



**MUSIC ACADEMY OF THE WEST
DIRECTOR OF PLANNED GIVING**



As a member of the Academy's Advancement Department, the **Director of Planned Giving** will develop, implement and manage a strategic Planned Giving program for Music Academy of the West to achieve or exceed annual planned giving targets for the Academy's legacy society ("The Encore Society"), and work with a team including the CEO, Chief Advancement Officer, and Board in raising cash and planned gifts to support a focused endowment growth initiative.

The successful candidate will cherish relationship building, thrive in an environment where fundraising is encouraged, appreciated and collaborative with leadership, be able to balance multiple priorities, and be focused on strategies that deliver planned giving commitments and endowment revenue.

Reports to: Chief Advancement Officer

Direct Reports: None

Key Working Relationships: President & CEO
Chief Advancement Officer
Director Individual Giving
Planned Giving Advisory Committee
Board of Directors

ESSENTIAL DUTIES AND RESPONSIBILITIES

- Develop, implement, and oversee a comprehensive planned giving plan to meet or exceed annual targets to increase members' commitments in the Encore Society. This plan will include revenue and expense budgets, a calendar of activities, timelines, reports which measure progress to goal. Strategies will include in-person visits, direct mail, events and digital content.
- Supervise the identification and qualification of new donor prospects.
- Collaborate with the Chief Advancement Officer, Director of Individual Giving, the Planned Giving Advisory Committee and the Board to manage cultivation strategies, solicitation schedules, and recognition benefits for all planned giving donors.
- Personally solicit planned gifts through in-person visits.
- Manage key information for planned gift donors and prospects in Raiser's Edge, including proposal records, prospect actions, profiles, gift agreements, and gift detail.
- Plan, execute, and evaluate planned giving events and experience-based opportunities to cultivate and steward planned giving prospects and donors.
- Cultivate relationships with attorneys, trust officers, accountants, financial planners and other estate planning professionals regarding gift opportunities for clients, to remain current on best practices, and develop a network of resources from which to request help in obtaining referrals.

QUALIFICATIONS

- 5 to 10 years of experience working in the planned giving field
- Knowledge of estate planning, including wills, trusts and estate and gift tax laws

- Proven record of cultivating prospects, making in-person asks and securing large gifts for planned giving and endowments
- Excellent interpersonal skills, including demonstrated ability to compel, cultivate, and solicit high net worth individuals and their advisors
- Excellent writing and public speaking skills
- Strong analytical skills to research and identify potential donors
- Knowledge of legal record keeping requirements for fundraising and documenting donations
- Strong strategic thinking and vision setting skills, coupled with ability to work independently to bring that vision to fruition
- Interest in the performing arts and/or cultural institutions a plus
- Bachelor's degree or equivalent combination of education and experience
- Proven track record of meeting assigned goals
- Excels in collaborative, entrepreneurial, fast-paced, action and results-oriented team environment
- Knowledge of Raiser's Edge or other donor software is an advantage
- Must be able to work during the summer, some evenings and weekends
- Experience working with volunteers

To apply, please email your cover letter, résumé, and LinkedIn profile link to Lori Davis at ldavis@rscfundraising.com with "Director of Planned Giving" in the email's subject line.

