

PRESIDENT & CEO
SERVING OLDER ADULTS (SOA)
MILWAUKEE, WISCONSIN



SOA is a nonprofit organization serving every Milwaukee County adult 50 and better with the resources they need and the opportunities that interest them throughout the entire aging process.

SOA has partnered with Spano Pratt Executive Search to identify their new President & CEO. For a confidential conversation and to learn more about this opportunity, please contact:

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SOA offers several different genres of dancing groups and classes.

Do you envision a community where every adult 50 and better will be connected to the resources they need? Serving Older Adults is seeking its next President & CEO. This individual will be a strategic, innovative leader who leads with purpose and passion. This is an opportunity to lead an organization that influences outlooks and outcomes for the aging population in Southeastern.

ORGANIZATION OVERVIEW

SOA is a nonprofit organization that provides opportunities and services to adults 50 and better, connecting them to the resources they need, and the opportunities that interest them. They create proactive and positive approaches to aging with the goal of maintaining optimal health and independence as long as possible through their five senior centers in Milwaukee County. These centers offer a place to socialize, exercise, participate in educational and creative classes, dine, and travel. Each year, SOA serves over 5,000 seniors with over 40% living below the poverty level.

Some facts about Seniors today:

- One in six people will be 60 or older by 2030 according to the World Health Organization.
- 5.9 million older adults live below the federal poverty level.
- One in four older adults experience social isolation which research has shown has a negative effect on physical and mental health, longevity and quality of life.
- 9.1% of older households were food insecure at some time during 2022.
- 73% of older adults need help learning to use new devices.
- Only 23% of older adults meet the activity guidelines for regular exercise which allows older adults to stay independent and prevent health problems associated with aging.



SOA founders developed the organization to provide proactive and positive approaches to aging.

Core Values

We believe older adults have value and should be encouraged to continue to contribute to the world in a meaningful way that enhances their lives, and the lives of others.

We believe older adults should be treated with respect, dignity, courtesy, and compassion.

We believe older adults should have opportunities to interact and develop healthy relationships with people of all generations.

We believe older adults deserve to live a safe, financially comfortable, healthy life with assistance from community resources and social services if needed.

We embrace diversity and inclusion and celebrate the differences in who we are and what we believe.

POSITION OVERVIEW

The President & CEO provides strategic leadership for SOA, working closely with the Board of Directors, keeping them informed in a timely manner on all relevant matters. This individual will oversee all aspects of the organization including, but not limited to, strategic planning, finance, compliance, human resources, fundraising and development, program development and delivery, community outreach, marketing, operations, and administration. The President & CEO will work in partnership with Milwaukee County as the largest funder of SOA and will manage teams across five locations.



Tech Connect is a SOA program designed to help older adults become more comfortable using technology.

KEY RESPONSIBILITIES

- Work closely with the Board of Directors. Assist the board with their operations including calendar, executive committee, bylaws, annual meetings, and recruitment of board members.
- Articulate SOA mission and vision, build alignment across the organization and serve as the chief optimist and enthusiast.
- Oversee all aspects of the organization including the strategic plan, finance, compliance, human resources, fundraising, program development and delivery, community outreach, marketing, operations, and administration.
- Represent SOA to the public. Understand the senior care landscape in Milwaukee, the funding streams and key stakeholders.
- Set the vision for SOA, create strategic direction, develop strategic road maps and execute three to five-year operational plans.
- Create the conditions for fundraising success including vision, materials, a compelling message, and a culture of fundraising. Oversight of comprehensive marketing and fundraising/development strategies that will enhance revenue from major donors, foundations, government agencies and others, to ensure the financial sustainability of the organization.
- Work in partnership with Milwaukee County as the largest funder for SOA.
- Build strategic partnerships, alliances and collaborations in the sector, region, with peers, donors, industry, associations, media and more.
- Take overall responsibility for organizational finances. Understand financial statements, assist Comptroller and adhere to financial controls, produce annual budget. Achieve organizational compliance including contractual and legal obligations.
- Responsible for the fiscal and operational integrity of the organization.
- Integrate technology throughout the organization.
- Set program goals, and measure program outcomes.
- Motivate and lead a high-performing, diverse management team. Onboard, recruit, retain, manage, develop talent across five locations. Work with management team to develop and implement organizational policies and procedures.

QUALIFICATIONS & EXPERIENCE

- Bachelor's Degree in a related field is required; Master's degree preferred.
- 15+ years at the senior nonprofit management level.
- Strong proven skills in leadership, strategy, fiscal matters, problem solving, supervision of employees, oversight of development and fundraising, community relations, public speaking, and team building with the Board of Directors and staff.
- Proven commitment to expanding the diversity of the Board of Directors, staff, volunteers, vendors, and others.
- Must be able to work well with people from all cultures and backgrounds.
- Proven ability to increase funding and funding sources on an annual basis.
- Excellent oral and written communication skills.
- Must have a high level of integrity.
- Must be computer proficient.
- Evenings and weekend work is occasionally required.



