



Job Title: Development and Marketing Manager	Status: Exempt
Direct Reporting: President/CEO, Serving Older Adults of SE WI, Inc.	
Main Office Location: Milwaukee, WI	Date: May 3, 2024

Job Summary: The Development and Marketing Manager *oversees the development and implementation of Serving Older Adults' (SOA's) fund development strategy and manages strategic relationships and alliances that support the organization's mission and goals.*

SOA's mission is to provide services and programs for adults 50 and better. We envision a community where every adult 50 and better will be connected to the resources they need, and the opportunities that interest them, throughout the entire aging process.

Key Responsibilities:

- **Fundraising Strategy:**
 - *Develops annual multi-faceted fundraising plans that identify and prioritize the organization's goals and objectives for fundraising campaigns, grant writing, planned giving, special events, and individual and corporate solicitations.*
 - *Expands the funding base to ensure the organization's funding programs are effective and their goals are realized by initiating, maintaining, and leveraging key relationships with foundations and corporations, community organizations, key donors, and other relevant stakeholders.*
 - *Develops an appropriate and sustainable Planned Giving Program that cultivates current and prospective donors to include a suitable relationship management process.*

- **Marketing & Public Relations:**
 - *Fulfills the organization's key public affairs and outreach roles by developing a public relations strategy that represents the brand and articulates the organization's mission.*
 - *Oversees the planning and execution of community-based fundraising special events.*
 - *Oversees the management of the SOA website and associated social media ensuring that content and format is relevant, timely and accurate in delivering the key messages that support the organization's mission.*
 - *Develops content, design, production, and maintenance of the organization's publications (monthly activity guide, newsletter, annual report, etc.).*

- **Administration**
 - *Oversees the maintenance of an accurate and secure fundraising database, electronic records, files and gift processing methods to support all fund development projects. (Including potential or pending legacy or beneficiary gifts).*
 - *Directly supervises the development team to include Grant Manager and the Community and Outreach Coordinator*

- *Oversees individual donor campaigns and personal solicitation of funds to include specialized correspondence, scheduled in-person appeals, and letters of acknowledgement.*
- *Monitors and communicates fund raising program activity and budgets. Evaluates programs, and strategically plans for future needs and provides guidance related to fundraising programs for the annual budget.*
- *Prepares annual budget for Development & Marketing function to be incorporated by CEO into agency's budget.*
- *Provides support to the Board of Directors' Development Committee.*

Education:

Bachelor's degree in a related field or equivalent experience required

Relevant Experience & Training:

- *A minimum of five (5) years of experience in a nonprofit organization with demonstrated success in a development function including experience in annual fund drives, special events and planned giving. Capital fund raising experience is a plus.*
- *Experience in planning, leading, and managing development projects, including coordinating with peers to achieve desired outcomes, and tracking and reporting on progress to CEO and the Board of Directors. Experience developing marketing presentations to the agency's donor base and prospective donors, community groups, and foundations.*
- *Position requires excellent interpersonal, written, and verbal communication skills. Must have the ability to influence and engage a wide range of donors and build long-term relationships.*
- *The ability to develop, monitor and maintain positive, working, and supportive relationships with the Board of Directors, staff, participants, community members, foundations, and corporations.*
- *Ability to work independently without close oversight, but also a team player who will productively engage with others at varying levels of seniority within and outside the agency.*
- *Technically adept, familiar with Google Workspace, and other software utilized in facilitating the daily tasks.*
- *Experience with social media outlets, like Facebook and LinkedIn is a plus*

Working Conditions:

- *Work is performed in a creative, open office environment with business casual attire. Hours of work will generally be during regular business hours. There are occasions where extra effort will be required to meet client expectations.*
- *Travel---Travel is required primarily within SE Wisconsin. Occasional travel to surrounding areas in and out of the state may be required for conferences, meetings, etc.*

Physical and Other Requirements:

- *Work requires sitting, standing, walking, crouching, and driving.*
- *Must frequently lift and/or move 10 to 25 pounds and occasionally lift and/or move up to 50 pounds.*

- Complete a background disclosure form and meet all requirements to pass criminal background checks.

The above information on this description has been designed to indicate the general nature and level of work performed by employees within this job/classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees assigned to this job. Balance, Inc. is an equal employment opportunity employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, gender, national origin, disability status, protected veteran status or and other characteristic protected by law.