

# Planned Giving and Major Gifts Manager

**DEPARTMENT:** Philanthropy

**REPORTS TO:** Director of Philanthropy

**LOCATION:** La Jolla, CA on the scenic UC San Diego campus

**CLASSIFICATION:** Full-time, Exempt

**COMPENSATION:** \$80,000 to \$90,000 annually (DOE), plus a comprehensive benefits package

**APPLICATION MATERIALS:** Resume and cover letter

## **BUILD THE FUTURE OF THEATRE THROUGH LASTING PHILANTHROPY**

La Jolla Playhouse is seeking a **Planned Giving and Major Gifts Manager** to lead and grow a meaningful planned giving program while managing a select portfolio of major gift prospects. This is an opportunity to help secure the future of one of the country's most respected regional theatres by building deep donor relationships, expanding the Playhouse Legacy Circle, and inspiring transformational support for artistic work, arts education, and community impact.

The ideal candidate is a collaborative, strategic fundraiser who is comfortable guiding thoughtful conversations about legacy intentions, endowment support, and blended gifts. This person brings sound judgment, strong communication skills, and the ability to partner effectively with donors, staff, volunteer leaders, and professional advisors.

## **ABOUT THE ROLE**

The Planned Giving and Major Gifts Manager leads the Playhouse's planned giving strategy and advances a select portfolio of individual donors and prospects. The role is responsible for strengthening the legacy pipeline, increasing planned and endowed giving commitments, and helping donors align their philanthropic goals with the mission and long-term future of La Jolla Playhouse.

This position works closely with the Director of Philanthropy, Managing Director, Individual Giving team, Philanthropy Operations, Board members, and volunteer leaders. The role also serves as an external ambassador to the planned giving community, including wealth managers, tax advisors, and estate planning attorneys.

## **ABOUT THE PLAYHOUSE LEGACY CIRCLE**

The Playhouse Legacy Circle recognizes donors who have included La Jolla Playhouse in their estate plans through bequests, beneficiary designations, trusts, and other planned giving vehicles. The program also supports current endowed and outright gifts that help sustain the organization for future generations.

## **WHAT YOU'LL DO:**

- Lead the strategy, planning, and execution of a comprehensive planned giving program, including bequests, beneficiary designations, trusts, and endowment gifts
- Build, qualify, and manage a pipeline of planned giving and major gift prospects using donor data, subscriber trends, wealth indicators, and engagement history
- Develop and implement individualized cultivation, solicitation, and stewardship strategies for planned giving and blended gift prospects
- Manage a select portfolio of major gift donors and prospects, with a focus on relationship-building and long-term philanthropic growth
- Partner with the Managing Director, Director of Philanthropy, and other internal stakeholders to develop donor strategies and solicitation timelines
- Work closely with the Planned Giving Chair and Legacy Advisory Group to support program visibility, donor engagement, and stewardship efforts
- Collaborate with the Individual Giving team on blended gift opportunities and coordinated moves management strategies
- Partner with Philanthropy Operations to ensure accurate tracking, forecasting, reporting, and documentation of planned and major gifts
- Prepare donor correspondence, proposals, gift agreements, stewardship materials, and planned giving marketing content

- Collaborate with Marketing and Communications to develop website copy, donor stories, newsletters, and related materials that support planned giving outreach
- Help plan and support donor events, including cultivation gatherings and recognition opportunities for Legacy Circle members and prospects
- Review proposed planned gifts to help ensure alignment with organizational policies, financial considerations, and applicable legal and ethical standards
- Maintain accurate donor records and provide regular reports on activity, pipeline progress, and program outcomes
- Support long-term efforts to grow the Playhouse's endowment and strengthen a culture of legacy giving across the organization
- Represent La Jolla Playhouse at performances, donor events, and community-facing activities as needed

## **WHAT YOU BRING:**

### **Required qualifications**

- Bachelor's degree or equivalent combination of education and relevant experience
- At least 5 years of progressively responsible fundraising experience, including major gifts, planned giving, or a closely related field
- Demonstrated success cultivating, soliciting, and stewarding individual donors, including closing charitable gifts
- Knowledge of planned giving vehicles, estate planning fundamentals, and philanthropic gift structures
- Strong interpersonal and relationship-building skills, with the ability to work effectively with donors, trustees, volunteers, advisors, and colleagues across the organization
- Excellent written, verbal, and presentation skills, including experience drafting donor correspondence, proposals, and gift documentation
- Strong Microsoft Office experience including Outlook, Word, and Excel
- Experience using donor databases or CRM systems to manage portfolios, track moves, and report on fundraising activity
- Strong judgment, discretion, and professionalism in handling sensitive and highly personal donor conversations
- Ability to work independently, manage multiple priorities, and contribute as a collaborative team member
- Access to reliable transportation and ability to travel locally for donor meetings and events

### **Preferred qualifications**

- Experience securing planned gifts and/or gifts of five figures or more
- Experience in arts, culture, education, or other mission-driven nonprofit organizations
- Certification in planned giving (such as Certified Specialist in Planned Giving) or related professional development
- Experience with Tessitura or similar fundraising databases

If you're excited by the opportunity to build lasting donor relationships and help shape the future of the American theatre, we encourage you to apply—even if your experience doesn't align perfectly with every qualification listed.

## **WHY YOU'LL LOVE WORKING HERE:**

- Medical, dental, vision, life and LTD insurance
- 403(b) retirement plan with employer match after one year
- Paid time off (vacation, sick, holiday, and more)
- Complimentary tickets to Playhouse performances
- The opportunity to contribute to a nationally recognized arts organization with a collaborative, mission-driven team

## **PHYSICAL DEMANDS:**

This role is primarily based in an office environment and includes regular computer use, participation in meetings, and attendance at donor events and performances, including occasional evenings and weekends. The position may occasionally move materials weighing up to 20 pounds, with or without assistance.

## **ABOUT LA JOLLA PLAYHOUSE:**

La Jolla Playhouse is a place where artists and audiences come together to create what's new and next in the American theatre, from Tony Award-winning productions, to imaginative programs for young audiences, to interactive experiences outside our theatre walls. Founded in 1947 by Gregory Peck, Dorothy McGuire and Mel Ferrer, the Playhouse is currently led by Artistic Director Jessica Stone and Managing Director Debby Buchholz. The Playhouse is internationally renowned for the development of new plays and musicals, including mounting 120 world premieres, commissioning more than 70 new works, and sending 37 productions to Broadway, garnering a total of 42 Tony Awards, as well as the 1993 Tony Award for Outstanding Regional Theatre. We are committed to diversity in all areas of our work, on and off stage. We lead with our values and encourage individuals with unique perspectives to apply. EOE