



Sarasota Orchestra Job Description

Job Title: Director of Legacy Giving

Department: Donor Engagement

Reports To: Senior Director, Development Services

Classification: Full-time; Salary / Exempt

Supervises: N/A

Location: Sarasota, FL

General Overview:

Sarasota Orchestra has long been a cultural beacon in the community. As the [oldest continuing orchestra in Florida](#), we have set a regional standard for diverse performances that inspire people of all ages to experience live music. We have been the foundation for music education across generations, highlighted through both an acclaimed Youth Orchestra program that has nurtured young talent for over 65 years, and an annual music festival for emerging musical artists from around the world. This dedication to exquisite performance and first-class musical education underscores our mission to inspire and engage the community through the transformative power of music.

Known for its unique, team-oriented fundraising culture, Sarasota Orchestra seeks to engage a **Director of Legacy Giving** to join an established and successful team of fundraising professionals. The incumbent will be a seasoned, collaborative, successful, and ambitious planned giving expert to play a leadership role in all activities related to the development and implementation of strategies for identifying, cultivating, and soliciting annual/major giving prospects for legacy gifts. As the Orchestra prepares for a transformational multi-year capital campaign to build a [new Music Center](#) and strengthen the endowment, this role will partner with frontline fundraisers to identify and develop engagement plans for planned giving asks to support this historic fundraising effort.

The Director of Legacy Giving will strengthen gift planning culture at the Orchestra and in the donor community and enhance [Encore Society](#) programming to increase membership and engagement. To empower the Orchestra with a broad base of philanthropic support, especially from noncash assets, the incumbent will enhance the donor engagement program across all giving levels to focus on legacy giving. This candidate will manage the communications and training strategies both externally and internally for gift planning.

Responsibilities:

- Develop and maintain holistic and strategic gift planning processes for the Development team, including partnering with frontline fundraisers to support incorporation of planned giving into donor cultivation and solicitation strategies and serve as a resource for planned giving matters and gift conversations. **(30%)**
- Enhance the legacy giving program, including donor benefits and recognition, the planning and execution of high-quality and effective Encore Society events, and stewardship opportunities across all legacy giving levels. **(30%)**
- Oversee the gift planning communications strategy as aligned with overall donor communications creating the content for internal- and external-facing legacy giving collateral, including stewardship reporting and marketing pieces. **(15%)**
- Lead internal and external gift planning trainings on a regular basis with the donor engagement team, volunteer leaders, and the donor community to strengthen the gift planning culture. **(15%)**
- Support the tracking and management of all reporting for planned giving including the execution and stewardship according to individual donor gift and pledge agreements and addendums. **(10%)**
- Willingness to embrace other duties as assigned. Duties and responsibilities described herein are not a comprehensive list, and additional job tasks may be assigned from time to time as necessitated by the Donor Engagement department and business needs.

Necessary Knowledge & Skills:

- Bachelor's degree required.
- 7+ years of nonprofit development experience, with a track record of successfully supporting and/or managing major gift and legacy giving programs.
- Knowledge of planning giving vehicles, tax guidelines, and legal requirements.
- Experience working effectively with financial advisors and attorneys.
- Demonstrated ability to achieve fundraising goals while working with prospects in all phases of development: qualification, cultivation, solicitation, and stewardship.
- Ability to maintain a flexible work schedule, including some evenings and weekends.
- Willingness to be hands on when needed, managing and executing legacy society and cultivation events that engage donors, prospects, and volunteer leaders.
- Strong communications skills, both oral and written.
- Proficiency with Microsoft Office and fundraising CRM (preferably Tessitura).
- Excellent team player, with strong interpersonal skills.

Desired Qualifications:

- Commitment to the mission of Sarasota Orchestra – must adhere to the highest ethical standards, demonstrate an empathetic disposition and perseverance, and convey sensitivity to the needs of donors, volunteers, and staff.

- Experience with capital or endowment campaigns.
- Experience training gift officers, donors, and volunteer leaders in gift planning.
- Presents a high degree of sophistication, self-confidence and self-motivation, with a track record for successfully translating strategic ideas into action and results.
- Ability to work independently and collaboratively in a goal-oriented team environment.

Physical Requirements:

While performing the duties of this job, the employee is regularly required to talk, hear, sit, stand, walk, bend, reach, and use hands to finger, handle or feel. Repetitive motion is required while using a computer. The worker is required to have close visual acuity to perform an activity such as preparing and analyzing data and figures and viewing a computer terminal. This position requires the ability to occasionally lift and/or move up to 20 pounds.

Working Conditions:

The job operates in a professional office environment and performing arts venues. The environment is generally moderate in temperature and noise level.

We are an Equal Opportunity Employer.

If you are interested in this opportunity with Sarasota Orchestra, please e-mail a cover letter and resume to HR@sarasotaorchestra.org or call 941-487-2704 with any questions you may have. Thank you!