

Stratford FESTIVAL

Director Planned Giving



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Head and Heart

Based in Stratford, Ontario, the Stratford Festival is one of the world's foremost repertory theatre companies. It operates year-round, presenting a season of about a dozen plays each year between the months of April and November, a rich stream of digital content and hundreds of Forum events, designed to deepen understanding of the plays. For every person a theatregoer sees on stage, there are seven people working behind the scenes, some of the world's most dedicated and experienced arts workers. At the moment they are undergoing a culture shift to support anti-racism and anti-oppression and ensure a respectful, equitable and inclusive environment in which all staff, artists and audience members can feel a true sense of belonging.

What makes the Stratford Festival the largest and most popular repertory theatre in North America?

The simple, immediate, and very human connection between actor and audience. In a world tightly filtered by electronics, constrained by screens, and controlled by hidden interests, the Stratford Festival consistently surprises, delights, and challenges.



Four magnificent theatres. The Festival mounts at least a dozen productions annually, in four distinctive venues. With Shakespeare at the foundation of each season's playbill, it explores every theatrical style and period imaginable, from new works to the Greeks, from comedy to tragedy, from shameless farce to jaw-dropping musical theatre.

Thanks to the unique repertory model, in any single day an audience member can choose from up to eight different productions and from a vast array of **Forum offerings**. Such rich variety is one reason why



Stratford is an annual theatre and holiday destination for thousands from across North America and beyond.

Above all, the Festival's artists are among the finest there are – and the work of its actors, dancers, musicians, designers, and directors is supported by the unparalleled talent, drive, and creativity of extraordinary craftspeople behind the scenes.

No wonder that the Stratford Festival is one of the most treasured and influential theatre companies anywhere in the world.

The City of Stratford

The city of Stratford got its name in 1835, long before it became associated with Shakespeare or the theatre.

As vibrant as the Festival itself, Stratford offers its 30,000 residents:

- An affordable range of lifestyle options and real estate choices
- Excellent shopping, from distinctive boutiques to big-box convenience
- First-class public elementary and secondary schools, as well as four private schools
- The Stratford campuses of the University of Waterloo and Conestoga College
- The Stratford Chefs School
- A stunning array of top-flight restaurants
- Weekend farmers' markets
- Passenger train service by VIA Rail/GO train
- Direct buses to downtown Toronto (operated by the Festival during the performance season) and Pearson International Airport
- The beautiful Avon River – and of course those iconic swans!
- Stratford Summer Music and Spring Works Indie Theatre & Arts
- Stratford General Hospital
- A full range of sports facilities
- Thriving local industries in agriculture and auto parts manufacturing
- Two local radio stations and the daily newspaper, *The Beacon Herald*



Position Overview

Organization: Stratford Festival

Title: Director Planned Giving

Reports to: Senior Director Advancement

Location: Stratford, Ontario or commuting distance to Stratford. If not from the area a moving allowance will be provided.

Key Relationships: Senior Director Advancement
Chair of the Advancement Committee
Chairs, other fundraising committees and special campaigns
Stratford Shakespearean Festival Endowment Foundation
Executive Director
Artistic Director
Stratford Festival Executive Team



The Organization

Embracing a 70-year heritage of tradition and innovation, the Stratford Festival seeks to bring theatre alive for increasingly diverse audiences, pursue new artistic avenues, and expand the scope and reach of work beyond the stage itself. As part of this effort, the theatre also presents The Meighen Forum, a season-long program of events and activities that complement the



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playbill; conducts an artistic R&D program entitled the Laboratory; and is midway through a ten-year project – unique in North America – to film all of Shakespeare’s plays.

With an annual budget of \$65 million, the Festival earns 95% of its revenue through ticket sales, fundraising, and ancillary activities, making it one of the most self-sufficient cultural organizations on the continent.



The Festival has weathered the recent public health crisis remarkably well. It undertook a special relaunch campaign, which has raised \$13 million to support the return to the Festival’s stages. The Festival is in the midst of a multi-year recovery arriving at an important inflection point. It’s Artistic Director and Executive Director have committed to continuing with the organization for the next few years and leading an ambitious strategic planning process to map out the priorities for the Festival’s next great stage.

A registered charity, the Festival has built an \$100-million endowment fund to support operating activities, including training, education outreach, play development, and capital projects.

The \$100-million Spirit of the Tent campaign (concluded pre pandemic) supported the construction and operation of the new Tom Patterson Theatre. This 600-seat state-of-the-art facility will both affirm and vastly enhance the Festival’s position as a dynamic world leader in the development and production of live theatre.



By attracting the finest talent from Canada and around the world and by providing the conditions and training that enable artists to achieve their most courageous work, the Festival immerses audiences in a theatregoing experience that is innovative, entertaining, and unsurpassed anywhere in the world, one that is deeply relevant to, and reflective of, our lives and communities.

The Opportunity

This is a rare chance to advance the financial strength of one of the most important arts organizations in the English-speaking world.

