



## SENIOR VICE PRESIDENT OF DATA & FINANCIAL POLICY

### LEADINGAGE WISCONSIN

MADISON, WISCONSIN



#### ***LeadingAge Wisconsin Mission:***

*Transforming life for the aging and those who serve them.*

LeadingAge Wisconsin has partnered with **Spano Pratt Executive Search**, an LAK Group Company, to find their new Senior Vice President of Data & Financial Policy. For a confidential conversation and to learn more about this opportunity, please contact:

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LeadingAge Wisconsin

*If you are a mission-driven individual with a passion for finance, data and policy, with an affinity towards client engagement, consider LeadingAge Wisconsin.*

## ORGANIZATION

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LeadingAge Wisconsin is a leader in senior advocacy, education, and formulation of collaborative strategies. LeadingAge Wisconsin is committed to advancing the fields of long-term care, assisted living and retirement living. It strives to develop a continuum of elderly care and services that meet the holistic needs of seniors and individuals with a disability in order to encourage maximum independence and enhance quality of life. It serves as a resource for its members, assisting them in problem resolution and providing services and programs to meet their needs.

Its member network is comprised of more than 500 nonprofit organizations and serves as a valuable source of information to assist its membership in expanding the world of possibilities for aging. Providers of senior care services include Wisconsin nursing homes, facilities for the developmentally disabled, independent and assisted living facilities in Wisconsin, and community service agencies. Statewide, its members employ over 38,000 people who provide compassionate care to more than 48,000 individuals daily.

### **LeadingAge Wisconsin is committed to the following values:**

- **Courage-** We take risks to overcome fear and obstacles. We have the freedom to be creative and to break new ground. We do what is right and take action with a plan.
- **Community-** We believe that we are stronger together and that community is built when diverse thought leads to common action. We value the power of relationships.
- **Catalyst-** We serve as a community partner and connector to solve problems and create new opportunities to better serve an aging America.
- **Stewardship-** We are responsible guardians for our field. We are committed to upholding members' work and resources. We hold ourselves accountable for our mission, vision, and values.



*LeadingAge is a community of nonprofit aging services providers and mission-driven organizations serving seniors.*

## POSITION OVERVIEW

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The Senior Vice President of Data & Financial Policy works closely with the President/CEO as well as the LeadingAge Finance Network, Finance, and Public Policy committees in developing payment policy positions that are data-driven and grounded in research, best practices, and support member growth. This individual must develop and build relationships with key members of regulatory departments, other long term care policy stakeholders, Managed Care Organizations and work closely with contracted lobbyists.

This individual will work closely with the LeadingAge Wisconsin team, along with contract lobbyists, in coordinating advocacy strategy and activities. Additionally, this position will work closely with the President/CEO to establish and monitor the operating budget and financial well-being of the organization. This position supports and grows member value, including development of new member offerings, recruitment of new members and retention of existing members.



*Jonathan Lucroy escorts Ron off the field after catching his pitch.*

## CORE RESPONSIBILITIES

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### Finance Policy/Data Analysis

- In conjunction with President/CEO and SVP of Clinical and Regulatory, monitors and responds to regulatory and sub-regulatory changes, including rule cycles, survey/certification processes, billing/claims processes, RFIs/RFPs, and managed care contracting relationships, IGT implications
- Works proficiently with existing data sets including cost reports, claims and utilization data, quality/assessment data (MDS, OASIS) to develop data-driven policy positions and messaging, both for members and media
- Models the impact of Medicare/Medicaid reimbursement scenarios to the extent that he or she can field questions and be recognized as an expert
- Uses other sources of information in supporting policy positions that advantage LeadingAge Wisconsin members
- Has a financial understanding of state government and optimizes LeadingAge Wisconsin's related policy efforts.
- Fields member calls for reimbursement information and technical assistance
- Equips members with data needed for their organizational policy decision-making
- Prepares biennial workforce report and administers survey
- Provides ongoing education for members through reimbursement seminars and Finance Network
- Participates in meetings with agency staff responsible for rate setting for members
- Prepares MRA salary survey
- Prepares Excel tools for members as needed
- Facilitates problem solving with payers

### Financial Management

- Working with an outsourced accounting agency, ensures routine bookkeeping functions of the association (payroll, payables, receivables, etc.) are completed accurately and on a timely basis
- Oversees completion of monthly financial statements that reflect actual results in comparison to budget, ensuring input of journal entries to capture LeadingAge Wisconsin monthly operational relationships
- Provides ongoing expertise to grow revenue and find efficiencies for operations. As needed, provides course correction strategies to grow revenue and/or reduce expenses
- Works with LeadingAge Wisconsin President/CEO and Finance Committee to develop annual operating budget

### Membership Services

- Informs development of member education that is grounded on latest regulatory, payment and compliance changes
- Supports organization's internal data infrastructure, including tracking dues and member engagement over time. Works with LeadingAge National membership staff to maintain data integrity on member dues.
- Regularly meets with members to gather feedback on member satisfaction and LeadingAge Wisconsin offerings
- Proactively seeks out new opportunities to support provider members, including education/training, products/services, practice models, etc.

