



## GIFT PLANNING OFFICER Development Division

<b>Work Status:</b>	Full-Time Regular	<b>Payroll Type:</b>	Exempt
<b>Location of Job:</b>	Davies Symphony Hall San Francisco, CA	<b>Hourly Rate:</b>	Commensurate with experience
<b>Schedule:</b>	Monday – Friday, some weekends	<b>Regular Hours:</b>	9:00 AM – 5:00 PM, some evenings
<b>Reports To:</b>	Managing Director of Donor Relations and Gift Planning	<b>Supervisory:</b>	No

The San Francisco Symphony, one of America's most forward-looking arts organizations, presents over 220 concerts each year, creates leading edge media initiatives such as Keeping Score on PBS television and its own Grammy-winning record label SFS Media, and serves its community with one of the most extensive education and community programs of any orchestra in the country. Led by its innovative Music Director Michael Tilson Thomas, the SFS continues to set the highest possible standard for excellence in orchestral performance and to shape the cultural life of the Bay Area.

### **JOB SUMMARY**

The Gift Planning Officer is a key member of the San Francisco Symphony's 24-member development team and has oversight over all aspects of the organization's gift planning program. The Gift Planning Officer will be an experienced development professional with a desire to guide the legacy giving marketing, a passion for working with trusts & estates, as well as stewarding the 600+ members of the SFS's Pierre Monteux Legacy Society. Reporting to Managing Director of Donor Relations and Gift Planning, the Gift Planning Officer will also be a key member of the major gifts team, taking a leadership role in the acquisition, development and solicitation of new gift planning donors from within the major gift portfolios. The major responsibilities of this role include:

### **MAJOR RESPONSIBILITIES**

- Sustain and expand the planned giving program by identifying, cultivating, soliciting, and stewarding prospects and donors capable of making bequests, life income gifts, and other planned gifts to the Symphony through a donor portfolio as well as in partnership with the major gifts and individual giving teams. Assist with the development and implementation of a strategic plan to achieve income and other program goals.
- Provide prospects and their advisors with detailed information on planned gift vehicles. Prepare proposals and make presentations using planned giving software. Work closely with donors during

the estate planning process in order to help satisfy their charitable goals while complying with IRS requirements and the Symphony's gift acceptance guidelines.

- Manage all aspects of the 500 member Pierre Monteux Society, including cultivation and recognition events, stewardship, correspondence, and other communication and activities.
- Staff and coordinate activities of the Planned Giving Committee. Recruit volunteers to be advocates for program and assist with cultivation, solicitation, and stewardship as appropriate. Develop productive working relationships with key volunteers and professional advisors. Assist in the training of staff and volunteers on planned giving topics.
- Implement and assist with the improvement of a comprehensive and impactful marketing plan. Manage production of estate planning newsletter published three times annually, including working with the Development Communications Manager on interviewing donors for feature stories; writing and editing articles; and overseeing design, layout, and mail house vendors. Create additional marketing materials for targeted mailings, program book advertisements, and other SFS publications.
- Working with trust management company, oversee administration of charitable remainder trusts and the pooled income fund, including income payouts, tax documentation, tracking, and reporting. Administer gifts of real estate, life insurance, retained life estates, retirement plan designations, tangible personal property, and matured bequests. Administer systems and procedures for program, including gift tracking and reporting. Manage communication with donors and their legal representatives during life and the probate process.
- Responsible for the administration of the charitable remainder trust, charitable gift annuity, and pooled income fund programs, including payments to beneficiaries, annual notifications and financial reporting, and related correspondence, as applicable.

#### **MINIMUM REQUIREMENTS**

Minimum two years gift planning, fundraising or related experience in the legal or financial fields desirable. Bachelor's degree in related field required, with an advanced degree such as a J.D. preferred. Must possess excellent administrative, clerical and organizational skills; excellent writing and communication skills; ability to grasp and work with legal, regulatory, and financial documents and administrative details; ability to learn new computer database and other administrative/record-keeping systems; ability to manage details and handle multiple projects simultaneously efficiently and with a high degree of accuracy; a proactive and issue-spotting orientation; ability to work with a diverse group of people and to handle situations with tact and diplomacy. Must be proficient in MS Word and Excel; Power Point. Ability to maintain confidentiality.

#### **APPLICATION INSTRUCTIONS**

To apply, please visit our website at [www.sfsymphony.org](http://www.sfsymphony.org). Under the About Us tab, go to the Careers and Auditions page and click on "View jobs at the SF Symphony." Search for this job and click on "Apply for this Position" to submit your resume and cover letter.

**ORGANIZATIONAL PROFILE**

The San Francisco Symphony, under Music Director Michael Tilson Thomas, is one of the country's leading orchestras. Some 220 concerts each year reach an audience of more than 600,000, while national and international broadcasts, heard on more than 215 radio stations, reach millions more. The Symphony has its own recording label, SFS Media, and its recordings have won some of the world's highest honors. Its multimedia initiative, *Keeping Score*, has reached over six million people with television and radio broadcasts, DVDs, and an interactive website. The Orchestra tours extensively throughout Europe, Asia, and the United States, and its outstanding artistic reputation enables it to attract the world's finest guest artists and conductors to Davies Symphony Hall. More than 70,000 young people are served each year by the Symphony's numerous education programs, including its internationally renowned Youth Orchestra and Adventures in Music (AIM), which reaches every 1st through 5th grader in San Francisco's public schools. The organization is led by President Sakurako Fisher and Chief Executive Officer Mark Hanson.

The San Francisco Symphony's mission is to set the highest possible standard for excellence in musical performance at home and around the world; enrich, serve, and shape cultural life throughout the spectrum of Bay Area communities; and maintain financial stability and gain public recognition as a means of ensuring its ability to fulfill its mission.

The San Francisco Symphony is an Equal Opportunity Employer.