

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 are seeking a Philanthropic Advisor-Agency Endowments! The agency endowment Philanthropic Adviser (PA) is responsible for managing an assigned portfolio of Foundation philanthropic partners that primarily includes agency (nonprofit) endowments, designated funds, and other funds as assigned. The PA works to maintain an active portfolio by building relationships with philanthropic partners including boards of directors and nonprofit leaders, as well as prospecting to establish new agency endowment funds.

Key Responsibilities

- Maintain an active portfolio of 180 philanthropic nonprofit partners with agency endowments measured by annual contacts, growth in GMF funds, 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 philanthropic partners for giving and grantmaking. This includes partnering with staff and volunteers and communicating information in a clear and timely manner.
- Develops strategies to engage donors and prospects of color to be implemented as part of the Foundation's commitment to Racial Equity and Inclusion.
- As a relationship manager, develop in-depth knowledge of boards of directors, agency staff and donors, and document information aligned with the donor engagement process for each assigned agency or donor.
- Initiate regular communication with agency staff, boards of directors, and donors 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, agency representatives, and donors on behalf of the GMF, which include gift agreements, grant recommendations, contact reports, meeting minutes, correspondence etc.
- Advance fund change requests, liquidations, inactive fund process and handle challenging issues that may arise with the fund, or the advisers connected to it.
- Develop and executes 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.

Focused Assignment

- Develop proactive strategies to engage donors and prospects by leveraging GMF's connections in the community, including our board of directors, volunteers, and philanthropic partners, in support of growing the agency endowment service line.
- Using the donor engagement process, actively engage with both prospective and current agency endowment partners, their boards of directors, and finance and investment committees through regular communication and updates, presentations, etc. to steward and deepen relationships with organizations and individuals.
- Serve as a visible and trusted voice in the nonprofit community and regularly find opportunities to engage with local organizations and leadership, specifically those aligned with our racial equity and inclusion focus and to advance the Foundation's commitment to Racial Equity and Inclusion prioritizing increasing the number of agency endowments who are led by professionals of color.

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.
- Speak compellingly on the value of the Greater Milwaukee Foundation in all settings.
- Participate in assigned meetings, events and training as required.

Qualifications

- 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.



**Job Opportunity:
Philanthropic Advisor-Agency
Endowments**

- Knowledge of laws, regulations and processes related to charitable giving and nonprofit operations.
- Ability to interact effectively with people from diverse backgrounds.
- Ability to think strategically and creatively in a collaborative environment.
- Proficient in Microsoft Office Suite applications (i.e. Outlook, Word, Excel, PowerPoint specifically), web-based applications and databases.
- Must be organized and able to handle multiple tasks.

Salary: \$97,375

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 link below to apply:

https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R_ID=6567736

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.