



<b>POSITION:</b>	<b>Major Gifts &amp; Bequests Manager</b>	
<b>DEPARTMENT:</b>	<b>Philanthropy &amp; Corporate</b>	
<b>LOCATION:</b>	445 Hay Street Perth, WA	
<b>UNDERLYING AWARD:</b>	Live Performance Award	
<b>CLASSIFICATION:</b>	Production and Support Staff	
<b>AWARD LEVEL:</b>	Level Eight (8)	<b>EFFECTIVE DATE:</b> 8 November 2019

**1. PURPOSE OF POSITION**

To maximise philanthropic income from Major Gifts and Bequests.

<b>2. KEY RELATIONSHIPS</b>	
REPORTS TO	<ul style="list-style-type: none"> <li>Executive Manager, Philanthropy &amp; Corporate</li> </ul>
DIRECT REPORTS	<ul style="list-style-type: none"> <li>Nil</li> </ul>
KEY INTERNAL RELATIONSHIPS	<ul style="list-style-type: none"> <li>Chief Executive</li> <li>Executive Managers'</li> <li>Philanthropy and Corporate</li> <li>Marketing</li> <li>Education &amp; Community Engagement</li> <li>Artistic Planning</li> <li>Box Office</li> </ul>
KEY EXTERNAL RELATIONSHIPS	<ul style="list-style-type: none"> <li>Major Gift and other Patrons, prospective Patrons</li> <li>WASO Friends, Subscribers, Volunteers</li> <li>Bequestors and prospective Bequestors</li> <li>Professional, service &amp; community based organisations</li> <li>Estate Planning, financial and legal advisors</li> <li>Other Orchestras &amp; Artistic Institutions</li> </ul>

<b>3. WASO VALUES</b>	<b>BEHAVIOURAL REQUIREMENTS</b>
INNOVATION AND EXCELLENCE	To strive for excellence and innovation in every task
LEADERSHIP	To be a champion of orchestral music in our region and be a leader in the performing arts sector
PASSION AND INSPIRATION	To be passionate and committed to providing our audiences with inspiring and memorable experiences
RESPECT AND TEAMWORK	To cultivate relationships that are based on teamwork, honesty and mutual respect

<b>4. KEY RESPONSIBILITIES</b>
<p><b>1. Campaign &amp; Major Gifts Portfolio</b></p> <ul style="list-style-type: none"> <li>a. Managing a portfolio of campaigns with financial targets, including major gift campaigns</li> <li>b. Identifying, cultivating and asking support for agreed campaigns</li> <li>c. Stewardship and managing relationships with confirmed supporters</li> <li>d. Marketing &amp; promotion of agreed campaigns</li> <li>e. Identification of philanthropic campaigns and giving opportunities</li> </ul> <p><b>2. Bequest Portfolio</b></p> <ul style="list-style-type: none"> <li>f. Identifying, cultivating &amp; asking support from potential bequestors</li> <li>g. Managing relationships with confirmed bequestors</li> <li>h. Marketing &amp; promotion of WASO's bequest program, including bequestors events</li> <li>i. Program reporting</li> </ul> <p><b>3. General Responsibilities</b></p> <ul style="list-style-type: none"> <li>j. Health and Safety</li> <li>k. Database management (Tessitura)</li> </ul>



