

ASPEN LEADERSHIP GROUP

DIRECTOR OF GIFT PROCESSING
WISCONSIN FOUNDATION AND ALUMNI ASSOCIATION
Madison, Wisconsin
[Wisconsin Foundation and Alumni Association](#)



The Aspen Leadership Group is proud to partner with the Wisconsin Foundation and Alumni Association (WFAA) in the search for a Director of Gift Processing.

The Director of Gift Processing will provide leadership for the Gift Processing unit, comprising a team of eleven professionals, and will be responsible for the accurate recording of donations (gifts and commitments). The Director will serve as the primary contact for gift management, related donor receipts, and confirmation communications for the WFAA, which comprises 300+ staff members. The Gift Processing unit processes some 150,000 transactions per year.

The Wisconsin Foundation and Alumni Association exists to promote the welfare of and advance the objectives of the University of Wisconsin–Madison by encouraging the interest, engagement, and financial support of alumni, donors, and friends in the life of the university and with each other. WFAA is a private, nonprofit corporation that encourages individuals and organizations to make gifts to the university and to connect with the UW. Raising \$342M in contributions in FY19, the Foundation surpassed the \$3.2B goal of its comprehensive campaign for UW-Madison, titled *All Ways Forward*, in October of this year, and maintains investment portfolios in excess of \$4B.

In 2014, the UW Foundation merged with the Wisconsin Alumni Association® to better serve a growing population of UW alumni and donors. WFAA believes that private support grows out of good relationships between campus leaders, faculty, and program staff who need support, and the alumni and friends who want to invest in UW–Madison. WFAA provides important engagement opportunities to link UW–Madison alumni to each other and to their alma mater, building a strong community of Badgers.

WFAA believes in the value of the University of Wisconsin–Madison—its students, its alumni, Wisconsin, and the world. It works with alumni and friends to advance the UW, now and into the future. Working to support UW–Madison, its culture is collaborative and mission driven. It strives to promote from within, and it values professional growth and volunteer opportunities. Its teams use cutting-edge technology and sophisticated data every day to achieve results. WFAA fosters a comfortable work environment where its employees dress for their day in modern office spaces.

Since its founding in 1848, UW–Madison has been a catalyst for the extraordinary. As a public land-grant university and prolific research institution, its students, staff, and faculty members partake in a world-class education and solve real-world problems. UW–Madison has changed the way the nation takes its vitamins and brought flamingos to Bascom Hill. It has inspired satirists and senators alike. It has fearlessly sifted and winnowed to find today's truths. And with the Wisconsin Idea as its guiding principle, it is not only changing the 936 acres it calls home—Badgers are also creating a better future for Wisconsin, the nation, and the world.

REPORTING RELATIONSHIPS

The Director of Gift Processing will report to Controller Carrie Park.

PRINCIPAL OPPORTUNITIES

The WFAA is among the nation's top public university fundraising operations and is an organization dedicated to investing in its people, building a true spirit of collaboration across teams, and continuing to sustain and expand a diverse and inclusive work culture. The Director of Gift Processing, in addition to leading the Gift Processing unit, will be engaged in strategic, cross-team endeavors that are valued by and critical to the Foundation as a whole. The Director will serve as a key member of the data integration team in building new integrations for both gift and constituent files, and will also participate in a cross-functional working group of data management professionals across Constituent Data, Gift Processing, Registration, Membership, and Fund Management to establish best practices, process improvements, and knowledge sharing of systems tools for efficiency. This is a role for a professional who is excited by the challenge of leading and nurturing a lively, expert team as well as fostering innovation and creativity across the organization.

