

President and CEO
LeadingAge Wisconsin



**LeadingAge Wisconsin: An association developed
by members for members to transform senior services**

Leading Age Wisconsin has partnered with Spano Pratt Executive Search to identify the President and CEO. Interested candidates may submit cover letter with resume prior to February 28, 2023 directly to:

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414.839-5083

Mission, Purpose and Culture

Purpose: A member association dedicated to sustainability and success in long-term care, assisted living, and senior housing.

Vision: An America Freed from Ageism.

Mission: The Trusted Voice for Aging

About The Organization

Incorporated in December of 1960, LeadingAge Wisconsin is a statewide membership organization principally serving seniors and persons with a disability. Membership is comprised of more than 500 nonprofit organizations and serves as a valuable source of information to assist the membership in expanding the world of possibilities for aging. Members include providers of senior care services such as Wisconsin nursing homes, facilities for the developmentally disabled, independent and assisted living facilities in Wisconsin, and community service agencies. Throughout the state, LeadingAge Wisconsin members employ over 38,000 people who provide compassionate care to more than 48,000 individuals daily.

LeadingAge Wisconsin enhances not-for-profit members' dedication to excellence by providing programs and services to assist members in meeting the needs of elderly persons and individuals with a disability. LeadingAge Wisconsin demonstrates a caring commitment to the highest quality of life and greatest independence for each individual served.

LeadingAge Wisconsin is governed by a board of directors comprised of professionals within the industry.

Core Values

- LeadingAge Wisconsin is a mission driven, not-for-profit, member-supported, statewide association serving as a leader in advancing the field of long-term care through advocacy, education, and the development of collaborative strategies for its members and the general public.
- LeadingAge Wisconsin strives to be a visionary force whose unified voice advocates within the political and regulatory process in order to advance the development of a comprehensive long-term care delivery system for the future.
- LeadingAge Wisconsin leadership encourages its members to achieve excellence in the delivery of services to elderly individuals and persons with a disability by adhering to the highest ethical standards of practice.

- LeadingAge Wisconsin acknowledges the broad range of individual needs and opinions and provides a forum to foster member empowerment and peer support.
- LeadingAge Wisconsin serves as a resource to its individual members, assists in problem resolution, and offers/develops services and programs to meet and exceed member needs

Background

60+ Years of Experience

LeadingAge Wisconsin has a reputation for quality and a tradition of excellence. While there are a number of associations designed to represent those who serve elderly individuals and persons with a disability, the LeadingAge Wisconsin difference is that we have more than a 60-year history to back up our commitment to quality for the entire spectrum of care and services. From home and community-based services and senior housing settings to assisted living and skilled nursing environments, LeadingAge Wisconsin is a recognized voice of leadership. We know who we are and we honor our members' mission dedicated to the not-for-profit philosophy of care. We are our members, and our members are LeadingAge Wisconsin. Together, we have achieved more than a 60-year history worthy of celebration.

100+ Years of Expertise

LeadingAge Wisconsin is dedicated to serving the interests, needs, concerns, and opportunities of long-term care, assisted living, senior housing, and community support program professionals. As a staff, collectively we have more than 100 years of experience serving our members and subscribers, and we have a vast expanse of knowledge in the many areas that influence and impact these professionals. Yet, we readily realize that we are not the long-term care and assisted living experts – that role and responsibility falls to those who work in and manage the facilities themselves. Where LeadingAge Wisconsin truly excels is in bringing these professionals together in collaborative and cooperative forums where each person brings their best to the table. Each person shares a little and every person gains a lot. Through the many LeadingAge Wisconsin forums, committees, networks, task forces, work groups, and the Board of Directors, our members and subscribers readily and willingly share their best information, policies, practices, strategies, solutions, advice, forms, guidelines, and resources

Wisconsin Public Policy & Advocacy

LeadingAge Wisconsin is strongly committed to advocating on behalf of our association members. We currently employ three registered lobbyists who represent our member's views and interests to state agencies, legislators, and other government representatives. By taking a proactive approach to public policy formation, we are continually making advancements in Wisconsin public policy, with the goal of improving the quality of services and care for older adults and individuals with a disability.

