

# THE UNIVERSITY OF RHODE ISLAND **FOUNDATION**

## EXECUTIVE DIRECTOR GIFT PLANNING THE UNIVERSITY OF RHODE ISLAND FOUNDATION

### OVERVIEW:

The URI Foundation is seeking an innovative and experienced development professional to serve as the Executive Director of Gift Planning. Reporting to the Vice President for Development, the Executive Director will lead and manage a strategic, comprehensive and proactive planned giving program that reflects industry best practices and maximizes charitable contributions via various planned giving vehicles.

This is an exciting opportunity for a talented and collaborative professional to contribute to the growth, evolution and maturation of URI's development organization, and to optimize the philanthropic potential of the university's alumni, parents and friends in an ambitious comprehensive campaign.

### RESPONSIBILITIES:

- Collaborate with the Vice President for Development in setting the overall strategic direction for the planned giving operation within the context of URI's development program that will strengthen current planned giving fundraising and contribute to the broader agenda for the university's fundraising efforts in the current campaign and beyond. Increase the role of planned giving in supporting the university's long-term goals and aspirations.
- Elevate the visibility of planned giving opportunities through broad communication with the university's board members, advisory councils, alumni, parents and friends. Collaborate with communications and stewardship teams to develop a comprehensive marketing program for purposes of promoting planned giving, targeting alumni, parents, and friends and stewarding current legacy society members.
- Enhance operational efficiency in the planned giving office. Ensure that all systems processes—from gift documentation to systems reporting—are accurate and tailored to align with campaign reporting needs for management and the team.
- Enhance the partnership and collaboration between planned giving, and the annual fund. Working collaboratively with URI's Alumni Association partners develop a planned giving program for alumni in reunion gift campaigns (45th reunion and beyond).
- Provide leadership in training and mentoring front line fund raisers in planned giving techniques and strategies, putting in place a systematic program that ties into overall training initiatives for staff, as well as faculty, volunteers, and campaign leaders.
- Personally manage a select portfolio of planned giving prospects and donors. Partner with university development officers, faculty members, university officers, URIF Board members in the cultivation and solicitation of individual donors

## QUALIFICATIONS:

Excellent communication skills: the ability to present information concisely and effectively, both verbally and in writing. The ability to prioritize and take initiative, problem-solve, act independently and coordinate with team members, handle multiple tasks simultaneously. Candidates should also possess: Good judgment, personal integrity, strong interpersonal and organizational skills, accuracy and attention to detail required. Strong computer skills needed, especially in Microsoft Office products especially proficient in planned giving software and illustration preparation is essential.

## EDUCATION/EXPERIENCE:

A bachelor's degree is required. A J.D. or other advanced degree in an appropriate area of specialization and knowledge of laws affecting charitable giving is strongly preferred.

At least 7 years of experience in planned giving, estate planning, or trusts and estate, with a strong preference for individuals who have built the infrastructure of a planned giving program in higher education. A demonstrated ability to formulate and execute effective planned giving strategies, a track record of growing contributions through planned giving vehicles, and proven skills as a strategist with the ability to both develop and implement a division's strategic direction.

Must be able to travel to locations on and off campus for university business required plus work night and weekends as needed. The highest degree of professionalism and discretion in dealing with donors and potentially sensitive matters of confidentiality is required.

## APPLICATIONS:

*Forward letter of interest and resume to:*

URI Foundation  
Attn: Gerri Beagle, HR Manager  
79 Upper College Road | Kingston, RI 02881  
[gbeagle@uri.edu](mailto:gbeagle@uri.edu)

