



Director of Major and Planned Giving
Peabody Essex Museum
Salem, Massachusetts

THE SEARCH

The [Peabody Essex Museum](#) (PEM) seeks a collaborative and strategic advancement professional to serve as the director of major and planned giving (director). With a passion and love for the arts and understanding of fundraising best practices, the director will lead and oversee PEM's major and planned giving programs, partnering closely with museum leadership, curators, and advancement staff. Reporting to the chief philanthropy officer, the director will oversee a team of three, set annual goals, and lead strategy to expand and elevate PEM's planned, major, and principal gifts programs. In close partnership with the executive director, CEO, chief philanthropy officer, and board of trustees, the director will support the implementation of PEM's strategic plan, [PEM Forward](#), and build on the museum's strengths as the institution charts an exciting future trajectory.

The Peabody Essex Museum was founded in 1799 by several of America's first global entrepreneurs. Some of the earliest Americans to develop trading relationships with countries in Asia, Africa, Oceania, and elsewhere, these venturists also brought magnificent art back to Salem from the cultures they encountered. Generosity of spirit and civic-mindedness are central to PEM's origin story, from the moment that Salem's global traders created a society of wonder and discovery for the Salem community. Today, PEM deeply embraces its identity as a human-centered museum and prioritizes people – visitors, communities, and staff – at the heart of everything it does, including centering human stories, creating meaningful connections, ensuring accessibility and belonging, and engaging communities locally and globally.

This is an exceptional opportunity for a talented fundraiser to join PEM at a unique moment of growth and aspiration. The director will join a collegial team passionate about the arts, culture, and community, and, as a key member of the advancement team, will significantly contribute to advancing philanthropic priorities and the museum's mission. The ideal candidate will possess at least seven years of successful fundraising experience, preferably in a museum or museum-related field. The director must have an understanding of fundraising best practices and possess a proven track record of developing and fostering meaningful relationships that produce a sustainable major gift pipeline and program. The successful candidate will have personal success in cultivating, soliciting, and stewarding donors at the six- and seven-figure levels, and will possess proficiency in leveraging data and systems to inform strategy. Critical to success will be the credibility, maturity, and sophistication necessary to effectively engage with a diverse

constituency of senior leadership, curatorial staff, and high-level volunteers. In leading and developing a team of three, the director must also possess a track record of or proven ability to mentor, manage, and elevate the work of frontline fundraisers. A bachelor's degree is required; an advanced degree is preferred.

The Peabody Essex Museum has retained Jack Gorman of the national executive search firm Isaacson, Miller, to assist in this important recruitment. Confidential inquiries, nominations, and applications may be directed to Isaacson, Miller as indicated at the end of this document.

PEABODY ESSEX MUSEUM

The Peabody Essex Museum is one of the country's leading museums of art and culture, recognized for a daring interpretive approach and dedication to providing stimulating, life-enhancing experiences of creativity. PEM offers unique opportunities to explore a multilayered and interconnected world of creative expression. PEM's future lies in continuously asking how the institution can make a difference in people's lives. Read more about PEM's mission, vision, and values [here](#).

Peabody Essex Museum exhibitions and programs are rich and diverse, presenting outstanding works of artistic and cultural creativity from around the world. More than 850,000 works of art and culture — many of them the first of their kind to be collected in the United States — come together to offer an experience that's unique among American art museums. PEM's deep and far-ranging collection opens windows into how people live, work, and celebrate. In addition to its vast collections, PEM presents a vibrant schedule of special exhibitions. PEM's campus features a number of parks and gardens, 22 historic structures, and the Phillips Library, one of the nation's most important museum-based collections of rare books and manuscripts. The museum receives over 250,000 visitors annually, in addition to 1.3 million virtual visitors, and is recognized as an important economic engine in the region. Exhibitions organized by PEM have been presented at the National Gallery in Washington, DC, the Victoria and Albert Museum, the Palace Museum at the Forbidden City, the Freer Gallery of Art and the Arthur M. Sackler Gallery at the Smithsonian, and the Rijksmuseum in the Netherlands.

PEM Forward

The Peabody Essex Museum's strategic plan, [PEM Forward](#), draws on inspiration from the museum's mission, vision, core values, and DEIA commitment and identifies four strategic goals, which serve as grounding, reinforcing guideposts to fulfill PEM's vision. A 2023 strategic planning process engaged all departments of the museum in developing *PEM Forward*. The strategic goals are as follows:

- **EXPERIENCE:** Infuse all PEM experiences with unexpected, inclusive perspectives and approaches that emphasize storytelling and the power of human creativity between cultures and across time periods.
- **LEARNING:** Create innovative and accessible gateways to learning that empower audiences, community, and staff.
- **COLLECTIONS:** Maximize the collections, including the Phillips Library and the historic properties and grounds, to tell compelling, unexpected, and human-centered stories.
- **INFRASTRUCTURE:** Advance a sustainable infrastructure and secure resources to support our strategic goals, mission, and vision.

DIRECTOR OF MAJOR AND PLANNED GIVING

Reporting to and partnering with the chief philanthropy officer, the director of major and planned giving leads the major gifts team and oversees the implementation and management of the Peabody Essex Museum's major gifts and planned giving programs. The director will also manage their own portfolio, working closely with curators, high-level volunteers, and museum senior leadership to identify, qualify, cultivate, solicit, and steward individual donors in support of the museum's ambitious operating and campaign goals.

