

THE CHICAGO SYMPHONY ORCHESTRA ASSOCIATION JOB DESCRIPTION

TITLE: Manager, Endowment Gifts and Planned Giving
FLSA STATUS: Exempt
DEPARTMENT: Development

REVIEWED: 3/10/2022

GENERAL SUMMARY

The Manager, Endowment Gifts and Planned Giving contributes to the success of the Chicago Symphony Orchestra Association (CSOA) by managing a key philanthropic project area, as part of the 28-member Development department team, who collaborated during the 2020/21 season to raise over \$52 million. Manage the administration, marketing and stewardship processes for planned giving and endowment donors and their gifts vehicles.

PRINCIPAL DUTIES AND RESPONSIBILITIES

1. Manage a portfolio of 100-125 prospects and donors with the goal of acquiring new gifts and additional commitments in planned, endowment, and annual fund support—all geared to encourage life-long giving.
2. Responsible for the day-to-day administrative processes and requirements for planned giving vehicles.
3. Respond to and track all planned giving inquiries.
4. Manage the completion of documents required for bequest distributions, and ensure timely storing and tracking of data and records.
5. Execute an effective stewardship program for members of the Theodore Thomas Society, the CSOA's planned giving donor group, including regular communication and appreciation events.
6. Manage planned giving marketing efforts and analyze results to develop effective strategies.
7. Work with volunteer and CSOA constituent leaders to develop and implement planned giving cultivation and stewardship efforts.
8. Analyze donor database and proactively identify and qualify appropriate prospects as a part of overall plan to increase the number of Theodore Thomas Society members.
9. Assist development team members in creating planned gift strategies for donors in their portfolios.
10. Maintain an up-to-date knowledge of planned giving vehicles and practices, endowment fund structure and policies, and related tax information.
11. Work as a part of a team to develop and execute strategies for planned giving and endowment aspects of major campaigns.
12. Manage annual preparation and distribution of endowment fund reports to donors and fund representatives.
13. Maintain and update recognition lists for planned giving and endowment fund donors.
14. Coordinate stewardship and recognition logistics for concerts receiving support from endowment funds.
15. Attend and assist with development-related events and concerts throughout the year.
16. Other duties as assigned.

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CSOA is an equal opportunity employer where all qualified applicants will receive consideration for employment and will not be discriminated against on the basis of race, color, sex, sexual orientation, gender identity, religion, disability, age, genetic information, veteran status, ancestry, or national or ethnic origin. We value diversity and inclusion and seek to build and maintain a community and culture that celebrates and values diverse backgrounds, identities, and perspectives. We consider equivalent combinations of experience and education for jobs, and all candidates who believe they possess equivalent experience and education are encouraged to apply.

REPORTING RELATIONSHIPS

1. Reports to the Director, Endowment Gifts and Planned Giving
2. Other contacts: Trustees, Donors, Volunteers, Orchestra members, and Staff.

KNOWLEDGE, SKILLS, AND EXPERIENCE REQUIRED

1. Bachelor's degree required.
2. A minimum of five years increasingly responsible development (or related) experience. Experience in an arts organization preferred.
3. Proven track record in relationship management.
4. Knowledge of fundraising and research techniques.
5. Excellent writing and communication skills.
6. Computer literacy with extensive knowledge of Microsoft Word and Excel. Knowledge of Tessitura database and/or prospecting tools a plus.
7. Ability to plan and manage at both strategic and operational levels.
8. Ability to work autonomously while keeping direct supervisory and volunteers apprised of issues, problems, opportunities, and progress.
9. Ability to work collaboratively with development colleagues to create a results-driven, team oriented environment.
10. Creativity, flexibility, and self-motivation.
11. Project management skills.

WORKING CONDITIONS

Pleasant office environment.