larger than Rhodes. None of them have a dedicated graphics facility, but graphics and publications requirements are generally seen to operate together, as is the case at Stellenbosch.

RESOURCES:

Apart from the issue of increasing workload and lack of sufficient people, the Unit is well resourced and enjoys comfortable accommodation which is easily accessible to its clients.

Whilst the University supports the Unit by providing for salaries, space and overhead cost, the capital needs of the unit are self-funded by billing clients for services rendered. This is done on a ‘cost plus 10%’ basis for internal clients and at market related amounts for external clients. The graph below is an indication of how ‘profits’ have been accumulated to provide for future capital expenditure. Of course it may be argued that given the fact that the Units clients are predominantly internal the balances indicated in the graph are merely a reallocation of University resources. However, it must be remembered that the alternative to having work performed by the GSU is to place it with commercial enterprises who would be charging amounts in excess of cost plus 40%. Using this argument further and, on the basis of the figures indicated below, the actual saving to the University is in excess of R 100 000 per annum. In effect, the more work conducted by the unit, the greater the savings enjoyed by the University.
STRENGTHS AND WEAKNESSES:

**Strengths:**
- Dedication and expertise of the staff in the Unit
- Support of a loyal and expanding clientele
- Client-centric focus
- Positive relationships with outside agencies such as suppliers and printers
- Has solid links with institutions and organisations outside of Rhodes, such as SAIAB, Fort Hare

**Weaknesses:**
- Heavy workload on staff leading to exhaustion and morale issues

**Opportunities:**
- Ability to grow range and volume of services to the University
- With additional resources would come additional income generation and cost saving possibilities
- The possibility of expanding the Unit’s functions to include production of a wider range of Rhodes’ publications should be seen as a great opportunity to fulfil a long-term goal.

**Threats:**
- Loss of competent staff due to over-work
- Increasing demand for services without additional resources leading to deteriorating service standards
- Inability to meet growing demand for services
The purpose of the Development Section is to co-ordinate fundraising activities on behalf of the University, to fundraise for university priorities, to facilitate faculty fundraising, to administer donations and to manage the University’s donor stewardship programmes.

The activities of the Development Section are supported by the Communications Section who assists with the production of printed material and whose activities ensure a positive image of the university which in turn supports the fundraising process. The Alumni and Events Section, engage actively with our alumni body and in so doing create a platform which can be leveraged in support of fundraising projects and programmes.

**Background**

**The years 2002 to 2004**
Generous funding from Atlantic Philanthropies allowed the Communications and Development Division to employ additional staff in order to undertake the Centenary Campaign and to develop sustainable capacity for ongoing fundraising. New and inexperienced staff members, new strategies and roles, and a full centenary year of events meant that members of the Development Section were largely learning on their feet and juggling a number of roles.

**2005 – Current**
The past three years have seen the donations solicitation, administration and stewardship processes finding their feet. A fundraising model has been developed in order to facilitate best practices in these processes. Staff movement has stabilised, and for the last 12 months the section has operated with a full component of staff members placed according to the organogram. Whilst there has been little targeted fundraising for University priorities taking place in this time the attention given to structure and process will assist the Section to support the University’s mission into the future. The paragraphs that follow provide insight into these individual processes which have been developed and are managed by this section.

**Database Management:**
Establishing and maintaining accurate donor and donation data is essential to provide a basis for research, reporting, and relationship management. As the Division has become more aware of the potential uses of well researched and accessible data in the fundraising context, it has become clear that the externally developed database currently used will not perform as well as other systems. For this reason it was decided to re-integrate this into the University’s own database systems – a process which is currently underway. Apart from added functionality, this will also remove an enormous duplication of effort as well as opening up access of the information to a wider audience. This will in turn assist our fundraising and alumni-engagement projects.

**Donation Administration:**
All donations which come to the university are administered by the Donations Administration section. The information regarding donations and funding agreements
is at times entered incorrectly, and it has taken time to develop systems and routines which avoid these inaccuracies. Accurate information is vital in order to provide the appropriate responses to donors (tax certificates, receipt and thank you letters), in order to solicit further funding or to report on current status of donations.

