



Senior Planned Giving Officer
Rhode Island School of Design

Providence, RI

<https://www.risd.edu/>

Send Nominations or Cover Letter and Resume to:

Wendy Lazar

Senior Consultant

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The Opportunity

Contemporary times call for contemporary thinkers.

Rosanne Somerson

Co-Editor, *The Art of Critical Making*

President, Rhode Island School of Design

The mission of [Rhode Island School of Design \(RISD\)](#), through its College and the [RISD Museum](#), is to educate students and the public in the creation and appreciation of works of art and design, to discover and transmit knowledge, and to make lasting contributions to a global society through critical thinking, scholarship, and innovation.



As RISD approaches its sesquicentennial, its Division of Institutional Engagement (IE) is making an unprecedented investment in building a best-in-class team to engage donors, alumni, parents, faculty, and



staff in a new wave of philanthropic support. In the introduction to *The Art of Critical Making: Rhode Island School of Design on Creative Practice*, co-editor Rosanne Somerson, then the Provost and now the 17th President of RISD, wrote “...artists and designers manifest what has not existed previously — in many cases, what has never been imagined.” Candidates who approach their advancement careers with this spirit of innovation, entrepreneurialism, and creativity will thrive in IE’s fast-paced, collaborative, and ambitious culture.

Position Overview – Senior Planned Giving Officer

Summary:

The Senior Planned Giving Officer employs sophisticated relationship skills to identify, cultivate, solicit, and steward a portfolio of 150 high-potential major and planned giving (bequests, annuities, trusts, etc.) prospective and current donors, including conducting 150 personal visits annually. The Senior Planned Giving Officer devises personalized engagement plans for each assigned prospective donor, leveraging RISD cultivation opportunities, presenting gift opportunity proposals that may include cash and creative giving vehicles, speak to a donor’s philanthropic goals, and support the mission and goals of the College.



The Senior Planned Giving Officer possesses familiarity and success in proposing and completing creative gift arrangements, working with donors and their professional advisors. The individual develops and implements a comprehensive multi-year plan and timeline for assessment, cultivation, solicitation, and stewardship of assigned prospects, meeting or exceeding personal productivity goals. The Senior Planned Giving Officer employs the Raiser’s Edge database to manage prospect strategies and moves, documenting all prospect interactions in a complete and timely fashion. The Senior Planned Giving Officer serves as an educational and consultative resource aiding Philanthropy Officers, RISD executives, and volunteers in executing planned giving techniques and strategies for their assigned prospects, as appropriate. In addition, the Senior Planned Giving Officer develops strong relationships with RISD’s General Counsel, Chief Operating Officer, and Controller to support legal, fiduciary and reporting requirements of planned gift donors. The Senior Planned Giving Officer possesses and maintains his/her knowledge of relevant tax law and estate consequences of creative gift vehicles and how they can be used to advance RISD’s fundraising efforts.

Essential Functions/Duties:

- Develop and manage a portfolio of 150+ major and planned giving prospects within the alumni, parents, faculty/staff and friend constituencies of RISD. Maintain a rigorous schedule of personal visits (at least 150 annually) creating moves management plans related to them that include strategies of engagement and solicitation;
- Set annual and campaign dollar goals to meet or exceed them while monitoring progress on an ongoing basis;
- Forge relationships and collaborate with members of the Institutional Engagement team, such as Philanthropy Officers, Alumni Relations, Foundation Relations, Advancement Services, and Stewardship, and with administrative and academic department leaders. Work closely with Philanthropy Officers, Alumni Relations staff, and other RISD representatives to identify and engage alumni, parents, and friends to secure the largest gift commitments for RISD through creative gift arrangements;
- Accompany Philanthropy Officers, RISD leadership and/or volunteers on cultivation, solicitation or stewardship visits, in addition to maintaining personal active visit schedule;
- Identify emerging financial and estate planning trends with special emphasis on incorporating in solicitation of leadership and major gift prospects;
- Understand technical aspects of planned gift vehicles and the relevant tax and estate consequences of these vehicles and how they might be used to enhance RISD's fundraising efforts. Work closely with RISD's General Counsel, Chief Operating Officer, and Controller to ensure all planned gift agreements protect and benefit RISD as well as RISD donors;
- In partnership with the Office of Stewardship, develop and maintain high quality stewardship process for planned gift donors and members of the Metcalf Society, RISD's legacy recognition group;
- Work with the Office of Stewardship, Controllers Office, and external creative gift management advisors to ensure that income payment, stewardship and reporting requirements are met to sustain successful partnerships with planned gift donors;
- Record and track relationship development activities, gift, and reporting information in Raiser's Edge database;
- Work collaboratively and synergistically with Institutional Engagement Senior Management Group (SMG) including: Senior Executive Director of Development; Executive Director of Alumni and Family Relations; Executive Director of Advancement Services; and Executive Director of Campaign Planning and Strategies to achieve organizational goals and strategies.