President and CEO Profile

The President/CEO of the LeadingAge Wisconsin Association is appointed by and has reporting relationship to the Board of Directors and Executive Committee which are elected by the membership. The President/CEO is responsible for the overall operation of the Association including maintaining membership, providing quality services to the members, administration of an efficient and professionally run office, maintenance of good employee and membership morale. The President/CEO will work with the Board of Directors and its Executive Committee to ensure that the needs of the Association members are met. The following is a summary of the job profile highlighting the success indicators.

Leadership and Vision - Ability to transform vision to strategy - Experience creating and executing a strategic plan.

- Leads a strategic planning process that identifies goals to meet the needs of the Board and membership.
- Able to lead change and is an effective "voice and face" of LeadingAge Wisconsin members, especially when advocating for change.
- Creates ongoing dialogue with staff and board members that encourages openness to new strategies and tactics as we look to the future of aging services in Wisconsin
- Attracts, develops, and retains the professional talent necessary to execute the organizational strategy.
- Responsible for maintaining a full and active membership in the Association.

Communications and External Relationships - Serves as the public face and chief spokesperson of the Association.

- Collaborates with diverse partners and constituents to achieve mutually beneficial goals and objectives.
- Works closely with Leading Age as liaison at the national level to ensure alignment with advocacy efforts and uncover best practices within other statewide Associations.
- Raises the public visibility of LeadingAge Wisconsin, its members and its policy positions.
- Builds Association credibility by assuring that the mission, programs, and services are consistently presented in a strong positive image to relevant stakeholders.
- Serves as lead public spokesperson for the Association on matters affecting the members through print, digital, and other media.
- Provides leadership and participates in Board retreats/meetings, governmental committees, member gatherings, consumer groups, community functions and the public at large, advocating for the membership.
- Develops consistent communications with key elected and governmental officials, whose work has the most impact on Association members

Advocacy and Policy - LeadingAge Wisconsin is the leading resource for state officials in important matters. The CEO ensures effective public policy and advocacy on behalf of members.

- Identifies issues and emerging policy related trends that may impact members.
- Coordinates policy analysis of existing and emerging guidance from WI legislators and regulators.
- Advocates for the Association, its members, and especially older adults.
- Acts as a liaison between the Association and the community, building relationships with peer organizations and strategic partners.
- Maintains credibility and visibility with both legislators and regulators.
- Provides public testimony or selects the most strategic person to provide testimony on behalf of the Association.
- Engages members in and/or directs research prior to establishing position statements.

Board Governance - LeadingAge Wisconsin is governed by a board of directors comprised of professionals within the industry and elected by the membership.

- Works with the Board to plan impactful programs and meetings that achieve the operating, governance, and strategic goals of LeadingAge Wisconsin.
- Establishes, maintains, and routinely updates board governance materials.
- Responsible for determining board agenda with the approval of the Board chair of the Association.

Finance and Budget – Ensures the Association is properly resourced to meet all obligations and remains financially sustainable. The Association operates on a \$1.6M annual budget inclusive of all staff.

- Provides full transparency to the board as it relates to all financial matters.
- Oversees the budget and ensures that the organization's financial performance is within budget and established benchmarks.
- Ensures timely and accuracy of all financial reporting including Form 990.

Administration - Ensures that all major organizational processes are developed and run both efficiently and effectively.

- Manages day-to-day Association operations in accordance with established policies, procedures, and code of conduct.
- Cultivates a work/team spirit that promotes excellence.
- Provides advice, council and makes recommendations to other members of management and staff regarding service/program delivery issues.
- Provides relevant and timely communication to internal and external constituents.
- Accommodates additional duties as requested by the Board.

Programs and Membership Services – Ensures that members are provided with high value.

- Balances the needs and priorities of all member types; encouraging and increasing membership engagement.
- Develops and offers programs, assistance and educational tools to help members operate successfully and provide the necessary leadership to achieve success.
- Ensures that membership numbers, dues revenue, and educational programming meet the goals and targets of the Association.
- Maintains member satisfaction through valued educational programming, member services, and networking opportunities.
- Gathers feedback from survey data and research to assure member satisfaction.
- Meets with new member executives and introduces them to LeadingAge Wisconsin
- Increases member engagement and participation across all member types, activating members as needed for visibility and effectiveness for the organization
- Analyzes member needs and program trends and facilitates/directs the development of plans for new programs or enhancements to existing programs to meet these needs and trends.