Over the past two years in particular, the section has met regularly with key members of the Finance Division in order to find ways to ensure that information passed from one to the other is correct, and is managed appropriately. Systems are being developed to adapt methods to make them more user friendly and more accurate.

Problems in obtaining consistent accurate donation and donor information from university fund administrators are currently being addressed. Increased engagement with university departments will allow protocols to be established and adapted. Once the procedures have been properly implemented, there will be less risk of losing donors through poor stewardship, incorrect information and missed opportunities.

The two Telemail campaigns, held in 2002 and 2003, generated a great deal of back end administration, and the Development Administrative Assistant has managed the process effectively for the last two years. Many of these donors are coming to the end of their monthly or annual pledges, and are being encouraged to continue their support. To date the Telemail campaigns have contributed approximately R2.4 million to the University.

**Donor research:**
Well researched and organised donor information is vital to any fundraising strategy. Donor research was haphazard and reactive until the post was firmly established and filled 12 months ago. In the last year this activity has been undertaken with more structure and purpose and we are currently amassing a good deal of information which will be structured in such a way as to make it easily accessible and searchable on a range of criteria.

There is now a developing repository of research (see table below), the Donor InfoBase, accessible to the development team. In time systems will be developed to make this information available campus-wide.

<table>
<thead>
<tr>
<th>Profiles:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundations &amp; Trusts:</td>
<td>47</td>
</tr>
<tr>
<td>Private:</td>
<td>83</td>
</tr>
<tr>
<td>Corporate:</td>
<td>62</td>
</tr>
<tr>
<td>Other:</td>
<td>3</td>
</tr>
<tr>
<td><strong>Total number of profiles:</strong></td>
<td><strong>195</strong></td>
</tr>
</tbody>
</table>

**InfoBase: (created 11 October 2006)**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of profiles created from Jan to June 2006</td>
<td>31</td>
</tr>
<tr>
<td>Total number of profiles created from Jan to June 2007</td>
<td>78</td>
</tr>
<tr>
<td><strong>Total number of entries.</strong></td>
<td><strong>1839</strong></td>
</tr>
</tbody>
</table>

**Faculty fundraising:**
The relationship between faculty members and Development has an unfortunate history of unrealistic expectations, disappointment and frustration. This may be illustrated by the example of the Centenary Campaign where faculties were
encouraged to draw up their wish lists, and without any priority setting systems in place in the university it was inevitable that there would be disappointments and a loss of credibility when projects went unfunded. Recognising that this was perhaps the root cause of the relationship problems, we re-arranged the functions of the section which led to the appointment of a Development Liaison Officer (Corinne Knowles). The core responsibility of this staff member was to introduce protocols and processes which would empower faculty fundraisers whilst at the same time leading to a clearer understanding of respective responsibilities.

Some of the issues which were addressed include:

- Introduction of a fundraising model which includes procedures for raising funds for faculty projects.
- A web-based toolkit (www.ru.ac.za/fundraising/toolkit/contents.html) has been developed to provide potential faculty fundraisers with clear information and guidance.
- Each Dean has been visited to outline the fundraising process and discuss methods of implementation. All faculty boards have been addressed regarding the toolkit and fundraising methods.
- Fundraising workshops were held regularly during 2006, providing over 100 faculty, student and community fundraisers with the background and tools required to enable them to undertake their own fundraising in line with newly established protocols and processes. Many faculty members undertake their own fundraising with success, and it is hoped that the enabling tools and processes established and implemented in this section will continue to develop these capacities effectively.

Without any formal faculty project review process, faculty fundraising continues to be reactive, and there are times when the number of requests for funds far outweigh the capacity to deal with them. Faculty projects need comprehensive plans which take into account staff and resource projections, accurate budgets and an articulate proposal. Donors are then researched and engaged, and project reports fed back appropriately. Faculty members are often overwhelmed by this process, and need time and attention to ensure success. This strains the workload of the Development Liaison Coordinator, and it is hoped that as more faculty members are engaged and systems developed, the capacities and abilities of faculty members to access their own funds will increase. A user-friendly web presence, including online donor searching and accessing systems needs to be developed in order to decentralise this function more effectively.