Our ideal candidate will bring broad experience in planned giving fundraising as well as successful strategies to aggressively grow the planned giving program. You will bring a passion for the performing arts to the Stratford Festival's vibrant senior advancement team, where you will report to and work closely with the Senior Director Advancement. The Director Planned Giving will inherit a very successful Planned Giving portfolio and will play a key role in growing a very successful program. Responsibility and accountability to design, implement, manage and evaluate the future strategy for planned giving, including stewardship, to support future priorities through realized and deferred gifts to the operating company and/or the Endowment Foundation will be the focus of this role.

With responsibility for setting fundraising goals and development plans, the Senior Director will work closely with the Board Chair, Chair of the Advancement Committee, other committees related to fundraising, and with the Executive Director and the Artistic Director.

In addition to special campaigns, the Advancement team raises close to \$14 million annually as well as several million directed to the Endowment Fund.

Key Areas of Responsibility

- Design, implement and manage a comprehensive strategy in order to identify planned giving prospects, secure planned giving commitments and steward identified planned giving donors with the goal of increasing the number of legacy and major planned gifts and providing ongoing, meaningful stewardship to existing donors over their lifetimes.
- Develop an annual plan that includes accurate budget forecast for expenses and goal for confirmed expectancies.
- Identify, cultivate and solicit planned gifts, both annual and endowed, through a rated prospect list.
- Steward and personally manage a large portfolio of current planned giving donors and deepen connections with the Festival through regular personal contact, communications and special events.
- Maintain a current and in-depth knowledge of planned giving vehicles, including bequests, life insurance, charitable remainder trusts, pension funds, gifts of securities,

etc. and their applicability to individual donor situations with patrons in both Canada and the United States.

- Ensure that the Festival has the necessary systems, policies and procedures in place to operate the planned giving program within the regulatory framework of the Canada Revenue Agency and the Internal Revenue Code (U.S.).
- Create and implement strategies to enhance planned giving awareness among Festival patrons through development of communications materials and marketing strategies, including telefunding campaigns.
- Execute and manage the administrative duties of the position and, through the effective use of Tessitura, the Festival's database, accurately track enquiries, monitor relationships, and record commitments and realized planned gifts.
- Conduct in-person meetings as required with planned giving prospects (cultivation/solicitation) and planned giving donors (stewardship).
- Be on site in Stratford during the performance season and be able to travel throughout Ontario (and other parts of Canada) and to the Festival's major U.S. markets as required. Recognize that frequent evening and weekend work will be required throughout the Festival's season.
- Participate and collaborate with other members of the Advancement team to develop a strategic, comprehensive approach to generating planned giving support and leveraging donors from both the mid-level and annual membership/Playwright Circle programs
- Perform other duties as assigned.

Qualifications:

- University degree or equivalent education and experience in a field related to business, communications or public relations
- Minimum of seven years' experience in a senior gift planning role, preferably in the performing arts industry
- Experience working with both the Canada Revenue Agency and the Internal Revenue Code is desired
- Excellent written and oral communications skills



Candidate Competencies

- Demonstrated passion for the arts and an alignment with the Stratford Festival's mission, which is to ensure that the Festival is the premier classical theatre destination renowned for both excellence and innovation
- Exceptional interpersonal and communication skills that foster meaningful relationships with donors and prospects. Experience in making in-person solicitations with prospective donors and proven success in forging relationships with major donors
- Organizational skills that allow for the successful management of a portfolio of several hundred prospects and donors
- Experience with both Canadian and ideally, American fundraising models, trends, and innovative techniques. Understanding of differing approaches and attitudes toward giving in each country and of multi-generational approaches to philanthropy
- Strong attention to detail and ability to manage complex estates
- Imaginative and innovative approaches to the development of new planned giving strategies
- Strong financial ability to develop budget and manage expenses
- Clear understanding of the relationship and synergies between marketing and advancement activities
- Ability to work well with key internal and external stakeholders
- High professional standards, with an acute attention to detail

Application Instructions

Applying for this role starts with your own – objective – personal analysis. Do you have the top-flight success in planned giving and zeal for business excellence that this high growth portfolio demands?

If you are looking for an outstanding challenge, working with a great team for a very important, focused and successful organization we want to hear from you. Please submit your CV, a covering letter explaining why you are a serious candidate and salary expectations to:

PRESTON HUMAN CAPITAL GROUP via email: cathy@phcap.ca.

The Stratford Festival is working diligently toward a safe and healthy workplace for everyone. We welcome applicants of every identity, and encourage applications from Indigenous, Black, People of Colour, Deaf, disabled and 2SLGBTQ+ folks. We are committed to accommodating people with disabilities throughout the recruitment process and beyond. If you require accommodation (including, but not limited to, an accessible interview site, alternate format documents, ASL Interpreter, or Assistive Technology) during the recruitment and selection process, please let us know.

As a condition of hire, all successful job candidates must be fully vaccinated against COVID-19 and provide proof of full vaccination at time of contracting. This condition is subject to the provisions of the *Human Rights Code*.

Please note all inquiries and applications will be held in strict confidence and only qualified respondents will be contacted.



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