Director of Philanthropic Services
Communities Foundation of Oklahoma
801 NW 63rd St, Oklahoma City, OK 73116

Position Summary:
The Director of Philanthropic Services is responsible for promoting Communities Foundation of Oklahoma (CFO) by introducing and familiarizing communities with the work carried out by CFO and working with donors, non-profits and businesses to create charitable funds and gifts, both current and deferred. The Director will develop and maintain relationships with donors, prospective donors, as well as professional advisors, as throughout the state through a combination of donor/advisor outreach and community philanthropic education outreach and events. The Director will manage the Philanthropic Services team, consisting of the Community Outreach Manager and the Data and Research Officer.

Responsibilities:
• Provide leadership and strategic direction for Philanthropic Services group.
• Manage and oversee all new fund development efforts and monitor progress of fundraising goals, including the fund development cycle from identifying prospects, meeting with donors, and making philanthropic asks.
• Work with donors to match their philanthropic goals with the philanthropic tools offered by CFO.
• Manage the philanthropic services team, including the Community Outreach Manager and the Data and Research Officer.
• Generate awareness and understanding of CFO and its services by scheduling and presenting regularly at relevant meetings and conferences.
• Plan and execute professional advisors outreach efforts.
• Expand the foundation’s planned giving program.
• Oversee the new donor welcome and hand off process to Donor Services team.
• Oversee the moves management tracking system, through CSuite and Asana.
• Identify and implement best practice fundraising systems and processes that improve philanthropic services efforts at CFO.
• Present to the board about Philanthropic Services team efforts.

Required Education and Experience/Skills
Education:
• Bachelor’s Degree in a related field preferred, or an equivalent combination of experience and education in lieu of a degree.

Experience/Skills:
• Five or more years of experience as a planned giving officer, development officer, licensed attorney preferably in estate planning or tax area(s), Certified Financial
Planner, Certified Public Accountant, or Bank Trust Officer working in trust administration.

- Outstanding written and oral communication skills. Demonstrated ability to present to individuals and groups, ability to articulate the mission of CFO and discuss philanthropic projects in detail.
- Knowledge of local philanthropy and individual and business wealth in areas of the state.
- Demonstrates self-initiative, accountability, critical thinking and problem-solving skills.
- Exceptional interpersonal skills and ability to provide effective outreach, develop and maintain relationships, and work collaboratively with others to achieve positive outcomes.
- Possess an understanding of major life income gift vehicles and bequest gift techniques.
- Possess current knowledge of regulations and polices governing gift planning.
- Ability to keep donors and their records confidential.
- Possess cultural agility skills necessary to work effectively with diverse groups of individuals and communities.
- Ability to travel within the state as necessary.
- Knowledge of MS Windows, Outlook, Excel, Word, PowerPoint, Foundant/CSuite and experience working with an integrated database.
- Organized, able to manage multiple projects and adhere to timelines.
- Valid driver’s license.

**Position Type and Expected Hours of Work**
This is a Full-Time position with typical working hours of Monday through Thursday 8:30 AM to 5:00 PM and Fridays 8:30-12:00 PM. Hours and work shift may change in accordance with business needs.

**Travel Requirements**
This position requires travel.
- Personal Vehicle
- Must have valid DL and Insurance

**Reasonable Accommodation Statement**
To perform this job successfully, an individual must be able to perform each essential duty listed below satisfactorily. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

**Benefits & Salary**
- Annual Salary $80,000 - $90,000
- Health Insurance Available (Employer pays for ½ of employee’s premium)
- Retirement Plan with 5% Employer Match
- Dental Insurance (Fully paid by employer)
- Life & Disability Insurance (Fully paid by Employer)
- Cell Phone Reimbursement ($50/month)
• Annual Holidays Off
• Hours of Operation: M-Th 8:30am-5pm (1-hour lunch) – Fridays 8:30am-Noon
• Flex Spending Plan Available
• Generous annual PTO benefits – 156 Hours/year.
• 34-hour work week
• Employee Assistance Program from A Chance to Change