



President and CEO Position Profile

July 2020



Organizational Overview

The United Performing Arts Fund (UPAF) has been setting the stage for more than 50 years by providing critical investment in our region's vibrant performing arts scene. In 2019, UPAF raised \$12 million to sustain these community assets, allowing its 14 Member Groups to focus on what they do best: creating, performing, inspiring and educating.

As a local umbrella fundraising organization, UPAF engages the community in support of its Member and Affiliate Groups allowing them to focus more of their efforts on what they do best — creating, performing, educating and inspiring.

The UPAF mission statement is three-fold:

- 1. Raise much-needed funds to ensure entertainment excellence.**
- 2. Promote the performing arts as a regional asset.**
- 3. Responsibly steward the dollars our donors so generously give us.**

UPAF holds the highest rating from Charity Navigator for financial management, transparency, and accountability. UPAF receives no government funding. Generous individuals, companies and foundations contribute to all dollars raised. UPAF is committed to ensuring that everyone in our community benefits from the life-changing magic of the arts. We have worked diligently to expand the reach of the arts both on and off the stage through two outreach programs: UPAF Bright Minds, presented by BMO Harris Bank, and UPAF Connect, presented by Northwestern Mutual.

In celebration of UPAF's current President & CEO Deanna Tillisch's final UPAF campaign and her longstanding commitment to arts accessibility, UPAF is launching a one-year initiative to raise funds dedicated to making the arts accessible for all. Named for Deanna's daughter Kasey – a great lover of the arts who has cognitive and physical disabilities – Kasey's Fund will directly support UPAF Bright Minds and UPAF Connect to expand access to the arts for individuals and families with disabilities and/or economic barriers to participation.

To learn more, please visit: <https://upaf.org/>.





President and CEO Position Overview



The ideal candidate will seamlessly balance the many priorities, stakeholders, and activities crucial to the ongoing success of UPAF, and therefore, to the performing arts in Southeastern Wisconsin. A bold, strategic vision, strong leadership skills to champion that vision, and the operational skills to make it all happen are requirements for success.

The new leader will take the current positive momentum of the organization, expand upon it, and move it forward. UPAF is looking for an entrepreneurial and engaged leader who can relate to and celebrate the past and the present, while determining and implementing innovative ideas for the future.

She or he needs to have outstanding presentation and communication skills and demonstrate the ability to be a dynamic spokesperson, relationship builder, and resource developer. A proven track record as an innovative, entrepreneurial leader, eager and able to deliver demonstratable outcomes and develop alternative solutions to challenges is a must. A professional with broad and progressive fundraising experience with employee, corporate, individual and foundation solicitations, direct marketing, special events and workplace giving will be outstanding in this role. UPAF's leader needs to have exceptional interpersonal skills and demonstrate the capacity and interest in being a highly visible representative to multiple constituencies.

It is essential that the new President and CEO of UPAF will need to be entirely driven toward ensuring the vitality of a vibrant and inclusive performing arts scene in Southeastern Wisconsin through entertainment excellence, arts accessibility, and regional impact.

Primary Responsibilities

A. Leadership and Oversight

- Represent UPAF in the community and foster peer relationships with community leaders.
- Lead the development and implementation of the organization's strategic plan, with the support of the Board of Directors.
- Oversee the UPAF Allocation process, working with the Allocation Committee and Board of Directors, to determine how dollars will be annually distributed.
- Oversee and manage the internal UPAF staff team to ensure maximum efficiency and provide for their development and wellbeing.
- Act as principal liaison to the Board of Directors and support their efforts on behalf of UPAF.
- Create and maintain effective collaboration among UPAF constituents, donors, Member groups and the broader community.
- Promote and strengthen Board and committee understanding of community needs to be met through the Campaign funds.
- Set and maintain a culture of mutual respect across all areas of the organization.





B. Fund Development, Community Relations and Advocacy

- Oversee the coordination and implementation of the annual UPAF Campaign, working closely with volunteers to ensure success.
- Play a significant role in the cultivation and solicitation of major donors and in creating public interest in UPAF.
- Articulate and advocate UPAF's purpose and value to key stakeholders – donors/sponsors, staff, Board of Directors, Member groups, volunteers, and the broader community.
- Identify new strategies and potential contributors for increased giving and cultivation of Campaign volunteers.
- Cultivate and solicit potential individual, major donors.
- Develop and implement an annual campaign strategy that meets or exceeds annual budget expectations.

C. Financial Planning and Forecasting

- Lead the process of planning and budgeting in conjunction with the staff and the Board of Directors.
- Provide the Board with comprehensive, regular reports on the revenues and expenditures in relation to the overall annual budget.
- Oversee the complex fiscal operations, long-range financial planning, and resource allocation strategy for UPAF.
- Create efficiencies and address on-going needs of the organization – stay abreast of current trends (i.e. virtual engagement), risks, technology, etc. that might impact UPAF and its Members; proactively work with staff to make changes and/or adjustments.

Minimum Qualifications

- Strong communication, public speaking and writing skills.
- Enthusiasm for, and commitment to, the united fund model.
- Knowledge of, and appreciation for, the role of the performing arts.
- Deep interest in being part of the organization's evolution.
- Establish relationships and connections across the Greater Milwaukee community.
- Solid work ethic, sound judgement, self - confidence and positive energy.
- Demonstrated record of sound fiscal and organization management.
- Dedication and commitment to a vibrant and inclusive performing arts scene in Southeastern Wisconsin.
- Bachelor's degree as a minimum level of education.



Instructions for United Performing Arts Fund Applicants

For full consideration, please email all items below, **combined into one document**, to UPAF@leadingtransitions.com no later than **5:00 p.m. CT on August 21, 2020**.

1. A **letter describing your qualifications** for this President and CEO position, including your specific interest in UPAF's mission and a **description of your salary parameters**; addressed to:
Mindy Lubar Price
Leading Transitions LLC
1345 North Jefferson St., Suite 350
Milwaukee, WI 53202
2. A **detailed and updated resume**; and
3. The names of, your relationship to, and contact information for, **three professional references**.

Please note:

- References will not be contacted until a candidate has been notified.
- Background checks will subsequently be performed, with candidate permission.
- All inquiries and interactions with potential candidates are kept in strict confidence.

Leading Transitions is committed to the future vitality of nonprofit, philanthropic and community-centered organizations. The practice has been refined to provide the flexibility necessary to adapt to the intricacies and dynamics of any organization.

To learn more about what our firm has to offer, please visit: <http://leadingtransitions.com/>