



CALIFORNIA  
HISTORICAL  
SOCIETY since 1871

## Director of Development & Marketing Job Posting 10-9-21

### The Position

This is an opportunity to lead and expand the Development and Marketing Department of an organization that collects, shares, and honors the extraordinarily diverse stories from throughout our state so that Californians may utilize history's lessons to create a brighter future for everyone.

The California Historical Society (CHS) is seeking dynamic candidates for the position of Director of the Development and Marketing Department (DMD). Reporting directly to the CEO, the DMD Director is a key leadership position at CHS. Working closely with the CEO and the other members of the organization's senior leadership team, the DMD Director oversees CHS's development and marketing functions; plans, executes, and evaluates the results of CHS's development and marketing plans; sets and meets development objectives; grows revenue and audience; leads and supervises department staff members; actively secures major gifts for the organization; and strengthens the organization's donor stewardship efforts. The DMD Director has regular contact with board Trustees coordinating their involvement in the development function and staffs the board's Development Committee.

### About Us

At the California Historical Society (CHS) we are on a mission to inspire and empower people to make the state's richly diverse past a meaningful part of their contemporary lives. Founded in 1871, CHS fulfills its mission today by hosting online and in-person programs; mounting changing exhibitions at our headquarters in San Francisco; delivering content via blogs, e-newsletters, online exhibitions, social media, and the CHS Digital Library; providing K-12 teachers with classroom-ready resources; operating a research library; and maintaining a premier collection of original materials documenting the history of California. A new statewide field services program is under development to directly serve local and cultural history organizations throughout the state including those in traditionally underrepresented communities.

Learn more at [www.californiahistoricalsociety.org](http://www.californiahistoricalsociety.org).

### Responsibilities:

#### Leadership

- Serve as a member of the staff senior Leadership Team and work with other team members to

ensure that CHS is adhering to the organization's values and mission, developing strategies that achieve CHS goals; and focusing on the organization's vision.

- Collaborate with other Leadership Team members and Trustees to ensure that CHS is honoring diversity and inclusion principles in leadership, staffing, programming, interpretation, and services.
- Attend meetings of the CHS Board of Trustees and contribute written and verbal reports for the Trustees on a regular basis; identify potential new Trustees
- Collaborate with all staff on CHS-wide projects demonstrating the importance of teamwork by leading by example

#### Development

- Create an annual Development Plan that outlines development goals (including revenue goals), key performance indicators, and integrated development strategies; identify tactics and develop a timeline to implement strategies; coordinate the involvement of the CEO, DMD staff, senior Leadership Team members, and the board's Development Committee.
- Implement the annual Development Plan and utilize it to manage the day-to-day work of CHS's development function
- Update CHS's case statement as the organization evolves
- Oversee CHS's major gift, annual fund, membership, corporate giving, planned giving, donor events, donor research, and grant writing functions; direct the staff working directly in these programs
- Write gift and grant proposals and stewardship reports and oversee development of proposals and reports written by other members of the DMD
- Refine, implement, and manage CHS's donor stewardship program
- Stay up to date on funding sources and development trends and utilize knowledge to adjust CHS strategies and tactics
- Facilitate the involvement of each Trustee in the development function in a way that aligns with their skills and strengths; provide and/or arrange for appropriate training
- Staff the Development Committee of the Board of Trustees
- Network with other California fundraising professionals

#### Major Gifts Program

- Oversee the development and execution of a Major Gifts Program for CHS including the development of major gifts portfolios for the DMD Director, Major Gifts Officer, and CEO; identify key performance indicators to ensure regular and consistent attention to this function within the DMD; serve as prospect manager for CEO
- Develop and personally manage a portfolio of major gift donors and prospective donors from throughout California; develop a relationship plan for each person in the portfolio that emphasizes their needs and interests and builds a meaningful connection and partnership between them and CHS; communicate by mail, phone, email, in-person, and other means monthly, bimonthly, or quarterly depending on needs of donors and prospective donors
- Meet face to face with current donors and prospective donors on a consistent basis throughout the year; coordinate appropriate involvement by CEO, Trustees, other supporters, and/or staff members; organize small gatherings of donors and prospective donors based on common interests and/or geographical region
- Prepare and present donor proposals consistently throughout the year; actively solicit gifts
- Practice good stewardship principles; thank donors for their generosity, recognize gifts as donors wish to be recognized, and ensure that supporters understand that we value our relationship with them
- Utilize Tessitura CRM software to manage relationships with donors and prospective donors
- Prepare correspondence including proposals, reports, appeal letters, and thank you letters.

