

**Senior Director of Donor Services  
Greater Milwaukee Foundation  
Milwaukee, Wisconsin**



The Greater Milwaukee Foundation has partnered with Spano Pratt Executive Search to identify the Senior Director of Donor Services. For a confidential conversation and to learn more about this opportunity please contact Jamie Pratt.

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## Organization

# Community Leadership

As Wisconsin's largest community foundation and one of the first in the world, the Greater Milwaukee Foundation has been at the heart of Milwaukee's civic community for over 100 years. The Foundation serves as a partner of choice for all philanthropic donors, nonprofits and community stakeholders interested in growing resources and unifying impact so greater Milwaukee can thrive. It serves as a catalyst, investing in and advocating for community priorities and long-term change. It serves as a convener, connecting people across neighborhoods, organizations and sectors to tackle the greatest issues, together.

Since its establishment, the Foundation has invested more than \$1 billion in the community, and we continue to marshal generations of local knowledge, cross-sector partnerships and over \$1 billion in financial resources entrusted to our stewardship.

Our community's many assets are the strength upon which, together, we will achieve our shared vision of a Milwaukee for all. But there is a fault line running through the systems that shape daily life for everyone in our community. Historic and systemic racism has impaired access to opportunity and led to deep disparities that cause ongoing harm to communities of color and prevent our entire region from reaching its full potential.

The Foundation's North Star of racial equity and inclusion is at the very center of our practice and priorities as we engage partners, stakeholders and communities across greater Milwaukee on a scale capable of driving transformational change. We are committed to:

- Reimagining Philanthropy, by honoring all forms of generosity including time, treasure, talent and ties
- Catalyzing Systems Change, by developing lasting solutions to structural inequities
- Convening and Following Community Voice, by valuing resident power and priorities
- Building Inclusive Culture, by leading from within as an anti-racist organization

The Greater Milwaukee Foundation is how Milwaukee works together, and through our collective actions, we aim to repair the entrenched fault line of systemic racism and invest in a future where everyone thrives.





# Greater Together

## The campaign to build a Milwaukee for all

Today, we stand at a transformational turning point that calls on all of us to **join together, think bigger and act bolder**. The generational challenge before us is not just to rebuild the Milwaukee region—but to build a better region. We envision culturally vibrant communities and economically thriving neighborhoods. People of all backgrounds achieving their fullest potential and contributing to our shared success. A city that lifts up all of Southeast Wisconsin, creating a beacon for the nation. This generational vision for our entire community is only possible with all of us working together. And the Greater Milwaukee Foundation is stepping forward to help lead the way—and calling on our entire community to join us in the *Greater Together* campaign, the most ambitious undertaking in the Foundation's history.

- **The Foundation is a national leader among community foundations**, adding dimensions to our philanthropic banking model to deepen impact and systems change through convening, strategic philanthropy and community leadership. We are among the first in the country to advance a priority-focused campaign. Greater Together is GMF's first campaign and it is an ambitious and historic undertaking.
- **Why does Milwaukee need this campaign?** Milwaukee is at a critical turning point – we can and must address racial equity and inclusion in order to build a future in which all can live thriving lives. The campaign is a tool for us to help realize our vision for A Milwaukee For All. The campaign is a way for us to acknowledge all donors and their interests while also leaning into our community leadership role.
- **Quick facts:** \$700M comprehensive goal, of this \$50M in campaign priorities and goal of welcoming new donors of color
- **Everyone has a role to play.** We recognize that many communities have not historically felt welcome at the Foundation. We have an opportunity and obligation to be more welcoming and inclusive. We believe that everyone can be a philanthropist, everyone has a role to play. We'll know if we're successful because one of the goals of this campaign is to increase our donors of color in ways that help change the narrative of who and what constitutes philanthropy in this region.

## **Position Profile**

The Senior Director of Donor Services reports to Vice President, Development & Philanthropic Services and is responsible for structuring, implementing and monitoring a high-quality donor engagement and services program function. The primary goal of this position is to steward donors and funds, growing the assets and impact of the Foundation through existing and new donors. Under the direction of the Vice President, Development and Philanthropic Services (VP-DPS), the incumbent manages the donor services efforts of the Foundation, as well as supervises the Philanthropic Adviser teams and assigned administrative/operations personnel.

### **Essential Duties & Responsibilities**

- Works collaboratively with the development and gift planning teams to formulate and implement annual and long-term strategic plans for delivering and augmenting services to donors and engaging donors, with the ultimate goal of growing funds and community impact.
- Works collaboratively with Director of Development and Major Gifts, Director of Strategic Partnerships, and Director of Gift Planning to formulate and implement annual and long-term strategic plans for cultivating prospective donors, with the ultimate goal of increasing Foundation revenue.
- Serves as a resource to Senior Vice President and Chief Strategy Officer and VP of Community Impact in non-profit investment opportunities.
- Works with Director of Development and Major Gifts to prepare periodic reports for donor satisfaction, engagement, and fund and revenue growth metrics for the VP-DPS, President/CEO, committees and/or Board.
- Works with Marketing and Communications to develop creative ways to increase awareness among existing donors; enhances exposure through events for current and prospective donors.
- Works cross-functionally with all departments to provide support, input and collaboration to meet Foundation goals.
- Manages a portfolio of 100-125 donors/funds. 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 philanthropically support the Greater Milwaukee Foundation and the community. Manage progress toward a mutually-decided number of visits, qualifications, solicitations, commitments, and dollars raised during each fiscal year.
- Leads, coaches, and manages Philanthropic Advisers and motivates them to achieve goals. This includes establishing, monitoring, and evaluating personnel performance goals and observing, understanding, and growing staff.
- Sets and reviews the philanthropic advisor team's strategies inclusive of those working with portfolios of individuals, agencies and supporting organizations. In partnership with DPS Leadership, designs, analyzes and executes those strategies to solicit funds from individuals and organizations. As necessary, work collaboratively with leadership, Foundation staff, professional advisers and volunteers in researching current donors and prospects and preparing and presenting fund/gift proposals and stewardship. Mentor and build confidence in direct reports with these responsibilities.
- Remains knowledgeable and conversant in the Foundation's spending policy, fee structure and investment strategy, with the ability to communicate these concepts to donors and prospective donors.
- Ensures proper procedures are in place to provide swift and exemplary services to each fund holder by creating, documenting and training staff members.
- Develops and executes strategies to engage donors, prospects, advisers and volunteers of color to advance the Foundation's commitment to Racial Equity and Inclusion.
- Contributes to the successful achievement of the strategic goals for the department including campaign or special initiative fundraising programs.
- Promotes GMF co-investment opportunities with the purpose of maximizing community impact, which includes partnering with appropriate Development & Philanthropic Services team members, Community Impact team and Milwaukee Succeeds team.
- Enters notes into Foundation database in a timely fashion after substantive contact with donors and prospects.

