



**MILWAUKEE**  
JEWISH FEDERATION

## **JOB DESCRIPTION**

### COMMUNITY PLANNER

**Department:** Impact

**Reports to:** Chief Impact Officer

**FLSA Status:** Exempt

**Work Status:** Full time

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#### **About the organization**

Since 1902, the Milwaukee Jewish Federation has demonstrated the power of collective giving by raising and investing financial resources to make the world a better place. Each year we distribute about \$20 million to Jewish and other nonprofit organizations. Funds come primarily from our \$6.5 million annual campaign and our \$200 million Jewish Community Foundation. In addition to fundraising, we have several direct service programs like Jewish Museum Milwaukee, which served 30,000 remote visitors this past year, the Nathan and Esther Pelz Holocaust Education Resource Center, which educates about 40,000 students and adults each year, and the Wisconsin Jewish Chronicle, serving the Jewish community across the state. We are committed to the principles of *Klal Yisrael* (the collective unity of the Jewish people), *Tzedakah* (the obligation to care for one another) and *Tikkun Olam* (improving the society in which we live). [Learn more about the Milwaukee Jewish Federation.](#)

#### **Summary/Objective**

A strategic, analytic and creative thinker, the Community Planner helps fulfill the Milwaukee Jewish Federation's mission by ensuring impactful investments of our donors' charitable contributions. The Community Planner will identify and assess community needs; create plans to meet those needs through partnerships, allocations, and project development; and evaluate the impact of our investments.

#### **Essential Functions**

- Needs assessment: Identify, evaluate, and prioritize current and future needs in the Jewish community.
- Investments
  - Manage the Annual Campaign allocations process for local and national partner organizations.
  - Identify additional opportunities to invest in agencies and projects to meet community needs.
  - Continually improve the allocations process with a focus on demonstrating impact.
- Project evaluation
  - Establish a process for evaluating impact of investments by establishing goals, measurement methods, and reporting processes.

- Obtain data that drives fact-based decision making and effective communication of our impact.
- Fundraising support
  - Through education and improved communication, enable the Fundraising Development (FRD) team to use planning information to secure supplemental funding and to increase annual giving.
  - Generate funding opportunities and support the fundraising team in matching the opportunities with interested donors.
  - Identify impact stories that can be shared with the marketing and FRD teams.
- Agency relations
  - Cultivate trusting and mutually respectful relationships with Jewish community agencies.
  - Maintain ongoing and active communication with partner agencies.
  - Facilitate agencies' compliance with the Principles of Affiliation.
- Committee management
  - Lead volunteer-driven process for monitoring and evaluating the performance of our partner organizations.
  - Staff the Agency Review Council, Community Planning and Allocations committee, and ad hoc planning task forces.
  - Help develop a pipeline of MJF leaders through community planning volunteer service.

This is not necessarily an exhaustive list of all responsibilities, skills, duties, requirements, and efforts associated with the job. While this is intended to be an accurate reflection of the current job, management reserves the right to revise the job or to require that other or different tasks be performed when circumstances change (i.e. changes in personnel, workload, or technological developments).

### **Qualifications**

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

### **Required Experience**

- Bachelor's degree.
- Three to five years of experience in strategic planning, grantmaking, program management, nonprofit management, or research roles.
- Knowledge of research techniques (surveys, focus groups, data analysis, etc.).

### **Required Skills/Abilities**

- Knowledge of the Jewish community, customs, values, and traditions.
- Ability to think expansively, creatively, and strategically with practical skills to implement solutions.

- Exceptional interpersonal skills.
- Superior written and oral communications skills.
- Integrity and professionalism.
- Proficiency in Office 365 (Outlook, Word, Excel, PowerPoint, SharePoint, Teams).
- Adjusting to multiple and often competing demands in a busy work environment.
- Ability to work as a team player, influencing others over whom they have no direct control.
- Valid driver's license, reliable transportation, acceptable driving record.

### **Supervisory Responsibility**

This position has no supervisory responsibility.

### **Work Environment**

This job operates in a professional office environment with the majority of work being done in a general office environment with pleasant working conditions, good lighting, ventilation, and reasonably regular work hours without being exposed to weather conditions. The noise level in the work environment is usually moderate.

### **Physical Demands**

The employee is occasionally required to stand and walk; will sit and use hands to finger for computer usage most of the day, may climb stairs although an elevator is available; may stoop, kneel, crouch for filing; must talk on telephone. The employee must rarely lift and/or move up to 25 pounds. Specific vision abilities required by the job include close vision, distance vision, color vision, peripheral vision, depth perception, and the ability to adjust focus especially for computer usage.

Please note this job description is not designed to cover or contain a comprehensive listing of activities, duties or responsibilities that are required to perform the job. Duties, responsibilities and activities may change at any time with or without notice.