

Job Opportunity: DPS Specialist II

The **Greater Milwaukee Foundation (GMF)** 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 DPS Specialist II! The Development and Philanthropic Services Specialist II is responsible for administrative and operational functions within the department that include supporting the philanthropic advising team and their work with individuals and families, agency endowments, and partner foundations. This position is both reactive to the needs of the team and proactive in managing several recurring processes, projects and tasks that involve reporting, meeting preparation, managing expenses, event planning support, fund maintenance, etc. The Development and Philanthropic Services Specialist provides other general support for the team, as well as the Foundation overall in partnership with administrative/operational colleagues at the Foundation.

Process Management

- Manages processes related to fund changes, fund audits, and board ballots in partnership with colleagues across the foundation and leverage a skill set for attention to detail, reading and research, synthesis of information, timeliness, and follow through.
- Manage recurring inactive and acorn fund process that involve working across a variety of portfolios to identify funds, coordinate mailings and internal communications, maintain tracking worksheets, and partner to advance timeline.
- Coordinate weekly Exchange by managing queue of nonprofit organizations, communicating externally and internally, scheduling meetings, providing Zoom support, and serving in host role at least periodically.
- Partner with events team to coordinate invite lists and event registrations and logistics, which includes securing space, arranging food and refreshments, preparing event materials, serving as external contact, and confirming reservations and attendance.
- Help us to continue to refine and streamline our shared work with continual process improvement and efficiencies.
- Additional special projects as assigned.

Reporting and Data Processing

- Partner with central operations team to maintain CRM and donor portal with accurate donor information by updating records, filing documents, and maintaining data integrity.
- Maintains the Foundation's Fund files by creating new files, maintaining an organized system, auditing for accuracy, etc.
- Produces CRM reports, including gift and grant histories, generating portfolios, financial reports, and other on demand reports as needed by those this position supports.
- 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.
- Fulfills requests for donor-related data from team members and other departments for events, publications, and Foundation needs.

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General Support

- Provides administrative support to assigned colleagues, which includes meeting coordination, material preparation, data entry, expense reporting, and other general administrative tasks.
- Schedules wide variety of activities, which includes appointments, meetings, travel reservations, facility usage, etc. for internal and external stakeholders.
- Prepares a variety of documents, which include correspondence, agendas, meeting minutes, event programs, reports, etc. to both communicate and document.
- Collaborates in processing departmental mailings, appeals, periodic publications, end-of-year communications, and other donor-related mailings.
- Maintains supply of marketing collateral by working with Communications & Marketing and Finance, ensuring all information sheets and presentation materials are updated regularly.
- Participates in assigned meetings, events, and trainings as required.

Non-Essential Duties

- Serves as backup coverage for the receptionist during lunches, breaks, meetings, and PTO days as necessary.
- Assists with departmental and Foundation events, including event pre-planning, coordinating event logistics, set up, tear down, and other clerical duties as assigned.
- 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

- Associate degree in Business or related field, Administrative Professional, or equivalent experience required; Bachelor's Degree preferred.
- Four (4) or more years of administrative support experience; previous experience working in a nonprofit, finance/banking, or sales environment preferred.
- Criminal background check is required for this position.

Knowledge, Skills & Abilities

- Ability to support the mission, vision, and values of Greater Milwaukee Foundation and abide by applicable standards of conduct, policies, and procedures.
- Ability to read, understand, and synthesize information from various sources.
- Ability to communicate effectively, verbally and in writing.
- Ability to follow standard processes and procedures, while problem solving and process improving.
- Ability to interact effectively with people from diverse backgrounds, including internal and external audiences.
- Ability to work with CRM (Foundant) and navigate system to enter and extract information.
- Proficient in Microsoft Office (MS) Suite applications (i.e., Outlook, Word, SharePoint, PowerPoint specifically), with intermediate to advanced skills in MS Excel required.
- Proficient with Teams, Asana, and Zoom.

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- Must be honest, dependable, and able to meet deadlines.
- Must be organized and able to handle multiple tasks, switch between tasks efficiently, and consistently produce a high-quality work while performing under pressure.
- Self-motivated and able to work independently.

We recognize that at this moment, during the COVID-19 pandemic, it is a uniquely difficult time, and we aim to be as flexible and supportive as possible in both the recruitment for and onboarding of this position. Some staff may be eligible to work a hybrid work schedule (i.e. work part of their regular schedule remotely); however, all staff must work the majority of their time in the GMF office.

Salary: \$52,620

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

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.