



Membership Manager

Filoli is a 654-acre historic site of the National Trust for Historic Preservation, located on the San Francisco Bay Peninsula near Woodside, CA, and one of the finest remaining country estates of the early 20th century. As a team member here, you will be able to connect rich history with a vibrant future through beauty, nature and shared stories. You have the opportunity to preserve, build upon and share the wonder of this place.

In our daily interaction with guests, we envision a time when all people honor nature, value unique experiences and appreciate beauty in everyday life. You will also actively play a part in creating a vibrant future through our 2019-2023 Strategic Plan. Embedding the core principles of Diversity & Inclusivity, Sustainability and Organizational Excellence into each pillar of the plan, we are focusing on five main pillars of our organization: People & Culture, Fundraising & Financial Strength, Infrastructure Investments, Visibility & Branding and Engagement & Education. We welcome and appreciate your contributions to Filoli.

SUMMARY

The Membership Manager is an important point of contact for Filoli members and potential members. In line with Filoli's Strategic Plan, the manager is responsible for managing Filoli's membership programs with a focus on new member acquisition, member renewals, retention, tracking and reporting. The manager is expected to work a flexible schedule that includes evenings and weekends when needed to provide direct hands-on support for staff during special events.

This full-time, exempt position will have a varied schedule that includes weekend and/or evening service. Depending on candidate experience, the annual salary range for this position is \$82,000 to \$87,000. This position is also eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. The Membership schedule may change to meet the needs of the organization so flexibility is important.

ESSENTIAL DUTIES AND RESPONSIBILITIES INCLUDE:

Leadership

- Responsible for internal management and operational integration of the Membership program;
- Coordinate with peer departments especially in the area of operations, event and program planning and scheduling, development, and cross departmental function;
- Serve on editorial team for reviewing Filoli external communications and membership mailings;

- In coordination with development, support donations from members through processing and communication;
- Participate in weekly operations meeting and regular management meetings;

Membership

- As point of contact for 18,000+ members, provide a high level of service to foster strong relationships with members and potential members;
- Establish monthly goals for new and renewing members, and monitor progress against goal; adjust strategies and tactics when necessary;
- Plan and deploy new member solicitation and promotion strategies to drive membership to progressively increasing levels;
- Coordinate the annual membership drives, renewals and special appeals;
- Manage membership database (Altru) and oversee data entry standards for consistency;
- Plan and attend all membership events and coordinate staff and management representation at events where appropriate;
- In collaboration with the Development department, create an independent program for the Filoli Circle Membership Program:
 - Provide personalized services and recognition;
 - Develop customized materials, benefits and messaging;
 - Plan regular special opportunities or events for Filoli Circle members;
 - Create appeals to upgrade Basic level members to the Filoli Circle;
- Coordinate with Development Department to ensure appropriate member and donor recognition;
- Participate in industry associations, like APGA, AAM, and AFP to network with other member organizations; be aware of trends, regulations and innovations in membership programs;
- Oversee external vendors and create partnerships to meet the growing needs of the program;
- Manage all supplies for Membership Department;
- Occasionally assist with Visitor Services and Retail for membership and ticket sales;
- Manage Gift Membership process and work with Finance, Visitor Services and the Clock Tower Shop to facilitate sales;
- Coordinate and implement special projects as they arise;
- Ensure the confidentiality of all member and donor personal information;

Personnel, Budget & Reporting

- Directly manage Membership staff including hiring, scheduling, time tracking and management, training; evaluating and all coordination with Human Resources;
- Responsible for Membership program budget oversight within an approved budget; responsible for tracking and coding and reconciling with accounting;
- Provide regular analysis and reports of the program.

