



**Search for the Chief Advancement Officer  
Southern Maine Agency on Aging  
Biddeford, Maine**

**THE OPPORTUNITY**

The Southern Maine Agency on Aging (SMAA) seeks an experienced, dynamic, and aspirational chief advancement officer (CAO) to join a committed and growing team during an exciting time of organizational growth and importance as SMAA's annual giving revenue is expected to double by 2025 and triple by 2027. The CAO will ignite and sustain a sophisticated and inclusive culture of philanthropy among the Board of Directors, the Advisory Council, staff, and volunteers of SMAA.

The [Southern Maine Agency on Aging](#) is a private, non-profit organization dedicated to planning and implementing social services for adults age 60 and older, prioritizing those with the greatest economic and social need, including low-income individuals, BIPOC communities, and individuals residing in rural areas. SMAA programs include Meals on Wheels, the Sam L. Cohen Adult Day Center, Agewell exercise and wellness workshops, caregiver support and respite services, and an active Information & Referral phone line that connects older adults and caregivers to the resources they need.

Serving in a vital leadership role within SMAA, the CAO is presented with a unique opportunity to evolve and lead a strategic, creative, and entrepreneurial development program. Reporting to Megan Walton, Chief Executive Officer (CEO), the CAO will set organizational fundraising goals and objectives that build upon the strengths of the current development program to meet and exceed SMAA's needs, now and into the future.

The CAO will oversee a staff of three across all areas of fundraising and engagement, including individual giving; institutional giving; donor engagement and stewardship; marketing and communications; development operations; and board relations. By aspiring to new levels of excellence and possibility, the CAO will strategically grow and enhance the development function into a philanthropic enterprise of unsurpassed effectiveness through the implementation of creative fundraising tactics; innovative

engagement strategies; robust donor pipeline development, including the diversification of funding sources, and an emphasis on growing individual giving; clear and achievable goals; and data-informed decision making. The CAO will also demonstrate success in personally cultivating, soliciting, and stewarding gifts from individuals and foundations, as well as the ability to guide and support senior leaders in their fundraising efforts, serving as an advisor and co-strategist for soliciting transformational gifts.

The ideal candidate will have a proven track record of fundraising success; and the enthusiasm, drive, and professionalism to achieve organizational goals. As a leader and manager, the CAO will promote a culture of excellence, collaboration, and professional growth and set clear direction, priorities, and measurable goals for the advancement team. The CAO will also provide the highest level of support to SMAA's Board of Directors and its Advancement Committee, with an emphasis on further cultivating and stewarding the philanthropic generosity of the Board and assisting the CEO in the identification and recruitment of new Board members, as appropriate.

With superior written and oral communication skills, the CAO will demonstrate the ability to champion the impact, strategic priorities, and vision of SMAA, adopting the organization's message and voice and translating it to diverse audiences. To this end, the CAO must also demonstrate an ability to fully immerse themselves in the life of the organization to serve as a spokesperson to prospective and existing donors effectively. Importantly, the CAO will bring a passion for SMAA's mission, with a strong understanding of and appreciation for the organization's history, impact, achievements, and vision.

SMAA has retained the national executive search firm Isaacson, Miller to assist in conducting this search. All inquiries, nominations, and applications should be directed to Isaacson, Miller as indicated at the end of this document and will be held in the strictest confidence.

## **SOUTHERN MAINE AGENCY ON AGING**

The Southern Maine Agency on Aging (SMAA) is a local nonprofit organization that serves as the focal point in Cumberland and York counties for services, information, and resources to empower older adults and adults with disabilities as well as their caregivers to live to their fullest potential. 2023 marked SMAA's 50<sup>th</sup> Anniversary. As the state with the oldest population in the country, SMAA is poised to have an even greater impact as its constituency grows and its programs evolve.

Founded in 1973, under the authority of the federal Older Americans Act, the Southern Maine Agency on Aging is a private, non-profit organization dedicated to planning and implementing social services for adults age 60 and older, prioritizing those with the greatest economic and social need, including low-income individuals, BIPOC communities, and individuals residing in rural areas. SMAA serves as an advocate, provider, and focal point for information and services needed by older adults, adults with disabilities, and their caregivers in York and Cumberland counties. SMAA applauds Maine's Department of Health and Human Services for its focus on older Mainers, ensuring they live with dignity in a place that balances their needs and preferences. SMAA uses a wide variety of resources to carry out its mission,

including a strong team of volunteers and staff, multiple contracts and partnerships with other organizations and units of government, and an array of programs and services.