Over the past 18 months, a number of faculty projects have been successful in their fundraising efforts. The Andrew Mellon Foundation gave R700 000 to WASA; SANTED gave R3million to African Languages; Ed Saunders, a UK alumnus, gave R100 000 to Art History Masters bursaries; PPS gave R100 000 to the Law Library; and ILAM was successful in raising R399 000 from the National Heritage Council. A number of faculty members have raised funds successfully without coming through the Development Office. While this is encouraging, the newly developed fundraising model will ensure that all efforts are coordinated through this office to ensure appropriate stewardship and strategy.
Setting Priorities:
Prior to and since the Centenary Campaign, priority projects have been decided in an ad hoc way, with the responsibility resting on the VC. Without a consultative screening process, and full endorsement from decision makers, any sense of priority failed to materialise. A very pertinent and current example of the impact of this is clearly illustrated by our experiences with the Library project. An enormous amount of time and effort was expended over a period of 18 months but to this day the project has yet to be signed off with any finality by the University. This process involved extensive consultation with a working committee, guidance from a Cape Town consultant and many, many meetings and discussions. Potential donors were identified and our key volunteer groups (RDC, UK and USA Trustees) were engaged in the development of possible fundraising plans. We began the process of meeting with potential contributors and just as we successfully brought in the first donation of R500 000 from Barloworld, the process was put on hold by the University. Whether the project will eventually be given the green light and in what form it will take is still unclear.

Recognising that the lack of an agreed priority setting process was materially affecting the Division’s ability to support the institutional mission, the Section has focussed intently on developing a Fundraising model (A copy of this model is included as Attachment 3) as well as designing and implementing a number of systems and processes which would support our efforts and help avoid similar wastage of time and effort as outlined above. Despite the time this has taken there have been a number of successes such as Alumni House and the Xstrata Chair in Exploration Geology. In addition during this time we have also focussed our efforts on developing and nurturing key donor and volunteer group relationships in order to pave the way for significant fundraising in future years.

At this stage the section is currently focussed on developing fundraising plans for two institutional priorities:
   a) The Library (on the assumption this will go ahead)
   b) Student Financial Aid.

In the event of a major fundraising campaign being required, we do feel it important that the University recognise that additional resources may be required. Our input is therefore vital prior to the University delegating priority fundraising responsibilities to the Division.

Fundraising and Stewardship
a.) Donor Visits
Part of the fundraising strategy for priority projects involves national and international donor visits by the Vice Chancellor and the Development staff. Although it is a labour intensive process arranging such visits, they are a necessary activity in ensuring that our important funding partners receive the necessary stewardship to maintain good relations. Wealthy foundations such as Carnegie Corporation, Andrew Mellon Foundation and Atlantic Philanthropies, as well as the UK and USA Trustee groups, are important partners, and personal meetings are the best means of engaging and deliberating. The amount of time required to put together beneficial trips which include alumni gatherings, trustee meetings, visits to universities and donors is demanding when other ongoing processes need the attention of the section. Files are
being organised and systems developed to make this easier and to ensure that valuable opportunities are maximised. Follow up on the trips, and the generation of proposals and reports arising from this require time and expertise, and ways to manage this are have been negotiated with the Research Office. Future plans include shorter more regular visits, and better use of human resources and our growing network of volunteer groups.

b.) Donor relations
In interacting with our key donors we are always mindful of opportunities to broaden the relationship to include business development opportunities. This has the potential to ensure that the relationship between the organisations is deepened and becomes reciprocal. This facilitates the growth of long-term partnerships – and hopefully, ongoing giving. An example of this would be where the Division facilitated the introduction of FNB as potential bankers to the organisation based on their donation towards Alumni House.

A stewardship policy (copy attached as Annexure 5), developed by the Section, provides the blueprint for appropriate recognition of contributions made. This together with reporting reminders, donor visits and appropriate communication, ensures that donors are nurtured towards their next donation.