–Carrie Park, Controller

PRIMARY RESPONSIBILITIES

The Director of Gift Processing will

- serve as primary subject matter expert for gift processing for internal WFAA staff and UW Campus Partners, understanding hands-on operations, including potential ownership of complex channels or transactions;
- manage a team responsible for recording and maintaining gift and commitment records, matching and recurring gift programs, as well as providing excellent customer service;
- manage all gift revenue donor communications, including tax receipts, acknowledgements, and confirmation letters;
- maintain and grow a quality assurance program for gift entry;
- in consultation with the Controller, buildout a comprehensive financial control initiative program for gift processing;
- drive transformational initiatives requiring change management with empathy and compassion, advancing a positive team environment and culture;
- provide strategy and leadership oversight to ensure that the team is operating efficiently and meeting defined service level agreements;
- develop and implement technology enhancements for efficient revenue processing;
- collaborate with business stakeholders to establish effective partnerships;
- implement and administer gift policies and procedures managed consistently, effectively, and in compliance with WFAA business rules;
- consult with both internal WFAA staff and UW Campus Partners on new fundraising initiatives or other special projects;
- maintain current process guides to aide in the efficient and accurate processing of all gift related revenue and related functions;

- provide training on best practices around processing gift and commitment information and related policies to development and campus staff;
- identify and implement interfaces to afford a continued move towards more automation of gift revenue channels;
- recruit, interview, select, orient, train, mentor, coach, and develop highly talented and qualified staff and encourage an appropriate level of independence and supporting professional growth; and
- identify the current and long-term development/training needs of individuals and groups, and provide or facilitate access to appropriate development experiences.

KEY COLLEAGUES



Michael M. Knetter
President and CEO

Mike joined the Wisconsin Foundation and Alumni Association as President and Chief Executive Officer in 2010 after eight years as Dean of the Wisconsin School of Business. Prior to joining UW–Madison in 2002, he was Associate Dean and professor of international economics in the Tuck School of Business at Dartmouth. He also served as Senior Staff Economist for the President’s Council of Economic Advisors for former presidents George H. W. Bush and Bill Clinton. Locally, he chaired the capital campaign for The Road Home Dane County, a nonprofit that assists in finding housing and work solutions for homeless families in Dane County. At WFAA, Mike has led a variety of initiatives to support the advancement of UW–Madison, including the launch of a new CRM system, the \$3.2 billion *All Ways Forward* campaign, and the merger of the UW Foundation with the Wisconsin Alumni Association. Mike completed his undergraduate studies in economics and mathematics at the University of Wisconsin–Eau Claire and his PhD in economics at Stanford University.



Geoff McCloskey
Chief Financial Officer

Geoff has served as Chief Financial Officer at the Wisconsin Foundation and Alumni Association since 2015 after joining the organization in 2012 as Controller. Prior to WFAA, he served as a project controller and asset manager with Wind Capital Group LLC, as Vice President of Shared Services and Finance Transformation with CUNA Mutual Group, as finance director at the State Bar of Wisconsin, as Controller at Ransomes Inc., and as a Staff Auditor at Price Waterhouse. At WFAA, Geoff oversees all finance, accounting, and treasury functions in addition to IT and facilities. He has been involved with numerous community organizations, and currently serves as a board member for Tellurian, Inc. Geoff is a CPA and received his bachelor of business administration in both accounting and finance from the University of Wisconsin–Madison.



Brenda Phebus
Chief Human Resources Officer

Brenda joined the Wisconsin Foundation and Alumni Association as Chief Human Resources Officer in 2018. She has previously held multiple HR leadership positions in organizations spanning telecommunications, financial services, and small businesses. At WFAA, Brenda oversees all human resources functions, including strategy and daily operations. Brenda received a bachelor's degree in psychology from UW–Madison and an MBA from Southern Illinois University at Carbondale. She holds a Senior Professional Human Resources certification.



Carrie Park
Controller

Carrie has served as Controller at the Wisconsin Foundation and Alumni Association since March of 2020 after joining the organization in 2018 as Managing Director of Gift Processing. Carrie moved into the nonprofit sector after a decade in public and private accounting settings, during which she obtained her CPA license and practiced general accounting, tax preparation, and estate planning. In 2007, she accepted a position with Dallas Seminary Foundation in Dallas, Texas where she oversaw accounting and treasury functions, tax and regulatory compliance, financial reporting, and gift planning. Most recently, Carrie was Assistant

VP of Information Systems and Donor Records at Baylor University in Waco, Texas.

