

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 – Partner Foundations! The Philanthropic Adviser manages a portfolio of donors and philanthropic partners connected to our Partner Foundations and the communities they serve, building strong relationships with individuals and families to support their philanthropic goals through thoughtful engagement, strategic giving, and alignment with Foundation priorities. In partnership with senior staff, this role also supports the coordination and ongoing work of Partner Foundations, including donor engagement, meeting preparation, and administrative support, while strengthening relationships, encouraging current and legacy giving, and helping guide philanthropic investments that advance community impact.

## **Essential Duties & Responsibilities**

### Key Responsibilities

- Maintains an active portfolio of 150-200 donors/funds that is measured by annual donor contacts, growth in funds through lifetime and legacy giving, co-investment in Foundation priorities and grantmaking into the community. Manages progress toward a specified number of meetings, qualifications, solicitations, commitments and contributes to annual team fundraising and long-term donor engagement goals.
- Qualifies, cultivates, solicits and stewards current and prospective donors for giving and grantmaking, which includes partnering with staff and volunteers and communicating information in a clear and timely manner.
- Develops and executes strategies to engage donors, prospects, advisers and volunteers of color to advance the Foundation's commitment to racial equity and inclusion.
- Develops in-depth knowledge of donors and advisers and documents information aligned with the donor engagement process for each assigned donor.
- Initiates regular communication with donors and their advisers to service funds and cultivate expanded relationships, resulting in the identification of new prospective donors and advisers, which includes exercising a high level of responsiveness to calls, emails and letters received.
- Maintains accurate and detailed records of all interactions with prospects, agency representatives and donors, which includes gift agreements, grant recommendations, contact reports, meeting minutes and correspondence.
- Advances fund change requests and inactive fund process and handles challenging issues that may arise with the fund or the advisers connected to it.
- Collaborates with the Senior PA to set annual stewardship and engagement plans for the partner foundation/supporting organization service line.
- Serves as an active and respected leader and ambassador for the Foundation in the local community, maintaining a strong network of diverse community leaders, professionals, etc.

### General

- Serves as a resource to the Senior PA and Senior Director of Stewardship and Donor Services to enhance donor service and engagement.
- Contributes to the annual goals and objectives for the DPS team, as well as the successful achievement of the Foundation's major fundraising initiatives.
- Remains current in professional and Foundation best practices, policies and processes, including gift agreements, service lines, fund types, spending policy, investment performance, fee structure

and new legislation related to charitable giving, with the ability to communicate these concepts to prospects and donors.

- Participates in community events, professional development and/or networking opportunities to enhance the visibility of the Foundation.
- Serves on cross-functional team committees to improve internal and external processes.
- Speaks compellingly on the value of the Greater Milwaukee Foundation in all settings.
- Participates in assigned meetings, events and training as required.

### **Non-Essential Duties**

- Assists in the creation of annual goals and objectives for the DPS department, which includes carrying out development activities as identified in the team's annual goals.
- Assists the Director of Gift Planning and Vice President, DPS 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.
- Performs 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.
- Three (3) or more years of experience in event planning, fundraising, development, advancement or sales in the nonprofit industry required.
- Graduate degree strongly preferred.
- 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 commitment to racial equity and inclusion.
- Self-motivated and able to work independently, take initiative and solve problems.
- Demonstrated superior customer service skills and aptitude; ability to interact effectively with people from diverse backgrounds.
- Proficient in Microsoft Office Suite applications, web-based applications and databases.
- Must be honest, dependable and able to handle multiple tasks while being organized and meeting deadlines.
- Ability to communicate respectfully and effectively, verbally and in writing.
- Demonstrated ability to develop strong and credible relationships with donors/clients.
- Knowledge of laws, regulations and processes related to charitable giving and nonprofit operations.
- Ability to think strategically and creatively in a collaborative environment.

#### Certifications, Licenses, Registrations

- A valid driver's license, proof of auto insurance and reliable transportation required.
- Certified Fund Raising Executive (CFRE) or other special certification desired.

### **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:

[https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R\\_ID=7112427](https://recruiting.myapps.paychex.com/appone/MainInfoReq.asp?R_ID=7112427)

***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.***