



THE UNIVERSITY OF OKLAHOMA  
**FOUNDATION**

Vice President and Chief Advancement Officer  
The University of Oklahoma Foundation  
Norman, Oklahoma  
<https://www.oufoundation.org>

*Send Nominations or Cover Letter and Resume to:*

Jill Lasman

Senior Executive Vice President

617-262-1102

[JLasman@LindauerGlobal.com](mailto:JLasman@LindauerGlobal.com)

or

Donna Russell

Senior Consultant

617-262-1102

[DRussell@LindauerGlobal.com](mailto:DRussell@LindauerGlobal.com)

## The Opportunity

---

When the University of Oklahoma's (OU) first president David Ross Boyd stepped off the train in Norman, Oklahoma, in 1892, he was greeted with a barren expanse of prairie, no tree in sight. His only remark was, "What possibilities!" Soon after, OU was born. Close to 130 years later, the University lives by that same spirit: Anything can grow if you have the drive to make it so.

Today, OU is at an inflection point in its history. With new university leadership, an ambitious [strategic plan](#), and the recent decision to move the administration of Advancement from the university to the University of Oklahoma Foundation, the possibilities are endless. To seize these opportunities and ensure for a successful future, OU seeks a Vice President and Chief Advancement Officer (VP/CAO) to lead and build upon its fundraising efforts bringing it to new heights and incorporating industry best practices and innovative approaches to create a comprehensive and sustainable best-in-class Advancement operation.

Reporting to the President of the Foundation and serving as a critical member of the University's Presidential Cabinet, the VP/CAO will build and lead a robust advancement enterprise serving three campuses and inspiring a culture of philanthropy and collaboration to successfully grow OU's Advancement program to its greatest potential. Serving as the visionary leader, the VP/CAO will work in close partnership with the University's president,



Video, Message from President Harroz

administrative leadership, deans, faculty, board members, volunteers,

staff, and other partners across OU to develop a highly strategic, consistent, and well-coordinated fundraising and alumni engagement strategy to achieve university-wide goals.

The successful candidate will be a transparent communicator and bridge builder who has demonstrated an ability to forge partnerships across a large complex community. The VP/CAO will encounter willing and passionate partners, internally and externally, who are eager to engage in the fundraising process. The VP/CAO will be a seasoned leader and manager with experience in an institution of similar complexity and a deep understanding of and appreciation for public higher education, ideally with a knowledge of healthcare/academic medicine. They will have demonstrated success in and a commitment to creating and promoting a diverse, inclusive, and respectful workplace environment. Previous experience soliciting principal/transformational gifts and leading a highly effective fundraising organization is required. The VP/CAO will be a person of integrity, both trusting and trustworthy, and will be dedicated to the mission and values of OU.

## Overview

---

OU is a comprehensive research university located across three campuses: the flagship in [Norman](#); the Health Sciences Center in [Oklahoma City](#); and the [Tulsa campus](#). More than 2,000 faculty members, 575 of whom hold endowed positions, are committed to providing students – 25,000 in Norman, 1,000 in Tulsa, and 3,000 at the Health Sciences Center – with an exceptional hands-on learning experience, OU's programs continue to be ranked among the best both regionally and nationally. Offering more than 170 academic programs within 22 colleges, some of the most recognized degree programs are meteorology, petroleum engineering, ballet and musical theatre, health sciences, entrepreneurship and venture management, international business, energy management, and journalism.

Designation by the Carnegie Foundation as a Highest Research Activity institution, places OU in the highest tier of comprehensive research universities in the nation. The Stephenson Cancer Center, established in 2001, was NCI-designated in 2018. OU's research enterprise features award-winning and nationally and

internationally recognized faculty, multidisciplinary research centers, scholarly publications, and acclaimed performances at venues throughout the world. Learn more about OU's [research areas](#).



OU's outstanding tradition in athletics brings an exciting vitality to the Norman campus and across all sports claiming 38 total national titles. OU is best known for football and is king in the modern era of college football (1946-present). Since the end of World War II, the Sooners have more victories (664) than any other school and the second-best winning percentage (76.7%). The Art District offers more than 350 performances per year and is home to two museums, the Fred Jones Jr. Museum of Art and the Sam Noble Oklahoma Museum of Natural History.

