

The Los Angeles Philharmonic Association is currently seeking a: Gift Planning Officer

Founded in 1919, the Los Angeles Philharmonic Association presents, and promotes the performing arts in its varied forms at the highest level of excellence to a diverse and large audience, at Walt Disney Concert Hall, the Hollywood Bowl, and The Ford.

Position Summary:

The Los Angeles Philharmonic Association represents the people and venues of the LA Phil. Anchored by the Los Angeles Philharmonic, the staff and administration work to support performance in our four iconic venues: Walt Disney Concert Hall, the Hollywood Bowl, the Judith and Thomas L. Beckmen YOLA Center, and the Ford. Having celebrated its 100th anniversary of performance in 2019 and the Centennial of the Hollywood Bowl in 2022, the Gift Planning Officer will play an integral role in the success of fundraising activities specific to the overall mission and strategic priorities of the Los Angeles Philharmonic Association.

The Gift Planning Officer (GP Officer), reporting to the Director, Gift Planning, will have a dynamic and diverse portfolio of 200 legacy giving prospects capable of and inclined to make a legacy gift. Key responsibilities include identification, engagement, solicitation, and stewardship of prospects capable of making legacy gifts.

The GP Officer will be a new position, providing the gift planning team with a dedicated gift officer/relationship manager whose primary job responsibility will be to increase the membership of the Clark Society by identifying, qualifying, and then cultivating gifts from a donor's will, trust or other gift planning vehicles (beneficiary designations, split interest gifts, etc.). Using predictive data modeling, LA Phil has identified a group of 918 unassigned (no assigned gift officer/relationship manager) donor prospects who have same characteristics as current LA Phil planned giving donors. This new position would take 200 of these prospects in a year and contact each to determine if they are a qualified prospect. This will create a pipeline of planned giving donors for the future growth of LA Phil's contributed revenue, especially legacy gifts from our donors' estates, which will continue to build the endowment and quasi-endowment.

As new qualified prospects are identified, the GP Officer, or the other members of the gift planning team (Director, Gift Planning and Associate Director, Gift Planning) will be available to become the assigned Relationship Manager for that donor, and then to cultivate and solicit new planned gifts and thereafter to steward the relationship so that the donor does not change their intention to leave a legacy (planned) gift to the LA Phil as part of their estate plans.

Position Elements:

- Manage a personal portfolio of at least 200 prospects with 5-7 figure legacy giving potential. Identify, qualify, cultivate, solicit, and steward individual donors and, as required, their families.
- Responsible for initial follow-up on leads generated by predictive data modeling, specifically a group of 918 unassigned (no assigned gift officer/relationship manager) donor prospects who have same characteristics as current LA Phil planned giving donors.
- Utilizes predictive data model and additional research data to define strategic plans for solicitation of prospects.

- Working with the Senior Coordinator, Gift Planning, uses gift planning marketing strategies to create maximum participation by LA Phil constituencies. Utilizes marketing and communications and donor recognition materials and programs to implement effective donor relations.
- Partners, coordinates, and liaises with fundraisers/relationship managers throughout Philanthropy Department on the identification and promotion of individuals who are currently annual fund or major gift donors as prospects for legacy gifts.
- Develop and maintain personal contact with individual prospects for legacy gifts and provide information and reports concerning gift utilization and impact.
- Coordinate activities with donors' attorneys and financial advisors to determine appropriate methods of legacy giving and provide illustrations and proposals regarding legacy giving vehicles.
- In partnership with the Director, Gift Planning, identify and leverage opportunities to cultivate estate gifts from volunteer leadership of the LA Phil Affiliates Program to cultivate and solicit legacy gifts from its 900-member network.
- Educate potential prospects, professional advisors, and past donors about gift planning opportunities at LA Phil.
- Work alongside donors' attorneys to review and complete documentation of irrevocable legacy gifts, including split interest gifts.
- In partnership with the special events team, the Gift Planning team, and other Philanthropy staff, design and execute legacy giving events, mailings, and PR for key constituencies.
- Enhance recognition opportunities through the Clark Society of donors who have included LA Phil in their estate.
- Provide ongoing gift planning training to Major Gift Officers, Annual Fund Officers, and other Philanthropy staff.

