

Legacy and Endowment Giving Manager

- DEPARTMENT:** Philanthropy
- CLASSIFICATION:** This is a full-time, exempt position, eligible for a full array of benefits including health insurance and 403(b) retirement plan
- PAY:** \$70,000 - \$75,000
- LOCATION:** La Jolla, California, on the beautiful campus of the University of California, San Diego
- REPORTS TO:** Director of Philanthropy
- TO APPLY:** Submit a cover letter and resume to resumes@ljp.org. Please include in the subject line - "Legacy and Endowment Giving Manager"

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 Tony Award winner Christopher Ashley, the Rich Family Artistic Director of La Jolla Playhouse, 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 36 productions to Broadway, garnering a total of 42 Tony Awards, as well as the 1993 Tony Award for Outstanding Regional Theatre.

La Jolla Playhouse is 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. La Jolla Playhouse is proud to be an Equal Opportunity Employer (EOE).

ABOUT REVELLE LEGACY GIVING SOCIETY

Revelle Society members are strong believers in La Jolla Playhouse and its mission. They include La Jolla Playhouse in their estate planning through bequests in wills and trusts, beneficiary designations on retirement accounts and life insurance, and other estate-planning vehicles. Planned gifts to La Jolla Playhouse qualify for the Federal Estate Tax Charitable Deduction.

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ABOUT THE POSITION

The Legacy and Endowment Giving Manager will manage La Jolla Playhouse's Revelle Legacy Giving Society (Revelle Society) and steward Revelle Society members. The primary focus of the position is to implement a planned giving and endowment program that fosters relationships with donors who are interested in leaving a legacy to ensure the long-term financial success of the Playhouse. The Legacy and Endowment Giving Manager will support the Individual Giving team with gift planning, prospect research, portfolio management and analytics. This position requires a combination of fundraising expertise, relationship building skills and strategic planning skills to cultivate and steward Revelle Society members. The Legacy and Endowment Giving Manager will serve as the Playhouse's expert in the planned giving community of wealth managers, tax advisors and estate attorneys.

ESSENTIAL JOB DUTIES

Donor and Board Stewardship

- Work closely with the Managing Director and Director of Philanthropy to strategize and maintain a timeline for solicitations for the Endowment Campaign in conjunction with annual operating support.
- Assist in planning and implementing activities to meet the long-term goal of building the Playhouse's endowment through planned gifts, as well as raising current support for operations, special campaigns, and other initiatives.
- Work with the Individual Giving Team to strategize blended gift solicitations by developing cultivation, stewardship and planned giving approaches on how to identify potential planned giving donors and initiate conversations.
- Establish, implement and create a Revelle Society Planned Giving Annual Plan, including written proposals, illustrations, gift agreements and Revelle Society testimonials and newsletter content that integrates with the Marketing & Communications Department's communications to subscribers and donors.
- Administer planned giving gift acceptance policies.
- Secure and formalize planned and endowment gifts with current portfolio of Revelle Society donors.
- Create a Legacy Advisory Committee which will serve as a volunteer professional resource for the Philanthropy Department which will promote philanthropy to La Jolla Playhouse through planned giving, attendance at Revelle Society events, meetings and engagement opportunities.
- Manage and create planned giving marketing tools and collateral including website content, brochures and materials, and personalized planned giving overviews.
- Create and manage annual benefits package for Revelle Society members.
- Work closely with the Special Events team to organize events for Revelle Society members.
- Ensure planned gift documentation is up to date in Tessitura and donor files, and analyze proposed planned gifts to ensure they are structured on a sound financial basis and comply with the Playhouse policies and procedures.
- Ensure compliance with relevant laws, regulations, and ethical standards governing planned giving.

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- Maintain accurate records of planned gifts and provide regular reports to management and stakeholders.
- Identify prospective new Revelle Society members through prospect research of Playhouse subscribers and donors.
- Manage planned giving budgets and timelines, etc.
- Attend Inner Circle Nights, Backstage Tours and other donor events as needed.
- Other duties as assigned.

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

- Alignment with the **mission and values** of La Jolla Playhouse and a passion for the arts and uphold and support the Playhouse's **Anti-Racism Action Plan**.
- Outstanding **interpersonal skills**, including the ability to effectively communicate with all levels of staff, volunteers, Board of Trustees and interns.
- High degree of **integrity and discretion**: able to exercise good judgement in various situations requiring professionalism, diplomacy and **confidentiality**.
- Excellent **verbal, public speaking and written communication skills**.
- A **positive attitude** and spirit of teamwork.
- Ability to **assess situations** and independently develop a plan of action.
- Ability to drive

EDUCATION AND EXPERIENCE

- Certification in planned giving (e.g., Certified Specialist in Planned Giving) is a plus.
- Proven experience in planned giving, cultivating and closing charitable gifts of five figures or higher and/or related field within the nonprofit sector.
- Strong knowledge of planned giving vehicles, tax laws, and estate planning principles.
- Bachelor's degree from four-year college or university and/or 3-5 years related experience and/or training.
- Advanced knowledge of the entire MS Office software suite and ability to learn Tessitura database and understand moves management tracking.

WORKING CONDITIONS

- Regular, predictable attendance required
- Normal office working conditions: sitting at a desk and computer terminal for long periods of time, typing and computer work.
- Available to work nights and weekends as required.
- Able to sit or stand for long periods of time.
- Able to pick up and move a minimum of 20 lbs.