

Director of Legacy Giving

Job Title: Director of Legacy Giving
Department: Philanthropic Partnerships
Reports To: Senior Director of Legacy Giving
Category: Exempt, full time

The Dallas Foundation

The Dallas Foundation is a community foundation that brings together people, ideas, and investments in Greater Dallas so individuals and families can reach their full potential. Working closely with our donor partners, we share our expertise, leadership, and the opportunities to co-invest in solutions that match their interests and make a meaningful impact. We also support programs that benefit children ages birth to 3 as well as those that advance equity and inclusion, ensure community and economic resilience, and enhance our community's nonprofit ecosystem, prioritizing partnerships that reduce intergenerational poverty and meet today's pressing needs while positioning Greater Dallas for a brighter, more equitable tomorrow.

Position Summary:

The Director of Legacy Giving is responsible for managing a comprehensive program that engages donors to support The Dallas Foundation in their legacy plans by identifying new planned giving opportunities from current fundholders and prospective donors. This position includes donor acquisition and donor retention responsibilities to include stewarding planned gifts, consistently delivering excellent services to donors and contributing to the achievement of the Foundation's goals and objectives for growth. The Director of Legacy Giving will cultivate new planned gifts and secure financial support through bequests, trusts, endowments and other planned giving instruments in order to achieve the Foundation's strategic plan including growing assets and estate gifts.

The Director of Legacy Giving will help refine program strategies, processes, and activities that lead to successfully meeting growth goals. This role will also assist in creating planned giving communications, develop, and execute fundraising strategies and steward new and current donor relationships to grow the Foundation's Legacy Society.

Duties and Responsibilities:

To excel in this role, the ideal candidate must demonstrate proficiency in fulfilling each essential duty and responsibility. These include the following:

- Work closely with the Chief Partnerships Officer and Senior Director of Legacy Giving to identify, engage and steward professional advisors, including estate planning attorneys, wealth advisors, CPA's and other potential referral sources
- Identify, cultivate and secure new planned gifts working with current and prospective fundholders
- Guide and advise planned giving donors in creating legacy giving plans. Document all legacy plans and bequest intentions. Update Legacy Plans as needed

- Build and nurture relationships with planned giving donors through annual stewardship meetings. Identify growth opportunities within the Foundation to include the creation of philanthropic funds as a companion to their estate gift
- Support the Donor Services Team in its work to identify, cultivate, solicit and steward planned gifts from current donors of the Foundation
- Steward Legacy Society Donors as well as plan annual Legacy Society events and engagement opportunities
- Work with the Vice President of Philanthropic Partnerships to administer matured planned gifts, working with family members, advisors, bank officers and administrators to obtain the gifts and carry out donor intent
- Assist the Marketing and Communications team in creating content for planned giving email communications
- Enter, maintain, and manage data records in an up-to-date and complete manner using appropriate software, including donor records, contact reports, etc. for accurate reporting on fundraising plans, portfolios, and gift activity
- Work in partnership with the Donor Services team to deliver valued professional services that enhance the quality of donor experiences. Participate in donor orientation and family meetings, as necessary
- Support strategic planning and operations of the Philanthropic Partnerships team to ensure work of the team aligns with broader Foundation goals and provide leadership for one or more of the strategic priorities
- Actively contribute to developing and maintaining a high-performing and cohesive team including seeking out real-time feedback and owning individual goals and growth
- Using data as a guide operate with a continuous improvement mindset, identifying areas for increasing donor engagement, process/product standardization/streamlining and work with key individuals from all departments to ensure integration of all functions
- Collaborate with all departments for efficient use of resources and to maximize effectiveness of internal processes

Special Projects and Events:

- Support the Women's Philanthropy Institute, Rising GENerosity and Professional Advisor events
- Serve as an internal and external ambassador in the community attending professional networking events, community and civic events
- Attend monthly meetings of the Dallas Estate Planning Council and Dallas Council of Charitable Gift Planners
- Complete other tasks as assigned

Supervisory Responsibilities:

None

Qualifications/Education/Experience:

The requirements listed below are representative of the knowledge, skill, and/or ability required.

- Aligned with [The Dallas Foundation's Organizational Values](#)

- 10+ years' experience in the fundraising, nonprofit or financial services fields with special emphasis on working with individuals of high net worth; philanthropic/foundation experience preferred
- Experience with fundraising and relationship identification, cultivation and solicitation, including experience working with planned gifts and planned giving donors
- A working knowledge of trusts, wills, and other estate planning vehicles and charitable options is preferred
- Professional certification such as CFRE® or CAP®, or accreditation from estate planning academic program preferred, but not required. If not already earned, the CAP® certification will be expected to be completed within two years of the start date
- Experience and demonstrated results connecting, collaborating, and engaging with current and potential donors for purposes of philanthropic engagement
- Ability to organize and prioritize work while managing competing priorities
- Familiarity with the process of probate and trust estate administration, including interacting with estate attorneys, executors, financial advisors, and trustees
- Excellent interpersonal, oral and written communication skills with the ability to communicate with donors, and staff about complex gift planning and estate issues clearly and diplomatically
- Through the lens of data and evaluation, a dedication to problem-solving, efficiency, and continuous process improvement
- Self-starter, results-oriented, and a commitment to quality service
- A clear commitment to equity of opportunity, as well as a genuine respect for diversity, equity and inclusion
- Proficiency in Microsoft Office Suite including Excel, Outlook, PowerPoint, and Word is essential
- Proficiency in philanthropy record systems, e.g., Raiser's Edge, DonorCentral, Foundant, etc. is preferred

Physical Requirements:

The physical requirements and work environment are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodation may be made to enable individuals with disabilities to perform the essential functions of the job.

- Moderate noise level
- Occasional standing and lifting of at least 5 pounds
- Prolonged period sitting at a desk and working on a computer

Work Environment:

The Dallas Foundation supports a hybrid work environment where all employees are expected to work in the office Tuesdays through Thursdays, with optional remote work on Mondays and Fridays. Microsoft Office applications form the primary digital workplace along with Foundant Technologies' CommunitySuite, Grants Lifecycle Manager (GLM), and Scholarship Lifecycle Manager (SLM).

Benefits:

Benefits include medical, dental, and vision insurance as well as a 401(k) program, with employer match, and paid time off



Applying:

The Dallas Foundation is dedicated to building an inclusive, diverse, equitable, and accessible workplace that fosters a sense of belonging.

To apply, please submit your resume and cover letter [here](#).