## The University of Oklahoma Foundation and the Model for OU's Fundraising Future

---

Since 1944, OU donors have entrusted more than \$3B in donations to the University of Oklahoma Foundation, an independent not-for-profit corporation that encourages and supports charitable giving for the benefit of the University of Oklahoma. Current assets of the Foundation stand at \$2.2B. The Foundation acts as the principal organization through which those gifts are made and administered for the benefit of the University. The sole reason for its existence is to serve OU and the generous donors who support the University. Endowments reflect the priorities and goals of the University and stand as an enduring tribute to donors' generosity. The OU Foundation endowment is a point of pride at the University due to the Foundation's exceptional investment management, unwavering commitment to donors' intentions, and transparency of financial information.

In summer 2020, the OU Board of Regents and Foundation Trustees approved a plan to move the university Advancement function to the Foundation to allow for a more comprehensive and sophisticated approach to fundraising at all levels. The move will allow the Foundation to increase its annual investment in Advancement, allow for the full integration of the fundraising organization and end-to-end fundraising processes, and create a comprehensive fundraising governance model. A complete transition of Advancement employees to the Foundation is expected to be completed by January 2021. Under this new model, the Foundation will receive, manage, and raise private resources supporting the mission and priorities of the University.



For generations, University of Oklahoma donors have served as the sowers of tremendous opportunity. Shifts in the business model for higher education, financial pressure on students and their families, new and evolving competitive threats, and OU's aspiration to be a world class research institution, substantially increase the need for private funds to support the University. To meet these challenges and seize these opportunities, OU must have a fundraising organization worthy of its aspirations. It does not have that organization today, but it must in its future.

## Advancement Overview

---

Overall, the Foundation will be comprised of 115 fulltime employees. The VP/CAO will oversee a growing Advancement operation with a total staff of over 80 fulltime employees and a current annual operating budget of more than \$10.5 million dollars. With an unprecedented commitment to build a best-in-class advancement operation, the budget will increase to \$13.5 million dollars in the immediate future to allow the team to reach its fullest potential, including adding additional staffing and operational resources to the department.



In FY19, OU Advancement raised \$135 million dollars, followed by \$125 million dollars in FY20. OU's last campaign, *Reach for Excellence* (1995-2000), raised a total of \$514M.

There is additional and growing capacity in the donor base including support from loyal alumni, newly engaged alumni, and friends of the institution. Areas of untapped opportunity exist, particularly within the Health Sciences Center and Foundation and Corporation relations.

## Opportunities and Expectations for Leadership

---

The decision to transition Advancement to the Foundation has been positively embraced and viewed as an ideal opportunity to provide more stability, structure, and resources following unfortunate turmoil and leadership transition. With the appointment of President Joseph Harroz in May 2020, and the July 2020 launch of the new strategic plan for the flagship campus, there is a spirit of renewal, optimism, and forward momentum towards a bright OU future.

Among the many objectives on which the VP/CAO will be measured during the first three years in the position are the following, presented here in no particular order of importance:

## **Building the Advancement Enterprise and Leading the Vision for the Future**

The incoming VP/CAO is charged with building, leading, and providing vision and direction to a newly transitioned and higher performing Advancement enterprise in support of OU. This includes the development, execution, and evaluation of all aspects of the operation, including annual, leadership and major giving, corporate and foundation relations, planned giving, advancement services, research and prospect management, and alumni relations, creating a professional, systematic, sustainable, and centralized model to ultimately launch a campaign in the coming years. The VP/CAO will provide effective management of the organization ensuring that processes are well-documented, activities are well-structured, effective systems are in place, accountabilities are clearly defined, and best practices are utilized.

The VP/CAO must serve as the visionary leader of the advancement team, representing three of OU's campuses, assuring all efforts are well coordinated and in support of the university-wide strategic priorities. The VP/CAO will define a culture of philanthropy that is planful, accountable, and transparent and prepare the Advancement team to move forward in key areas to engage faculty, staff, students, alumni, and the community in new and dynamic ways. Embracing President Harroz's commitment to diversity and inclusion, the VP/CAO will recruit, build, lead, and inspire a diverse team with attention to professional development, as well as succession planning.



While a campaign is a few years away, the VP/CAO will begin setting the stage and expectation for a higher level of professionalism, accountability, data analysis, digitalization, and communication between campuses and with key constituencies and partners.

## **Serve as a Key Member of University Leadership and Embrace the Mission and Values of OU**

Reporting to the long-standing and highly respected President of the University of Oklahoma Foundation, the VP/CAO is also a vital member of the University's President cabinet. The VP/CAO will provide professional insight and advice based on a depth and breadth of knowledge and experience as active member of the president's senior leadership team. As a member of the OU community, the VP/CAO will embrace and uphold the mission and values of the university.

