POSITION DATA

JOB TITLE: Senior Manager, Planned Giving
DEPARTMENT: Institutional Advancement
REPORTS TO: Director, Major Gifts & Grants

POSITION OVERVIEW
The Senior Manager, Planned Giving reports directly to the Director, Major Gifts & Grants. In this newly established role, the senior manager will build on the current baseline structures and systems in place for the 9/11 Memorial & Museum Trust, the organization’s newly launched planned giving program. A core focus is growing the planned giving program in alignment with 9/11 Memorial & Museum’s efforts to continue to develop a diversified and sustainable funding model. The senior manager, in consultation with the director, will be charged with further developing the vision, strategy, and execution of the planned giving program. This includes developing, disseminating, and executing additional related policies across the organization; creating marketing/stewardship materials and experiences; and working with multiple stakeholders inside and outside of the institution to execute the program.

She/He will directly solicit planned giving prospects. The incumbent will also manage a full range of donor cultivation duties/portfolio management, including working with other frontline fundraisers to develop planned giving as a critical component of a long-term fundraising plan. She/He requires a strong spirit and collaborative skill set, as it involves working as a part of a team to diversify funding resources and engage in long-term financial planning, including the development of strategies tied to the 20th anniversary commemoration of 9/11.

ESSENTIAL FUNCTIONS

• Works with the director to set short, medium, and long-term measures of success for the program, forecasting long-term potential as well as identify challenges
• Ensures the alignment of the planned giving program with the strategic direction of Institutional Advancement team in concert with director and the chief advancement officer
• Manages planned gift compliance for the organization in accordance with gift agreements
• Partners with the prospect researcher and fundraising team to identify planned giving prospects, segmenting and aligning strategies for key audiences
• Creates a centralized approach for cultivation and stewardship (development of a planned giving/legacy society/donor community)
• Works with internal teams and external vendors to create marketing materials/campaign strategies (website, collateral, one-pagers, mailings, etc.)
• Drafts tailored communications, reports, stewardship updates, meeting prep, and updating materials to support frontline fundraisers in their portfolio management/stewardship
• Support and execute elements of the 20th anniversary in alignment with key responsibilities
• Leads tours of the 9/11 Memorial & Museum with prospective/existing patrons, as well as regularly allocate time to be out of the office cultivating supporters at off-site meetings and events
• Participates regularly in key, organization-wide dialogues to identify areas of fundraising opportunities across relevant strategic and other initiatives
• Performs other duties, as assigned

QUALIFICATIONS/SKILLS REQUIREMENT

• Bachelor’s degree required.
• Minimum of 5–7 years of previous fundraising experience with an emphasis on planned giving, preferably at a cultural institution or relevant nonprofit organization, leading to major gifts from individuals, institutions, and corporations
• Self-motivated and possesses a demonstrated ability to articulate planned giving concepts and strategies with credibility to a diverse constituency
• Knowledge of estate planning preferred, including wills, trusts and estate, and gift tax laws and knowledge of the legal record-keeping requirements for fundraising and documenting donations
• Demonstrated strong relationship-building and solicitation skills
• Ability to persuasively communicate and articulate the mission of the foundation to internal and external audiences, including via pitch presentations and VIP tours
• Must be able to work closely and collaboratively with other members of the Institutional Advancement team and integrate efforts with solicitation around a diverse range of fundraising programs and events
• Highly motivated self-starter with the ability to lead, work in a team setting, and work independently; have comfort with gray areas, navigating multiple stakeholders, and an orientation toward problem-solving
• Excellent written and oral communication skills
• Strong computer skills – proficiency in full suite of Microsoft Office applications required and experience with Raiser’s Edge preferred

HOW TO APPLY:

• Include title of position in the email subject field.
• Please state the job board or website where posting was seen.
• Send cover letter and resume to 911mmiajobs@911memorial.org