



Director of Planned Giving

Boston Symphony Orchestra

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BOSTON | NEW YORK

The Boston Symphony Orchestra seeks a Director of Planned Giving to design, direct and implement a comprehensive program to promote and secure planned gifts.

About the Boston Symphony Orchestra

Founded in 1881, the Boston Symphony Orchestra (BSO) is a world-renowned symphonic organization and one of the largest in the country. With exceptional leadership (including Andris Nelsons as Ray and Maria Stata Music Director and Barbara W. Hostetter as Board Chair) and \$576 million in total endowment investments, it is an exciting time for the BSO as society reemerges from the pandemic and returns to in-person performances.

The BSO's mission is to foster and maintain an organization dedicated to the making of music consonant with the highest aspirations of the musical art, creating performance and providing educational and training programs at the highest level of excellence. Comprised of approximately 100 players, the orchestra is led by the internationally acclaimed conductor Andris Nelsons, who became the 15th music director of the BSO in the 2014-15 season. Named Musical America's 2018 Artist of the Year, Andris Nelsons has re-established the orchestra's international touring tradition, led the orchestra in a multiple Grammy award-winning cycle of the symphonies of Shostakovich, and created a unique partnership between the BSO and the historic Gewandhaus Orchestra of Leipzig, where he also serves as music director.



The BSO's yearly schedule of major activities includes a subscription season at Symphony Hall (September–April) and a summer season at Tanglewood (July–August), as well as concerts by the Boston Pops at Symphony Hall during the spring (May–June) and the holiday season, under the direction of Keith Lockhart, Julian and Eunice Cohen Boston Pops Conductor.

Today, the BSO reaches millions of listeners through not only its concert performances in Boston and at Tanglewood, but also via streaming on BSO NOW, educational and community programs, radio, television, recordings, and tours.

About Equity, Diversity and Inclusion at Boston Symphony Orchestra

The BSO aims to build a more equitable, diverse, and inclusive organization, ensuring the organization is relevant and accessible to everyone. Throughout its long history, the BSO has created space for artists (including being the first orchestra to hold blind auditions) and understands that it continually needs to evolve to be an orchestra that is both in the city and of the city.

Sandra St. Fleur Wright was recently appointed to the newly created role of Vice President of Talent and Equity, where she will focus on advancing EDI in all facets of the organization. The organization is currently embarking on a strategic road map for EDI.

About the Opportunity

Under the leadership of newly appointed CDO Maureen Flores, BSO raised \$35M in 2022. With 14,000 total donors and an already established group of planned giving donors through the Walter Piston Society, this role is an exciting opportunity to build on the foundation of engagement and grow the planned giving program. Established in 1987 and named for Pulitzer Prize-winning composer and noted musician Walter Piston, who endowed the BSO's Principal Flute Chair with a bequest, the Walter Piston Society recognizes and honors those who have provided for the future of the Boston Symphony Orchestra, Boston Pops, or Tanglewood through one of a variety of irrevocable deferred gifts, or by including the BSO in their long-term plans.



Reporting to the Chief Development Officer and a key member of the individual giving team at the BSO, the Director of Planned Giving will be responsible for designing, directing, and implementing a comprehensive program to promote and secure planned gifts for the organization. The successful candidate will be highly collaborative and adept at networking and forming relationships with demonstrated experience in closing planned gifts at the six-figure level and higher. This person will partner with colleagues to assist in strategizing and preparing solicitations to help ensure that the orchestra's

endowment, capital, and special project funding priorities are met. They will also work closely with trustees, advisors, colleagues, and other key leaders to identify and qualify new prospects and will serve as a key relationship manager as part of the front-line fundraising team.

Key Responsibilities

- Manage a portfolio of approximately 200 planned gift prospects and solicit and close gifts of 5, 6, and 7-figures
- Create a comprehensive marketing plan to encourage patrons to consider planned gifts options as part of their philanthropy, including direct mail, email, and website presence
- In concert with the CDO, develop a long-term strategy and projections for a robust and dynamic gift planning program for the BSO and all its programs
- Work collaboratively with the CDO, gift officers, and the annual giving team to support their work with donors. Work with senior organization officers and fiduciary and legal representatives of the organization to secure deferred or complex gifts (e.g., Real estate, other property) to the organization
- Serve as the subject matter expert for the front-line fundraising team on gift planning options, providing proposal materials and other written materials
- Provide oversight of the administration and reporting requirements for all deferred/planned gifts including bequests, trusts, life insurance, and real estate
- Serve as liaison with the gift processing and finance offices on matters pertaining to past, present, and future planned gifts, including their administration and accounting
- Prepare reports, briefing materials, correspondence, proposals, and related documents for solicitation of prospects
- Partner with the Donor Relations office to manage the Walter Piston Society, the recognition program for planned gift donors, to steward and maintain those donor relations

Key Qualifications

- 7+ years related experience in planned giving, with experience leading a planned giving program of added value
- Strong understanding and knowledge of all aspects of gift planning and fundraising including planned giving vehicles, giving societies, deferred giving strategies, and reporting tools
- Working knowledge of the current laws regarding taxability of donations
- An understanding of the requirements for financial reporting of planned giving donations, and an ability to work collaboratively and strategically with colleagues in development and finance to ensure proper allocation and reporting of all planned gifts
- Experience developing and implementing data-driven marketing strategies that have resulted in planned gifts
- Entrepreneurial and positive mindset
- Degree in law of added value
- Willingness to work in-office two days per week
- Some travel, weekend, and after-hours work required, including a presence at Tanglewood in Lenox, MA in the summer



All qualified candidates will receive consideration for employment without regard to race, color, religion, sex, national origin, disability, veteran status, or any other characteristic protected by law.

Compensation

The salary range for this position is \$150k - \$165k; the successful candidate's starting salary will be determined commensurate with experience, competencies, and skillset

Please email your cover letter and resume in confidence to: bso@developmentguild.com

For more information, please visit www.developmentguild.com.

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For more information about the Boston Symphony Orchestra, please visit www.bso.org

About Development Guild DDI

For 40 years, Development Guild DDI has consulted to leaders across the nonprofit spectrum. Based in Boston and New York, we have successfully collaborated with more than 650 clients nationwide in the sectors of health & science, education, environment, the arts, and social justice. We are experts in executive search and fundraising and are at the forefront of delivering best practice in these services.

With each engagement, we work in teams tailored to a client's particular needs, providing sector-specific intelligence, cross-sector insight, and hands-on functional expertise. We combine our perspective on nonprofit leadership with our knowledge and experience in both fundraising and executive search. This distinct perspective enables us to deliver the most strategic and measurable impact.

