



## **Endowment and Planned Giving Manager**

Department: Development  
Reports To: Chief Advancement and External Affairs Officer (CAEAO)  
FLSA Status: Full Time, Exempt

### **Summary:**

To expand its fundraising opportunities, the Museum will be formalizing its planned giving program in fall of 2023 and will begin planning for a new, multi-year endowment campaign to launch in late 2024/early 2025.

This new position will work closely with the President and CEO and the CAEAO in preparing, launching, and managing the Museum's planned giving and upcoming endowment campaign. This individual will focus on program development and management, cultivation, preparing solicitations, stewardship of donors and prospects, and record keeping.

### **Duties and Responsibilities:**

- Responsible for managing the planning, execution, and growth of endowment and planned giving campaigns.
- In coordination with President and CEO and the CAEAO, develop program strategy, timeline, objectives, and metrics for each campaign. Track, report, and achieve key milestones for campaigns' goals and objectives.
- Work collaboratively with and in support of President and CEO, CAEAO, Board members, and other advancement staff to cultivate, solicit, and steward endowment and planned giving donors.
- Responsible for donor correspondence, proposals, reports, and recognition fulfillment.
- Develop and manage marketing efforts related to the campaigns, including but not limited to brochures, website updates, and hosting informational sessions for donors and professional advisors.
- Oversee the Museum's Planned Giving Society, including communications and events.
- Ensure proper processing of gifts, including coordinating with the Finance Department to properly allocate revenue and inform the creation of funds.

- Work directly with executors, trustees, other fiduciary/financial custodians, and internal Museum partners to manage in a timely and efficient manner planned gifts to the Museum, including gifts by wills and trusts, beneficiary designation, and retirement funds.
- Attend and assist at the Museum’s public programs and development events.
- Serves as a member of cross-departmental teams, as appropriate.

**Key Requirements**

- Bachelor’s degree required.
- Minimum 3-5 years professional experience in nonprofit fundraising with emphasis on planned and/or endowment giving.
- Knowledge of estate planning and gift tax laws preferred. Ability to examine financial and legal documents.
- Experience with prospect identification, cultivation, solicitation, and donor relations required.
- Excellent interpersonal, verbal, and written communication skills.
- Strong project planning, critical thinking and problem solving; self-motivated and self-directed. Ability to set priorities and meet multiple deadlines with minimum supervision.
- Superior organizational skills and attention to detail, ability to handle multiple tasks, and strong ethics.
- Proficiency in Patron Manager or other CRM database, OfficeSuite, Emma or other email marketing platform.

**Competencies**

- |                                     |                           |
|-------------------------------------|---------------------------|
| 1. Judgement/Decision Making        | 5. Customer Focus         |
| 2. Communication – Oral and Written | 6. Integrity              |
| 3. Organization/Planning            | 7. Initiative             |
| 4. Business Literacy                | 8. Collaboration/Teamwork |

**Dallas Holocaust and Human Rights Museum Core Values**

**Respect:** We treat everyone with dignity and respect.

**Empathy:** We understand that people have varied experiences of struggle and triumph and we treat everyone with compassion.

**Inclusivity:** We value people's differences and strive to make the Museum accessible to all.

**Excellence:** We work to perform at the highest possible level in everything we do.

**Integrity:** We act ethically and transparently.

**Courage:** We are Upstanders.

The Dallas Holocaust and Human Rights Museum is an equal opportunity employer. We value and strongly encourage a diverse environment.

Applicants, please send cover letter referencing the job title and resume to [resume@dhhrm.org](mailto:resume@dhhrm.org).