

Position and Candidate Specification



Greater Milwaukee Foundation

President and Chief Executive Officer

PREPARED BY:

Ellen Pennow

David Wick

Kaitlin Hayes

Damon Veras

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Inspired by the concept of a community trust first demonstrated in Cleveland the year before, Oliver C. Fuller introduced the idea of a community foundation to the Milwaukee community in 1915. [The Greater Milwaukee Foundation](#) was part of the first wave of community foundations and part of a movement that transformed philanthropy. By local citizens pooling together their assets in a local foundation administered by a prominent local bank, they were able to maximize their ability to address pressing local needs and plan for the future.

That vision continues today. Under the Foundation's first President & CEO, first appointed in 1970, the Foundation grew its assets from \$4 million to \$100 million, and launched the first of many major grantmaking initiatives to improve the community, among many milestones. It is now one of the oldest and largest community foundations in the country. The Foundation today remains a key trusted philanthropic and community leader under the direction of retiring President & CEO, Ellen M. Gilligan, who was appointed as President and CEO in 2010.

Serving as both a catalyst for change and a convener, the Greater Milwaukee Foundation seeks to connect organizations, sectors, and people to tackle the greatest issues facing the Milwaukee community. Aligned with the community's needs and values, the Foundation's leadership has advanced a new era at the Foundation where racial equity and inclusion guides decision-making, investment and action across the organization.

The Foundation recently completed its most ambitious fundraising initiative, the historic \$726.8 million priority-focused [Greater Together Campaign](#), which was one of the first of its kind in the country. Through this comprehensive campaign, donors joined together with the Foundation and community partners to commit the resources needed to enhance the long-term vitality of the region with an added focus on key priorities for community impact.

The Foundation joined with the Medical College of Wisconsin and Royal Capital Group (an African American owned and led real estate development firm) to make a historic, community-based investment by funding the [ThriveOn Collaboration](#) with the vision to bring economic and social benefit to communities of color disproportionately affected by disparities in Milwaukee. This commitment is demonstrated in the Collaboration's catalytic, foundational investment in ThriveOn King--the restoration and repurposing of the iconic Gimbels-Schuster Department store building in the Historic King Drive District at the nexus of three vital north side neighborhoods. The development features community, commercial and residential space that offers new resources and opportunities to the neighborhood, including the availability of dignified and affordable housing for area residents. In early 2024, the Foundation will move its offices to the new [ThriveOn King development](#).

These efforts, along with other initiatives such as [Milwaukee Succeeds](#), a communitywide education partnership aimed at improving academic outcomes for all of Milwaukee's kids, reflect the vision outlined in the current strategic plan, [A Milwaukee for All](#). This plan, launched in 2020, was deeply informed by community convenings and input and focuses philanthropy on addressing systemic racism that prevents individuals, families and the region from reaching their full potential.

MISSION

To inspire philanthropy, serve donors, strengthen communities now and for future generations.

VISION

Greater Milwaukee becomes a vibrant, economically thriving region comprised of welcoming and inclusive communities that provide opportunity, prosperity and a high quality of life for all.

VALUES

Integrity

This is at the heart of all we do. We demonstrate integrity through honesty, civility and respect. We respect each other and take pride in our work.

Service

We provide exemplary service, nurturing relationships for generations and honoring commitments. We hold ourselves to the highest standards of ethics, accountability and fiduciary responsibility.

Effectiveness

We partner with our vast network of donors, nonprofits and community leaders, developing effective strategies and mobilizing resources to strengthen communities and address persistent challenges.

Inclusion

We believe that all voices are vital to our region's future. We promote equity and embrace the diversity of individuals, ideas and expressions. We are committed to learning from our partners and leading by example.

KEY GREATER MILWAUKEE FOUNDATION FACTS AND FINANCIAL HIGHLIGHTS

- \$1 billion in assets.
- Serve over 1,500 charitable funds. This includes 600 donor advised funds, 180 of which are agency endowments.
- Support Milwaukee, Ozaukee, Washington and Waukesha counties.
- In 2022, the Foundation made nearly 5,000 grants to qualified charities in partnership with donors, totaling more than \$81.2 million. \$70 million came from donor directed funds.
- Employ 65 staff members.
- Greater Milwaukee Foundation's [Board of Directors](#) is comprised of leaders from across the Milwaukee community.
- The [Action Report on Racial Equity](#) outlines the Foundation's most recent progress pursuing the organization's strategic priorities.

The President and Chief Executive Officer (CEO) of the Greater Milwaukee Foundation has an outstanding opportunity to build upon a legacy of impact and lead the organization into an exciting new chapter. Working in concert with the Board of Directors and staff, the President and CEO is responsible for ensuring that the organization effectively carries out its mission to address the most compelling needs of the community in partnership with donors, community leaders, business leaders, and the nonprofit sector. The President and CEO will lead all aspects of the Foundation's work, including development and donor relations, financial stewardship, grantmaking, and successful implementation of key strategies and goals as outlined in the strategic plan. Additionally, the President and CEO is responsible for evaluating key trends impacting the Foundation and developing new and innovative ways for the Foundation to expand its impact as it accomplishes its vision and mission.

The Greater Milwaukee Foundation has a long history of impact and tremendous potential to achieve even more in its next chapter. As a vital leader and voice for Milwaukee's most complex and critical community issues, the President and CEO will guide the Foundation's ability to convene influencers, donors, and policymakers around the city and region's most important needs and priorities.