- Ensures 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.
- Drafts gift agreements and legacy promise agreements as well as briefing and solicitation materials such as priority menus, proposals, etc.
- Obtains fund documentation and/or written gift confirmations from new, current, and deferred gift donors.
- Reviews the level of service being provided to all donors by regularly seeking input from team members and/or using GMF survey tools; adjusts services as appropriate.
- Oversee signature events, partnering with GMF leadership, staff and colleagues to lead collaborative planning and execution for DPS-related large scale engagement opportunities that advance strategic vision. Partner with staff responsible for events to plan and deliver ongoing donor engagement opportunities throughout the year.
- Participates in community events, professional development and/or networking opportunities to enhance the visibility of GMF.
- Speaks 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.
- Participates in assigned meetings, events and trainings as required.

#### Supervision

- Supervises assigned department personnel. Includes the following responsibilities, but are not limited to hiring, training, scheduling, evaluating and ensuring accuracy, timeliness and the completion of all work performed by direct reports.
- Educates direct reports on all department and agency policies and procedures.
- Meets with assigned staff at least monthly to identify and resolve problems, manage projects, track goals, and review work processes and procedures.
- Represents team and/or department at meetings, events and training as required.
- Serves on the GMF Management Team and the DPS Leadership Team.

#### **QUALIFICATIONS**

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; Graduate degree preferred.
- Certified Fund Raising Executive (CFRE) or other special certification desired.
- Seven (7) or more years of nonprofit experience in positions that involved fund development or planned giving, donor relations and volunteer management required.
- Three (3) or more years of supervisory experience required.
- Major and planned giving and campaign experience preferred.
- Experience in marketing, sales, advancement and/or stewardship required, preferably in the nonprofit industry.

#### 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.
- Knowledge of planned giving with an understanding of and the ability to explain investment and financial information.
- Understanding and enthusiasm for the power of endowment and a passion for helping people realize their own philanthropic goals.
- Engaging interpersonal skills; excellent verbal and written communication skills.
- Ability to effectively present information to top management, public groups, individuals and groups of high net worth and/or Boards of Directors.
- A team player with an attitude of service and ability to motivate others.
- Ability to interact effectively with people from diverse backgrounds.
- Ability to problem-solve issues.
- Proficient in Microsoft Office Suite applications (i.e. Outlook, Word, Excel, PowerPoint specifically), donor database/customer relationship management software and databases; knowledgeable about the role of technology and electronic communication in fundraising.
- 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.
- Equity-Mindedness - Possesses and demonstrates a strong appreciation and understanding of the core principles and practices of diversity, inclusion, equity and racial justice. Is willing to take personal and institutional responsibility for the actions and behaviors of the organization (including its staff, key stakeholders and partners), as well critically reassess their own and the organization's practices. Is also race-conscious and aware of the social and historical context of unjust and exclusionary practices in American institutions and society.

#### Certifications, Licenses, Registrations

- A valid and current driver's license and vehicle is required.

#### **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).
- Expressing or exchanging ideas by means of the spoken word.
- Receiving and responding to oral communication.
- 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.

## **Location: Milwaukee, WI**

In Milwaukee, you'll find urban living and a Midwest ambiance combine to provide an ideal work-life balance for modern living. Short commute times, big city amenities, diverse and affordable neighborhoods, below average cost of living, an abundance of natural resources and a nationally recognized education system all come together during an unprecedented time of opportunity and growth. The Milwaukee Region is made up of five counties in southeastern Wisconsin – Milwaukee, Waukesha, Ozaukee, Washington and Racine – that have a combined population of nearly 1.8 million people.

Known as the City of Festivals, Milwaukee hosts its world-famous [Summerfest](#) music festival each summer on Milwaukee's lakefront. The 11-day celebration of great music and food attracts more than 800,000 attendees. Milwaukee's diverse ethnic heritage is celebrated with major ethnic festivals each summer, including Festa Italiana, [German Fest](#), [Irish Fest](#), [Mexican Fiesta](#), [Polish Fest](#), [Indian Summer](#) and [Bastille Days](#). Each of these three-day events attract tens of thousands of revelers who come to celebrate the unique music, foods and cultures of the people who call the Milwaukee Region home.

Milwaukee is among a handful of medium-size cities that features an opera company, ballet and a symphony (which recently moved into its brand-new home in a historic movie theater that has been renovated). It also has a vibrant music scene with venues of all sizes that can accommodate everything from emerging acts to today's rock stars.



*For a confidential conversation, please contact:*

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