Oregon Shakespeare Festival
Job Description

POSITION TITLE: DIRECTOR OF PLANNED AND MAJOR GIVING

JOB SUMMARY:
Reporting to the Director of Development (DOD), the Director of Planned and Major Giving is a member of the Oregon Shakespeare Festival's (OSF) Development Team. The Director of Planned and Major Giving assists in identifying, cultivating and soliciting individuals for personal, planned and deferred gifts for the full range of OSF giving priorities, including, but not limited to: gifts for general operating, endowment, capital and programmatic needs. Successful individual and planned giving experience is required.

ESSENTIAL JOB RESPONSIBLITIES:

- Builds relationships with prospects and donors with the goal of increasing their financial commitment to the Festival.
- Serves as the Festival's planned giving officer for prospects, donors and volunteers.
- Participates in prospect review sessions with the Individual Giving team.
- Accepts assignments to solicit cultivate and steward donors as appropriate.
- Share responsibility for the overall and Individual Giving goals of the Development Department.
- Markets and raises awareness of opportunities for and the advantages of making outright and planned gifts to OSF.
- Collaborates with the Director of Individual Giving and other members of the Development team to create a comprehensive print and web based communications plan to engage donors.
- Seeks opportunities to increase both OSF's planned giving and individual giving through presentations, one-to-one outreach and contact with members and donors.
- As OSF's planned giving officer, works closely with prospects, donors, OSF Development staff, OSF Board, volunteers, the OSF consulting planned gift attorney, and retained financial/legal advisors as an information resource.
- Generates and presents planned gift proposals.
- Maintains 'best practice' working knowledge of the primary methods of making planned gifts as well as current knowledge of tax information sources.
- Performs work in a manner consistent with OSF Mission, Values and Vision and Company Handbook, including a commitment to diversity and inclusion.
- Other duties as assigned.

OTHER JOB RESPONSIBILITIES:

- Serves as the lead Development staff member during the Southampton Society (planned giving recognition) and Bowmer Society (education giving recognition) donor weekends; participates in other donor cultivation and recognition events as appropriate.
- Works directly with major donors and senior volunteers to further organizational objectives.
- Partners with the Development staff to ensure that all donors receive appropriate, consistent recognition and an accounting of the impact each gift has for the Company.
- Collaborates with the Director of Development to conceptualize, analyze and implement fundraising campaigns and initiatives for individual and planned gifts.

RELATIONSHIPS:

- Reports to the Director of Development
- Works with a ten person Development Staff

MINIMUM QUALIFICATIONS:

Education:

Bachelor's Degree. Work experience beyond minimum requirement will be considered in lieu of this education requirement.

Work Experience:

Required: Three (3) years of individual fundraising experience, including planned giving.
Knowledge and skills in prospect research, cultivation, solicitation and stewardship.

Preferred: Knowledge of planned giving techniques and tax laws impacting charitable giving. Familiarity with and a commitment to the work of the Oregon Shakespeare Festival.

Machines, Tools, Equipment:

Familiarity with Microsoft Office Suite (Word and Excel in particular). Knowledge of the Tessitura software database a plus.

Other Abilities and Skills:

Excellent oral, written, analytical and interpersonal skills required; strong work ethic and professional integrity; tact and discretion; teamwork; sense of humor; sincere interest in OSF and the arts.

Physical requirements:

Must be able to travel 20 -30% of the time. Some evening and weekend work is required. Job requires frequent and repetitive use of hands for computer work.

Exempt Position
February 2013