



THE EXPERIENCE FOR A LIFETIME

**University School of Milwaukee
Advancement Office – Employment Opportunity**

Director of Advancement and Donor Relations

About University School of Milwaukee:

University School of Milwaukee (USM) is an educational leader in Wisconsin, and is ranked among the top college-preparatory schools in the United States. Students in grades PK-12 are engaged, encouraged, supported, and motivated to achieve excellence in academics and beyond. Our faculty and staff are talented and passionate. Our academic courses and extracurricular activities are outstanding. The student body is motivated, and our alumni and parent communities are actively invested in USM's success.

Our primary goal is to ensure that our students receive the best possible balanced education, in every sense of the word. To achieve this, we have continually invested in faculty, curriculum, programs, facilities, and financial planning for the future. As part of the recent comprehensive Our Common Bond campaign, which spanned five academic years from 2015 to 2020, the USM community provided significant philanthropic support for several major strategic initiatives. This included considerable endowment growth (currently valued at \$100,000,000) for financial aid, faculty compensation, a Fund for Student Success, the Kramlich Family Distinction in Innovation, and so much more. Capital improvements included the creation of the Lubar Center for Innovation and Exploration, the Jack Olson '67 Commons Upper School dining hall, the Palermo Family Servery, a Fine Arts addition highlighting the new Sardas-Trevorrow Band Room and the Stratton Family Orchestra Room, the Lower School's Lee Community Room where we welcome all of our families, and other facility upgrades. In total, more than \$30 million (14% over goal) was invested to support student learning, professional development, and life-enriching experiences for our families. Including, our largest collective-gift to the annual USM Fund of \$6.8 million over the span of the Our Common Bond campaign.

Most recently, two passionate groups of donors helped to advance two important capital projects for our athletic department: Wildcat Park, an all-synthetic turf baseball field and stadium, and two golf simulator training platforms. Both of these projects, along with the strength of our endowment funds and the recent success of the Our Common Bond campaign, speak to the willingness of our donors to invest in their school with their "best gift" and support significant improvements with their thoughtful philanthropy.

Under the leadership of Steve Hancock, who joined USM as head of school in 2020, University School of Milwaukee embarked on a thoughtful and inclusive process to develop a comprehensive strategic plan that will help provide a clear direction for our future advancement efforts. Grounded in over a century of academic excellence, the new strategic plan was developed from a position of strength. The school's robust enrollment, secure endowment, and zero debt will enable us to build on an exceptional foundation for our next comprehensive campaign for our school.

Position Description

The Advancement office team informs alumni, current families, friends, and all of our donors about USM's strategic direction and the philanthropic plans in support of these opportunities. The Director of Advancement and Donor Relations position will support the Advancement team's work to strengthen USM's donor-centered relationships in annual giving, capital campaign initiatives, planned giving, and stewardship. This position will also help to launch our next comprehensive campaign in support of the goals developed in our 2022 strategic plan. It will also help to facilitate a donor-centered stewardship program that will be steadfast on our sincere acknowledgment of all of USM's investors. The new director will also help position our case-for-support in significant constituent markets throughout the country; including, Boston, Chicago, Denver, San Francisco, L.A., New York City, and the east/west coast regions of Florida.

The ideal colleague for this position will be an entrepreneurial, energetic, goal-oriented advancement professional with demonstrated experience in closing gifts and a proven track record of managing an array of investors for the philanthropic support of an independent school or other nonprofit of similar size, with experience in direct donor-centric engagement. The individual will be an exceptional communicator in verbal, written, and presentation-style communications with excellent interpersonal skills to work collaboratively and across a large PK-12 independent school. The Director of Advancement and Donor Relations will be highly organized and adept at prioritizing and managing multiple projects simultaneously in a hardworking, fast-paced office. They will be a team player who will be comfortable working independently and collaboratively. The new Director must possess the confidence to advise and set strategy for best practices in increasing gifts and acquiring new gifts, be relentless at retaining donors/investors, and skillful at all aspects of the moves management process.