## **FINANCIAL AND FUNDRAISING OVERVIEW**

SMAA has historically relied on Federal support from the Older Americans Act. However, with a rapidly increasing population of older adults in the region, SMAA has a goal of growing its philanthropic and fee-for-service revenue to better meet the needs of older adults and family caregivers. With an operating budget of nearly \$7 million, SMAA raised \$980,000 in FY 23. As SMAA continues its growth trajectory and bolsters its sustainable financial position, the organization's advancement enterprise will place renewed emphasis on increasing individual giving.

## **LEADERSHIP**

### ***Megan Walton, Chief Executive Officer***

Megan Walton was hired in 2019 as Chief Executive Officer of the Southern Maine Agency on Aging. Previously, Walton worked for Amara, a Seattle nonprofit that supports children and families experiencing foster care. Working her way from development associate to Chief Operating Officer, she made key contributions to a 10-year period of incredible growth for the organization. Megan holds a BA from Middlebury College and an MBA from the Albers School of Business at Seattle University. She currently serves on the nonprofit boards of 75 State Street and In Anne's Spirit.

### ***Board of Directors***

Southern Maine Agency on Aging is governed by a strong and active Board of Directors comprised of 16 dedicated leaders across business, academia, finance, public health, human and social services, and advocacy.

## **CHIEF ADVANCEMENT OFFICER**

Reporting to the CEO, the chief advancement officer serves as a critical member of the executive team and partners with this group to establish funding priorities and strategies for all of SMAA's goals and objectives. The CAO will establish and implement a comprehensive and strategic development program designed to fully support the organization's mission and programs, building upon the strengths of existing philanthropic efforts while strategically pursuing new opportunities for funding and engagement.

This individual is responsible for reinforcing a culture of philanthropy among all stakeholders, from donors to board members to volunteers and staff, promoting SMAA to new audiences and prospects, thereby generating new interest and support for the organization and increasing the depth and breadth of private individual and institutional support.

## **Key Responsibilities and Duties**

### ***Strategic Vision & Fundraising***

- Serve as architect and leader of a strategic, cohesive, and systematic development program to broaden fundraising, outreach, and engagement activities and increase philanthropic revenue year-over-year.
- Prepare SMAA for future fundraising endeavors, ensuring an optimally deployed staff and an effective, efficient infrastructure that will support success.
- Assess SMAA's fundraising potential and craft a sophisticated multi-year fundraising and engagement strategy that will result in sustainable long-term growth in philanthropic contributions in keeping with the mission and core values of the organization.
- Identify compelling funding priorities and match them with existing and potential donors.
- Personally cultivate, solicit, and steward a portfolio of 50 top prospects. Lead by example, demonstrating success and ensuring that timely steps are taken toward solicitation.
- Partner with programmatic colleagues to identify prospects who may currently be giving their time to the Agency through volunteer work.
- Direct institutional and foundation fundraising efforts, including grant research and writing, oversight of the annual grants calendar, and reviewing organizational documents for foundation submission. Track proposals and reports and ensure timely reporting and compliance.
- Develop and deploy a strategic and forward-thinking operating model that utilizes and is enabled by metrics, data, and development benchmarking with an eye toward best practices.

### ***Executive Engagement***

- Guide and support the CEO in her role as chief spokesperson and chief fundraiser, serving as an advisor and co-strategist in cultivating prospective donors and soliciting transformational gifts.
- Engage with senior leaders, volunteers, programmatic staff, and other key constituents in all development-related activities, ensuring that their time spent is productive, meaningful, and personally rewarding.
- Serve as an active member of the executive team. Build collaborative professional relationships with peers and foster a strong team orientation. Work with a broad range of diverse individuals and groups to achieve shared goals.
- Participate in organization-wide strategic planning efforts and contribute to discussions that guide strategies and policies shaping SMAA's future. Listen and contribute to strategic insights.
- Promote a culture of philanthropy among the Board of Directors and staff through continuous education about the critical importance of philanthropy, especially unrestricted giving, to SMAA's organizational health.
- In coordination with the CEO, advance philanthropic conversations at the board level and solicit board participation in executing development plans.

