



## Position Description

### **Bequest Programme Executive**

*(part time 0.4FTE Fixed Term Contract 4 May 2020 to 26 March 2021)*

#### **Chamber Music New Zealand (CMNZ)**

Chamber Music New Zealand (founded 1950) is a national agency that tours top-level international and New Zealand ensembles to our major cities and other groups, predominantly New Zealand artists, to smaller centres (working in partnership with affiliated societies). CMNZ has an extensive education and outreach programme that includes the NZCT Chamber Music Contest for secondary school students, masterclasses at our universities, coaching sessions in schools, “accessible” workshops and concerts for the intellectually disabled (run in partnership with the IHC Foundation), and other activities designed to enhance the enjoyment and understanding of music.

Chamber Music New Zealand is a registered charitable trust. It receives core funding from Creative New Zealand. Sponsorship, community trust funding and philanthropy are vitally important to our activities.

#### **Position Purpose**

The Bequest Programme Coordinator is a new position for Chamber Music New Zealand (CMNZ) and plays a key role in the development and implementation of a bequest programme at CMNZ, a significant activity in CMNZ’s 2020 development plan.

The Bequest Programme Coordinator will be responsible for:

- Researching, developing and implementing the CMNZ Bequest programme in collaboration with the Development Manager
- Managing the implementation of a bequest campaign in 2020 and reporting on it
- Maintenance and development of key relationships with current and prospective bequestors
- Ensuring bequests are processed into PatronBase (CMNZ’s fundraising and marketing database) and manage acknowledgement letters in a timely manner.

This role is part of the Development Team. The team will maintain best business practice and build strong relationships with funders, sponsors and partners.

#### **Key Relationships**

Reports to: Development Manager

Manages: There are no staff reporting to this position

Internal: All CMNZ staff including Board members and volunteers. Maintains a close relationship with the Finance Manager and Business & Fundraising Administrator.

External: Donors and supporters including individuals and estate trusts.

## Authorities

Financial: nil

Staffing: nil

## Location

This position is based in Chamber Music New Zealand's main office in Wellington.

## Key Responsibilities

Key Result Area	Key Activities/Expectations
<ul style="list-style-type: none"><li>Researching, developing and implementing the CMNZ Bequest programme in collaboration with the Development Manager</li></ul>	<ul style="list-style-type: none"><li>Research the current bequest environment in New Zealand by conducting situation and competitor analyses of bequest environment in the non-profit and arts sectors.</li><li>Audit CMNZ's current bequestors and prospects.</li><li>Scoping and detailing recommended bequest programme at CMNZ including communication of the programme across all marketing channels.</li><li>Action the bequest programme at CMNZ including re-name, framework, content, stakeholder engagement and communications calendar, in collaboration with Development Manager.</li></ul>
<ul style="list-style-type: none"><li>Manage the implementation of a bequest campaign in 2020</li></ul>	<ul style="list-style-type: none"><li>Collaborate with Business and Fundraising Administrator and marketing team to develop written content and artwork, mailing of DM, and advertising online and in print collateral.</li></ul>
<ul style="list-style-type: none"><li>Maintenance and development of key relationships with current and prospective bequestors</li></ul>	<ul style="list-style-type: none"><li>Assist with building existing and creating new relationships with acknowledged bequestors and families, where appropriate.</li><li>Manage telephone and written communications to bequestors and estate trusts to acknowledge bequests.</li><li>Record notes regarding calls or meetings with bequestors in Communications tab of PatronBase database.</li><li>Help coordinate stakeholder engagement opportunities to attract and acknowledge bequestors.</li></ul>
<ul style="list-style-type: none"><li>Ensure bequests are processed into PatronBase (CMNZ's fundraising and marketing database) and manage acknowledgement letters in a timely manner.</li></ul>	<ul style="list-style-type: none"><li>Ensure records of bequests (current and future) are maintained in CMNZ's fundraising &amp; marketing software (PatronBase) with Business &amp; Fundraising Administrator and Finance Manager.</li><li>Monthly reporting on all bequest programme progress to Development Manager for board reports.</li></ul>

## **Skills**

- Research skills and well-developed ability to identify and analyse information and put forward ideas and recommendations
- Demonstrated ability to communicate effectively both orally and in writing, including excellent listening skills
- Well-developed relationship management and interpersonal skills, with the ability to communicate effectively with a wide range of stakeholders, and maintain confidentiality and sensitivity
- Ability to understand complex financial information related to bequests
- Ability to work autonomously and as part of a team
- A positive attitude with a flexible, positive and collaborative approach
- Excellent organisational skills with the ability to multitask
- Good planning and project management skills, including managing risks
- Sound problem-solving skills and judgement
- A completer/finisher with attention to detail

## **Knowledge/Experience**

- Sound track record of working within a fundraising team
- Sound track record of managing stakeholder relationships, ideally in a not-for-profit organisation
- Ideally, experience of working within a bequest programme in a not-for-profit organisation
- Ideally, experience of managing donor direct mail and EDM appeals for a not-for-profit organisation or other similar organisation
- Familiarity with using CRM databases an advantage
- Knowledge of the arts sector particularly the classical music sector an advantage
- Experience of working in a small team an advantage.