A photograph of four diverse students (three girls and one boy) smiling and posing together. They are dressed in casual attire, including a York School t-shirt, a plaid skirt, a leather jacket, and a zip-up jacket. The background is a plain, light-colored wall.

# Position Statement

## Director of Institutional Advancement

Monterey, California

Start Date: July 1, 2025



# Director of Institutional Advancement

## Position Statement



### Overview

York School is an award-winning, independent, coeducational, college preparatory day school for grades 8-12 situated on the Monterey Peninsula. With this year's enrollment at 180 students, York is an intentionally small school with a rigorous academic program, exceptional faculty, and a distinctive campus culture. It is known for its welcoming, inclusive, and diverse community, where all members live according to the principles of "Honesty, Respect, Responsibility, and Compassion." These core principles of honesty, respect, and responsibility are central to the campus culture. Students leave their backpacks outside and know they will be there when they return. Passionate debates happen in the classroom and competitive play on the field, but students are still kind to one another. The York campus is full of welcoming people who experience a remarkable level of trust, compassion, and appreciation. York is a place with a diversity of ideas and experience.



Since its founding in 1959, the school has always been guided by its mission: "To inspire and prepare a diverse community of creative, independent thinkers." York promised to be a "school for all." As such, the School is committed to enrolling students of all backgrounds, regardless of their families' ability to pay full tuition. With a diversity initiative led by the Board of Trustees, financial aid awards this year were distributed to more than 60% of the student body and totaled over \$2 million. A former York Head of School once remarked, "York School can be described in one sentence: It is an inclusive school rather than an exclusive one."

York's enrollment comes from Monterey, Santa Cruz and San Benito counties as well as some international students from China who enroll through the Cambridge Network, a company that specializes in providing student homestays. Students involve themselves in multiple activities on the campus and enjoy trying out different things. Because it is a close community, no student "can hide" (as one observer pointed out) and they are comfortable with who they are with all their idiosyncrasies, personal attributes and particular abilities. It is definitely not a pretentious place.

The school has enjoyed a well-earned reputation for exceptionally bright students who earn impressive results in National Merit designation and AP scores. Rather than doing things the way they've always been done, the Head of School (Doug Key), Director of Teaching and Learning (Jon Zeljo) and Department Chairs have led the faculty in the requisite paradigm shift to make sure there is an engaging, meaningful, and relevant curriculum, made accessible and effective for all types of learners, with an emphasis on learning by doing. The curriculum reflects a combination of essential skills, self-discovery and supportive guidance, while providing students who prize individualized attention access to terrific faculty.

# Director of Institutional Advancement

## Position Statement



As one of the parents noted, "What we were originally looking at York was for college preparedness and academics ... what we came to appreciate about York once our oldest daughter enrolled were: 1) The teachers are devoted and set the bar high, then they support and encourage students to get there; 2) The sports teams are competitive. They want to win like everyone else, but refuse to compromise on integrity, camaraderie, fairness, and team spirit; and 3) York's campus culture doesn't just value kindness and compassion, they live it."

Under the dynamic leadership of Doug Key, York School is poised to build upon its reputation as a school that fuels students' curiosity, ignites passions and fosters a love for learning. York School is a close-knit community in which talented faculty and staff provide a comprehensive, high quality educational program while placing a strong emphasis on building authentic relationships with their students to bring out their very best. The student and faculty experience at York is different by design. The school believes in the power of potential.

The school seeks to bring to its community a new Director of Institutional Advancement for the beginning of the academic year 2025-26. The DOIA will work in close collaboration with administrators, faculty, and staff while reporting to Head of School Doug Key and serving on his senior administrative team.

This position within the senior administrative team requires an individual who respects tradition but also shares the bold vision for a school seeking its place in the 21st century as an educational beacon and with an initiative (described later) that could make York School a national model for innovation and sustainability. All of this can be made possible with creative funding opportunities and community partnerships led by an individual who has an entrepreneurial spirit that mirrors the school's desire to graduate courageous leaders, problem solvers, and independent thinkers.



