



Individual & Legacy Giving Officer

Dayton Art Institute is a Mission-Driven EEO Employer

06/20/2023

Mission

Through art, we create transformative and diverse experiences, strengthen community connections and inspire imagination.

Vision

Through art, we are dedicated to collection stewardship, creative engagement and inspirational experiences. With intentional momentum, we nurture inclusion, diversity, equity and accessibility.

The Dayton Art Institute (DAI) seeks an Individual & Legacy Giving Officer to cultivate, inspire, and steward a portfolio of individual donors to grow restricted and unrestricted annual and planned giving arrangements and develop and execute annual and multi-year related strategies for the museum. This position will also oversee the Individual Jefferson Patterson Society (IJPS) program (membership of \$1,500 and above), Carnell Society program (donors committed to making a planned gift to the DAI) and DAI's Former Associate Board (FAB) members.

Working closely with the Development Director and Director and CEO, the successful candidate must possess a background, knowledge, skills and drive to implement all aspects of the museum's comprehensive individual and legacy giving program that reflect financial planning and deferred giving opportunities including and not limited to bequests, wills, annual trusts, unitrusts, giving through retirement plans, and other pertinent future giving options to establish a strong knowledge of donor relationship building and appropriate stewardship tactics.

Additional functions include, developing and monitoring planned giving policies and procedures, creating, and maintaining a marketing and recognition program for donors who

have made planned gift commitments and ensuring that reporting and compliance related to all planned gifts are completed in a timely manner. The Officer collaborates closely with internal and external clients overseeing accuracy, quality control, deadlines, and budget requirements. This position will also identify prospects from existing memberships, strategize, guide and direct strategies to increase individual donor gifts to the museum. The Individual & Legacy Giving Officer will work closely with the Membership & Annual Fund Officer.

As a key member of the Development team, the Individual & Legacy Giving Officer plays a critical role in advancing the museum's inclusion, diversity, equity, and accessibility strategies internally and externally and must be able to become a key "voice" in building relationships with the Development committee, financial planners, attorneys, etc., to help build prospect research and advisor pipelines.

This position will also assist with special events including JPS receptions (working closely with the Engagement & Corporate Giving Officer), Art Ball, Oktoberfest, Bourbon & Bubbles and other donor-related events (especially pertaining to members of the Carnell Society and FAB). The Officer has direct contact with museum donors often with exchange of confidential information. Experience in Raisers Edge or Altru is highly preferred.

This is a full-time, salaried exempt, hybrid position. While the ability to work a hybrid flexible schedule is provided, the majority of this position's schedule is Monday through Friday. On occasion, evenings and weekends will be required, but minimal and typically known in advance. Work schedules may vary as workflow requires.

Reporting Relationship

The Individual & Legacy Giving Officer reports to the Development Director and is a member of the Development Team. The base salary ranges from \$70-\$80k based on experience.

Desired Qualifications, Experiences, Skills and Abilities

- Bachelor's degree; CFRE preferred
- Minimum of 5 years fundraising, major gifts, solicitation, and development strategy experience, preferably in a small to medium size organization, non-profit and/or arts related organization
- Knowledge of planned giving vehicles including wills, trusts and estate and gift tax laws with direct responsibility of planned giving goals, current trends in philanthropy, donor advised funds and basic estate and financial planning for individuals, including tax implications of charitable giving.
- Knowledge of legal recordkeeping requirements for fundraising and documenting donations
- Deep experience in planned gifts with a proven record of success with five to six-figure and higher gifts
- Demonstrated understanding of planned gift best practices including adherence to an accountability matrix and pipeline development

- An ambitious and entrepreneurial spirit with progressive advancement experience
- A team player who is naturally collaborative, self-motivated, and achievement oriented
- Solid time management, goal setting, attainment, and project management skills
- Excellent oral and written communication skills and strong computer skills required
- Strategic planning and organizational skills to effectively coordinate and prioritize workload
- Gifted relationship-builder with the skills, agility and ability to identify funding opportunities and match them with donor and prospect interest; to build strong rapport with wide range of target audiences including donors, current and prospective members, volunteer leadership, financial planners, and attorneys to strategize for the future, tap into new opportunities and employ new approaches all while assuring day-to-day operations are effective
- Sound financial acumen and knowledge of budget preparation, monitoring, and administration
- Commitment to the DAI, passion for its Mission, values diversity and the importance of art and art education for future generations
- Proficient in Microsoft Office Suite, web browsers, planned giving software and Blackbaud Altru or similar donor databases
- Knowledge of American Sign Language or multilingual a plus

To be considered for this opportunity, submit a resume and cover letter stating salary expectations to <https://www.daytonartinstitute.org/about/employment/> . Relocation assistance available.

Submission Deadline: This job listing will remain open until the first interview phase is complete or until a sufficient number of qualified candidates have been identified. NOTE: Incomplete application materials may not receive full consideration for the position.