Position Requirements:

- 2-3+ years of successful gift planning experience. Experience should include a working knowledge of specific deferred gift vehicles and tax consequences of deferred gifts, and thorough knowledge of the laws relevant to gift planning.
- A Bachelor's degree is required. JD, other advanced degree, and/or CSPG certification is preferred.
- Proven success and personal experience in the formation, presentation, and negotiation of deferred gifts. Customer-service orientation.
- Ability to create powerful, compelling written and oral communications for legacy giving, and experience presenting materials to external audiences. Exceptional interpersonal skills and judgment, along with a commitment to promote the LA Phil by developing productive relationships with donors, volunteers, and staff.
- Sound judgment and superior ability to solve problems creatively and effectively. High ethical standards.
- Ease in dealing with major donors and volunteers and facility in conversations around end-of-life issues.
- Ability to understand the aspirations and interests of patrons in order to develop relationships between them and the LA Phil.
- A demonstrated record of completing assignments, including timely documentation of donor contacts in the development database.
- Passionate and committed to meeting with donors and securing gifts.
- Team-oriented approach with a track record of respecting co-workers and volunteers.

- Must be self-motivated, creative, and have great attention to detail.
- Must be comfortable and proficient with technology including Microsoft Office Suite, internet-based collaborative applications, social media, and donor software. Experience and knowledge of Tessitura desirable.
- Maintain confidentiality and accuracy with respect to all donors and prospect information.
- S/he/they must be comfortable working in a fast-paced and dynamic work environment and be willing and able to work some nights and weekends.
 - Knowledge of the Los Angeles philanthropic community, although not required, is helpful. An interest in or passion for music, particularly classical music, is a plus
 - Dedication and commitment to engage in and promote diversity, equity, and inclusion within the staff, vendors, and within interactions with the surrounding community is a must
 - Secondary language fluency is a plus

COVID Workplace Safety Requirements

This position will require you to interact with employees, patrons, vendors and others who may or may not be vaccinated or recently tested. You will be required to wear personal protection equipment (PPE) required by the LA County Department of Public Health protocols and the LA Phil. You agree to comply at all times with the LA Phil's COVID-19 Prevention Plan, including testing and vaccination requirements.

How to apply:

Complete the online application by clicking [here](#).

- Complete the application with all pertinent information.
- At the end of the application, a confirmation page will appear when your submission has been successful

The Los Angeles Philharmonic Association will consider for employment qualified Applicants with Criminal Histories in a manner consistent with the requirements of the FCIHO.

EQUAL EMPLOYMENT OPPORTUNITY POLICY

The Los Angeles Philharmonic Association embraces and is committed to diversity and inclusion within our staff, musicians, guest artists, audiences, and surrounding communities. The Association does not discriminate on the basis of race, color, religion, religious creed (including religious dress and religious grooming), sex (including pregnancy, perceived pregnancy, childbirth, breastfeeding, or related medical conditions), sexual orientation, national origin, ancestry, citizenship, age, physical or mental disability, legally protected medical condition or information, genetic information, marital status, gender, gender identity, gender expression, military status, veteran status, or any other basis protected by federal, state, or local law. Consistent with the law, the Association also provides reasonable accommodation for disabled applicants and employees in accordance with the Americans with Disabilities Act (ADA) and the California Fair Employment and Housing Act, for pregnant employees who request an accommodation with the advice of their health care providers, for pregnancy, childbirth or related medical conditions; for employees who are victims of domestic violence, sexual assault or stalking; and for applicants and employees based on their religious beliefs and practices.

