

# OKLAHOMA BAPTIST UNIVERSITY

## POSITION DESCRIPTION

**Title:** Executive Director of Development and Planned Giving      **Department:** Advancement

### **OBU Mission Statement**

OBU transforms lives by equipping students to pursue academic excellence, integrate faith with all areas of knowledge, engage a diverse world, and live worthy of the high calling of God in Christ.

### **Expectations for all Employees**

Oklahoma Baptist University achieves its mission through a shared commitment to the following expectations. All employees must embrace these expectations and model them in their behavior.

- *Demonstrate commitment to the essentials of the Christian faith.*
- *Commit to the mission and vision of Oklahoma Baptist University.*
- *Treat people with dignity and respect.*
- *Build relationships on honesty, integrity, and trust.*
- *Strive for excellence through teamwork, leadership, and a strong work ethic.*
- *Manage human and financial resources wisely and efficiently.*

**Purpose:** The Executive Director of Development serves as a senior member of the Advancement leadership team, responsible for identifying, cultivating, soliciting, and stewarding major and principal gift donors in support of Oklahoma Baptist University's *Shape the Future* Campaign and long-term endowment growth. This role also serves as the University's Planned Giving Officer, overseeing the design and implementation of a comprehensive planned giving program in partnership with OBU's principal partner, Water's Edge Financial Advisors Firm, and other financial planning partners. The Executive Director will build and manage a portfolio of high-capacity donors, working strategically with University leadership, faculty, and volunteers to advance OBU's mission through transformational philanthropic support.

### **Essential Functions:**

#### **Major and Principal Gifts**

- Manage a personal portfolio of 100–150 major and principal gift donors and prospects with giving capacity of \$50,000 and above.
- Develop and execute customized cultivation, solicitation, and stewardship strategies to move donors through the giving pipeline.
- Work closely with the Vice President for Advancement and President to secure transformational gifts for the *Shape the Future* Campaign and future institutional priorities.
- Partner with academic and administrative leaders to align donor interests with University funding opportunities.
- Conduct at least 10–15 meaningful donor visits per month, producing measurable progress toward yearly fundraising and targeted Shape The Future campaign goals.
- Serve as a senior resource and mentor to the development team, contributing to strategy, training, and performance management.

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### **Planned Giving**

- Collaborate with Water's Edge to lead the establishment and growth of a robust Planned Giving Program in order to increase deferred and complex gifts (bequests, trusts, securities, charitable gift annuities, etc.).
- Collaborate with Waters Edge and other trusted financial partners to provide donors with professional planning resources.
- Develop marketing and education initiatives to promote legacy giving among alumni, faculty, staff, and friends of OBU.
- Maintain expert knowledge of estate planning, tax law, and charitable giving vehicles to effectively guide donors and advisors.
- Oversee the recognition and stewardship of planned giving donors through programs such as the creation of an OBU Legacy Society.

### **Campaign and Endowment Strategy**

- Partner with Advancement Services to ensure accurate recording, tracking, and reporting of major and planned gifts.
- Support campaign communications, proposals, and gift agreements, ensuring clarity and donor-centered messaging.
- Contribute to long-term endowment growth strategies, cultivating relationships that lead to endowed scholarships, professorships, and programmatic support.
- Represent OBU at Advancement and alumni events, regional gatherings, and national meetings as needed.

### **Required Qualifications:**

- Demonstrated experience in planned giving or advanced fundraising strategy preferred.
- Excellent interpersonal and communication skills with the ability to engage donors, advisors, and volunteers at all levels.
- Strong organizational and analytical skills with ability to manage multiple priorities.
- Commitment to the mission, vision, and values of Oklahoma Baptist University and the Office of the President as well as alignment with OBU's Christian worldview.
- Ability and willingness to travel frequently and work evenings/weekends as needed.

### **Education:**

**Required:** Bachelor's degree required.

**Preferred:** Master's degree preferred; CAP or Planned giving certifications preferred.

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**Experience:**

**Required:** Minimum of 7–10 years of experience in higher education or nonprofit fundraising, with a record of securing six- and seven-figure gifts.

**Special Requirements:**

- Must be a member of a local evangelical\* Christian church.  
\*Evangelical is a broad term referring to segment within Christianity which maintains the authority of the Bible and the belief in salvation by faith in Jesus alone.
- Please apply using the link for “Administrative Applications” on the OBU website at:  
<https://www.okbu.edu/hr/jobs.html>

**OBU Benefits Summary:**

OBU understands that our employees are our most valuable assets when fulfilling our mission. We strive to offer an extensive array of benefits and opportunities for employees to choose from. Full-time employees benefit from the generous OBU provision of premium contributions for nationwide family-friendly Health and Dental coverages along with free life insurance that includes accidental death and dismemberment equal to an employee’s base salary. OBU provides access to optional employee-paid ancillary benefits like vision, hospitalization, critical illness, accident, additional employee-paid family life insurance coverages, and education benefits at OBU and other institutions of higher education. There is generous paid time off that includes annual granted vacation time, accrued sick leave, six annual holidays, and week-long breaks for Thanksgiving and Christmas that include energy conservation days. For all employees working at least half-time, there is an employer matching opportunity for retirement investments in a 403(b)(9) plan administered by Guide Stone. There are numerous other perks and opportunities for OBU employees including FREE family membership to the OBU Recreation and Wellness Center or RAWC, Global outreach university mission trips, cafeteria discounts, and parking privileges to name a few. For more information about the current OBU employee benefits and opportunities, please contact the Human Resources staff at [HR@okbu.edu](mailto:HR@okbu.edu).