# Director of Institutional Advancement

## Position Statement



### The Campus

The school commands a hilltop next to the Laguna Seca Golf Ranch (a Robert Trent Jones, Sr. and Jr. designed golf course), just north of the Carmel Valley (Pacific Grove). Because of its location, special attention is paid to being environmentally conscious both as consumers and producers.

York enjoys a rare combination: being adjacent to the Salinas Valley with its incredibly fertile agricultural farmland while at the same time being proximate to the technology of the Silicon Valley and San Francisco. It is that happy circumstance that allows the school to dream of something very few (if any) independent schools in the country could ever envision ... a dream made possible by an event by the Federal Government in 2011. Fort Ord was located in Monterey but was closed by the government. In redeploying the real estate, York School was presented with an incredible gift: 101 acres of land next to the existing campus. York's Board of Trustees have developed a plan for this Outdoor Lab that is compelling in many dimensions (and described in more detail under Opportunity).

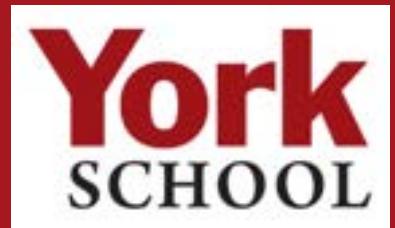
The charming, picturesque, existing 24-acre campus has more than 10 buildings, including a multi-purpose athletics center, a school chapel, library, the indoor Gatanaga Theater and outdoor Gawain Family Theater, visual arts center and several academic buildings. The 9,000 sq. ft. science Building was one of the first Green Buildings in Monterey, with 30 environmentally sustainable elements in it which led York School to be the first school to be certified as a Monterey Bay Area Green Business. Over 50% of the energy needs for the campus come from solar power blocks.

With its proximity to San Jose and San Francisco, York has easy access to the home of notable institutions of higher learning and a remarkable array of opportunities for visitors and residents alike, including museums and cultural centers, symphony, opera, jazz and arts festivals, and professional sports in football, hockey, baseball, and basketball beyond the incredible array of local offerings on the Monterey Peninsula.



# Director of Institutional Advancement

## Position Statement



### The Region

Monterey was founded in 1770 by missionary Junípero Serra and explorer Gaspar de Portolà. Due in part to its geography and climate, the Monterey Peninsula presents a unique overlap of species with a variety of natural habitats. Most are familiar with the world-renown attractions of the Monterey Bay Aquarium, the Pebble Beach Golf course, the 17-mile drive that leads to Route 1 and the Big Sur, Cannery Row (the setting for the novels Cannery Row and Sweet Thursday by local author John Steinbeck) and Fisherman's Wharf, Carmel Mission, and the Point Piños Light in Pacific Grove which is the oldest continually operating lighthouse on the West Coast of the United States built in 1855. Monterey has a noteworthy history as a center for California "plein-air" painters and many noted authors such as John Steinbeck and Robert Louis Stevenson. More recently, Monterey has been recognized for its significant involvement in post-secondary learning of languages other than English and its major role in delivering translation and interpretation services around the world. Despite closing the large expanse of Fort Ord, the government continues its specialized school in languages.



### The Program

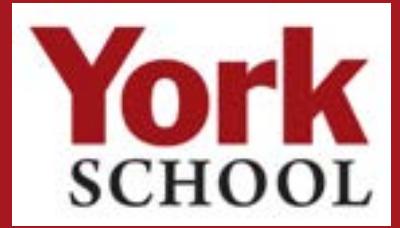
Through robust curricular, co-curricular, and extra-curricular programs, the School strives to produce globally minded students who solve complex problems in their current and future communities using relevant 21st century skills.

Signature programs include:

- **Global Programs:** With a Global Scholar certificate for seniors, a unique partnership with CIEE allowing York to send a sizable contingent of students abroad over the past four summers, and a week-long climate change program in Costa Rica for every tenth grader (for more information, please visit [Global Programs | York School - Private Coed 8 - 12 Education in Monterey](#)).
- **Service Learning:** Through the Service Learning Internship requirement (for more information, please visit [Service Learning \(york.org\)](#)), where students volunteer with a single organization, and recipients of the Central Coast Philanthropic Youth of the Year Award in eleven of the past sixteen years.
- **STEM:** Nationally recognized as a top 500 STEM high school in the country (please visit [Robotics | York School - Private Coed 8 - 12 Education in Monterey, CA](#), with its rigorous math and science curriculum, a STEM Scholar certificate for seniors, and a highly successful Robotics Team, York prepares its students for the future.
- **Outdoor Lab** [Service Learning \(york.org\)](#)
- **Technology** (for more information, please visit <https://www.york.org/technology-curriculum?fromId=238708&LevelNum=2229&DepartmentId=32443&siteId=1417>

