

**Position Title:** *Planned Giving Manager*  
**Department:** *Philanthropy*  
**Report to:** *Head of Philanthropy*  
**Direct Reports:** *Not applicable*  
**Touring:** *No*  
**Date:** *September 2021*

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## Summary

The Planned Giving Manager is responsible for the acquisition and administration of all planned gifts (including bequests, codicils and all other forms of deferred giving). The role is also responsible for initiating contact with patrons, potential patrons and for managing, maintaining and developing relationships to increase financial support for The Australian Ballet. This position is Melbourne based and may require some interstate travel.

This role works in consultation with the Philanthropy Management team and all activity is in line with the strategic objectives set by the Philanthropy Director and the Head of Philanthropy.

## Our Company

The Australian Ballet is one of the world's leading national ballet companies and a globally recognised Australian major performing arts organisation. Each year the company presents upwards of 220 performances through its main stage seasons in Melbourne, Sydney, Brisbane, Adelaide and Perth; along with public programs, special events, an extensive regional tour, a Children's Ballet and Education programs and regular overseas tours.

Orchestra Victoria (OV), provides pit services for ballet and opera in Victoria, and is a wholly owned subsidiary of The Australian Ballet. The Australian Ballet and Orchestra Victoria have an annual turnover of more than \$70 million and employ over 265 staff.

## Our Values

**We are exceptional** In our art we strive to inspire, transform and to connect emotionally with our audiences. Beauty, athleticism, technical excellence and strength are hallmarks of our aesthetic.

**We are ambitious** We know where we are going. We believe in our ability to make things happen and to reach for the stars. We're disciplined and don't give up. We do things today.

**We are innovators** Creativity powers our company. We value knowledge, experience, open-mindedness, fresh thinking and passion on and off the stage.

**We are proudly Australian** Our company joyfully reflects the rich diversity of our nation, speaking to all Australians, and about Australia, to the world.

**We are one team** We work as one team towards common goals across the entire organisation, wherever we are and whatever we do. We are friendly, trusting in our relationships, always open to the other point of view, and willing to have courageous conversations.

**We are sustainable** We recognise the importance of diverse and growing income streams, and our dependence on state-of-the-art facilities and systems. We emphasise analysis, critical thinking, and careful planning in all our work.

## **Duties and Responsibilities**

### **General**

- Actively contribute to and attend The Australian Ballet functions such as; opening nights, performance functions and other events/ activities.
- Provide reports to the Head of Philanthropy following each event/activity.
- Undertaking other duties as reasonably requested by the Head of Philanthropy

### **Planned Giving**

A focus of the organisation is the growth of the Planned Giving program, with a view to increasing notified bequests pledged to The Australian Ballet Foundation to \$100m over the next 3-5 years. This position will be a key part of this activity.

### **Planning & management**

- With the Head of Philanthropy, review the annual program plan, budget and unit goals, and formulate strategies for achievement of agreed objectives.
- Oversee the financial targets for the Planned Giving program and prepare reports as required, in consultation with the Head of Philanthropy.
- Maintain accurate and up-to-date donor records on Tessitura, including personal information and contact tracking.

### **Bequest promotion**

- Working with the Philanthropy Director and the Head of Philanthropy, develop and manage a program of bequest acquisition, targeting key stakeholder groups include current donors, subscribers, ticket buyers, auxiliary groups and other potential individuals.
- Work with members of the Philanthropy department, and other departments as required, to identify prospects.
- Implement calendar of events to raise awareness and cultivate prospects and donors.
- Attend other donor functions as required.
- Assist and implement strategies for contact and cultivation of solicitors, financial advisers, service clubs and other relevant groups to raise awareness of The Australian Ballet's bequest program.

### **Solicitation & stewardship**

- Work with other Planned Giving Managers on planned giving promotion and outreach mailings.
- Visit other identified prospects to provide information and develop awareness of making a bequest to The Australian Ballet.
- Liaise with solicitors and other third parties as necessary.
- Work with other Planned Giving Manager to actively involve Board members, volunteers, staff and others in identifying, cultivating, soliciting and stewarding bequestors.
- Nurture and cultivate those who have indicated their support through a bequest. Undertake other duties as reasonably requested by the Director and Senior Managers

## **Knowledge, skills and abilities**

To successfully fulfil the roles and responsibilities as outlined above, the Planned Giving Manager should demonstrate the following skills, knowledge and personal qualities: -

### **Essential:**

- Diplomacy, confidentiality, customer service, teamwork and attention to detail.
- Ensure that service delivery excellence is the hallmark of The Australian Ballet's reputation.
- Ability to represent the values and behaviours of The Australian Ballet
- Experience working with Bequests and Planned Giving
- Legal knowledge and understanding of wills
- Ability to relate and work with a mature community
- Excellent interpersonal, communication and public speaking skills
- Demonstrated fundraising and donor relations experience in an arts/education/NGO or similar
- Flexibility to work outside office hours when required
- Competence in data management and reporting
- Demonstrated experience in fundraising stewardship
- Ethical and moral standards
- Ability to maintain confidentiality at all times
- Initiative and drive
- Passion for cause

### **Desirable:**

- Experience in the operations and support required to support the planning, implementation and service function of a Bequest program
- Competence in data management and reporting
- Analytical abilities
- Time and project management skills
- Proficiency in MS Office, including MS PowerPoint and database management
- Ability to motivate and train volunteers
- Hold a current driver's licence