



Job Title: Director of Legacy Giving

Salary: \$100,000.00- \$120,000.00

Department: Philanthropy

Reports to: Senior Director of Development

Classification: Full-time, Exempt

Date: July 2022

Summary

The Director of Legacy Giving is responsible for the planning and implementation of all aspects of Houston Grand Operas legacy giving program, benefitting the Houston Grand Opera Endowment. The Director of Legacy Giving will serve as the key staff member on the HGO Development team for the identification, cultivation, solicitation, and stewardship of planned, deferred, estate, and endowment gifts. Houston Grand Operas Laureate Society (HGOs giving group who have remembered HGO through their estate plans) is to be managed by the Director of Legacy Giving.

Essential Duties and Responsibilities

- Develop and implement strategies and tactics for the identification, cultivation, solicitation, and stewardship of planned, deferred, estate, and endowment gifts.
- Design and carry out a comprehensive, annualized, marketing plan to increase the number of members of Houston Grand Operas Laureate Society. This includes developing and implementing marketing plans focusing on donor communications, donor events, publications, articles and mailings to promote the planned giving program of Houston Grand Opera, including the preparation of content of presentations, proposals, brochures, correspondence, reports, and collateral supporting materials.
- Manage a portfolio of donors whose primary, and lead gifts to HGO, are planned, deferred, estate, and endowment gifts.
- Educate and work with HGO Development team colleagues on prospect identification and cultivation of planned and endowment giving prospects.
- Serve as HGO liaison to Laureate Society Council, a steering and advisory committee of volunteers who give guidance on HGOs marketing and ongoing development of deferred and planned gifts.
- Develop and distribute to HGO Development team, Laureate Society Council, and Endowment Board, a monthly report on the progress of acquisition of planned, deferred, estate and endowment gifts.

- Facilitate the process of planned and estate gifts, working with donor representatives and counsel, toward establishment and maintenance of named funds within Houston Grand Opera Endowment
- Serve as HGO Development team primary contact on any chosen consultants or vendors for planned giving.
- In conjunction with HGO Chief Financial Officer, and HGO Endowment Board chair, develop and distribute annual reports to HGO Endowment fund holders.
- Create and deploy, throughout the fiscal year, an ongoing acknowledgment and recognition process for endowed and planned gifts.
- Review and ensure accuracy in donor listings for endowed funds, and legacy giving in Opera Cues, on the HGO website, and other HGO publications.
- Develop and maintain professional skills and relationships with peers in deferred, planned, and legacy giving in order to remain current on topics and issues regarding planned giving.
- Assist with staffing of HGO Development team events as assigned.
- Serve as an organizational representative at performances and special events.

QUALIFICATIONS

The successful candidate is a skilled professional with a preferred minimum of five years of experience in development/fundraising with emphasis on legacy giving. Demonstrable work experience in positions that exhibit responsibilities for business development, customer/client/donor experience, strategic envisioning and planning, and financial acumen, is also preferred, as is a proven track record of success in the acquisition of customers/clients/donors, and the management of a customer/client/donor portfolio. Work experience that represents the abilities to work independently in a disciplined manner, with self-initiation, and within a fast-paced work environment, is required. Must be comfortable soliciting for planned, deferred and endowment gifts, and funding for HGO. Minimum of a bachelors degree from an accredited college or university; advanced degree/certification is a plus. Interest/background in the arts is a plus.

SPECIAL JOB CHARACTERISTICS

Excellent interpersonal, communication, writing, and organizational skills. Ability to maintain confidentiality. Ability to work effectively with volunteer leadership and HGO staff of all levels. Computer proficiency, including spreadsheets and database applications, is required. Evening and weekend work hours required.

HGO employees are required to comply with HGO's Workplace Safety Protocols, including our COVID-19 Vaccination Policy, that are in place at the time of service when an offer of employment is made. If an offer of employment is extended, applicants will immediately provide HGO with proof of vaccination against COVID-19 or a fully supported petition for exemption due to a qualifying disability or sincerely held religious belief.

APPLICATION INSTRUCTIONS

To apply for this position, please visit Houston Grand Opera's job board at <https://www.houstongrandopera.org/employment-and-auditions/>