

The Greater Milwaukee Foundation is how Milwaukee works together. For over a century, we have helped generous people give back to the community. Together with donors and partners throughout the region, the Foundation invests in the potential of people and places, supports community-grown solutions and strives to end the systemic racism that holds our region back. Through the power of transformative philanthropy and social change, we are focused on shaping a future where everyone thrives – a Milwaukee for all.

You can make a difference as we seek a Philanthropic Adviser-Stewardship Lead. This person is responsible for managing an assigned portfolio of Foundation philanthropic partners that primarily include individuals and families and manages the annual stewardship efforts for GMF donors. The PA works to maintain an active portfolio that is measured by donors growing their GMF funds through lifetime and legacy giving, co-investing in GMF priorities, and leveraging philanthropic dollars for grantmaking into the community.

Essential Duties & Responsibilities

Key Responsibilities

- Maintain an active portfolio of 200 plus donors/funds that is measured by annual donor contacts, growth in GMF funds through lifetime and legacy giving, co-investment in GMF priorities, and grantmaking into the community. Manage progress toward a specified number of meetings, qualifications, solicitations, commitments, and contribute to annual team fundraising and long-term donor engagement goals.
- As a trusted fundraising partner, qualify, cultivate, solicit, and steward current and prospective donors for giving and grantmaking. This includes partnering with staff and volunteers and communicating information in a clear and timely manner.
- As a relationship manager, develop in-depth knowledge of donors and advisers, and document information aligned with the donor engagement process for each assigned donor.
- Coordinate the stewardship, cultivation, and education of donors, including key prospects and professional advisers as appropriate, through personal visits and attendance at various GMF and other events to further their commitment to and understanding of GMF services.
- Initiate regular communication with donors and their advisers to service funds and cultivate expanded relationships, resulting in the identification of new prospective donors and advisers. This includes exercising a high level of responsiveness to calls, emails, and letters received.
- Maintain accurate and detailed records of all interactions with prospects and donors on behalf of the GMF, which include gift agreements, grant recommendations, contact reports, meeting minutes, correspondence etc.
- Advance fund change requests, inactive fund process and handle challenging issues that may arise with the fund or the advisers connected to it.
- Develop and execute strategies to engage donors, prospects, advisers, and volunteers of color to advance the Foundation’s commitment to Racial Equity and Inclusion.
- Serve as an active and respected leader and ambassador for GMF in the local community, maintaining a strong network of diverse community leaders, professionals, etc.
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General

- Serve as a resource to Senior Director of Donor Services to enhance donor service and engagement.
- Contribute to the annual goals and objectives for the DPS team, as well as the successful achievement of GMF’s major fundraising initiatives.
- Remain current in professional and Foundation best practices, policies, and processes, including such things as gift agreements, GMF service lines, GMF fund types, GMF spending policy, investment performance, GMF fee structure, new legislation related to charitable giving, etc. with ability to communicate these concepts to prospects and donors.
- Participate in community events, professional development, and/or networking opportunities to enhance the visibility of GMF.
- Serve on cross-functional team committees to improve internal and external processes.
- Speak compellingly on the value of the Greater Milwaukee Foundation in all settings.

- Participate in assigned meetings, events, and training as required.

Non-Essential Duties

- Assist in the creation of annual goals and objectives for the Development and Philanthropic Services Department, which includes carrying out development activities as identified in the team's annual goals.
- Assist the Director of Gift Planning and VP of Development and Philanthropic Services in the review of new gift agreements before they are signed to ensure legal compliance and the foundation's ability to fulfill donor's intentions, as needed.
- Perform other duties (or functions) as assigned.

Job Specifications

To perform this job successfully, an individual must be able to carry out each essential duty in a satisfactory manner. The job specifications listed below are representative of the education and experience as well as the knowledge, skill and/or ability (KSAs) required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Education & Experience

- Bachelor's degree in related field required, such as finance, accounting, marketing, or law; Graduate degree strongly preferred.
- Certified Fund Raising Executive (CFRE) or other special certification desired.
- Three (3) or more years of experience in event planning, fundraising, development, advancement, or sales in the nonprofit industry required.
- Bilingual skills in Spanish desirable.

Knowledge, Skills & Abilities

- Ability to support the mission, vision and values of the Greater Milwaukee Foundation and abide by applicable standards of conduct, policies and procedures.
- Demonstrated ability to develop strong and credible relationships with donors/clients.
- Knowledge of laws, regulations and processes related to charitable giving and nonprofit operations.
- Proven customer service skills
- Ability to interact effectively with people from diverse backgrounds.
- Ability to think strategically and creatively in a collaborative environment.
- Ability to communicate respectfully and effectively, verbally and in writing.
- Ability to solve issues.
- Proficient in Microsoft Office Suite applications (i.e., Outlook, Word, Excel, PowerPoint specifically), web-based applications and databases.
- Must be honest, dependable, and able to meet deadlines.
- Must be organized and able to handle multiple tasks.
- Self-motivated and able to work independently.

Certifications, Licenses, Registrations

- A valid and current driver's license and vehicle is required.

Physical Requirements

- Sitting most of the time with some bending and reaching.
- Standing, walking and bending periodically.
- Engaging in repetitive movement of wrists, hands and fingers – typing and/or writing.
- Working frequently at close visual range (i.e. preparing and analyzing data and figures, accounting, transcription, computer terminal, extensive reading).
- Exerting up to 10 pounds of force occasionally and/or negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects.

Work Environment

- Work is generally performed in an open-concept office environment with moderate noise.
- Standard office equipment is generally used (e.g. telephone, computer, printer, copy machine).

Work Schedule & Travel Requirements

- Office hours are 8:00 a.m. - 5:00 p.m. All employees must work the majority of their time in the office; however, with approval from their supervisor, this position may be able to work a hybrid schedule.
- May be required to travel locally or long-distance for work-related conferences and meetings.
- May be required to attend events or meetings outside of normal work hours (no more than 10 hours per month).

Salary: \$ 98,700

Benefits: We offer an excellent benefit package, which includes health, dental, vision, flexible spending, life insurance, 403(b) retirement plan, paid time off (PTO), parental leave, educational assistance and more!

Application Instructions: Please click on the link below to apply.

https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R_ID=7129965

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.