General

- Fulfill expectations as listed in Filoli Expectations for Directors, Managers and Supervisors (see attached);
- Support Filoli's diversity, equity, accessibility and inclusivity efforts and ensure that Filoli's membership program is available to all;
- Work at Filoli events as needed (i.e. Holidays, festivals, weekend and evening programming);
- Provide excellent customer service and promote a positive visitor experience;
- Represent the highest standards in support of Filoli's policies, procedures, guidelines and standards;
- Maintain flexibility and perform other duties as assigned to respond to the needs of the organization;
- Attendance and punctuality are essential to work and all work-related functions.

SUPERVISORY RESPONSIBILITIES

This position will oversee the Membership Sales Specialist and external vendors.

MINIMUM QUALIFICATIONS

An individual must be able to perform each essential duty listed above and any additional responsibilities as directed as well as satisfy the educational and skill requirements listed below:

Education and/or Experience

Education: High School Diploma/GED required and Bachelor's degree preferred.

Core Competencies:

- **MEMBERSHIP AND DEVELOPMENT EXPERIENCE** – Minimum 3-5 years of general office experience. Minimum 2-4 years working directly with a large database system - experience with Blackbaud's Altru is a plus. Minimum 2-4 years working in a non-profit environment with a large, engaged member base.
- **PROGRAMS AND EVENTS EXPERIENCE** – Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.
- **PEOPLE AND PROJECT SKILLS** – Provide outstanding customer service and work effectively with exceptional diplomacy and tact, serving a huge and diverse membership base. Effective team leadership skills and cross-functional collaborative capacity. Ability to either take direction or work independently as the situation requires.
- **LEADERSHIP** – Flexible, energetic, and outcomes-oriented self-starter who brings a creative approach to solving problems. Capacity to interact effectively and build partnerships with Filoli's many constituencies including staff, Board members, community partners and supporters, donors, members, visitors, and volunteers.
- **CULTURAL COMPETENCIES** – Model a responsibility to self-awareness and awareness of others to recognize that individuals bring unique backgrounds, beliefs, values, and world-views. View racial and cultural differences as assets to the organization.
- **DIVERSITY, EQUITY, AND INCLUSION** – Committed to Filoli's dedication to integrate accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion of advancing organizational DEAI objectives and influencing others to approach all work with an equity lens. Promote processes and communication that encourage organizational cultural competence and inclusion.

- COMMUNICATION SKILLS – Possess excellent verbal and written communication, listening and organizational skills.
- DECISIVE NATURE – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives and formulate rapid solutions with understanding of the inherent risks and the implications of decisions.
- COMPUTER SKILLS – Expert level of proficiency using Microsoft Office Suite, Google applications and enrollment/renewal database software (Altru);
- AVAILABILITY – Maintain a flexible work schedule that includes evenings and weekends to meet the demands of executive management.

Skills and Abilities:

- Develop, document and implement Filoli’s membership process;
- Through Altru, run queries and reports and utilize Altru training and support services;
- Possess outstanding attention to detail and editing skills;
- Maintain confidentiality of all member personal information;
- Work with limited supervision and also within a team;
- Ability to tirelessly follow-through to successful completion of all projects and communications.
- Read, interpret and communicate information in documents such as safety rules, operating and maintenance instructions, and procedure manuals;

CERTIFICATES, LICENSES, REGISTRATIONS

A valid Driver’s License is required.

PHYSICAL REQUIREMENTS

The physical requirements described here are representative of those that must be met by an employee to successfully perform the essential functions of this job including:

- Lift/carry items up to 30 pounds;
- Stand, walk across uneven terrain, climb stairs, reach, lift, carry and bend as well as sit for long periods of time at a computer and speak on the phone.

HOW TO APPLY

1. Candidates with the above prerequisites are invited to submit their resumes along with a cover letter outlining their related experience and background to:
<https://filoli.applicantstack.com/x/openings>
2. Possession of minimum requirements does not guarantee an interview.
3. Please, no phone calls.
4. Thank you for your interest in Filoli!

Please visit our website for more information: www.filoli.org

Filoli is an equal opportunity employer who values diversity in the workplace.