**Sponsorships:**

Towards the end of last year it became apparent that uncoordinated sponsorship activities were compromising other initiatives as well as our relationships with key corporate donors. The Division agreed to develop plans not only to control but to enhance these opportunities and the Development Manager has worked hard to establish both protocols and relationships with our current major sponsors. Given the number of new sponsorship requests being received together with the time consuming nature of negotiating appropriate sponsorship contracts, we have decided to make this a specific element of our Publicity Co-ordinators role.

**Development Communications**

Since the last review, there have been a number of changes in the communication methods of development material. The quarterly Donor Bulletin – sent to all local donors – made way in 2005 for the more glossy annual *Rhodos*. Communicating development news and ideas to the university community has been through the quarterly staff *Rhodos*, and the now defunct *ThisWeek@Rhodes*. While it is acknowledged that these communications are an important part of the supportive fundraising environment, other priorities and staff changes in the Communications Section have prevented this opportunity from being exploited. Currently the Section’s web pages do contain useful faculty fundraising information but content is by and large static. The use of the web as a means of conveying information about, for example, fundraising successes and advances is vital but we currently lack the resources to maintain or maximise this opportunity. In terms of the Division’s overall staffing recommendations this important role will be taken over by the revised Publicity Coordinator’s position.
DEVELOPMENT SECTION SWOT ANALYSIS
(Detailed analysis attached)

Strengths:
Good Administrative structures,
Strong sense of teamwork,
Good institutional and donor networks
Clear understanding of role
Readiness to act

Weaknesses:
Excessive workload
Relative inexperience of team
Institutional bureaucracy/priority setting

Opportunities:
Capitalise on structures for fundraising purposes

Threats:
Lack of resources inhibit ability to deliver
Workload leading to some sense of de-motivation

Proposed Action Summary:

Priority Project Fundraising: With the impending culmination of the University’s strategic planning exercise and size and shape debates, we are hoping for specific instruction as to where to channel our core fundraising efforts. As it stands we clearly understand the need for additional student financial aid and are anticipating instruction on the library project in the very near future.

Database and protocol development: The transfer of the database to the university Protea system is eagerly anticipated, and will allow us to develop decentralised systems and protocols, facilitating easier access to the fundraising processes throughout the university. In the next five years it is hoped that this will be developed, tested and promoted appropriately. It will also improve our ability to report accurately.

Fundraising Model: With the new database, protocols will be developed to ensure compliance with the model, including project signing off by the Dean, and implementing systems to support accurate entries into the database and extraction of usable information from it.

Fundraising Trips: More regular local trips and more strategic international trips are planned for the next five years. Good relationships have been nurtured, and the office is ready to embark on donor visits with the potential of good returns as opposed to relationship building activities only.
**Web development:** a more vibrant web presence will provide easier access to information internally and a better marketing tool for fundraising activities, including online giving options.

**Volunteer Fundraising committees:** The USA and UK Trustee groups, the RDC and the Rhodes Sports Foundation (RSF) are established, and will be developed to maximise their fundraising potential.

**Annual Giving Fund:** The attention given to our alumni through our various communications and engagement efforts and through the Telemail projects together with better administrative systems will allow us to pursue the introduction of an annual giving fund.

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**Central Administration**

The Central Administration of the Division currently consists of three staff members i.e. the two Directors and an Administration Assistant, Marie Nelson

As mentioned earlier, Kerry Swift has resigned and we are in the process of replacing his position with that of a Communications Manager. This will enable the remaining Director to take over the relationship development responsibilities previous managed by Kerry. Kerry’s communications related activities such as the production of the *Rhodos* special editions will be taken on by the new Communications Manager. We feel that this is a logical and functional structure which will enable us to meet the University’s expectations of the Division.