## **Forge Partnerships and Build Relationships Internally and Externally**

With the university setting fundraising priorities, the VP/CAO serves as a key thought partner to the University President and works closely with senior administrative and faculty leaders to design and recommend strategies to achieve fundraising objectives, contribute to strategic planning, and provide leadership at an institution undergoing significant growth and change. The VP/CAO will have the opportunity

to work in partnership with leadership, faculty, donors, volunteers, and other partners to develop consistent and coordinated strategy for achieving university-wide goals, leading a robust central fundraising enterprise, while also enhancing a principal gifts program, including a presidential portfolio. In partnership with the Foundation President, the VP/CAO works closely with the Foundation Board of Trustees and will staff various development and campaign committees as necessary. Additionally, the VP/CAO will orchestrate the participation of president and senior leadership in the cultivation and stewardship of key funding sources, including individuals, foundations, and corporations. The VP/CAO will encourage collaboration and coordination among the campuses and colleges/schools and units to create interdisciplinary, and transformational, gift opportunities.

## Candidate Profile: Qualities and Qualifications

---

The VP/CAO will be a bold, experienced, and inclusive leader with the personal capacity to galvanize growth and change. The VP/CAO must be a seasoned and successful manager of people and programs with a track record of building, inspiring, empowering, and holding accountable strong and diverse teams. Above all, the successful candidate will embrace the mission, values, history, and tradition of OU and be drawn to the opportunity to build a best-in-class Advancement enterprise in support of a premier public university.

With a proven ability to lead organizational change, the ideal VP/CAO candidates will offer the following professional and personal characteristics:

- Demonstrated experience building, organizing, and leading a successful development program supported by a diverse team of talented development professionals across a complex organization;
- Experience in implementing best practices in fundraising and strategic and operational planning, including establishing metrics and processes to monitor and evaluate performance outcomes and implement performance improvement initiatives when required;
- Participation in the design, planning, implementation, management, and successful conclusion of a major campaign is essential;
- Demonstrated ability to provide management oversight, leadership, and strategic direction. Excellent organizational skills, a strong sense of operational efficiency and financial acumen; the ability to plan, monitor, and tightly manage a comprehensive and complex budget;
- A track record of recruiting, developing, and retaining a high caliber staff, building a diverse team, and creatively organizing and managing them to maximize the support of internal and external constituencies; a willingness to empower others to execute while providing the support they need;
- A demonstrated commitment to diversity and inclusion and a track record of working effectively with diverse groups;
- Professional credibility and maturity required to effectively engage and leverage the president, deans, faculty, board members, volunteer leadership, unit/division development staff, and other key stakeholders in fostering a tradition of fundraising and building the university's endowment;
- Experience engaging, training, motivating, and staffing board members and volunteers in the cultivation, solicitation, and closing of significant gifts; appreciation for the role of volunteers in building an effective development network;

- A high level of energy, self-confidence, a positive ‘can-do’: attitude, good sense of humor, and the ability to function at a high level in an environment of high expectations are essential attributes;
- Superior presentation skills; excellent communication skills, including the ability to write and speak clearly and effectively. Must be a superb listener with sensitivity to nuance and a communication style that is open and issues focused. Ability to develop trust and strong collaborative working relationships, promoting the sharing of resources and information across the University;
- Honesty, integrity, enthusiasm, and perspective; a strong work ethic, supported by commitment and follow-through;
- Ten or more years of progressively responsible senior leadership experience in development with a demonstrated track record of successful principal/transformational gift fundraising;
- Leadership experience within an institution of higher education is strongly preferred; candidates who can demonstrate success in a complex environment characterized by multiple subsidiary enterprises spread geographically over various sites will be at a particular advantage; knowledge of healthcare/academic medicine strongly preferred;
- A Bachelor’s degree from an accredited institution is required;
- The ability and willingness to travel nationally and internationally.

*The University of Oklahoma is committed to achieving a diverse, equitable, and inclusive university community by embracing each person's unique contributions, background, and perspectives. The University of Oklahoma recognizes that fostering an inclusive environment for all, with particular attention to the needs of historically marginalized populations, is vital to the pursuit of excellence in all aspects of our institutional mission. This enhances the OU experience for all students, faculty, and staff and for the communities we engage.*

*The University of Oklahoma, in compliance with all applicable federal and state laws and regulations, does not discriminate on the basis of race, color, national origin, sex, sexual orientation, genetic information, gender identity, gender expression, age, religion, disability, political beliefs, or status as a veteran in any of its policies, practices, or procedures. This includes, but is not limited to: admissions, employment, financial aid, housing, services in educational programs or activities, or health care services that the University operates or provides.*

## Leadership

---



**Joseph Harroz, Jr.**  
**President, The University of Oklahoma**

Joseph Harroz, Jr. was named the 15<sup>th</sup> president of the University of Oklahoma on May 9, 2020.

