

Job Title: Major Gift Officer, Planned Giving
Supervisor Title: Vice President of Institutional Advancement
FSLA Status: Exempt

Summary:

The Major Gift Officer, Planned Giving position will manage a portfolio of major donors and major donor prospects as well as plan and manage the San Diego Symphony's Planned Giving Program. This position will manage the Symphony's Legacy Society, a group of supporters that have made planned gifts or cash gifts to the Symphony's endowment.

Reporting to the Vice President of Institutional Advancement (VPIA), the Major Gift Officer, Planned Giving will work closely with the VPIA to implement a robust planned giving program that includes, marketing, cultivating, soliciting, and stewarding Legacy Society Members. This position will serve as the primary liaison to the Planned Giving Advisory Council, a collection of volunteer estate, tax, and financial planning professionals who volunteer to bring awareness to the Symphony's Planned Giving Program. These professionals promote the San Diego Symphony among their clients and professional networks and are a professional resource for the IA staff when discussing complex planned giving instruments.

This position will ensure that Planned Giving and Endowment support is top of mind for the entire Advancement staff. This position will work closely with gift officers to collaboratively identify 15-20 planned gift disclosures each fiscal year and steward Legacy Society members that are unassigned to other gift officers. In addition to this, the Planned Giving and Gift Officer will also cultivate, solicit, and steward a portfolio of 55-65 major donor prospects with a goal of converting 25-30% annually to become major donors.

Planned Giving Responsibilities:

- Work closely with the VPIA and the Director of Advancement, Campaign and Major Gifts, as well as other members of the Advancement team to strategize and maintain the timeline for solicitations for the Endowment Campaign in coordination with Annual Operating Support solicitations.
- Staff VPIA on planned giving and blended gift strategies.
- Work with gift officers to strategize blended gift solicitations and develop cultivation and solicitation plans.
- Develop and implement a stewardship plan for Legacy Society members/Planned Giving donors.
 - Ensure that moves management steps are recorded in the donor database.

- Ensure planned gift documentation and recording is up to date in the Symphony's donor database and donor files.
- Ensure the proper recording of planned gifts.
- Work with gift officers to ensure proper stewardship of the Legacy Society members in their portfolios.
- Serve as the staff liaison to the Planned Giving Advisory Council so they may:
 - Serve as a volunteer professional resource for IA staff,
 - promote philanthropy to the San Diego Symphony through planned giving,
 - ensure that the council is knowledgeable about the impact of the San Diego Symphony on and off stage, and
 - attend council meetings and engagement opportunities.
- Manage and implement all aspects of Crescendo Pro online resources and marketing services.
- Establish and implement the Symphony's Planned Giving Marketing Plan, including Legacy Society testimonials and newsletter content that integrates with the larger communications schedule.
- Manage and coordinate all aspects of Crescendo planned giving marketing, including website content, brochures and marketing materials, and personalized planned giving instrument overviews.
- Work closely with the Special Events team to organize events for Legacy Society members.
- Ensure that planned gifts are properly counted and recognized according to the Symphony's Gift Counting and Recognition Guidelines.
- Develop and maintain appropriate tracking documents.
- Develop and manage planned giving budgets and timelines, etc.

Gift Officer Responsibilities:

- Manage a portfolio of 55-65 major gift prospects by identifying, cultivating and soliciting prospects with the capacity of giving \$50,000 over a three-year period.
- As a gift officer, this position will:
 - Qualify major donor prospects
 - Develop cultivation, solicitation, and stewardship plans for each prospect
 - Serve as the primary relationship manager for these donors once they convert to major donor status
 - Ensure that moves management is recorded and ensure that annual metrics for contact reports and solicitations are achieved
 - Attend concerts and events to cultivate and meet new donor prospects
- Other duties as assigned.

Required Knowledge, Skills, and Abilities:

- Demonstrated administrative ability and project management skills are required.
- Ability to build relationships with stakeholders and staff.
- High degree of discretion: able to exercise good judgement in a variety of situations requiring professionalism, diplomacy, and tact in dealing with diverse groups of trustees, musicians, staff, and business leaders.

- Excellent oral and written communication skills.
- Superior organizational skills with acute attention to detail.
- Ability to balance multiple, and sometimes conflicting, priorities.
- Ability to work independently on projects from conception to completion.
- Ability to work under pressure and meet deadlines.
- Ability to work with a customer database to track moves management and donor communications.
- Advance knowledge of the entire MS Office software suite.

Education and Experience:

- Bachelor's degree.
- Minimum of 3-5 years' experience in philanthropy.
- Non-profit experience desired.
- Passion for, and/or experience supporting music or other arts organizations is a plus.

Working Conditions:

- Normal office working conditions: sitting at a desk and computer terminal for long periods of time, typing and computer work, light to moderate lifting.

The expected salary range for this position is **\$110,000 – \$120,000** annually. The final offer may vary outside of this range, depending on the candidate's qualifications, experience, and overall fit for the role.

Benefits:

Health, dental and vision insurance; life, AD&D, and long-and short-term disability insurance; FSA; paid sick days, vacation days and holidays; 401(k) plan.

The San Diego Symphony provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

We are committed to being a workplace in which every employee has equitable opportunities and support, and experiences a sense of belonging. Individuals with diverse backgrounds, identities, and experiences are encouraged to apply.