Additional Functions:

- Perform related duties as requested;
- Work collaboratively with other members of Institutional Engagement to support department initiatives, plans, and projects;
- Serve as a representative of Institutional Engagement with other campus partners.

Job Qualifications/Specifications/Knowledge/Skills Experience Required:

- Bachelor's degree in relevant field required;
- Master's degree in relevant field, J.D., Certified Financial Planner™ (CFP) and/or designation as Chartered Advisor in Philanthropy® preferred;
- Seven years+ experience in fundraising or working with high net worth individuals through a family office, private banking, financial services, financial planning or related professions;
- Program strategy development and execution experience. Individual and team success in securing and maintaining 7-figure+ accounts and/or philanthropy;
- Demonstrated ability in prospect identification, relationship building, strategizing and solicitation of charitable planned gifts or similar estate planning experience;
- Experience in developing and marketing charitable gift arrangements and working with marketing vendors;
- Must possess deep understanding of and practice in higher education industry standards, best practices and reporting as defined by the National Association of Charitable Gift Planners (CGP), the Council for the Advancement and Support of Education (CASE), and the Voluntary Support of Education (VSE);
- Demonstrated knowledge in estate planning techniques, tax law and the general body of statutory, regulatory, and case law regarding planned gifts. Ability to work collaboratively with RISD and external accounting, finance and legal counsel;
- Proven ability to manage complex organizational relationships and work effectively with executive leadership;
- Excellent oral and written communication and presentation skills. Demonstrated ability to write and present persuasively;
- Strong organizational skills;
- Demonstrated effectiveness in outreach to volunteers and other fundraising partners;
- Interest/experience in art and design desirable.

Additional Requirements:

- Ability to read and comprehend detailed documents and instruments and to perform detailed work using reasoning and problem-solving skills.
- Excellent oral and written communications and organizational abilities.
- Must be able to deal with confidential data.
- Excellent interpersonal skills.
- Capacity to keep up with current trends and training in this field.
- Ability to understand and work in diverse and foreign cultures.
- Work hours are not confined to weekdays but may also include evenings and weekends.
- National and international travel required.

Institutional Engagement Overview

The Division of Institutional Engagement advances RISD's mission by strategically fostering lifelong relationships with alumni, parents, friends, and organizations to strengthen goodwill and philanthropy. Its vision is to ensure that any person or organization who engages with RISD becomes an advocate and donor. The Division includes a development team of frontline fundraisers, a campaign planning and strategy team responsible for implementation of programming and communications, an alumni relations team that engages alumni and families, and an advancement operations team responsible for data integrity and technology. Together, they are executing an [IE strategic plan](#) with the following goal:

Division of Institutional Engagement Goal: Be the BEST

- **B**uild an organization and campaign that position philanthropy as a vital revenue stream for the College and Museum;
- Create sustainable opportunities to **E**ngage alumni, parents, friends, students, staff, and donors in support of the priorities of the College and Museum;
- Invest in staff, systems, and processes that support a long-term performance-based, high-achieving culture, essential to the **S**uccess of the institution; and
- Create an IE communications organization to **T**ell the impact of philanthropy on the College and Museum, inspiring pride and advocacy.

