ASSOCIATE DIRECTOR, PLANNED GIVING

The Toronto Symphony Orchestra is one of Toronto’s most important cultural institutions, recognized internationally as an outstanding orchestra and proud to represent Canada on the world stage. The TSO inspires, enriches and engages audiences of all ages and serves as a showcase for the advancement of orchestral music. It is an exciting time in the organization’s history with many new initiatives underway that will deepen the TSO’s connection within the Toronto community and provide music lovers with meaningful opportunities to get involved.

SUMMARY

This successful candidate is an experienced fundraiser with a proven track record of in planned giving. Strong relationship management, experience working with all forms of gift planning vehicles and donor-centered strategy development are critical components of the job. Reporting to the Associate Vice-President, Donor Relations & Engagement the Senior Development Officer, Planned Giving will be responsible for the identification, cultivation, solicitation and stewardship of a portfolio of planned giving donors.

KEY RESPONSIBILITIES

- Actively manage a portfolio of 75-100 planned giving prospects and donors at various stages of their relationship with the TSO. Develop tailored cultivation programs and personalized stewardship activities including identifying, evaluating and recommending the strategic steps necessary to bring the prospect closer to confirming a planned gift.

- Meet personally with planned gift prospects, confirmed donors, and their advisors as required.

- Cultivate, solicit and steward a small portfolio of major gift donors who may also be planned giving prospects.

- Develop and implement a comprehensive plan for the marketing of planned gifts, including the development of information resource materials for the TSO’s Legacy Circle program.

- Conduct detailed analysis and evaluation to determine trends/patterns and make recommendations on how to develop the planned giving program

- Prepare gift agreements, bequest wording, as well as documents to establish charitable gift annuities, charitable reminder trusts, and other forms of planned gifts.
• Maintain current knowledge of tax and other regulatory issues that relate to charitable giving

• Build & maintain excellent relationships with donors, allied professionals and key stakeholders including presentations to legal, tax and financial advisors as necessary

• Liaise with staff in other departments to remain current with existing and planned TSO initiatives and priorities to promote opportunities for philanthropic support.

REQUIRED EXPERIENCE AND SKILLS

• Exceptional strengths in planned giving fundraising including comprehensive knowledge of fundraising best practices and strategy. (7+ years of fundraising experience preferred)

• Familiarity with deferred giving strategies, planned giving vehicles, and tax laws and the ability to communicate this easily to prospective donors

• Ability to build strong relationships with prospective and current donors

• Work with a relatively high degree of independence, initiative and responsibility

• Excellent interpersonal and communication skills; ability to work collaboratively across Development department and entire TSO

• Strong analytical skills, critical thinking and problem solving skills

• Highly professional; conscientious with the highest degree of personal integrity due to the sensitive nature of this work

• Interest in and knowledge of orchestral music is desirable

• High degree of organization and attention to detail

• Ability to work with confidential information

• Proficiency in spreadsheet, word processing, and fundraising software. The TSO uses Tessitura software; training will be provided if unfamiliar with this database.
Evening and weekend work may be required during the TSO season (September - June). Compensation is competitive and the comprehensive benefits package includes an RRSP matching program.

The Toronto Symphony Orchestra provides a collegial work environment and offers opportunities for advancement. TSO is an equal opportunity employer and encourages all qualified individuals to apply. The TSO is committed to providing accommodations for persons with disabilities. If you require accommodation, the TSO will work with you to meet your needs.

While the TSO thanks all applicants for their interest, only those applicants selected for an interview will be contacted. Application deadline is **March 4, 2020**. Please send your resumé and cover letter to:

Dawn Marie Schlegel  
Associate Vice-President, Donor Relations & Engagement  
dmschlegel@TSO.CA