



THE UNIVERSITY OF OKLAHOMA FOUNDATION

100 Timberdell Road, Norman, OK 73019

SR. DIRECTOR OF PLANNED GIVING, HSC CAMPUS

POSITION SUMMARY:

Under the direction of the Executive Director of Planned Giving, advance all aspects of a robust and growing planned giving program for the OU Foundation. Provide strategic, comprehensive, and proactive planned giving program that reflects industry best practices and maximizes charitable contributions through appropriate, donor-aligned planned giving vehicles.

Through strategic planning and execution, and in consultation with OU Foundation leaders and peers, develop and execute annual and campaign fundraising goals. Increasing awareness and planned giving contribution opportunities. This position involves a full range of donor cultivation duties, including working with other advancement staff to develop planned giving strategies. Goals are set and measured.

KEY RESPONSIBILITIES:

- **Fundraising.** Research, identify and contact planned giving prospects. Fundraising, with emphasis on personal one-on-one contacts, with individuals on complex gifts, including bequest commitments, testamentary gifts of retirement accounts, charitable remainder and lead trusts, charitable gift annuities, pooled income fund gifts, and retained life estates. Explain these giving vehicles to prospects and donors, and work with financial advisors and trust and estate attorneys.
- **Plan.** Develop and manage planned giving fundraising plans with annual goals, objectives, and strategies for fundraising programs. Oversee follow-up strategies for each donor prospect and stewardship activities. Manages the solicitation, cultivation, and closure of gifts.
- **Events.** Implement planned giving programs to increase membership in the George Lynn Cross Society, which recognizes planned giving donors. Assist in developing programming to highlight OUHSC and OU Health George Lynn Cross Society.
- **Strategies.** Initiate programs and methodologies to attract new donors/prospects, administer estates, and steward donors. Engage grateful patients, physicians, and alumni to educate and encourage personal participation in gift planning programs. Adopt appropriate institutional solicitation strategies for potential gift planning prospects.
- **Communication.** Identify potential donors and maintains an up-to-date major donor prospect database. Determine the best way to communicate, develop, and implement a communication plan.

REQUIRED QUALIFICATIONS:

Knowledge, Skills and Abilities

- Demonstrated expertise in and knowledge of planned giving fundraising programs, including direct solicitation responsibilities.
- Ability to analyze donor data points to enhance planned giving strategies.
- Ability to work with legal documents including donor agreements with attention to detail.
- Experience with Development software, e.g., Agilon or similar software.
- Commitment to outstanding healthcare and research to advance knowledge and treatments to improve healthcare.
- Ability to make effective presentations to large and small groups.
- Knowledge of media, communication and dissemination techniques and methods.
- Ability to communicate well, and build rapport quickly with donors, faculty, and colleagues.
- Ability to compose business documents with appropriate formatting and grammar.
- Proficient in MS Office.
- High level of initiative and creativity.
- Team-oriented and willing to travel 25% of the time.

Education/Experience

- Bachelor's Degree in Communication, Marketing, Public Relations, or closely related field.
- 8 or more years of fundraising experience, with an emphasis in planned giving, and a record of significant personal achievement in fundraising.

Will consider equivalent combination of education and experience.

Preferences

Knowledge of estate planning, wills, trusts, and related estate and gift tax laws.
Advanced knowledge of Planned Giving vehicles.
Preferred experience in healthcare fundraising and grateful patient cultivation.

SALARY RANGE:

Salary commensurate with experience.