RISD had a [record-setting fundraising year](#) in 2019, raising \$24.7M from alumni, parent, students, friends and donors with \$15.8M raised specifically for student financial aid. The Division works with a prospect pool that includes more than 30,000 alumni living and working around the world, amongst which are renowned artists, designers, musicians, celebrities, politicians, business people, athletes, and others who value the sense of community and commitment that are so central to their RISD experience.



In the past decade, RISD has seen a 46% increase in first-year applications and the number of students who qualify for federal financial aid has jumped by 57%. Currently, the College has an operating budget of \$150 million and an endowment of approximately \$350 million. Access is of critical importance as RISD looks to the future. In 2017, RISD became the first arts and design college to join the select ranks of the American Talent Initiative, which aims to expand the numbers of accomplished low- and moderate-income students at some of the nation's most selective schools of higher education. The College aims to place a RISD education within reach of a larger, more diverse pool of talented students, in particular those from constituencies that are underrepresented in the fields of art and design. As such, increasing financial aid and additional support for students is an institutional priority. This past year, 100% of first-year students who demonstrated financial need received some aid, but more remains to be done.



In addition to financial aid priorities, RISD depends on high-quality facilities to provide the environments, tools, and conditions that activate student learning, enable exploration, and serve as the fundamental framework of an exceptional art and design education. RISD occupies 50 buildings located in the heart of downtown Providence and has deepened its commitment to studio-based education and to the stewardship of its campus. RISD has completed a comprehensive planning process that identifies how it can best transform its campus to energize learning, discovering,

collaborating, and making. Informed by renewed commitments and planning, RISD has developed a series of capital projects for the core campus that will animate its immersive residential learning environment.

Location

Providence, Rhode Island:

Aptly deemed The Creative Capital, Providence, Rhode Island has earned a reputation for being an arts and cultural mecca. With the largest number of working artists per capita in the country, the city boasts a vibrant mix of galleries, theaters, and museums. Providence combines the accessibility and friendliness of a small city with the culture and sophistication of a bigger cultural center.

Learn More: [Providence, RI](#)



Background Checks:

Prior to submitting your resume for this position, please read it over for accuracy. Lindauer does verify academic credentials for its candidates, and our clients frequently conduct background checks prior to finalizing an offer.

To learn more, call 617-262-1102
or send nominations or cover letter and resume to:
Wendy Lazar, Senior Consultant at
wlazar@LindauerGlobal.com

All inquiries will be held in confidence.



Appendix

RISD Leadership:



Rosanne Somerson
President

A designer, professor, and academic leader, President Rosanne Somerson has been advancing art and design since she was a student at RISD in the 1970s. She returned to the College in the 1980s to teach and in 1995 founded the Furniture Design Department before serving as Provost and chief academic officer. As RISD's 17th President she is committed to expanding inclusion, equity, and access in order

to enhance a genuinely rich learning environment. President Somerson also maintains a creative practice, designing furniture for exhibitions and commissions, and frequently speaks and writes about the power of art and design in advancing life in the 21st century.

Learn more: [Rosanne Somerson](#)

Institutional Engagement Leadership:



O'Neil A.S. Outar
Vice President, Institutional Engagement

O'Neil A.S. Outar joined RISD's leadership team in January 2018, bringing more than 20 years of fundraising and leadership experience from some of the world's leading public and private research universities. He began his career at Tufts University, where he served as director of the Fund for Arts, Sciences, and Engineering during the university's \$609 million *Tufts Tomorrow* campaign. From there, Outar held several ascending leadership roles at the Massachusetts Institute of Technology, leading the work that secured some of

MIT's largest-ever donations.

Learn More: [O'Neil Outar](#)