Required Knowledge, Skills and Attributes - 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.

- *Public policy and advocacy experience* - interest in and understanding of the state policy arena and the ability to raise the visibility of the association's priorities and profile among the Wisconsin administration, legislature, regulators and members. Ability and desire to influence and direct desired outcomes.
- *Strong knowledge of healthcare policies and trends*- Fluency with the rapidly changing healthcare environment. As value-based purchasing and healthcare reform continue to advance, aging services and acute care providers will need to forge stronger partnerships.
- *Financial acumen and measured risk taking*- Excellent financial background with experience in financial strategy, budgeting, planning, and financial reporting.
- *Board governance* - Demonstrated success with effective nonprofit governance and good board relationship management.
- *Entrepreneurial instincts and orientation towards innovation*- Ability to provide strategic thinking and direction with a vision to achieve long-term organizational goals.
- *Inspirational leadership*- The ability to organize and inspire a leadership team to deliver content and services that make members more successful together than they can be on their own; to continue a fiscally sound administrative and programmatic structure to

develop and execute operational plans to guide and support staff in meeting members' needs and, to garner the respect and trust of members and constituencies.

- *Communication and messaging*- The ability to listen effectively and transparently relate to a wide range of stakeholders-from high level government officials to staff of member organizations- inspiring trust and confidence while representing the field of aging services. Internally, regularly share information with the staff and solicit their input for key decisions.
- *Responsiveness and visibility* - Ability to establish and maintain effective external relationships. Ability to serve as a leader and positive role model for internal and external customers.
- *Servant Leadership* – Is passionate about the LeadingAge mission, has the ability to bring genuine interest and passion to members and those they serve and internal team members. The ability to listen with intent, be empathetic and exhibit the passion to serve others is important.
- *Self-Direction* - Must be results-oriented and accustomed to taking an organized approach to achieving high quality and timely accomplishment of multiple activities through staff delegation and appropriate Board interaction.

Education and Professional Experience

1. A Bachelor's degree from an accredited university is required. A Master's degree is desirable.
2. A minimum of 5-10 years of progressively more responsible leadership experience in the health care sector preferably within long term care.
3. Advocacy experience highly preferred.

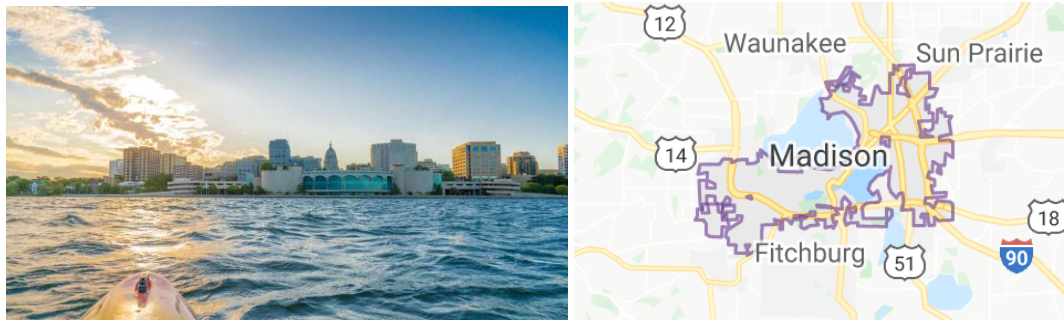


Location

LeadingAge Wisconsin is based in the state capitol of Madison. The selected candidate will regularly be engaged in advocacy with influencers at the government level and thus will reside within 50 miles of the office location.

Madison is known for the domed Wisconsin State Capitol, which sits on an isthmus between Lakes Mendota and Monona. Greater Madison is an outdoor lover's paradise. Green space and trails. Five glistening lakes and over 260 parks perfect for picnicking.

<https://www.visitmadison.com/>



Spano Pratt Executive Search shall provide equal opportunity to all qualified candidates, and will refer candidates without regard to race, color, religion, national origin, sex, age, disability, veteran status or any other legally protected basis.

Instructions

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