



*Job Title:* Director, Planned Giving

*Department:* Development

*Reports to:* Director, Campaign

*Supervises:* Associate Director, Planned Giving (to be hired with Campaign currently not budgeted.)

*Interacts regularly with:* CEO; Senior Director, Development (SDD); Gift Officers; and Volunteer leadership/Board members.

*Status:* Full-time, Exempt

### **JOB SUMMARY**

The Director, Planned Giving (DPG) reports to the Director, Campaign and oversees and implements a best-in-class Planned Giving program for the San Francisco Symphony. The DPG's portfolio will contain 100-120 Major and Planned Giving donors and prospects and as a frontline fundraiser will be responsible for cultivation, solicitation, and stewardship for all gift types from this portfolio totaling \$1.5M- \$3M annually. The DPG is responsible for ensuring that the Development Team adds 50+ planned giving households per year and \$5M+ to the pipeline. Additionally, the DPG manages 1 direct report to be hired with the Campaign.

The Director, Planned Giving should be a deeply collaborative individual who can partner with board members, executive staff leadership, Development leadership, and frontline fundraisers to guide Planned Giving strategies and train team members in identifying, cultivating, soliciting, and stewardship Planned Gifts. The individual should be experienced in producing gift illustrations and advising on sophisticated blended/planned gift strategies, with experience managing life income investment pools, and have experience working with Board members and Board committees.

The successful candidate is a strategic thinker capable of identifying and creating the most advantageous estate and financial planning tools applicable to the specific needs and desires of individual donors, as well as assisting and collaborating with donors' advisors in the structuring and implementation of planned giving strategies. They should be a self-starter, optimistic, detail-oriented, and possess a can-do attitude. They should have experience managing a complex Planned Giving program as well as direct reports. They need to be committed to the success of the symphonic artform and be able to communicate thoughtfully and enthusiastically about the work of the San Francisco Symphony, its opportunities and its challenges.

### *Essential Job Functions and Responsibilities:*

- Is a key strategist for the Development Team for strategy and messaging on Planned Giving.
- Responsible for managing a portfolio of 100-120 major and planned giving donors and prospects through all stages of the gift cycle bringing in \$1.5M- \$3M in annual operating support.

- Responsible for adding 50+ planned giving households per year and \$5M+ to the pipeline.
- Collaborate with other members of the Principal and Major Gifts Teams to develop and implement strategies and actions to identify, cultivate, solicit, and provide stewardship to prospects of planned gifts.
- Partner with Leadership and Gift Officers with solicitation visits related to planned gifts, and prepare and present planned gift illustrations as needed.
- Collaborate with Stewardship Team on customized acknowledgement plans for Planned Giving donors.
- As the Department's Planned Giving in-house resource, prepare and provide training and mentorship to all Gift Officers on Planned Giving.
- Manage and support the Gift Planning Committee and volunteer leadership for Planned Giving. Collaborates with Director, Campaign and leadership on strategy for Committee and Volunteers.
- Establish and launch a Planned Giving Council filled with Bay Area estate attorneys, financial/estate planners, etc. and oversees effective meetings throughout season.
- Develop a robust pipeline of planned gifts and a model for long-term, future cashflow analysis.
- Prepare and provide weekly/monthly analysis and progress reports to leadership and Gift Planning Committee.
- Monitor, track, and report on the status, progress, and receipt of planned gifts.
- Facilitate the processing of non-cash gifts to ensure appropriate and timely acknowledgement, recognition, and stewardship.
- Elevate all gifts for consideration that require review and approval to the Gift Acceptance Team and provide briefings on gifts and recommendations.
- Review gift agreements for planned and blended gifts, and update documents.
- Manages institutional relationship with SFS's trust and charitable gift annuity administrator and with planned giving software administrator.
- In collaboration with the Stewardship and Development Communications Team, create and execute on annual Endowment Reporting for donors and monitor utilization reports of endowed funds.
- In collaboration with the Development Communications Team: Develop and implement marketing strategies focusing on donor communications, donor events, publications, website, articles, and mailings to promote the planned giving program, including the preparation of presentations, proposals, brochures, correspondence, reports, and collateral supporting materials.
- Manages institutional relationship with any marketing consultants, and oversees development of Planned Giving program Newsletters, Emails, Brochures, Postcards etc.
- Follows up on inquiries in response to Planned Giving efforts from all prospecting channels.
- In collaboration with the Services and Operations Team, draft and edit acknowledgements, gift agreement letters, pledge payment documentation, PMS LOI and welcome materials, and ensure PG data integrity is maintained.
- In collaboration with the Data Team and Research Team, provide research and analyze data to support the solicitation strategies and fundraising goals.
- In collaboration with the Stewardship Team, create, implement, and ensure Stewardship for existing members of the Pierre Montoux Society is effective and engaging. Implement programmatic and personalized recognition activities and donor benefits. Evaluate and work to enhance the effectiveness of the recognition program.
- In collaboration with the Events Team, create and execute cultivation and stewardship events that deepen the relationship the SF Symphony has with its Planned Giving donors and prospects.
- Supervise and lead a high-performing and ambitious AD, Planned Giving and guide their job performance success and professional development.
- In collaboration with the Director, Campaign, assign and monitor Planned Giving projects for the Campaign and Planned Giving Associate.

