



Position Description – Philanthropy Executive – Bequests

About Arts Centre Melbourne

Situated in the heart of Melbourne's cultural precinct, Arts Centre Melbourne (ACM) presents world-class performing arts in a year round exciting program. Experience Australia's best performing arts companies and exceptional international productions, alongside celebrations of comedy, cabaret and popular music.

Our values describe behaviours we will demonstrate in our interactions with Visitors, Presenters, Government and each other: Leadership, Creativity, Care More and Community.

About Philanthropy at Arts Centre Melbourne

Arts Centre Melbourne was built for all Victorians, a place where everyone can come together and experience all that the performing arts has to offer. It was created in 1979 with a singular and powerful remit: To enrich the lives of Victorians, culturally, educationally, socially and economically.

Arts Centre Melbourne has a strong legacy of Philanthropy, as demonstrated by the original naming of many of our spaces – Myer, Smorgon, Potter to name just a few. Two of our most significant programs were also funded by and therefore named after their benefactors – The Betty Amsden Participation Program and The Kenneth Myer Asian Theatre Series.

The Arts Centre Melbourne program is funded by a combination of state and federal government grants, self-generated income and philanthropy.

The Arts Centre Melbourne Arts Angels were established by President of Victorian Arts Centre Trust, Richard Pratt, in 1994 and continue to form an important role in the funding of the artistic program at ACM.

Philanthropy plays a critical role in extending the reach and impact of Art Centre Melbourne's cultural, education, access, and commissioning and exhibition programs. The desire is to grow philanthropic contribution to further extend this reach and impact.

The current philanthropic program covers the following areas:

- Fundraising Campaigns and Appeals
- Major Gifts (Arts Angels and President's Club)
- Bequests
- Memberships
- Trusts and Foundations

All money raised is directed to the following areas:

- Access and participation programs – opening up the performing arts to every Victorian
- Education and creative learning – inspiring the next generation of creatives and makers
- Commissions – supporting new works, bold ideas and extraordinary talent
- Collections – preserving and exhibiting Australia's cultural heritage

About the Position	
Primary Purpose	<p>The Philanthropy Executive, Bequests plays a key role in the implementation of Arts Centre Melbourne’s strategy to engage and acquire gift in wills donors and increase philanthropic income from bequests. This role works collaboratively with other Philanthropy team members to communicate the impact of gifts in wills for the organisation.</p> <p>The primary purpose of the role is to identify a portfolio of bequest prospects and confirmed bequestors and manage their cultivation, solicitation and stewardship.</p>
Reports to	Associate Director, Philanthropy – Major Giving
Direct Reports	None
Key Relationships	<p>Internal</p> <p>Executive Director Philanthropy; Associate Director, Philanthropy – Major Giving, Philanthropy Executive, Private Giving, Head of Fundraising Campaigns; Philanthropy Services Manager; Administrative staff; Researcher; Programming; Collections; Marketing; Strategic Communications</p> <p>External</p> <p>Arts Centre Melbourne Donors, Prospective Donors, Arts Centre Melbourne Members, Fund Managers, Financial Trustees</p>
Position Type	Full Time
Salary Classification	Band 4.1
Financial Delegation	As per the current Financial Delegation Policy

Key Criteria	
Qualifications	Bachelor degree and/or intermediate experience managing donor or client relationships, including across a breadth of generations.

Experience	<ul style="list-style-type: none"> • Experience in communicating effectively with a variety of people across different generations. • Proven ability to utilise fundraising or CRM databases to support donor portfolio management, including reporting (Experience with Tessitura desirable but not essential) • Confidence to make unsolicited approaches to prospective donors, who have been identified based on research about linkage, interest & capacity • Demonstrated ability to work autonomously and prioritise workloads whilst functioning successfully as part of a broader Philanthropy team • Experience in the development and delivery of donor, client or prospect engagement events • Excellent interpersonal skills • High attention to detail for written materials • Focused on results, a self-starter, dependable and highly organised • A strong, positive ambassador for Arts Centre Melbourne • Donor-centric and intuitive to donor needs • Perseverance in cultivating long lead prospects
Other (i.e. legal or physical)	<ul style="list-style-type: none"> • This is a relationship-based role, requiring a high degree of confidentiality, emotional intelligence, tact, compassion, empathy and professionalism • Required to attend functions and events outside of normal business hours and at weekends • Drivers licence and own vehicle required to visit donors in their homes.

Accountabilities

Information systems and reporting

- Work with the Philanthropy Services Manager to develop Tessitura systems and reports around existing bequestors, confirmed prospects and potential prospects
- Prepare quarterly report for the Executive and Foundation including information on the evolution of the bequest program.
- Instruct relevant administrative personnel to maintain an accurate and up-to-date bequest database.
- Regularly review Tessitura to ensure it reflects any changes to status of bequest donors.
- Maintaining industry knowledge around best practice for fundraising through gifts in wills.

Nurture and manage relationships with confirmed and potential Bequestors

- Organise appropriate recognition for confirmed bequestors (i.e. pins, certificates, donor boards etc.).
- Actively follow-up new prospects by telephone contact and face to face meetings, including home visitation.
- Maintain and nurture ongoing relationships with existing bequestors through face to face meetings including home visits, regular telephone contact, personalised cards etc and hospital/home visits if aware they are unwell.
- Respond to requests for bequest information by arranging for appropriate documentation to be sent and following up with home visits.
- Instruct relevant administrative personnel on their role to ensure optimal servicing of confirmed and potential bequestors.
- Respond to any requests that arise from confirmed bequestors or family members.
- Attend funerals of confirmed bequestors.

Event Management

- Develop an annual calendar of bequest events that specifies timing, purpose and anticipated attendance.
- Agree Event calendar and Budget with Philanthropy team managers.
- In advance of each event, brief delivery staff in accordance with Event Management Checklist and liaise regularly to ensure timely and effective delivery of events.

External communications

- Work with Strategic Communications team to develop case study content and the gifts in wills case for support, for use in bequest articles in ACM publications and external media.
- Deliver acquisition campaigns for gifts in wills
- Prepare articles and supply photographs for bequest articles in organisation's publications.
- Actively participate in the creation of copy for brochures and other promotional literature pertaining to bequests.
- Brief relevant third parties on criteria and protocols with regard to the creation of artworks for brochures and other promotional literature.

Administration of received notifications

- Develop Operating Procedure for key steps to be followed upon notification of a realised bequest, including liaison with family, Trustee, General Counsel and Finance team.
- Undertake all responsibilities of the role as outlined in Operating Procedure.

Decision Making

- Under the direction of the Associate Director, Philanthropy – Major Giving, the incumbent will be required to make decisions regarding the management of the bequestor portfolio including appropriate communications and activity to develop positive donor relationships
- A moderate level of operating autonomy is required, and the ability to take tactical decisions within the scope of the role.