- Staff the Advancement Committee of the board, including developing agendas with the Committee Chair for regular meetings, providing staff support for initiatives and committee efforts and preparing necessary materials for committee meetings and assignments.

### ***Staff Management***

- Lead, support, and mentor SMAA's development staff of three direct reports (communications manager, annual giving coordinator, and development database coordinator), promoting a culture of excellence, collaboration, and professional growth. Further develop a high-caliber staff that is well-prepared to meet the ongoing challenges and opportunities of an ambitious program.
- Oversee development personnel activities, including the hiring, training, defining of job descriptions, and performance review processes for the team. Enhance professional development, career planning, and employee wellness opportunities for development staff.
- Actively and meaningfully prioritize, promote, and maintain a commitment to diversity, equity, inclusion, and belonging within the development enterprise and throughout the organization.
- Maintain a leadership style that is fair, equitable, open, inspiring, empowering, and motivating to staff. Foster a work environment that recognizes and rewards performance, supports new ideas and risk-taking, builds confidence, and encourages interaction and teamwork. Serve as an advocate for staff, representing their concerns and needs.

### ***Communications and Marketing***

- In collaboration with the newly hired communications manager, manage and oversee the communications annual plan with key metrics included.
- Provide the board of directors with crucial messaging and opportunities to support community awareness.
- Partner with the communications manager to develop communications strategies, goals, and tactics.
- Oversee centralized processes and procedures for communications and marketing; review and approve all print and electronic marketing materials.
- Work with a PR consultant as needed.

### ***Skills and Qualifications***

Candidates will possess many, if not most, of the following professional qualifications and personal characteristics:

- A significant track record of fundraising success, progressively responsible fundraising experience, and a depth of knowledge and best practices in all key areas of advancement.

- A passion for and commitment to the mission and programmatic direction of SMAA, as well as an appreciation for and understanding of the organization's impact and programmatic breadth.
- A genuine and proven commitment to diversity, equity, inclusion, belonging, empathy, and justice among the advancement team, the SMAA community, and beyond.
- A proven ability to work with volunteers including engaging and motivating board members.
- Strong planning and analytical skills, proven experience in developing and effectively implementing an organization-wide development plan.
- Results-driven with personal experience cultivating five-to-six-figure gifts, including supporting donor strategies, solicitation approaches, and donor stewardship.
- A range of experience from various sources, including individual and institutional giving, with a track record of results across all areas. Fluency in a range of giving vehicles, including planned giving.
- A sharp eye for operational efficiency and the best use of resources, including a demonstrated understanding of budgets and the ability to manage them.
- Exemplary organizational development skills in building and managing strong teams, plus the ability to inspire and motivate staff.
- An entrepreneurial spirit and demonstrated history of implementing new ways of thinking and engagement while also thinking strategically and tactically.
- Superior written and oral communication skills; the ability to understand and translate information for all audiences; clarity and eloquence in writing and speaking.
- A data-driven approach and the ability to articulate metrics in broadly accessible terms.
- Success working closely with an organization's executive team, board members, and staff members.
- The credibility, maturity, and sound judgment required to effectively engage and leverage SMAA's leadership and volunteers in cultivating, soliciting, and stewarding of key prospects and donors, including high-net-worth individuals and philanthropists.
- Strong personal integrity, work ethic, and a sense of humor and perspective.
- The personal flexibility to work evenings or weekends as required.
- A bachelor's degree or the equivalent combination of education, training, and experience from which comparable skills can be acquired.

## **TO APPLY**

Southern Maine Agency on Aging has engaged Isaacson, Miller, a national executive search firm, to assist with this search. Inquiries, nominations, and applications should be directed electronically and in confidence to:

Rebecca Kennedy, Partner (she/her)  
Becky Piper, Managing Associate (she/her)  
Elizabeth Arvanitis, Search Coordinator (she/her)

Isaacson, Miller

<https://www.imsearch.com/open-searches/southern-maine-agency-aging/chief-advancement-officer>

*SMAA considers applicants for all positions without regard to age, race, religion, color, gender, disability, national origin, sexual preferences, or any other legally protected class.*