- Monitors trends in senior living and positions LeadingAge Wisconsin and membership with thought leadership, data and other information
- Serves as liaison to assigned LeadingAge Wisconsin committees. Builds committee engagement and collects feedback on policy proposals



*LeadingAge Wisconsin panel discussion*

## QUALIFICATIONS & EXPERIENCE

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### Education

- A bachelor's degree in finance, public policy, or related field required; advanced degree preferred.

### Experience

- Strong working knowledge of reimbursement for post-acute services, with deep knowledge in at least one area of LeadingAge Wisconsin membership: subsidized housing (HUD and tax credit), Medicare/Medicaid for home health/HCBS, nursing facilities, assisted living, senior living finance.
- Has a history of public speaking, with an outgoing personality that easily engages others.
- Strong written and verbal communication skills; ability to quickly digest information and communicate on-the-spot. Ability to translate complex payment information for members.
- Has proven track record as an autonomous worker, strongly self-motivated and goal oriented; has been in a key role requiring time management and workflow coordination.
- Must have knowledge and demonstrate proficiency in the use of computer software programs of MS Excel, MS Word and MS Outlook.
- History of integrity, honesty and professionalism.
- Nonprofit accounting experience desired.





*Caretaker for seniors within the LeadingAge Wisconsin network.*

## KEY COMPETENCIES

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### **Mission-Driven Leadership & Professionalism**

- Trustworthy, with members' best interests at heart.
- Positive, respectful, and professional even in high-stakes or adversarial situations.
- Self-starter who is collaborative, flexible, and aligned with the mission of supporting members.
- Team player with an eye towards the broader ecosystem of LeadingAge member network.
- Relatable to multi-generational leadership within long-term care communities and varied audiences.

### **Organizational & Financial Management**

- Gets excited about data collection and analysis, analyzing budgets, and financial statements.
- Keen focus on operational performance to guide strategic decisions.
- Efficiency-minded, especially about revenue opportunities, and course corrections to sustain organizational health.

### **Analytical & Critical Thinking**

- Objective about problem-solving, with sound decisions by leveraging data analysis, factual evidence, and measurable outcomes.
- Wants to interpret and explain “what’s behind the numbers” and use sound logic and reasoning.
- Open and outward facing with members with strong budgeting and financial acumen focus.

### **Financial Policy & Data Analysis Expertise**

- Leverages deep expertise in Medicare/Medicaid reimbursement, rate setting, managed care, and state government finance to optimize financial outcomes and compliance.

- Models impact, develops policy positions, and provides technical assistance w/ complex datasets (cost reports, claims, utilization, quality metrics).
- Influential to members and policymakers, grounded in the ability to translate financial and regulatory data into actionable insights.

### **Member & Stakeholder Engagement**

- Genuinely listens and explains complex financial or regulatory information.
- Knows how and when to tailor communication to diverse audiences, from members to lawmakers.
- Master connector; approachable, genuine, and influential when advocating.
- Education focused, with a passion for training.
- Natural facilitator who empowers members to respond to regulatory and reimbursement changes.
- Conversational at meetings amongst members and lawmakers.



#celebrateage

## **COMPENSATION**

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The Senior Vice President of Data & Financial Policy role includes a compensation range of \$125,000 - \$150,000, robust benefits, and unique opportunities to make an impact.

To learn more about LeadingAge Wisconsin:

- Company website: <https://www.leadingagewi.org/>

## LEADINGAGE SOUTHWESTERN WISCONSIN REGION

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LeadingAge Wisconsin is headquartered in Madison. This role can be hybrid but is expected to be onsite in Madison on a regular basis.

Madison, Wisconsin is a vibrant and progressive capital city that offers a unique blend of natural beauty, cultural richness, and innovation. Home to the University of Wisconsin–Madison, the city boasts a youthful energy and a strong focus on education, research, and technology. With a picturesque setting between Lakes Mendota and Monona, Madison offers abundant outdoor recreational opportunities, from kayaking and biking to hiking and winter sports. The city's dynamic arts and music scene, diverse culinary offerings, and commitment to sustainability make it an attractive place to live, work, and explore.

Consistently ranked among the best places to live in the United States, Madison combines small-town charm with big-city amenities. Its strong economy, excellent healthcare systems, and inclusive community contribute to a high quality of life. The city's neighborhoods are known for their distinct character, walkability, and welcoming atmosphere, making Madison a great choice for individuals and families alike. Whether you're drawn by career opportunities, a love of the outdoors, or a sense of community, Madison offers a well-rounded lifestyle in a thriving and forward-thinking environment.

## NOMINATION & APPLICATION PROCESS

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The position will remain open until it is filled. Confidential inquiries, nominations, and questions concerning this search may be sent by email. **To be considered for this opportunity, please send your resume with cover letter to:**

Dave Gromacki, Executive Search Consultant  
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Lindsey Kriete, Practice Director  
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