- Develop and maintain professional skills and relationships with peers in planned giving and financial/gift planning fields.
- Remain current on topics and issues affecting the field of planned giving.
- Support accuracy in Planned Giving donor listings.
- Manage the relationship with planned giving consultants and vendors in collaboration with the Director, Campaign.
- Manage and reconcile the Planned Giving program's expense budget and contributions reports.
- Represents the San Francisco Symphony on one or more of the Planned Giving Roundtables in the Bay Area.
- Along with other senior leaders attends board and committee meetings including Development, Gift Planning, etc. as needed.

*Skills:*

- Understands of the needs and interests of major and planned giving donors in order to develop relationships between them and the San Francisco Symphony.
- Able to articulate the case for support so that individuals "buy in" to the vision/mission/goals of the Symphony and with sufficient effectiveness to secure gifts at assigned donor giving levels.
- Maintains a deep and up-to-date knowledge of tax laws that impact charitable giving, personal assets and estates.
- Broad knowledge of the principles of fundraising – able to participate in all aspects of the gift cycle: (1) to initiate contacts with potential donors; (2) to develop appropriate cultivation strategies for them, including working with volunteers and senior leadership; (3) to move potential donors in an appropriate and timely fashion toward solicitation and closure; (4) to make solicitations when appropriate; (5) to maintain stewardship contacts with donors.
- Demonstrated management abilities for ambitious and goal-oriented professionals.
- Excellent oral, written and interpersonal skills required.
- Problem-solving, research and analytical skills.
- Solid relationship-building skills, able to interface with external constituents, Staff, Conductors, Musicians, Guest Artists, and Board of Governors.

*Other duties:*

- Attend concerts and events, regularly on nights and weekends.
- Perform additional duties as required by the San Francisco Symphony.

**Qualifications**

- Bachelor's degree and five or more years of experience in fundraising, with a track record of success in planned giving preferably in the performing arts.
- Law degree preferred.
- Experience as attorney; CPA; certification in financial planning, estate planning, or planned giving is preferred.
- Proven experience in major and planned giving fundraising, preferably in performing arts organizations, and in cultivating and soliciting prospects capable of gifts at the \$25k+ level.
- Track record of management success.
- Experience on large capital campaigns in a sophisticated and complex environment preferred.
- Relevant experience outside the nonprofit environment working with High Net Worth Individuals will be considered.
- Excellent communication skills, written and verbal.

- Proficient in Microsoft Office and donor database software. Tessitura preferred.
- Proficient in PG Calc and other Planned Giving software.
- Strong organizational skills.
- Good interpersonal skills and diplomatic abilities.
- Ability to work successfully in a fast-paced environment while managing multiple assignments and priorities.
- Regional travel as needed.
- Willing to attend concerts and events, regularly on nights and weekends.

### **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 “Jobs at the SF Symphony.” Search for this job and click on “Apply for this Position” to submit your resume, cover letter, and application.

### **ORGANIZATIONAL PROFILE**

The San Francisco Symphony is widely considered to be among the most artistically adventurous and innovative arts institutions in the U.S. Under the artistic direction of Michael Tilson Thomas since 1995, the Orchestra is a leading presence among American orchestras at home and around the world, celebrated for its artistic excellence, creative performance concepts, active touring, award-winning recordings, and standard-setting education programs. In December 2018, the San Francisco Symphony announced Esa-Pekka Salonen as its Music Director Designate along with a group of eight Collaborative Partners from a variety of cultural realms who collectively form a new artistic leadership model. Salonen will begin his appointment as the SFS’s 12th Music Director in September 2020, at which time Michael Tilson Thomas will become the Orchestra’s first Music Director Laureate, following his remarkable 25-year tenure as Music Director.

The San Francisco Symphony presents more than 220 concerts and presentations annually for an audience of nearly 450,000 in its home of Davies Symphony Hall and through its active national and international touring. A cornerstone of the organization’s mission, the San Francisco Symphony’s education programs are the most extensive offered by any American orchestra today, providing free comprehensive music education to every first- through fifth-grade student in the San Francisco public schools, and serving more than 75,000 children, students, educators, and families annually. The SFS has won such recording awards as France’s Grand Prix du Disque and Britain’s Gramophone Award, as well as 15 Grammy Awards. In 2004, the SFS launched the multimedia Keeping Score on PBS-TV and the web. In 2014, the SFS inaugurated SoundBox, a new experimental performance venue and music series located backstage at Davies Symphony Hall. SFS radio broadcasts, the first in the nation to feature symphonic music when they began in 1926, today carry the Orchestra’s concerts across the country.

Pursuant to the San Francisco Fair Chance Ordinance, the San Francisco Symphony will consider for employment qualified applicants with arrest and conviction records.

The San Francisco Symphony is an Equal Opportunity Employer.