# Director of Institutional Advancement

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### The Opportunity: Big Ideas Attract Big Money

Philanthropists want to have an impact on things that matter to them. Healthy food and food science, maintaining a sustainable and clean environment that is consistent with stewardship for all of creation, creative ways to provide food more efficiently and efficaciously are huge and important areas of concern, especially for our young people. Relating requested philanthropic investments and partnerships to specific societal impacts, along with being a good citizen and community collaborator, the Board of Trustees began substantive discussions to develop the school's 101 acres to improve the experience for the students, provide a community benefit for the larger Monterey community, and generate revenue.

The Board of Trustees approved a preliminary master plan for developing the 101 acres that includes:

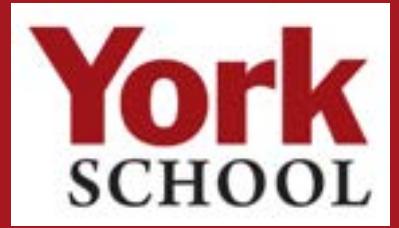
1. Partnership with Breakers Football Club (professional soccer) to build a soccer academy and stadium with a future leasing agreement of \$1 million a year with a completion date in 2026 (with funding from Breakers FC, the school replaced a grass soccer field with artificial turf and constructed a state-of-the-art all-weather track with field events); the faculty and staff have been exhilarated by the scope and nature of the project, helping boost morale and optimism for the future).
2. Identification of a developer for construction of 60 units of teacher affordable workforce housing (for York and teachers at other schools) on the eastern end of the York property.



3. Development and preservation of a "hands-on" environmental research site and center.
4. Development of a completely unique AgTech program that would utilize portions of the property for demonstration robotics/agricultural sites, bringing together the Salinas Valley with Silicon Valley. Addressing environmental science issues, limiting and dealing with agrotoxins, food science, use of new and clever technology (and possible inventions) to deliver healthier food to more who need it with greater efficiency and less cost, sustainability issues—these are huge topics that would be tackled by the incredibly bright York students in collaboration with corporate partners as well as University of California-Davis and Cal Poly San Luis Obispo involvement. The success of the program has already generated a network of future financial sponsors, especially among the agricultural business community and could be a huge opportunity for outstanding results in philanthropy and funding for the school.

# Director of Institutional Advancement

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Thesis program, launching five groups committed to increasing diversity, equity, and inclusivity, and creating an award-winning service learning program directed by students. Believing that students should learn by doing, he supported the creation of Bosque School's Medical Reserve Corps, one of only a few in the country that trains high school students as certified first responders. Doug was raised in Albuquerque, the youngest of three, by a Sandia Laboratories scientist and public school administrative assistant. He graduated with a B.A. and M.A. in History from the University of New Mexico. As an undergraduate, he also ran track, once competing against Olympians Michael Johnson and Carl Lewis. He completed his coursework for his Ph.D. and began extensive research on federalism in the American West during the Progressive Era before entering independent school education full time. Doug and his wife, Michelle, have four children. For many years, the family spent much of their time at the pool, since all the kids are competitive swimmers, following Michelle's lead as a College All-American and U.S. national team water polo player.

## GOVERNANCE

The governing body of York School is the 22-member Board of Trustees, including five Emeriti, which has chief legal and fiduciary responsibility for the entire community. The current Board Chair is Norelle Boyce P'23, 28. The Head of School and Chaplain are ex-officio members.

Doug Key became York School's eleventh Head of School in July 2019. For twenty years, Doug helped build Bosque School, a co-educational day school of 500 students serving grades 6 through 12 in Albuquerque, New Mexico. In 2002, he was appointed the school's second Head of Upper School.