PREFERRED COMPETENCIES AND QUALIFICATIONS

The Wisconsin Foundation and Alumni Association seeks a Director of Gift Processing with nonprofit fundraising experience with a focus of leading a gift processing department as well as knowledge of nonprofit fiscal policies, procedures, rules, and regulations; highly developed language, mathematical, analytical, decision making, and problem-solving skills; advanced MS Office experience including advanced knowledge of Excel; an understanding of relational database design or database management; and experience using customer/constituent relationship management software (CRM), preferably Blackbaud CRM.

A bachelor's degree in business, accounting or a related combination of degree and experience is required for this position and at least three years of management experience in nonprofit operations or a senior gift processing role.

DIVERSITY, EQUITY, AND INCLUSION

Wisconsin Foundation and Alumni Association is committed to treating all people with dignity and respect. It values diversity and treats all individuals with respect and professionalism by providing a workplace that offers equal employment opportunity for all persons based solely on merit. In connection with employment opportunities, discrimination on the basis of race, color, religion, sex, age, national origin, citizenship status, disability, sexual orientation, veteran status or any other protected status under applicable local, state or federal law is not tolerated.

Just as the university community benefits from differing viewpoints, perspectives, and experiences, inclusion and diversity are imperative for the success of WFAA's mission. WFAA values people and the differences that they bring to the organization, and creates an environment in which all staff members and constituents feel respected and have opportunities to thrive.

The range of programs and initiatives to which WFAA's work contributes spans every facet of life on campus and in the world. From working with scientists studying the most basic elements of life to talking with donors, members, volunteers, students, and others inspired to support life-changing programs or areas of the university, WFAA's work is fundamentally diverse. Attracting, developing, and retaining top talent gives WFAA access to new ideas, promotes better decision making, and creates a working environment that promotes respect, collaboration, acceptance, and productivity among people from varying backgrounds. WFAA engages all donors, alumni, students, and friends of the university and encourages diversity, inclusivity, and participation by all of these groups in its activities.

SALARY & BENEFITS

The Wisconsin Foundation and Alumni Association is committed to providing its employees with an environment that is inspiring, creative, and respectful. It offers competitive pay and an excellent benefits program, which includes a generous earned time off policy and an annual 10% 401k contribution after one year of service.

LOCATION

The Wisconsin Foundation and Alumni Association is based in Madison, Wisconsin. Candidates desiring a remote appointment will be considered, although preference will be given to candidates who are willing (post-COVID) to work and reside in the Madison, Wisconsin area. Madison is consistently rated one of the best places in the country to live and play. A vibrant, picturesque city with a population just over 250,000, Madison is the capital of Wisconsin and the home of the University of Wisconsin. While boasting many big city amenities, Madison is an easy city in which to live. Commutes are short, the cost of living reasonable, and the crime rate low. It's a great place to work, have fun, find friends who share your interests, and raise a family. Madison has a stable, diverse economy, and plentiful cultural and recreational opportunities.

APPLICATION INSTRUCTIONS

All applications must be accompanied by a cover letter and résumé. ***Cover letters should be responsive to the mission of the Wisconsin Foundation and Alumni Association to promote the welfare of and advance the objectives of the University of Wisconsin–Madison by encouraging the interest, engagement, and financial support of alumni, donors, and friends in the life of the University and with each other.*** Review of applications begin immediately, and will continue until the successful candidate has been selected.

To apply for this position, visit

[Director of Gift Processing, Wisconsin Foundation and Alumni Association.](#)

To nominate a candidate, please contact ALG Senior Consultant Susan Faraone:
susanfaraone@aspenleadershipgroup.com.

All inquiries will be held in confidence.