This Advancement office leadership position will partner directly with a veteran Chief Advancement Officer, Patrick Tevlin on all matters pertaining to the growth of greater donor engagement and gift support. The Director of Advancement and Donor Relations will have shared management responsibility of the Advancement office staff, and the portions of the office's budget pertaining to the position. This key position will also provide management of the Major and Principal Gifts Program. Ultimately, the professional in this position will be part of an advancement team that takes great pride in raising on average \$5 million in pledges and gifts.

USM seeks world-class talent to join our inclusive school community. We welcome candidates in the field of advancement who can contribute to the diversity and excellence of our academic community. For the right-fit candidate, we are willing to mutually agree on a start date.

Key Duties of the Position:

- Directs and implements strategies for identifying, cultivating, and successfully soliciting individuals for gifts of \$25 - 100K to support annual giving efforts, and will solicit gifts of \$100K - \$1M in support of strategic capital campaign initiatives.
- Manages a portfolio of prospects through an active schedule of solicitation, cultivation, and stewardship calls to current donors and new prospects.
- Builds relationships among prospective donors, alumni, parents, and volunteers to support programs and priorities.
- Partners with faculty and members of the leadership team to align priorities of the school with donor goals/interests.
- Works with the Advancement office database manager to ensure that potential major and principal gift prospects are properly qualified, assigned, cultivated, and stewarded.
- Coordinates, writes, and produces appropriate fundraising materials including, but not limited to, case statements, brochures, solicitation letters, gift proposals, appreciation letters, donor reports, and campaign status reports.
- Maintains information on select donors and prospects including contact reports in the Blackbaud Raiser's Edge (CRM) system. Communicates in ways that are donor-centric, while furthering the mission of USM and our strategic design initiatives.
- Seeks opportunities to travel and meet with donors as needed.
- Supports, collaborates with, and supervises staff as needed.
- Manages several cost-center budget lines for greater efficiency.

Additional Details of the Position:

In addition to the duties outlined above, the DOA will be required to:

- Meet Advancement office metrics for donor visit preparation, qualification, contact reports, in-person visits, referrals, and accurate coding using the CRM system.
- Represent the Advancement office at various board and school functions.

MINIMUM QUALIFICATIONS:

- A bachelor's degree and ten years of equivalent experience in higher education, independent school (day or boarding schools), or advancement offices (development offices) in healthcare or civic nonprofit institutions.

PREFERRED QUALIFICATIONS:

- Experience as lead solicitor, closing a significant number of gifts between \$25K - \$1M from major prospects.
- Prior experience working with comprehensive campaigns, alumni engagement, or in a university or independent school setting.
- Experience working with various technologies including advanced knowledge and experience with Blackbaud CRM systems, Google Suite, Microsoft Office, Zoom, mass email applications, and project management software.
- Strong leadership, interpersonal, organizational, and problem-solving skills with attention to detail.
- The ability to work with ambiguity, navigate a complex work environment, and manage multiple projects simultaneously.
- The ability to work independently as well as collaboratively to achieve goals with a commitment to delivering exceptional donor-centric services.
- Strong written and verbal communication skills as well as effective presentation skills.
- Flexibility to accommodate changing priorities and deadlines.
- High level of professionalism and commitment to confidentiality with sound judgment and discretion.

USM Supports a Diverse and Inclusive Culture

USM is dedicated to providing equal opportunities and equal access to all individuals regardless of race, color, religion, ethnic or national origin, gender, genetic information, age, disability, sexual orientation, gender identity, gender expression, and veteran's status. USM does not discriminate in admissions, educational programs, or employment on the basis of any factor stated above or prohibited under applicable law. Students, faculty, and staff are assured of participation in USM programs and in the use of facilities without such discrimination. University School complies with Executive Order 11246, as amended, Section 503 of the Rehabilitation Act of 1973, the Vietnam Era Veterans Readjustment Assistance Act, and applicable executive orders, federal and state regulations regarding nondiscrimination, equal opportunity and affirmative action. USM is committed to achieving a diverse workforce through application of its affirmative action, equal opportunity and nondiscrimination policy in all aspects of employment including recruitment, hiring, promotions, transfers, discipline, terminations, wage and salary administration, benefits, and training.

University School is committed to providing reasonable accommodations to qualified individuals with disabilities upon request. To request this document in an alternate format or to request a reasonable accommodation, please contact the Director of Human Resources.