<b>1. Campaign &amp; Major Gifts Portfolio</b>	
<p>a. Managing a portfolio of campaigns with financial targets, including major gift campaigns</p> <p>b. Identifying, cultivating and asking support for agreed campaigns</p>	<ul style="list-style-type: none"> <li>Identifying and managing a number of campaigns (multi-year and year-long) that generate income to achieve end of year budget</li> <li>Manage campaigns from conception to delivery and report regularly on outcomes</li> <li>Manage campaign plans in Tessitura from identification and solicitation to gift receipt and acknowledgment, including management of current and future Tessitura Plans</li> <li>Assist team with identification of prospects for other campaigns</li> </ul>
<p>c. Stewardship and managing relationships with confirmed supporters</p>	<ul style="list-style-type: none"> <li>Ensure appropriate acknowledgment of Patrons for all managed campaigns</li> <li>Manage stewardship for confirmed supporters, including events, lounges and meetings with musicians and WASO staff</li> <li>Where possible, try to uplift giving, encourage gift renewals and identify new donors for WASO Philanthropy</li> </ul>
<p>d. Marketing &amp; promotion of agreed campaigns</p>	<ul style="list-style-type: none"> <li>Develop and implement marketing and promotion plans for campaigns including philanthropy EDMs, the Encore Newsletters, regular concert programs, social media and the WASO website</li> <li>Create events and communication strategies to raise awareness of managed campaigns</li> <li>Work with Marketing team &amp; PR Manager on promoting WASO Philanthropy, highlighting successful giving stories as well as upcoming campaigns</li> </ul>
<p>e. Identification of philanthropic campaigns and giving opportunities</p>	<ul style="list-style-type: none"> <li>Assist with strategic advice on future campaigns and giving opportunities</li> <li>Consider other team members' objectives and opportunities for cross-campaign leveraging</li> </ul>
<b>2. Bequest Portfolio</b>	
<p>f. Identifying, cultivating &amp; asking support from potential bequestors</p>	<ul style="list-style-type: none"> <li>Work with WASO Philanthropy team to identify and cultivate prospects for bequests, including the management of Tessitura Plans</li> <li>Develop and implement strategies for contact and cultivation of professional, service and community based organisations to raise awareness of WASO's bequests program</li> <li>Where appropriate, work with bequestors to confirm a 'living' gift</li> </ul>
<p>g. Managing relationships with confirmed bequestors</p>	<ul style="list-style-type: none"> <li>Attend WASO Philanthropy events and functions as required.</li> <li>Stewardship and management of relationships with confirmed Bequestors with particular attention paid to the regular re-writing of Wills</li> <li>Ensure appropriate and up-to-date recognition of all bequestors</li> </ul>
<p>h. Marketing &amp; promotion of WASO's bequest program, including bequestor events</p>	<ul style="list-style-type: none"> <li>Manage and review marketing and promotion plans for bequests</li> <li>Promote bequests through regular philanthropy communication channels, including philanthropy EDMs, the Encore Newsletters, regular concert programs, social media and the WASO website</li> </ul>



	<ul style="list-style-type: none"> <li>• Create events and communication strategies to raise awareness and cultivate bequest prospects.</li> <li>• Visit identified prospects to provide information and develop awareness of WASO's bequest program</li> </ul>
i. Program reporting	<ul style="list-style-type: none"> <li>• Effectively manage bequests within Tessitura</li> <li>• Track and provide reports on all bequest notifications and deceased estates using Tessitura, including regular statistical reporting.</li> <li>• Monitor estate management and ensure WASO receives appropriate entitlements from estates.</li> </ul>
<b>3. General Responsibilities</b>	
j. Health and Safety	<ul style="list-style-type: none"> <li>• Ensure the health, safety and welfare of yourself and other employees, customers and visitors as outlined in the WASO Employee Handbook</li> </ul>
k. Database management	<ul style="list-style-type: none"> <li>• Use Tessitura to maintain a comprehensive database of philanthropy contacts and other key personnel</li> </ul>

**5. CORE COMPETENCIES**

**a) Skills & Experience:**

- Proven track record and demonstrated high level fundraising and donor relations experience in an arts, NGO, education or not-for-profit organisation.
- Exceptional verbal and written communication and relationship management skills including experience in public speaking.
- High level of initiative and negotiation skills.
- Research and analytical skills, thoroughness and an attention to detail.
- A demonstrated high level of computer literacy and an ability to use data management and reporting systems. Previous use of Tessitura is desirable.
- Demonstrated organisational skills, particularly in relation to meeting deadlines, managing multiple relationships and time management.
- Ability to work both independently and collaboratively in a team environment to achieve results.

**b) Education & Knowledge:**

- Tertiary qualifications or commensurate experience essential.
- Strong and demonstrated understanding/application of fundraising principles in a not-for-profit environment.
- A desire to keep abreast of key developments in fundraising in Australia and a knowledge of key sources to identify giving prospects.
- A current driver's license.

**c) Attributes:**

- A keen sense of creativity and 'out of the box' thinking to ensure cut through in a competitive philanthropy market.
- Passion and desire to succeed with a pro-active nature.
- Strong ethical standards and an ability to maintain strict confidentiality.
- Ability to show empathy and be an effective listener.
- Be committed, driven, resilient and comfortable working in a fast paced environment.
- Willingness to work outside normal business hours and regularly attend concerts and events.
- Able to work to strict deadlines and with minimal supervision.
- Able to work as part of a team that shares a culture of listening and building ideas and skills.
- Strong interest in orchestral/symphonic music and/or performing arts.