### Marketing

- Develop an annual marketing plan that outlines goals, key performance indicators, strategies, major tactics, and a timeline; collaborate closely with the Marketing and Communications Manager on plan development and coordinate involvement of other DMD staff, CEO, and senior Leadership Team
- Oversee execution of the annual marketing plan including major marketing and communications campaigns; provide general direction to Marketing and Communications Manager in the implementation of the plan's strategies and tactics
- Align marketing and development efforts, including messaging, to insure consistency, clarity, synergy, and increased impact
- Ensure that CHS is presenting a consistent message to internal and external audiences in a professional manner

### Financial Forecasting and Reporting

- Forecast contributed income for each annual budget that is based on goals established in development plan and marketing plan
- Develop and manage department budget; adjust throughout year as necessary and appropriate
- Provide monthly reports to CEO and Executive Committee on key performance indicators
- Work with COO and Operations Department to ensure all activities comply with legal requirements and CHS policies
- Manage the department in a fiscally sound manner

### Supervision

- Recruit and hire new staff members within DMD; participate in interviewing process to assist other departments as requested
- Coach, direct, guide, mentor, motivate, and provide feedback to the development and marketing professionals within DMD; ensure accountability of staff
- Conduct annual performance planning and evaluation as facilitated by human resources staff.

## **Education and Experience**

- Bachelor's Degree in an appropriate discipline with college and/or continuing education coursework in fundraising and marketing
- Minimum of two years' experience successfully leading a nonprofit organization's comprehensive development function including annual giving, membership, corporate giving, planned giving, events, grant writing, marketing, and/or public relations; OR five years' progressively responsible development experience culminating in the management of a nonprofit organization's major gift or institutional giving functions
- Minimum of three years' demonstrated experience successfully building relationships with major donors and securing gifts of at least five-figures regularly

## **Knowledge, Abilities, and Skills:**

### Required

- Advanced knowledge of fundraising principles, procedures, and trends; and proficient knowledge of marketing and communications principles, procedures, and trends
- Ability to develop and implement comprehensive development and marketing plans

- Knowledge of the Bay Area and California charitable giving landscape
- Commitment to a high standard of ethics and maintaining a high level of confidentiality with information about donors, prospective donors, volunteers, and staff
- Ability to lead strategically and creatively in an environment that values inclusion and diversity
- Excellent interpersonal communication skills including listening, patience, empathy, respect, diplomacy, responsibility, and dependability; ability to lead and work within a collaborative team environment and with a wide variety of people in a cordial and professional manner
- Experience creating authentic relationships with donors, colleagues, and supervisees
- Ability to articulate the organization's vision in an inspiring and enthusiastic way that motivates people to support the organization's mission financially
- Strong written, verbal, and presentation communications skills including proficiency in English
- Excellent organizational, time management, and problem-solving skills; can juggle multiple priorities, work on a deadline, and maintain a positive attitude; ability to collect, synthesize, and present information in an accurate, timely, and comprehensive manner
- Excellent supervisory skills
- Experience developing and tracking key performance indicators
- Experience developing, managing, adhering to, and course-correcting a budget
- Ability and willingness to work outside of regular business hours including evenings and weekends and to travel throughout the state
- Interest in and curiosity regarding the extraordinarily diverse history of California and a commitment to and passion for the California Historical Society's vision, mission, and values

#### Desired

- Knowledge of Tessitura or similar CRM software
- Basic knowledge of California history
- Fluency in one or more non-English languages appropriate to the population of California

### **Things you should know:**

The California Historical Society is committed to the principles of Equal Opportunity Employment and encourages applicants of different backgrounds, cultures, genders, experiences, and abilities to apply. As stewards of California history, we recognize the need for and value of diverse perspectives in both historical interpretation as well as day-to-day collaborative teamwork. Applicants should be passionate about the roles that cultural and historical organizations play in contemporary lives across the state and be willing to roll up their sleeves to put those ideals into action with grace, humility, humor and perseverance.

This is a full-time exempt position, including paid employee health, vision, dental, life, and AD&D, a generous holiday and time off policy, and a team full of interesting and warm people to work with on a daily basis. Position is based in San Francisco, and involves some overnight travel, evenings and weekend work.

Compensation: \$120k-130k, depending on experience

Interested candidates should submit a cover letter and resume or C.V. to [recruiting@calhist.org](mailto:recruiting@calhist.org). Please include your name and the position for which you are applying in the subject line. Resume review will begin immediately. To ensure consideration of your application, please apply by Friday, November 5, 2021. However, applications may be considered after this deadline until the position is filled.