

## **The Los Angeles Philharmonic Association is currently seeking a: Senior Coordinator, Gift Planning**

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 upcoming Centennial of the Hollywood Bowl in 2022, the Senior Coordinator, Gift Planning 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 Senior Coordinator, Gift Planning, reporting to the Director, Gift Planning, is an integral member to the Gift Planning team who will utilize knowledge of gift planning vehicles, marketing strategies specific to legacy giving, and the data analytical skills necessary 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 the overall Philanthropy Department and other staff, particularly the Philanthropy Operations team, the Senior Coordinator, Gift Planning will participate in preliminary fundraising activities in an effort to effectively coordinate prospect visits and proposals and donor stewardship.

This position reports to the Director, Gift Planning. It also interfaces regularly with the Associate Director, Gift Planning and the Gift Planning Officer, all frontline fundraisers and relationship managers for the GPO. It also interfaces with the Director, Philanthropy Operations, including but not limited to the Senior Research and Prospect Manager, LA Phil Finance staff, and external vendors/advisors and donors. The Senior Coordinator, Gift Planning will be responsible for working collaboratively with other teams in the Philanthropy Department, including the Philanthropy Operations team, and with LA Phil volunteers (including volunteer members of the LA Phil Affiliates) and donors who have made or are considering making deferred gifts that will create their legacy with the LA Phil.

### **Position Elements:**

- In a highly collaborative and team-oriented manner, administers the day-to-day activities of the Director, Gift Planning, Associate Director, Gift Planning, and Gift Planning Officer (as the three members 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, so as to initiate and/or respond with appropriate and excellent support. Anticipates needs of the Director, Gift Planning, Associate Director, Gift Planning, and Gift Planning Officer by monitoring the upcoming work schedule and future events.

- Demonstrates excellent judgment and interpersonal skills in responding to inquiries from prospects or donors while maintaining the utmost confidentiality.
- Exercises independent thinking and ownership of projects. Conceptualizes, plans and implements multi-step projects with minimal supervision.
- Provides oversight for GPO's marketing effort. Working in coordination with the Director, Gift Planning, oversees the production and distribution of marketing materials throughout the calendar year, including the development and production of gift planning publications (i.e. newsletters, postcards, brochures, website updates, etc.). Performs specialized functions involving the creation/design of in-house produced marketing materials and coordinates with LA Phil's Philanthropy Communications and Marketing staff to ensure timely production of marketing materials. Maintains relationships and serves as the primary liaison with outside marketing/communications vendors.
- Administers operation of LA Phil's legacy society, the William Andrews Clark Society. Ensures that all new memberships are promptly processed, and donors are included in events and special mailings offered exclusively to Clark Society members. Monitors and tracks the Clark Society stewardship program in cooperation with the Director, Gift Planning.
- 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 which help to improve the program and ultimately the donor experience.
- Coordinates the LA Phil's trusts and bequests information management efforts. Works with the Director, Philanthropy Operations and the LA Phil Finance staff to help ensure the validity and relevance of database information. Develops an in-depth knowledge of the database with the ability to manipulate data and facilitate the production of reports as requested.
- Provides donor support and helps to resolve problems related to trust administration. Supports the GPO as an internal contact within the Philanthropy Operations and Finance staff of LA Phil, as well as an external contact with professional advisors working with the GPO.
- Working with the LA Phil Philanthropy Communications staff, drafts and develops various documents, letters, memos, and reports relating to stewardship, internal and external requests, and information analysis (i.e. acknowledgement letters, legacy society invitations, compiling of financial data, etc.).
- Proactively provides administrative support in the legacy giving prospect management process. Performs Tessitura (LA Phil donor database) data entry, research and analysis including running Tessitura PG module and other 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.
- Develops and applies specialized knowledge and expertise to utilize and maintain information in the Tessitura database. Creates custom reports as needed in an effort to provide accurate data. Thinks critically and performs in a proactive manner, collaborating with Philanthropy Operations team, to troubleshoot with respect to reports, database management, office equipment and software.

- Works closely with Director, Gift Planning, Associate Director, Gift Planning and Gift Planning Officer to analyze donor/prospect information and to draft planned giving letters/proposals to support gift discussions and solicitations, using Tessitura and PG Calc.
- Records and updates proposals in Tessitura system. Monitors proposals by ensuring that every step is regularly updated and new 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 Philanthropy Operations team, the efficient and time-sensitive running of specialized queries and reports from Tessitura to support gift planning fundraising, metrics, prospect management and marketing efforts.
- Presents fundraising data re legacy gifts in an engaging and accessible way to increase comprehension by LA Phil Philanthropy staff, volunteers, and Board. Provide data necessary for Board and management reporting re gift planning.
- 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).
- Working with the Director, Gift Planning, handles communications with the Music Center Foundation, which oversees the investment of some portions of the LA Phil's endowment, regarding donors of endowment and planned gifts.

**Position Requirements:**

- A Bachelor's degree and at least 2 years' experience in planned giving, fundraising, donor relations, trust administration, marketing, data management, a legal environment, or a satisfactory combination thereof.
- Strong interpersonal and relationship building skills; must have demonstrated success in professional environments and have ability to relate well and inspire confidence among older and/or prominent individuals and other professionals.
- Must be a proven team player and a self-starter with a highly disciplined work ethic 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. Excellent written and verbal communication skills required.
- Well-spoken and cooperative, with the highest standards of professionalism maintained at all times. 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.
- Data-driven and technically proficient, extremely detail oriented, including outstanding proofreading skills.
- Experience coordinating travel and scheduling meetings.
- Advanced proficiency with Microsoft Word, PowerPoint, Excel and PG Calc, and knowledge of donor databases, with familiarity with Tessitura a plus. Ability to trouble-shoot standard office equipment.
- 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.

**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.
- 
- 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.