

**The Los Angeles Philharmonic Association** is currently seeking a:  
**Manager, Gift Planning**

Founded in 1919, the Los Angeles Philharmonic Association's mission is to perform, present, and promote music in its varied forms at the highest level of excellence to a diverse and large audience, both at the Walt Disney Concert Hall and the Hollywood Bowl. The Los Angeles Philharmonic Association is dedicated to continuing its pre-eminent status in the music world of the 21st century.

**Position Summary:**

The Manager, Gift Planning, reporting to the Director, Gift Planning, will utilize knowledge of planned giving and data analytical skills to play a key role in legacy giving prospect management, donor stewardship, marketing, and supervision of the trust and bequest administration work for the LA Phil's growing Gift Planning effort ("Gift Planning Office" or "GPO"). Working closely with the GPO and other Development staff members, the Manager, Gift Planning will participate in preliminary fundraising activities in an effort to effectively coordinate prospect visits and proposals and donor stewardship.

The LA Phil has a current operating budget of over \$115 million. The LA Phil is in the public phase of a major comprehensive campaign (goal \$500M) over the next three years to build the institution's reserves and working capital, invest in facilities, and fund current and new program needs. The LA Phil Development Office each year raises over \$35 million through its annual fund, plus over \$20 million in endowment, capital, and special operating gifts. The Manager, Gift Planning will help to grow these gifts, especially for the endowment.

**Position Elements:**

- In a highly collaborative and team-oriented manner, administer the day-to-day activities of the GPO, including scheduling meetings, planning and executing travel arrangements with itinerary, preparing correspondence, filing, etc.
- Provides daily administrative support within the GPO, including phone coverage, preparation of visit packets, creating advanced level power point presentations, filing, budget administration, etc.
- Develops a strong understanding of the key drivers of GPO success, to initiate and/or respond with appropriate support, anticipating the needs of the GPO by monitoring the upcoming work schedule and future events.
- Provide oversight for GPO's marketing effort, overseeing the production and distribution of materials throughout the calendar year, including gift planning publications (i.e. newsletters, postcards, brochures, website updates, etc.). Perform specialized functions involving the creation/design materials and coordinate staff to ensure timely production of marketing materials, acting as the primary liaison with outside marketing/communications vendors as needed.
- Administer the operation of LA Phil's legacy society, the William Andrews Clark Society, ensuring that new memberships are promptly processed, donors are included in events, and special mailings offered exclusively to Clark Society members. Working with the Director, Gift Planning and Director, Leadership Gifts to monitor and track the Clark Society stewardship program.
- Utilizes an understanding of the internal operations of LA Phil's trusts and bequests administration work to assist with special projects, prepare specialized reports, and develop and implement solutions to improve the program and the donor experience.

- Coordinates the LA Phil's trusts and bequests information management efforts, working with the Director, Development Operations, the Controller and Finance Staff to ensure the validity and relevance of database information.
- Provide donor support and help resolve issues related to trust administration, supporting Development and Finance staff, as well as external professional advisors working with the GPO.
- Working with the LA Phil Development Communications staff, draft and develop various documents, letters, memos, and reports relating to stewardship, internal and external requests, and information analysis.
- Proactively provide administrative support in the legacy giving prospect management process.
- Perform Tessitura data entry, research and analysis of the Tessitura PG module and Tessitura reports, reports from PG Calc Bequest Manager, reviewing biographical information and researching donor interest to create visit packets, adjusting trip changes, tracking visit reports.
- Maintain information in the Tessitura database, create custom reports, troubleshoot reports, database management, office equipment and software.
- Works closely with the GPO to analyze donor/prospect information and to draft planned giving letters/proposals to support gift discussions and solicitations, using Tessitura and PG Calc.
- Record and update proposals in Tessitura system, monitoring each to ensure regular updates and actions are promptly recorded. Provides Director, Gift Planning with regular summaries of all open proposals for review and follow-up.
- Oversees marketing efforts, particularly with respect to legacy giving data management, including management of the documentation of legacy giving marketing efforts and tracking responses into Tessitura; periodically re-assesses and refines processes to ensure maximum efficiency.
- Coordinates with the Development Operations team, the time-sensitive running of specialized queries and reports from Tessitura to support gift planning fundraising, metrics, prospect management, and marketing efforts.
- Presents fundraising data regarding legacy gifts to increase comprehension by LA Phil Development staff and Board members.
- Supports stewardship and recognition of gift planning donor listings and levels.
- Analyzes gift planning efforts and distributes key metrics to GPO, including portfolio reports, pipelines, contact activity reports, and campaign reports.
- Refines and segments donor data for effective gift planning initiatives.
- Manages external and internal relationships for data systems (PG Calc, Tessitura & Bequest Manager).
- With the Director, Gift Planning, handle communications with the Music Center Foundation, regarding donors of endowment and planned gifts as applicable.
- Assists with other fundraising projects and duties as assigned.

**Position Requirements:**

- Bachelor’s degree with at least 2 years’ experience in planned giving, fundraising, donor relations, trust administration, marketing, data management, a legal environment.
- Strong interpersonal and relationship building skills; with demonstrated success in professional environments, with the ability to relate well and inspire confidence among others.
- Must be highly disciplined, a proven team player, and a self-starter, who can work with minimal supervision. Must be able to set priorities and work independently with frequent interruptions, while balancing multiple requests.
- Extremely detail oriented with excellent written and verbal communication skills, with outstanding proofreading skills required.
- Data-driven and technically proficient with advanced proficiency with Microsoft Word, PowerPoint, Excel and PG Calc.
- Knowledge of donor databases and familiarity with Tessitura a plus.
- Ability to use discretion and independent judgment to derive useful information in communication with donors and their families on sensitive issues and in relation to confidential information.
- Must possess strong customer service orientation and skills, demonstrating a professional and friendly demeanor and ability to anticipate and provide helpful service to internal and external customers.
- Experience coordinating travel and scheduling meetings.
- Be willing and able to work some nights and weekends.

Preferred qualifications:

- General knowledge of legal and financial documents and concepts, tax and estate planning. Legal and financial experience helpful.
- Notary
- Experience in the drafting of marketing materials and strategies.
- 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.

**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**

It is the Los Angeles Philharmonic Association's policy to provide equal employment opportunity for all applicants and employees. 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.