KEY RELATIONSHIPS

Reports to Board of Directors

Direct reports Chief Financial Officer, Chief Operating Officer and Executive Vice President
Senior Vice President and Chief Strategy Officer
Chief Diversity, Inclusion and Organizational Learning Officer
Vice President, Community Impact
Vice President, Development and Philanthropic Services
Vice President, Marketing and Communications
Executive Director, Milwaukee Succeeds

Other key relationships Donor and philanthropic partners
Grantees
Volunteers
Community leaders and residents
Business leaders
Political and civic leaders

KEY OBJECTIVES

- In concert with the Board of Directors and staff, drive the strategic vision to support a Milwaukee for all.
- Build upon the successful Greater Together Campaign by continuing to deepen relationships and expand the donor base. Raise both unrestricted and dedicated funds. Ensure processes, systems, strategies, and structures support a long-term, best in class development operation.

- Continue driving focus on the North Star priority of Racial Equity and Inclusion as well as the four strategy areas: Reimagine Philanthropy, Catalyze Systems Change, Build Inclusive Culture, Convene and Follow Community Voice.
- Support the organizational transition to ThriveOn King, and help the ThriveOn Collaboration realize its vision of bringing economic and social benefit to communities of color through programmatic community impact.
- Create and foster an inclusive workplace with achievable and measurable goals that advance the Foundation's commitment to diversity, equity, and inclusion.
- Ensure the fiscal health of the Greater Milwaukee Foundation by managing revenues, the operational budget, endowments, assets, and organizational reserves.
- Embark upon strategic planning to support current initiatives while concurrently building efforts to support a next strategic chapter for the Foundation.
- Drive innovation in response to an unpredictable and ever-changing world; catalyze Greater Milwaukee Foundation's ambitious mission, address emergent needs of the greater Milwaukee community, and build meaningful relationships, partnerships, and understanding across differences.
- Support the Board of Directors to deepen commitment and fulfillment while ensuring good governance and fiduciary responsibilities.
- Participate nationally in the philanthropic community to ensure that the Foundation's programs and resources reflect the best thinking of a broad community of grantmakers.
- Serve as the organization's chief spokesperson, building further awareness of, and confidence in, the Foundation and its mission.

IDEAL EXPERIENCE

Mission focus

A demonstrated sense of service and community engagement, with a passion for solving the issues that are most important to the communities the Greater Milwaukee Foundation serves; a demonstrated ability to build a strong and healthy organizational culture driven by an organization's mission and values.

Senior leadership and management experience

Experience as a leader or senior member of an executive team, with evidenced senior level management experience, operational acumen, financial sophistication, and success stewarding growth and change within a multi-faceted organization.

Experience building and cultivating relationships

Considerable sociopolitical savvy, professional maturity, and the ability to establish and maintain authentic relationships; an evidenced ability cultivate major legacy donors and build communities of diverse and next-generation donors.

Communications and public engagement

A demonstrated record of representing an organization to a wide range of audiences, with the ability to serve as a neutral, substantive communicator and convener for the common good. Experience building meaningful dialogue and engagement across diverse agendas and differences.

Commitment to equity

A strong commitment to diversity, equity, and inclusion, as well as a track record of supporting action and progress in reducing inequities as a leader; evidenced track record of exemplifying the values of the Racial Equity Initiative.

Experience working with, or serving on, a Board of Directors

Brings an understanding of governance principles and best practices.

Connection to and appreciation for Milwaukee, Greater Wisconsin, and their unique community needs

CRITICAL LEADERSHIP CAPABILITIES

Strategic, Visionary Leadership

- Develops and implements the strategic plan, achieving appropriate streamlining opportunities and capacity building where required.
- Works with the Board of Directors to balance short-term objectives with long-term vision to drive organization's strategic direction.
- Anticipates and understands the challenges and opportunities facing the communities that the Greater Milwaukee Foundation serves, and creatively adjusts approaches and strategies accordingly.

- Challenges assumptions and conventional wisdom as appropriate with specific, supported thought leadership, and explores intentional and innovative strategies, initiatives, and partnerships.

Impact and Influence

- Demonstrates resourcefulness, creativity, and respectful persistence in forging relationships built on trust and long-term considerations.
- Incorporates best-in-class development processes that deliver sustainable and significant increases in philanthropic support.
- Connects with, listens to, and engages with stakeholders from across the Milwaukee region and, as appropriate, the state of Wisconsin. This includes community members, donors, nonprofit leaders, national and local foundations, and public officials.
- Articulates the Foundation's mission and values effectively and with passion.

Leading People

- Engages and develops a talented staff whose expertise, passion, and professionalism will drive continued expansion of the Foundation's impact and influence.
- Creates an inclusive workplace that attracts, retains, and develops a talented and committed team.
- Develops an organizational infrastructure that provides support for a diverse team, creating clear decision-making processes, and reinforcing independent and open communication among team members.
- Delegates strategic objectives to leaders and teams within the organization with clear and explicit intent; builds a strong sense of empowerment and shared responsibility across the organization.
- Holds the staff accountable for their commitments, providing fairness, equity, and constructive feedback, as well as clearly articulated metrics and benchmarking for the success of all, motivates and mentors team members to achieve their goals.

OTHER PERSONAL CHARACTERISTICS

- Integrity, maturity, and energy
- Intellectual curiosity
- Political effectiveness and nonpartisan collaboration
- Humble, empathetic, and approachable
- Consensus-building leadership style, with the ability to bridge and honor differences
- Belief in servant leadership and the power of philanthropy

APPLICATIONS AND NOMINATIONS

If you wish to submit application materials or nominate someone to serve as the next President and CEO of the Greater Milwaukee Foundation, please email: GMFCEO@SpencerStuart.com.

The Greater Milwaukee Foundation is an equal opportunity employer and encourages people of diverse backgrounds to apply. We celebrate diversity and are committed to creating an inclusive environment for all employees.