Administrative support is lacking within all sections and we propose that the Administrative Assistant’s job be re-evaluated in order that this individual is able to take on some of this additional workload. However, this will require that a receptionist be appointed as concentrated administrative work does not appear to mix well with the constant interruptions that are the nature of a receptionist’s daily activity! We would propose that this position be filled by an intern or be seen as a development post. The benefit of this is that the incumbent will get a clear understanding of the work of the Division and may very well be assimilated into the Division as and when a vacancy occurs. (With our historically high staff turnover this is an important point). Added to this it may help alter the demographical make-up of the Division. This post could be funded from the savings gained in not replacing Kerry in Johannesburg.
Staff matters

Organisational Structure

We have attached two organogram’s:

a) The current/agreed establishment
b) An adjusted structured based on the following alterations:

- Replacing the Executive Director of Development with a Communications Manager based in Grahamstown
- Addition of a Graphic Designer
- Addition of a Receptionist
- Confirmation of the posts of Development Administrator and Alumni Relations Officer
- Modification of the role of the Publicity and Advertising Coordinator to take on board Development Communications

Specific staff issues:

With reference to the attached staff schedule and the organogram’s there are a number of issues which are revealed:

- The predominance of white-female staff members: This appears to be an issue which we are going to have to deal with specifically as and when vacancies occur. Low salaries which are nowhere near market related for people with the skills required by the Division are probably the most significant contributing factor. If we are to correct this imbalance we will need to review this aspect as well as instruct selection and search committees to target individuals from designated groups – in particular black males.
- The relatively short terms of service of the bulk of the Division’s staff – high staff turnover has been a characteristic of the Division. Whilst some of this could be attributed to low salaries, other reasons for leaving have included:
  - Getting engaged and/or married
  - Moving to positions in private schools in order to provide for children’s education
  - Moving to work which is more aligned to personal skills and/or field of interest
  - Moved overseas/to a different centre
  - Only had a contract post with the University and sought more permanent position
  - Demands of job with little corresponding appreciation for the effort made
  - Unwillingness to deal with changes within the Division
  - Lack of professional development opportunities
- The impending retirement of our most senior and experienced staff member: On retirement at the end of 2009 Jenny Purdon will have served the University for over 27 years. Having at one time or another filled most of the posts in the Division, this loss of experience will be sorely missed. In terms of a replacement strategy, we are grooming Kate Rogers to take over from Jenny.
Kate is an alumnus and certainly has the talent and skills to fill this important position. She is currently being mentored by Jenny with this aim in mind.

- Retirement of the Senior Alumni Relations Officer, Sharon Tweddle within the next 6 years and closer to the time we will develop a suitable replacement plan.
- The loss of Kerry Swift has forced us to re-look at our operational arrangements and in large part informs the recommendations we make in this review. The ability of the Director to take over Mr Swift’s relationship management role is made on the assumption that we replace his post with that of a Communications Manager.
- The recent resignation of Cherie Wille means that we are in effect without a communications structure at all! We hope to appoint an Internal Communications Coordinator shortly and, a little later on, the Communications Manager. In the short term we will have to cut down significantly on work such as the production of Rhodos and corporate advertising. The GSU will attend to essential advertising only in the interim.
- Currently two posts are still reflected as contract positions – these being the Alumni Relations Officer and the Donor Administrator. Both of these posts were established as part of the donation made by The Atlantic Philanthropies on the basis that by increasing the capacity of the Division, the costs of these positions would be more than justified in terms of their value added. Whilst the University has picked up the costs of these posts as required by the donor, the incumbents have yet to be offered a permanent position which is not conducive to career planning in any way. Applications to correct this situation have again been made to the relevant staffing committee.

Management and Personal Relationships

In terms of the review process we are required to comment on issues of management style and relationships within the Division and between the Division and the structures with which we interact on a regular basis:

**Internally:** The consensus is that interactions within the Division are general open, friendly, cooperative and supportive. All managers operate on the ‘open-door’ principle which encourages interaction and creativity. Whilst acknowledging that there are always issues of personality and performance to address we do believe that there is mutual respect between individuals and between the sections and that management within the structures is not overly hierarchical. There are regular meetings held within sections and between the Divisional head and section leaders but stemming from the review, staff members have indicated that they would like to see more regular Divisional meetings.

