



Annual Giving 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. In this position, you have the opportunity to engage in the 2024 - 2028 Strategic Plan, centered on connecting to our community, and support the launch of a site plan and capital campaign designed to provide Filoli guests greater access to nature. Filoli's culture is rooted in integrity and we are accountable for our work, actions, and impact on our visitors, community, and environment. Through our values, Filoli Team members are committed to being Inclusive, Welcoming, Innovative, Collaborative, and committed Stewards using sustainable practices for the future.

Are you a passionate fundraiser with a knack for building lasting relationships? Join our team as the Annual Giving Manager and play a pivotal role in advancing our mission while making a lasting impact on our community.

SUMMARY

The Annual Giving Manager leads a vibrant and expanding annual giving program, taking charge of strategic planning, execution, and evaluation to elevate the organization's fundraising efforts. This dynamic role is central to advancing initiatives for the Annual Fund and Filoli Circle members, focusing on building meaningful relationships with donors, members, and prospective supporters. Ideal candidates will be strategic and data-savvy, with a flair for creativity in crafting innovative acquisition and upgrade strategies that drive engagement and impact. The Annual Giving Manager will also oversee the Development Information Assistant, ensuring timely and accurate gift acknowledgments, data entry, weekly reporting, and prompt responses to general Development department inquiries.

Working at a beautiful historic house and garden, this is a full-time, exempt position with flexible scheduling and weekend/evening service as needed. Depending on candidate experience, the salary range for this position is \$88,000 to \$106,000. This position is also

eligible for employee benefits: medical, dental, vision, life, LTD, Flex Plan, 401(k), vacation, sick leave and holiday pay. In accordance with Filoli policies, the employee may work offsite up to 20% on an agreed upon day and travel for off-site meetings and conferences.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Annual Fund

- Plan, implement, and manage the organization's growing Annual Fund, including developing and implementing specific strategies for donor acquisition, retention, and upgrade;
- Identify opportunities for converting Annual Fund donors into Filoli Circle supporters;
- Execute a robust calendar of appeals and campaigns, oversee gift processing and acknowledgment following department guidelines, and collaborate with the Stewardship & Donor Engagement Coordinator to steward Annual Fund donors;
- Create and oversee the development of persuasive appeal content, with an emphasis on storytelling and donor impact;
- Collect donor interest areas and other relevant data to develop segmented communication strategies that are personalized to the donor;
- Collaborate with the Director of Marketing and Director of Membership to integrate Annual Fund messaging in other Filoli communications;
- Promote Matching and Recurring Gifts opportunities;
- Update the organization's Annual Fund web pages with current information;

Filoli Circle

- In collaboration with the Director of Membership, create and implement a Filoli Circle strategy aimed at increasing donor engagement, membership renewals, upgrades, and acquisitions;
- Identify opportunities for Filoli Circle Supporters to become Major Gift donors;
- Develop Filoli Circle Member recognition events to steward donors and also build affinity and brand awareness;
- Send surveys and integrate member feedback back into program improvements;
- In collaboration with the Stewardship & Donor Engagement Coordinator, provide concierge service to Circle Members;

Development Operations

- With the assistance of the Development Database Specialist, create comprehensive Annual Giving reports to analyze the success of appeals and efforts to inform future strategies;
- Create and maintain Annual Fund and Filoli Circle budgets;
- Create program collateral (printed and digital), including managing content for web pages;
- Oversee and ensure cohesion between all general Development department communications related to annual giving;

- Partner with gift officers to advance donor giving and increase philanthropic support, transitioning annual donors to major gift donors as appropriate;
- Assist at Development Events as needed;
- Prepare presentation slides for Development Committee and/or Board meetings and present as needed;

General

- Fulfill expectations as listed in Filoli Expectations for Directors, Managers and Supervisors (see attached);
- 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;
- Follow Filoli's Dress Code Policy for back-of-house staff. If working a guest-facing event, please wear the recommended Filoli uniform pieces;
- Attendance and punctuality are essential to work and all work-related functions.

SUPERVISORY RESPONSIBILITIES

This position will supervise the Development Information Assistant.

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: Bachelor's degree and 4-6 years of experience in the development field or a related area or an equivalent combination of education and experience;

Core Competencies:

- **DEVELOPMENT EXPERIENCE** - A minimum of 4-6 years of experience in development. Familiar with a variety of development concepts, practices, and procedures. Experience managing an annual appeal campaign, including list management, segmented messaging, acknowledgment, cultivation, and reporting processes. Experience with managing giving circles is preferred.
- **PEOPLE, PROJECT, AND PROGRAM SKILLS** – Possess excellent planning and project management skills. Has completed projects where a wide degree of creativity and latitude was expected. Experience with performing various tasks and working with a

broad range of individuals. Effective teamwork 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 with a creative problem-solving approach. Work and communicate successfully with a highly diverse population of current and potential donors, staff, volunteers, members, board members, and the public. Strong administrative skills. Ability to multitask, see many sides to complex issues, and perform at high standards with a collegial team.
- **CULTURAL COMPETENCIES** - Model a responsibility to self-awareness and awareness of others, recognizing that individuals bring unique backgrounds, beliefs, values, and worldviews. View racial and cultural differences as assets to the organization.
- **DIVERSITY, EQUITY, AND INCLUSION** – Committed to Filoli’s dedication to integrating accountability across all efforts to support and sustain a racially equitable organization. Demonstrate a passion for advancing organizational DEAI objectives and influencing others to approach all work with an equity lens. Promote processes and communication methods that promote organizational cultural competence to create a sense of belonging.
- **COMMUNICATION SKILLS** – Demonstrate excellent written and verbal communication skills. Ability to communicate (listening and speaking) effectively with all constituencies of the organization. Ability to speak and make presentations to groups, both large and small.
- **DECISIVE NATURE** – Well-honed ability to independently anticipate and analyze situations, define problems and objectives, recognize viable alternatives, and formulate rapid solutions with an understanding of the inherent risks and the implications of decisions.
- **COMPUTER SKILLS** – Advanced computer experience, including Google Applications and Microsoft products; management databases; and design and presentation programs. Proficiency in Altru (Blackbaud) or a similar database is preferred.
- **AVAILABILITY** – Maintain a flexible work schedule that includes evenings and weekends to meet the demands of executive management. Working off site is optional, but no more than 20% on a regular basis with a mutually agreed upon schedule.

SKILLS AND ABILITIES

- Ability to regularly make independent decisions of significant importance to the organization and demonstrate thoughtful judgment when taking actions independently;
- Work independently while maintaining open and transparent communications about duties and project status;
- Demonstrate consistent and exceptional attention to detail, resourcefulness, and an ability to think through an issue and anticipate possible problems, obstacles, and conflicts;
- Be organized and follow through on tasks to successful completion;
- Display impeccable discretion, confidentiality, judgment, graciousness, and flexibility at all times;

- Take general direction, multi-task, and work in an environment of regular interruptions;
- Serve as a collaborative team member with strong interpersonal skills;
- Demonstrate a strong customer service orientation;
- Read and interpret 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 in this job description are representative of those that an employee must meet to perform the essential functions of this job, including successfully:

- Lift/carry up to 20 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.

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.