Participants build strong social networks by engaging in shared activities. While participating in an activity, 97% report feeling happier and 95% report feeling supported and included.

COMPETENCIES

Leadership

- **Visionary:** History of creating a vision for an organization and fostering innovation and creativity. Ability to balance visionary thinking with practical implementation.
- **Strategic Leadership:** Develops strategies and problem solves to achieve organizational goals; understands organization's strengths and weaknesses; analyzes market and competition; finds external threats and opportunities; adapts strategy to changing conditions.
- **Executive Presence:** A decisive decision-maker; shows confidence in self and others; motivates others to perform well; gives recognition; displays passion and optimism; inspires respect and trust; visible and involved building relationships.

Fundraising and Finances

- **Development:** Track record of success developing and executing comprehensive fundraising strategies; cultivate relationships with individual donors, foundations and corporate partners; explore and implement innovative revenue-generating opportunities.

- **Financial Management:** Oversee and assist the organization's annual budget, financial planning, forecasting and reporting in collaboration with the Board of Directors and the finance team; oversee the management of five senior center sites.
- **Strategic:** Research new methods of generating alternative sources of revenue for the organization, including services for fees, partnerships and collaborations.

Interpersonal Relationships

- **Team Development:** Hire key leadership and oversee retention of quality staff; development/mentoring of existing staff; oversee appropriate staff workload.
- **Transparent Collaboration:** Highly visible and transparent communicator with a collaborative approach to problem-solving.
- **Trust Building:** Ability to build trust with diverse participants, stakeholders, including staff, board members, nonprofit partners, and funders. Create an environment of accountability across all stakeholder groups.

Board Governance

- **Communication:** Serve as the primary liaison between the board of directors and the organization; Ensure the board is informed, engaged, and equipped to fulfill its fiduciary and strategic roles.
- **Training and Development:** Support board recruitment, onboarding, training, and evaluation to maintain an effective governance structure; Work with the board chair to develop meeting agendas and facilitate productive board and committee meetings.
- **Organizational Oversight:** Lead the organization's strategic planning efforts in collaboration with the board; Oversee the execution of the organization's mission, programs, and initiatives.

Alignment to Mission

- **Passion and Interest:** A true advocate for seniors promoting activities and services to assist them in living a fulfilled and healthy life.
- **Mission Communication:** Ability to effectively communicate the SOA's mission, goals, and impact to external and internal audiences.

Government, Community, & Stakeholder Engagement

- **Community Presence:** Active presence in Southeastern Wisconsin and passion to engage with varied groups, foundations, businesses, and organizations to advocate for the mission.
- **Government Relations:** Develop and implement strategies to engage with government agencies, legislators, and policymakers; advocate for policies and funding that support the nonprofit's mission and beneficiaries; strengthen the partnership with Milwaukee County as the largest funder of SOA.
- **Stakeholder Stewardship:** Establish and maintain strong relationships with donors, corporate partners, community leaders, and other key stakeholders; develop and execute strategic engagement plans to enhance partnerships and collaboration.

COMPENSATION

- Compensation includes a hiring range of \$125k to \$165k plus a full benefits package



LOCATION: MILWAUKEE, WISCONSIN

In Milwaukee, you'll find urban living and a Midwest ambience combined 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 that have a combined population of nearly 1.8 million people.

Sitting on the southwest shore of Lake Michigan, there are numerous beaches with their related activities such as canoeing, paddle boarding, beach volleyball and yoga, sandcastle-making contests, and fishing. Beach-front as well as inland parks cover more than 15,000 acres of land allowing city dwellers to enjoy greenspaces. If you prefer to watch professional sports, Milwaukee is home to the MLB Brewers and NBA Bucks.

Milwaukee is known for its festivals and food scene. The largest festival is Summerfest, a two-week music festival, which brings in close to 900,000 people from across the country to hear their favorite

artists and bands. The Milwaukee food scene continues to grow with more options for exotic taste buds and wild appetites from James Beard award winners to Food Halls.

Milwaukee is home to the famous Milwaukee Art Museum, the Milwaukee Public Museum, Discovery World and The Betty Brinn Children's Museum. Milwaukee features an opera company, ballet, and a symphony. With over 15,000 theater seats, the Milwaukee Theater District ranks No. 1 in the United States for the highest number of theater seats per capita.

For more information about Milwaukee, visit [City of Milwaukee | Home](#).

NOMINATION & APPLICATION PROCESS

This position is not just a job; it's an opportunity to change lives of adults 50 and better. To learn more about SOA, visit <https://servingolderadults.org>

Confidential inquiries, nominations, and questions concerning this search may be sent by email. To be considered for this opportunity, please submit a cover letter and resume to either:

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