Members of the Division are expected to be very strong team players and this is often shown at times such as graduation and Founders Weekend when we all help wherever we can. In general terms there is a clear understanding of the overall role which we as a Division are expected to play.
Externally (within Rhodes): Members of the Division interact regularly with colleagues from all departments and divisions with varying degrees of pleasantness! We do feel that the Division has shown a great willingness to assist and support wherever we can and it is often only resource limitations which prevent us from doing more. A good deal of effort has been made in building and developing relationships on campus and we would like to believe that our work is probably more respected and valued than perhaps at any time in the recent past.

Specific examples of good inter-departmental relationships which have developed through constructive interactions:

<table>
<thead>
<tr>
<th>Department</th>
<th>Examples of reasons for engagement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dean of Students</td>
<td>Communications</td>
</tr>
<tr>
<td>Research Office</td>
<td>Development processes and fundraising</td>
</tr>
<tr>
<td>SRC</td>
<td>Communications and fundraising</td>
</tr>
<tr>
<td>Finance Division</td>
<td>Donor Administration and stewardship processes and policies</td>
</tr>
<tr>
<td>Academic staff members and institutes</td>
<td>Fundraising</td>
</tr>
<tr>
<td>Campus Protection Unit</td>
<td>PR and Communications</td>
</tr>
<tr>
<td>IT Division</td>
<td>Web Unit realignment</td>
</tr>
<tr>
<td>Data Management Unit</td>
<td>Database</td>
</tr>
<tr>
<td>Registrars Division</td>
<td>Student Handbook and Rhodes Development Committee Sponsorships</td>
</tr>
<tr>
<td>Activate and RMR</td>
<td>Communications</td>
</tr>
<tr>
<td>Community Engagement</td>
<td>Give 5 Fundraising</td>
</tr>
</tbody>
</table>

Externally (off campus): Our relationship with the external communities with whom we interact is very good. Journalists comment on the good degree of cooperation they receive, donors are complimentary on our reporting and we are very proud of being seen to be welcoming and cooperative with visitors. From the Development perspective we work hard to build cooperative relationships with our key volunteers within the Board of Governors, Rhodes Sports Foundation and the two overseas Trusts.

In summary we believe that our ability to identify, develop and nurture relationships is the key to any successes we may have enjoyed and all members of the Division are very conscious of their individual responsibilities in this regard.
Conclusion

There is general consensus within the Division that the review process has been of particular value in that it has given us an opportunity to reflect on our roles and some of the issues which we have encountered over the last few years. More importantly, it has given us an opportunity to test our ability to materially contribute to the institutional mission. The outcome of the process is that whilst we may have a number of obvious weaknesses – staff vacancies being one – by and large we have a workable structure with good basic resource availability and an office environment which is ideal for the work we do. This coupled with clear administrative processes and procedures and generally good relationships with other departments give us a sense of real purpose.

We have submitted a number of recommendations and resource requests and our future planning and direction is based on acceptance of these. In the event that these are not accepted we will need to review some of our aspirations.
Alumni Relations and Events – Statistical Information

Table 1: Database statistics

<table>
<thead>
<tr>
<th>Alumni Database Statistics</th>
<th>2007 actual (% of total db) *</th>
<th>2002 estimated (% of total db)</th>
<th>Increase/decrease 2002/2007</th>
<th>Projected total for 2012 ¹</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Alums</td>
<td>53813</td>
<td>44816</td>
<td>+20%</td>
<td>64575</td>
</tr>
<tr>
<td>Active Addresses</td>
<td>35833 (66.6%)</td>
<td>26416 (59%)</td>
<td>+36%</td>
<td>43225</td>
</tr>
<tr>
<td>“Lost”</td>
<td>15317 (28%)</td>
<td>16500 (37%)</td>
<td>-8%</td>
<td>18100</td>
</tr>
<tr>
<td>Deceased</td>
<td>2663 (5%)</td>
<td>1900</td>
<td>+40%</td>
<td>3250</td>
</tr>
<tr>
<td>Known in RSA</td>
<td>28442 (53%)</td>
<td>21500 (48%)</td>
<td>+32%</td>
<td>34225</td>
</tr>
<tr>
<td>Known not RSA</td>
<td>7391 (14%)</td>
<td>6816</td>
<td>+8%</td>
<td>9040</td>
</tr>
<tr>
<td>With current e-mail addresses</td>
<td>10103 (18.7%)</td>
<td>6701 (15%) (Aug 2003)</td>
<td>+51%</td>
<td>12075</td>
</tr>
</tbody>
</table>