He has served the university for nearly 25 years in various leadership roles, serving most recently as OU’s interim president and as dean of the College of Law.

As president of OU, Harroz carried through on the development of a comprehensive strategic plan for OU’s future – a collaborative process that

began early in his interim presidency. The strategic plan aims to position OU as a top-tier public research university that fosters a culture of inclusivity, innovation, and excellence.

Throughout his nine-year tenure as dean of OU Law, the college earned national recognition, including the highest-ever *U.S. News & World Report* ranking by any Oklahoma law school and the first law school in the nation to achieve Apple Distinguished School status from Apple, Inc.

Prior to becoming dean, Harroz served two years as president of a publicly traded health care company, growing its market capitalization to more than \$80 million. From 1994 to 2008, he held roles at the University of Oklahoma, serving first as vice president for executive affairs and then for 12 years as general counsel, the chief legal counsel to the president, the OU Board of Regents, Rogers State University, and Cameron University.

Harroz began his legal career as a legislative director and legal counsel in the U.S. Senate. A native Oklahoman, Harroz graduated Phi Beta Kappa from OU in 1989 with a Bachelor of Arts in economics and a minor in zoology. He earned his J.D. in 1992 from Georgetown University Law Center.



**Guy Patton**  
**President & CEO, The University of Oklahoma Foundation**

Guy Patton has served as president and CEO of the University of Oklahoma Foundation since 2007. Under his watch, assets of the Foundation have grown to exceed \$3 billion.

Previously, Guy was with Fidelity Investments for more than 22 years. He joined Fidelity in 1985 as a sales representative in its retail business. He held numerous positions within the finance function during the early part of his career at Fidelity, and ultimately moved to general management roles that included leading Fidelity's institutional retirement business. Guy was also head of global human resources for Fidelity, and was a member of Fidelity's executive committee.

Guy received his bachelor's and master's degrees in economics from the University of Oklahoma.

## About Norman and Oklahoma City

---

### Norman, OK

Ever since Norman was founded as a frontier town in 1891, this thriving community has set itself apart with a vibrant downtown, the University of Oklahoma, a robust public education system, and a diverse population. Nestled in the heart of a world-class academic community, the Norman Public School District is the eighth largest in Oklahoma. The district, which is located near the University of Oklahoma, has earned a reputation for academic excellence, robust fine arts programs, first-rate athletic teams, and



providing opportunities for all students to reach their full potential. Living in Norman is very reasonable and affordable. Housing costs and the cost of living are below the national average. Norman's neighborhoods offer a wide variety of old and new—from campus homes to rural estates to modern designs. Beautification, historic preservation, and public safety are issues that are addressed by neighborhood and local government representatives. Norman is a family-friendly town with many activities the whole family can enjoy, including attending OU sporting events, swimming, playing miniature golf, visiting community and neighborhood parks, driving race carts, and attending a host of events held at the Cleveland County Fairgrounds.

Learn more about [Norman, OK](#)

### Oklahoma City, OK

Just a short, 30-minute drive from the University of Oklahoma's campus in Norman and the location of OU's Health Sciences Center campus, Oklahoma City offers everything you look for in a modern metropolitan community. Through multiple resident-led tax initiatives called MAPS, Oklahoma City is bursting with new development, bettering its infrastructure and schools, and creating new quality-of-life additions to the city that are wowing longtime citizens and drawing attention and visitors from around the country. With thrilling sports action, world-class museums, entertainment, shopping, and dining at more than a dozen different districts, the energy to continue to grow, build, and create is pumping all around town.

Learn more about [Oklahoma City, OK](#).

## Procedure for Candidacy

---

Nominations, applications, and inquiries are being accepted for the position. Consideration of candidates will continue until the position is filled. Candidates should submit, in confidence, a resume and cover letter.

Communications, nominations, applications, and inquiries concerning this search should be directed to:

**Jill Lasman, Senior Executive Vice President or  
Donna Russell, Senior Consultant at  
617-262-1102  
[JLasman@LindauerGlobal.com](mailto:JLasman@LindauerGlobal.com) or [DRussell@LindauerGlobal.com](mailto:DRussell@LindauerGlobal.com)**

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.



***Setting the Standard in Nonprofit Talent***

[www.LindauerGlobal.com](http://www.LindauerGlobal.com)