



OKLAHOMA CITY COMMUNITY FOUNDATION

OPEN POSITION

Join OCCF:

The Oklahoma City Community Foundation (OCCF) brings people together to invest in our community and those who live here. Founded in 1969 and one of the 20 largest community foundations in the country, OCCF partners with donors and nonprofits to impact our community's most pressing needs and ensure support well into the future. As a growing organization, we are expanding our services and efforts to transform lives across Central Oklahoma and beyond. We offer competitive salary, generous benefits, including a 403(b)-retirement plan, paid leave, and we are building an energized, values driven culture. We welcome talented, committed, caring individuals to join our team in connecting donors, programs and initiative to advance our mission to serve Central Oklahoma

Position:

The **Director of Gift Planning** works closely with the entire Philanthropic Services team and internal partners to cultivate and support the charitable giving of new and current fundholders, specializing in complex gifts. This position manages Foundation relationships with professional advisors and provides services to their clients. Working with professional advisors including attorneys, CPAs, financial advisors, and trust officers, the Director supports referred donors in accomplishing their philanthropic objectives.

Principal Duties and Responsibilities:

- Builds and nurtures strong relationships with financial, legal, and tax advisors to increase services offered through OCCF to assist their client's gifting.
- Operationalizes short and long-term planned giving goals and strategies to enhance existing relationships and increase the number of donors we serve.
- Grows donor prospect pool by building upon existing relationships.
- From inquiry through completed gift, manages all complex gifts for new and current donors, including partnering with advisors where involved.
- Maintains awareness of community and national issues related to philanthropy, estate planning and charitable giving to inform foundation operations and service offerings.
- Manages continuing education events with professional advisor groups.
- Applies understanding of state and federal regulations related to charitable giving to ensure legal and financial compliance.
- Works closely with OCCF's communications team to develop and implement marketing strategies for planned and complex gifts.
- Actively contributes to the Foundation's mission, supports the organization's culture, and values all other team members.
- Works collaboratively with team members to brainstorm ideas, solve problems, and implement meaningful solutions.
- Ability to embrace change positively, contributing to a resilient and agile team culture.
- Ability to maintain confidentiality, exercise good judgment, and maintain professionalism within a dynamic environment.

Qualifications & Skills:

- Bachelor's degree.



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- Minimum of 5 years' experience in planned giving, trust services, wealth management, collaborating with professional advisors, and working with financially sophisticated donors and/or high-net worth individuals required, 8-10 years preferred.
- Knowledge of deferred giving related to charitable giving and tax laws that impact charitable giving, personal assets, and estates.
- Excellent interpersonal, written, and oral communication skills.
- Excellent organizational and time management skills with attention to detail.
- Excellent public speaking/presentation skills.
- Ability to establish effective relationships with prospective donors, current donors, professional advisors, board members and OCCF team members.
- Ability to exercise sound judgment and discretion in working with sensitive and confidential information and with diverse donor and prospect populations.
- Ability to work independently and develop new business opportunities.

Working Conditions & Physical Demands

- Prolonged periods of sitting at a desk.
The ability to lift objects of 25 lbs.
- Extended periods of working with a computer, requiring the ability to focus on tasks and navigate software interfaces.
- Requires fine motor skills, including the ability to use touch, pinch, or pick primarily with fingers. This involves precision and dexterity for tasks such as typing, clicking and manipulating small objects.
- Strong visual acuity is essential for tasks such as reading information on a computer screen and discerning details.
- The work environment is an office setting with minimal noise.
- Minimal travel in the metro and surrounding area

This position is a safety-sensitive position based on the frequent operation of a motor vehicle

To apply, please send a cover letter, resume, and three references with the job title in the subject line to resume@occf.org.

Oklahoma City Community Foundation provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.