* Does not include 2007 graduates
¹ Calculated at the present rate of expansion and not taking into account the University’s expansion policy or any increased efficiency on our part

Table 2: Contact and communications initiatives

<table>
<thead>
<tr>
<th></th>
<th>2002</th>
<th>2007</th>
<th>2012 at present rate of increase</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Per month</td>
<td>Per month</td>
<td>±</td>
</tr>
<tr>
<td>Find-a-Friend</td>
<td>50</td>
<td>90 - 120</td>
<td>± 200</td>
</tr>
<tr>
<td>Birthday Cards</td>
<td>70 - 80</td>
<td>100 +</td>
<td>± 200</td>
</tr>
<tr>
<td>E-news (every 2nd month from 2003)</td>
<td>6701</td>
<td>10103</td>
<td>15250</td>
</tr>
<tr>
<td>Rhodos (2 issues per year)</td>
<td>Discontinued - none sent</td>
<td>15000 (SA only 1st year of enrolment pre 1991)</td>
<td>± 35000 everyone in SA, including donors</td>
</tr>
</tbody>
</table>

Table 3: Bequest programme

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1s</td>
<td>Right age group (with known addresses) - all received information about the bequest programme</td>
<td>2296</td>
<td>2160</td>
<td></td>
<td></td>
<td></td>
<td>not predicable</td>
<td></td>
</tr>
<tr>
<td>2s</td>
<td>Established one on one contact</td>
<td>104</td>
<td>120</td>
<td>no stats</td>
<td>no stats</td>
<td>no stats</td>
<td>no stats</td>
<td>not predicable</td>
</tr>
<tr>
<td>3s</td>
<td>Keen interest, attended a function</td>
<td>131</td>
<td>36</td>
<td>unknown</td>
<td>unknown</td>
<td>unknown</td>
<td>unknown</td>
<td>not predicable</td>
</tr>
<tr>
<td>4s</td>
<td>Keen interest, attends functions &amp; taken brochure</td>
<td>14</td>
<td>9</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>6</td>
<td>not predicable</td>
</tr>
<tr>
<td>5s</td>
<td>Indicated that they have made a bequest</td>
<td>61</td>
<td>58</td>
<td>56</td>
<td>53</td>
<td>46</td>
<td>29</td>
<td>125</td>
</tr>
<tr>
<td>6s</td>
<td>Have died and left a bequest</td>
<td>8</td>
<td>5</td>
<td>no stats</td>
<td>no stats</td>
<td>no stats</td>
<td>no stats</td>
<td>not predicable</td>
</tr>
<tr>
<td>Total over 65s</td>
<td></td>
<td>2614</td>
<td>2388</td>
<td>±1900</td>
<td>±1700</td>
<td>±1600</td>
<td>±1500</td>
<td>±3400</td>
</tr>
</tbody>
</table>
DEVELOPMENT SECTION SWOT ANALYSIS
(Detailed analysis)

Strengths:
• **Administrative structures**: The fundraising process requires procedures, protocols, and systems to function smoothly and beneficially. This has helped us to position staff strengths accordingly, and for the last year we have functioned increasingly according to the working model (organogram). The donation processing form, fundraising toolkit, faculty fundraising process, research request process, database and file cohesion are all in place, and we are beginning to refine and manage the process with more understanding and efficiency.
• **Teamwork**: There is excellent understanding and cooperation between members of the section. Each member is aware of the significance of their and other roles, and this provides a supportive environment for reflexivity and effectiveness. Despite attempts to plan and prioritise, it often feels as though we are coping with a wide variety of urgent tasks, and though there has not been enough time and place allocated for the consideration of load sharing and delegation, there is a strong sense of support from the team, and mutual acknowledgement of value.
• **Networking**: In order to ensure that the structures we put in place operate effectively, it has required problem solving with individuals and groups in other sections. Members of this section readily engage with stakeholders on and off campus, and good working relationships have been established. This provides opportunities for further development.
• **Readiness**: The section feels poised to embark on major strategic fundraising goals. The exportation of the database to the Protea system (pending – August), the agreement on the fundraising model and systems, the positioning of section members and operations, and this review process are all part of this sense of imminent functionality – the flexibility and structure of the section are strengths waiting to be maximised.

