



Manager, Prospect Research and Management
Development Department
Individual Giving

Work Status:	Full Time	FLSA Status	Exempt
Location of Job:	Davies Symphony Hall San Francisco, CA	Salary:	\$72,001 - \$76,057
Schedule:	Hybrid	Regular Hours:	9 am-5 pm
Reports To:	Deputy Director, Development and Individual Giving	Supervisory:	No

JOB SUMMARY

The Manager, Prospect Research and Management, is a key member of the Development Department who reports to the Deputy Director, Development. The Manager contributes to the success of the San Francisco Symphony’s fundraising efforts by supporting front-line gift officers, the administrative leadership team, the CEO and Music Director, and board members. The Manager helps gift officers maximize the value of their portfolios of donors and meets with gift officers regularly to enhance their solicitation plans. The Manager prepares reports for board and leadership meetings with prospects and reports about event guests. The Manager researches donors and prospects as requested by board members, the CEO, the Music Director, or Development staff. The Manager ensures that appropriate information is added to and maintained in the database; they support the Development Services team’s creation of reports and promote their use among gift officers.

ESSENTIAL FUNCTIONS & RESPONSIBILITIES

- Supports the board’s Committee of Governors, the CEO, and CPO by identifying and researching potential members of the Board of Governors and Advisory Council, providing profiles and speaking points for candidates being presented. The Manager attends board committee meetings as requested.
- Helps gift officers maximize the value of their portfolios of donors by routinely analyzing their donors’ giving propensity and evaluating unassigned donors. The Manager builds portfolios for new gift officers with top prospects and regularly reviews all portfolios and prospects with the gift officers.
- Reviews unassigned donors with the relevant Development leadership and recommends solicitation amounts and possible gift designations.
- Conducts periodic database wealth & philanthropy screenings, analyzes the results, identifies viable new prospects, and recommends gift officer assignments to the appropriate Development leadership.
- Meets regularly with gift officers to enhance their solicitation plans. Leads Portfolio Management Meetings, driving the agenda and the conversations to support movement towards obtaining gifts by the frontline fundraising team.

- Prepares reports for board members and leadership before their meetings with donors or prospects, and about event guests before elevated and major Development events.
- Collaborates with the Data Team to track and report campaign plans in Tessitura.
- Collaborates with the Data Team to develop and maintain automated reports from the Tessitura database for briefing documents.
- Maintains a library of reports and briefing documents that is shared with Development and selected administrative staff.
- Develops and maintains relationships in Tessitura for the Symphony's board and top donors; collaborates with the Board Liaison to maintain information about board member's organizational affiliations and contact information.
- Learns more about research tools and techniques and manages and procures research resources within the approved budget.
- Provides periodic training for development staff in portfolio and moves management, basic research techniques, and appropriate data entry protocols for Tessitura.
- Conducts job functions and activities in alignment with the principles of the SFS's Diversity, Equity, and Inclusion (DEI) work, and supports the organization's DEI work through participation in working groups and other initiatives as possible.
- Other duties as assigned.

MINIMUM QUALIFICATIONS

Required:

- 3-5 years' experience in research supporting individual, foundation, and corporate giving
- Demonstrated commitment to protecting the confidentiality of SFS information
- Demonstrated curiosity about people's philanthropic behavior, motivations, and methods
- 2-3 years' experience working with individual gift officers on their portfolios
- Strong analytical and problem-solving skills.
- Excellent communication skills, both written and verbal
- Strong organizational skills, with ability to work independently and manage highly detailed tasks
- Ability to professionally and diplomatically communicate and interact with a wide variety of internal and external stakeholders
- Ability to handle multiple tasks and often-changing priorities, and meet deadlines in a high-volume, fast-paced environment
- Demonstrated proficiency in Windows operating systems, Microsoft Office (Word, Excel, PowerPoint, etc.) and a constituent relationship management (CRM) systems (e.g., Tessitura or similar), and experience with Asana project management software,
- Familiarity with and/or passion for orchestral music a plus.
- The successful candidate is strategic, optimistic, and must possess a can-do attitude.

SUPERVISORY RESPONSIBILITIES

None

WORKING RELATIONSHIPS

The internal and external constituents with whom this position most frequently interacts include:

- Individual Giving team, Development Operations & Services team
- CPO, Development Leadership Team, Board Relations Manager
- CEO Office