

Job Opportunity: **Development and Philanthropic Services Specialist**

For more than a century, the **Greater Milwaukee Foundation** (GMF) has been inspiring philanthropy, serving donors and strengthening communities. Together with its donors and many community partners, the Foundation guides and shares a collective vision that 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.

You can make a difference, as we are seeking a Development and Philanthropic Services Specialist!

The Development and Philanthropic Services Specialist is responsible for administrative and operational functions within the department that includes processing gifts, financial statements, donor-related board meeting materials and miscellaneous reports. This position maintains Foundation database records and files, provides service support to existing funds and donors and performs other general office duties to support the Development and Philanthropic Services (DPS) department.

Key Responsibilities

Reporting and Data Processing

- Processes all gift transactions, which includes completing gift entry, logging gifts and sending out acknowledgment letters on a daily basis.
- Serves as online donor portal (POL) contact for donor questions and those needing access, which includes ensuring POL stays updated with latest information and weekly data uploads.
- Maintains donor management system (FIMS) with accurate donor information by regularly setting up new funds, updating records and maintaining database integrity.
- Produces database reports, including regular exception reports (to maintain database integrity), internal metric reports and reports on grantmaking and/or fund activity.
- Coordinates all quarterly financial report distribution, which includes printing statements, producing cover letters and ensuring timely and accurate materials.
- Communicates with donors and fund advisers in a timely manner regarding fund balances, grant status and history, gift status and history, and other fund information.
- Maintains the Foundation's fund files (both electronic and hard copy) by creating new fund files, maintaining an organized system and scanning all fund documentation into the database.
- Fulfills requests for donor-related data from team members and other departments for events, publications and Foundation needs.

General Support

- Provides administrative support to assigned team members, which includes scheduling, meeting coordination, meeting material preparation, data entry, travel arrangements, expense reporting and other general administrative tasks.
- Schedules a wide variety of activities (e.g. appointments, meetings, travel reservations/accommodations, facility usage) for internal and external stakeholders and groups.
- Coordinates meeting/event registrations and logistics, which includes securing space, arranging food and refreshments, preparing materials and confirming reservations and attendance.
- Reviews gift acknowledgment letters and other routine correspondence on an annual basis, making necessary updates with Marketing and Communications, Finance and DPS.
- Prepares a variety of documents (e.g. correspondence, agendas, minutes, event programs, reports) to communicate information and/or create documentation in paper and/or electronic format.

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- Compiles and distributes time sensitive board/advisory committee materials, preparing requested correspondence and maintaining required records in paper and/or electronic formats.
- Processes all departmental mailings, appeals, periodic publications, end-of-year appeals and other donor-related mailings.
- Maintains supply of marketing collateral by working with Marketing and Communications and Finance, ensuring all information sheets and presentation materials are updated regularly.

Qualifications

- Associate degree in related field or equivalent work experience required; Bachelor's degree preferred.
- Four (4) or more years of administrative support experience required; experience working in a nonprofit environment preferred.
- One (1) or more years of experience providing customer service to clients required.
- Two (2) or more years of data entry and/or database management experience required.
- Criminal background and credit checks are required for this position.
- Ability to read, understand and explain various documents and concepts to donors, including wills and trusts, spending policy, investment performance, asset allocation, etc.
- Ability to follow standard processes and procedures and perform data checks.
- Ability to calculate income available throughout the year to donors for grantmaking.
- Excellent written and verbal communication skills.
- Ability to interact effectively with people from diverse backgrounds.
- Proficient in Microsoft Office (MS) Suite applications (i.e., Outlook, Word, SharePoint, PowerPoint specifically), with intermediate to advanced skills in MS Excel and web-based applications and databases.
- Must be organized and able to handle multiple tasks, switch between tasks efficiently and consistently produce a high-quality work while performing under pressure.

Benefits

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

Application Instructions

Application Deadline: January 24, 2020

Please include resume, cover letter and salary requirements when [applying](#).

Equal Opportunity Employer