Weaknesses:
• **Workload and skills ratio**: The skills required to ensure effective operation are varied. While each team member is tasked with their own focussed range of daily tasks, the scope and variety of requests and responsibilities of the development section requires that some members are loaded with many disparate functions, causing a loss of focus and overload. Communication skills, especially writing (for proof reading, proposal and letter writing, report writing etc) are an important aspect of many of the development section’s responsibilities, and a lack of confidence and expertise in this area has meant that the management and implementation of these tasks rest on one or two members. This could threaten the functionality of the division if it is not addressed appropriately, through stronger direction and additional staff support.
• **Bureaucracy**: It has been important to establish systems and protocols, to facilitate accurate information, strategic solicitation and stewardship and good reporting (internal and external). The accuracy of information is vital, and it takes time for all stakeholders to comply with protocols. Time spent on checking and rechecking information that has been incorrectly received or entered is valuable, and sometimes ties the team in unnecessary detail. As the processes become more familiar, and adapt
to suit the environment, this will improve, but the time to reflect and adapt is sometimes sacrificed through the commitment to accuracy.

- **Priority setting**: in a sense, the university’s process of self-reflection over the last two years (internal audit, VC change, size and shape debates) has resulted in a shifting of priorities. Fundraising for university priorities has been on hold as these have been debated. Without clear strategic priorities, work in the section has been reactive, and competing urgencies have made it difficult to prioritise. Stronger direction from the university and within the division will address this.

**Opportunities:**

- **More funds**: the systems and expertise established in administration and research mean that there is capacity to identify and solicit potential donors for university goals. University established and endorsed fundraising priorities will direct this opportunity.
- **More fundraising expertise**: there is the capacity within the section to engage faculty with workable fundraising tools and ideas (eg toolkit, donor database, discussion papers). Appropriate communication and engagement (through discussions, web, workshops and publications) will expand the capacity of individuals and departments to access external funding. This opportunity can be facilitated through communication skill support, through an additional staff member, to provide administrative (with writing expertise) support for the section. This will free time and expertise to explore this opportunity.
- **Sponsorships**: establishing and maintaining sponsor relationships has the potential to find and keep an important stream of income with mutual benefits. Negotiating branding and marketing prospects for donors recognises the university’s branding and marketing opportunities, and will challenge our current ways of managing this. Management and implementation of this process needs more focus, and a dedicated staff member.
- **Self-management systems**: to prevent bureaucracy from loading the work of the division, systems can be developed to decentralise functions using a common data management system. As long as there are clear protocols and input checking devices, this can free the division to function more proactively and strategically. The cooperation of the finance division, data management unit, faculty fundraisers and donation administrators will ensure that all the necessary information can be accessed, inputted and analysed with more seamlessness and strategy. Again, additional administrative support for the section will free the time required to research, develop and implement these systems.

**Threats:**

- **Focus**: there is a danger within the section either to explore visionary strategies or to be lost in the details. Much work has been done to locate the function of this division within the university, and while this should provide more focus, it has led to a self-consciousness within a division that has yet to maximise its potential. There needs to be more relationship between the vision and the implementation of the division, in order to focus the work of the development section for the benefit of the university. More hands-on direction, less hands on management, an ethos of self-supervision, and communication opportunities between sections in the division with regular reminders of the bigger picture could address this threat.
- **Unrealistic Expectations and de-motivation**: juggling priorities, work overload, administrative gaps, a history of change and uncertainty and the necessary and unnecessary attention to detail within the section can lead to de-motivation and further
changes. Feeling set up for failure by the expectations of the university community, overwhelmed by work, uncertain of the future or numbed by routine are sure ways to lose motivation, and unless these issues are addressed, by additional support and direction, they will lead to more staff turnover, illness, fatigue and misdirected effort.