Job Opportunities:
Philanthropic Adviser

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 Philanthropic Advisor! This position is responsible for managing an assigned portfolio of Foundation philanthropic partners that primarily includes individuals and families. 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.

**Key Responsibilities**

- Maintain an active portfolio of 150-200 donors/funds that is measured by annual contacts to all philanthropic partners, growth in GMF funds through lifetime and legacy giving, co-investment in GMF priorities, and grantmaking into the community.
- As a trusted fundraising partner, contact and meet with current and prospective philanthropic donors to determine their capacity for giving, discover passions, and secure resources aligned with donor interests and Foundation priorities. Cultivate relationships for the purpose of developing and implementing strategies for the solicitation of funds, gifts, co-investment and legacy promises as well as meaningful grantmaking. Ask for gifts personally, sometimes as part of a team including staff and volunteers. Communicate information needed in a clear and timely manner with donors who are inspired to support the Greater Milwaukee Foundation and the community philanthropically. Manage progress toward a specified number of meetings, qualifications, solicitations, commitments, and dollars raised during each fiscal year.
- Develop in-depth knowledge of donors and advisers employing in-depth documentation for each assigned donor of their philanthropic interests, financial plans, volunteer involvements, family information, as well as their primary legal and financial advisers.
- Implement a customized service plan for all assigned donors with planned tasks that focus on their philanthropic interests, estate planning and financial needs.
- 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.
- Initiates regular communication with donors and their advisers to service funds and cultivate expanded relationships, which results in the identification of new prospective donors and advisers and includes exercising a high level of responsiveness to intake calls, emails, and letters received.
- Ensure that all written communications with assigned donors including gift agreements, gift acknowledgment letters, donor-advised fund grant recommendations, and fund financial statements are accurate and as personalized as possible and submitted in a timely fashion.
Job Opportunities:
Philanthropic Adviser

- Advance fund change requests, inactive fund process and handle challenging issues that may arise with the fund or the advisers connected to it.
- Achieve annual fundraising and long-term donor engagement goals for all prioritized donors and prospects in conjunction with DPS Team ensuring that annual financial fundraising goals are met.
- Develop and executes strategies to engage donors, prospects, advisers and volunteers of color to advance the Foundation's commitment to Racial Equity and Inclusion.
- Serves as an active and respected leader and ambassador for GMF in the local community, maintaining a strong network of diverse community leaders, professionals, etc.
- Partners with prospective donors, colleagues, board members, and volunteers to develop and lead on strategies for advancing relationships that result in investment at the GMF.

Focused Assignment

- Manages a philanthropic priority of the Foundation, working in partnership with the Director of Development and Major Gifts, cross-department program leads and external partners to advance the development of the priority through case development, internal operational readiness, event leadership and fundraising strategy. Serves as the internal expert on the team, who partners with the DPS Team and supports relationship managers in securing financial support for this priority.
- Work collaboratively across DPS and GMF to lead these assignments, while partnering with other GMF teams, individual colleagues and external stakeholders to advance the work by leveraging their expertise and skill sets, incorporating their feedback and perspective, and accessing their networks.
- Serve as a proactive leader in developing and implementing plans that both help to increase the quality and help advance this work on behalf of the GMF.
- Partner with Marketing & Communications to ensure the effective marketing and branding of donor communication pieces, as well as the distribution of press releases and other promotional materials as appropriate.

General

- Serves 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.
- Maintain accurate and detailed records of all interactions with prospects and donors on behalf of the GMF, which include contact reports, meeting minutes, etc.
- 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 one-on-one and dynamic group presentations, presenting information to Boards of Directors and community groups on leadership activities and co-investment opportunities.
- Participate in assigned meetings, events and trainings as required.
Non-Essential Duties

- Assists 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.
- Assists the Director of Gift Planning and VP of Development and Philanthropic Services in the review 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.

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 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 problem-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.
Job Opportunities: Philanthropic Adviser

Work Environment

- Work is generally performed in an office environment.
- Office space is an open-concept environment (no offices).
- Moderate noise (e.g. business office with computers and printers, light traffic, human voices).
- Standard office equipment is generally used (e.g. telephone, computer, printer, photocopy machine, calculator).

Work Schedule & Travel Requirements

- Office hours are 8:00 a.m. - 5:00 p.m. Employees are required to be available and engaged in work-related activities during the core working hours of 9:00 a.m. - 3:00 p.m.
- May be required to travel locally or long-distance for work-related conferences and meetings.
- Must have a valid driver’s license, proof of auto insurance and reliable transportation.
- May be required to attend events or meetings outside of normal work hours (no more than 10 hours per month).

Some positions may be eligible to work a hybrid work schedule (i.e. work part of their regular schedule remotely). However, all positions are asked to work the majority of their time from the GMF office.

Compensation: $94,900

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. To apply, please click on the attached link http://www.milwaukeejobs.com/apply/add/74355973

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.