MAJOR FUNCTIONS AND RESPONSIBILITIES

- Develop and implement strategies for PEM's major (\$25,000+), principal, and planned giving efforts. Partner with the chief philanthropy officer and key constituents to set and achieve annual major gift, operating goals, and campaign or other major fundraising initiatives.
- Provide clear direction, priorities, and measurable goals for the major gift team, which includes two major gift officers and one development coordinator. Motivate and advocate for the major gift team and provide impactful staff development and mentorship.
- Oversee the execution of tasks among team members to achieve key targets, while providing regular updates on progress for internal and external reports.
- Work in consultation with the executive director and CEO, chief philanthropy officer, board of trustees, and other leadership volunteers to identify, cultivate, solicit, and steward donors.
- Maintain clear, consistent, and timely communication with key constituents, cultivating strong, coordinated relationships.
- Collaborate with the development operations team to identify major gift prospects and integrate them into the development pipeline.

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- In partnership with the chief philanthropy officer, devise and execute engagement strategies for donors and prospective donors through key strategic events locally, nationally, and globally. Identify new and creative avenues to strengthen the major gifts donor pipeline.
 - Develop targeted travel strategies with curators and museum staff to reach national and international donors.
 - Manage the engagement strategy for PEM's curatorial Visiting Committees (VC), in coordination with the chief philanthropy officer. Work closely with the donor relations and events team, curatorial team, and others to successfully plan and execute VC events and other major fundraising efforts.
 - Partner with the individual giving and stewardship teams to make timely solicitations to prospective donors for the EIMA patron giving program.
 - Manage restricted, memorial, and honorary gift acknowledgment process with the director of institutional giving and stewardship for planned giving and other activities.
 - Manage the planned giving program strategy and implementation, including marketing collateral, events, estate documentation management, and other related duties.
 - Maintain a strong working knowledge of planned giving options and vehicles, and provide necessary training and advice to the frontline team. This includes networking with colleagues and organizations in the planned giving field to stay up to date on the latest trends, best practices, and legislative changes.
 - Coordinate welcome mailings of certificates, pins, and an acknowledgement letter from the PEM Executive Director for donors when legacy planning has been completed and confirmed. In the event of the passing of a planned giving constituent, coordinate the condolence process, estate plan, and data entry for the PEM database and next step procedures.
 - Manage, coordinate, and execute the Bowditch Annual Luncheon each spring season in partnership with various departments.
 - Lead by example and advance positive culture in a team-oriented environment.

QUALIFICATIONS AND CHARACTERISTICS

The successful candidate will possess at least seven years of fundraising experience, preferably in a museum or museum-related field. In addition, the successful candidate will demonstrate many, if not all, of the following skills and competencies:

- A proven track record of success in personally cultivating, soliciting, and stewarding major gifts from individual donors; a high level of comfort and effectiveness working with high-net-worth individuals and organizational leaders.
- Knowledge of best practices in all key areas of fundraising, including donor qualification and discovery, and strategic planning.
- Strong leadership and decision-making skills; the instinct and ability to develop recommendations and strategies for fundraising success that are consistent with the overall development strategic plan and fundraising priorities for the Peabody Essex Museum.
- Demonstrated ability to advise and counsel individuals and families on their philanthropy, decision-making, and planning.
- Ability to understand and communicate finance, accounting, and investment strategies to a wide range of audiences, including donors and professional advisors.
- The credibility, maturity, and sound judgment required to effectively engage and leverage leadership, volunteers, and other key constituents in the cultivation, solicitation, and stewardship of key prospects and donors.
- Demonstrated ability to effectively manage and mentor a team of direct reports.
- Superior written and oral communication skills with the ability to succinctly communicate a vision and process to senior leaders and other key audiences and constituents.
- Excellent data management and reporting skills with the ability to make data-informed decisions.
- Emotional maturity, with a good sense of humor and perspective; possessing integrity, imagination, strong listening skills, and a demonstrated ability to forge mutually respectful and effective relationships with a diverse group of personalities. Ability to work well with people at all levels of an organization. Participatory working style; ability to give and receive feedback.
- Strong collaboration skills, positive disposition, proven record of integrity, and highest level of professionalism.

- Demonstrated ability to think strategically and creatively when problem-solving. Strong organization skills and impeccable attention to detail and accuracy. Must be independent, proactive, and able to work under the pressure of tight deadlines.
- Strong goal orientation with flexibility to adapt to changing priorities and respond to development opportunities as they arise.
- Familiarity with Tessitura or other development database software/systems and experience with Microsoft Office Suite and Google Suite.
- The ability and willingness to attend evening and weekend events on a regular basis and to travel, as required.

COMPENSATION AND LOCATION

This is a permanent, full-time position in Salem, Massachusetts, with a salary range of **\$120,000 to \$135,000**. The salary of the finalist selected for this role will be set based on a variety of factors, including but not limited to qualifications, experience, education, licenses, specialty, and training.

This position is based on-site at the Peabody Essex Museum. Staff whose responsibilities are consistent with remote work are on a hybrid schedule.

APPLICATIONS, INQUIRIES, AND NOMINATIONS

Screening of complete applications will begin immediately and continue until the completion of the search process. Inquiries, nominations, referrals, and CVs with cover letters should be sent via the Isaacson, Miller website. Electronic submission of materials is strongly encouraged.

<https://www.imsearch.com/open-searches/peabody-essex-museum/director-major-and-planned-giving>

Jack Gorman, Partner
Christina Garrison, Senior Associate
Sandeep Kaur, Senior Search Coordinator

The Peabody Essex Museum has a strong institutional commitment to diversity and encourages qualified candidates from all backgrounds to apply.

This document has been prepared based on the information provided by the Peabody Essex Museum. The material presented in this leadership profile should be relied on for informational purposes only. While every effort has been made to ensure the accuracy of this information, the original source documents and information provided by PEM would supersede any conflicting information in this document.