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**GIFT PLANNING ASSOCIATE**

**Development Division**

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| **Work Status:**  | Full-Time Regular | **Payroll Type:** | Exempt |
| **Location of Job:** | Davies Symphony HallSan Francisco, CA  | **Hourly Rate:** | Commensurate with experience |
| **Schedule:** | Monday – Friday,some weekends | **Regular Hours:** | 9:00 AM – 5:00 PM, some evenings |
| **Reports To:**  | Director of Principal Gifts and Gift Planning | **Supervisory:**  | No |

The San Francisco Symphony, one of America's most forward-looking arts organizations, presents over 220 concerts each year, creates leading edge media initiatives such as Keeping Score on PBS television and its own Grammy-winning record label SFS Media, and serves its community with one of the most extensive education and community programs of any orchestra in the country. Led by its innovative Music Director Michael Tilson Thomas, the SFS continues to set the highest possible standard for excellence in orchestral performance and to shape the cultural life of the Bay Area.

**JOB SUMMARY**

As administrative support for the Gift Planning program, this position reports directly to the Director, Gift Planning. Duties include providing support for charitable gift planning in the following areas:

***Trust & Estates Administration***

* Under the direction of the Gift Planning Director, administer the charitable remainder trust, charitable gift annuity, and pooled income fund programs, including payments to beneficiaries, annual notifications and financial reporting, and related correspondence, as applicable.
* Implement administrative procedures for gift transactions, trusts and estates administration, and monitoring open estates through closure, including Gift Summary forms.
* Administer tax documents as provided by the Symphony’s tax preparers and coordinate with the Finance Department on financial, reporting, and accounting matters, as appropriate.
* Support in the administration of planned gifts of cash, stock, and other assets.
* Support in the administration systems and procedures for the program, including gift tracking and reporting through the Symphony’s database system.

***Marketing and Fundraising***

* Coordinate the production of all marketing materials, including design, copy, and product prototypes in cooperation with the program’s marketing consultant and Development Copywriter.
* Coordinate mail aspect of marketing projects to planned giving prospects and donors. Oversee mailing list development and direct mail house services.
* Build lists (“extractions”) for mailing marketing materials and correspondence according to identified segments using the Symphony’s database.
* Coordinate placement of recognition, advertising and articles for Symphony publications.
* Maintain current plans and schedules for marketing projects and ensure timely production of materials.
* Track and report on results of marketing efforts.
* In collaboration with the Director of Gift Planning, develop, cultivate, solicit and steward a small portfolio of gift planning donors and prospects.

***General and Administrative***

* Supports events and activities related to planned and major gift officers’ donor portfolio events.
* Leads the stewardship efforts of the San Francisco Symphony legacy society, including five donor stewardship events.
* Provides data base support, including ongoing reports, monitoring moves management, and as needed: entering contact reports, data input related to moves, events and cultivation activities.
* Support the Gift Planning program’s portfolio management system, including periodic maintenance of portfolio data.
* Provides staff support to Gift Planning Committee, preparing meeting materials, coordinating meeting logistics, taking meeting minutes, and facilitating cultivation and stewardship activities by committee members.
* Assist with research to obtain complete files for past and in-progress gifts. Help improve, maintain, and identify issues regarding donor files, financial accounting and recordkeeping.
* Creates custom-made reports and unique spreadsheets (Excel) as requested by the Director, Gift Planning and major/leadership gift officers.
* Assist in streamlining procedures and patron data-based reporting formats with guidance from the Gift Planning Director.
* Maintain working knowledge of development division events and protocol in order to answer volunteer leadership, donor, and other inquiries on behalf of the division.
* Undertake special projects to support charitable gift planning as assigned.

**MINIMUM REQUIREMENTS**

Minimum two years gift planning, fundraising or related experience in the legal or financial fields desirable. Bachelor's degree in related field required, with an advanced degree such as a JD preferred. Must possess excellent administrative, clerical and organizational skills; excellent writing and communication skills; ability to grasp and work with legal, regulatory, and financial documents and administrative details; ability to learn new computer database and other administrative/record-keeping systems; ability to manage details and handle multiple projects simultaneously efficiently and with a high degree of accuracy; a proactive and issue-spotting orientation; ability to work with a diverse group of people and to handle situations with tact and diplomacy. Must be proficient in MS Word and Excel; Power Point, and Access or Tessitura desirable. Ability to maintain confidentiality.

**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 “View jobs at the SF Symphony.”  Search for this job and click on “Apply for this Position” to submit your resume and cover letter.

**ORGANIZATIONAL PROFILE**

The San Francisco Symphony, under Music Director Michael Tilson Thomas, is one of the country’s leading orchestras. Some 220 concerts each year reach an audience of more than 600,000, while national and international broadcasts, heard on more than 215 radio stations, reach millions more. The Symphony has its own recording label, SFS Media, and its recordings have won some of the world’s highest honors. Its multimedia initiative, *Keeping Score,* has reached over six million people with television and radio broadcasts, DVDs, and an interactive website. The Orchestra tours extensively throughout Europe, Asia, and the United States, and its outstanding artistic reputation enables it to attract the world’s finest guest artists and conductors to Davies Symphony Hall. More than 70,000 young people are served each year by the Symphony’s numerous education programs, including its internationally renowned Youth Orchestra and Adventures in Music (AIM), which reaches every 1st through 5th grader in San Francisco’s public schools. The organization is led by President Sakurako Fisher and Executive Director Mark Hanson.

The San Francisco Symphony’s mission is to set the highest possible standard for excellence in musical performance at home and around the world; enrich, serve, and shape cultural life throughout the spectrum of Bay Area communities; and maintain financial stability and gain public recognition as a means of ensuring its ability to fulfill its mission.

The San Francisco Symphony is an Equal Opportunity Employer.