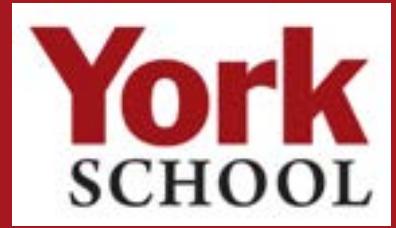
During Doug's 14 years as the school's longest-serving Head of Upper School, the high school doubled to 300 students and added 23 new courses, including 13 STEM offerings, including Wildlife & Conservation Biology and Scientific Methods for Physical Sciences. Doug led numerous initiatives, such as designing the Junior and Senior

## FINANCES AND FUNDRAISING

As a young school that was founded to offer an exceptional education to all students, regardless of their families' ability to pay full tuition, York has been slow to establish a robust legacy of giving among its alumni and current parents and the structures to support those efforts. York, historically, has had fewer access points to a variety of wealth, compared to its competitors, and the school hasn't had the operating budget to support a larger advancement office to build and develop those access points as the alumni population who has aged and increased their philanthropic capacity. Stakeholders acknowledge the tension between maintaining tuition support for financial aid and the need for York to have solid financial underpinning. This need is heightened by the widening income gaps between various communities on the Peninsula.

# Director of Institutional Advancement

## Position Statement



In the wake of the pandemic with enrollment declines, the school has faced operational deficits, over \$1 million in FY22 and \$600 thousand in FY23. Significant progress has been made recently to regain the overall financial health. Expenses have been reduced, enrollment has been bolstered, and as a result, the school is more mission-fit, better-sized, and ready to take advantage of the opportunities this presents. The potential lease arrangement with the Breakers FC would provide substantial budget relief.

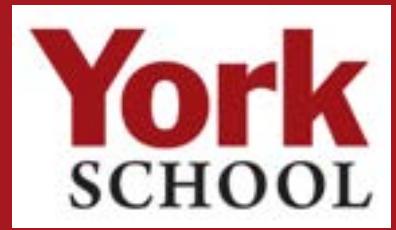
The trustees have adopted the Blue Ocean Theory to not obsess about direct competition but instead create uncontested market space (a blue ocean) by differentiating, creating unique value, and taking advantage of demand. The “Opportunity” is designed with this in mind. The new DOIA will be expected to support Doug Key’s strategic vision and aspiration for the School. The next DOIA should be prepared to both lead and collaborate with the Board and Head of School, seize new opportunities and address the challenges that will move the School forward with conviction. The goal for the DOIA is to execute programs of giving that attract the maximum gift support possible to York while helping engage diverse audiences of stakeholders.

The most obvious need is to pay particular attention to the Annual Fund. As the cornerstone of all other giving, participation rates across the board need to be elevated considerably. There are multiple areas that need to be reset so that commitment increases (in absolute dollars and participation). Anna Faith is a recent hire, coming from California State University-Monterey Bay, and is the Assistant Director of Philanthropy: Annual Giving and Alumni Relations. The desire is to move the present annual fund from its present level (approaching \$800,000) to cracking the 7-figure level in the next two years.

The department's ability to raise 95% of the goal in FY23 represents a significant improvement over the previous year's performance of reaching only 77% in FY22. This demonstrates a positive trajectory in donor engagement and fundraising effectiveness. The annual fund has benefitted from more attention to individual solicitations, better messaging among all community constituents, and individualized trustee philanthropy engagement plans. The increase in parent participation to 80% in FY23, its highest rate in 7 years, coupled with a rise in dollars given, indicates a growing culture of philanthropy within the parent community.

# Director of Institutional Advancement

## Position Statement



This goal is to be accomplished by creating a robust peer-to-peer fundraising model based on supporting a world-class curriculum that provides a margin of excellence, as opposed to the typical “close the gap” deficit-closing approach. Board members have pledged to lead the way with their own giving (and increase the size of the Board). An initiative started last year to cultivate donors and personally visit current parents in China, as well as execute regional major gift and alumni engagement strategies in San Francisco, Los Angeles, New York, with plans to add other cities in the future.

Thanking and asking go hand in hand. Therefore, current stewardship practices need to be evaluated and revamped so as to have more opportunities for individualized donor stewardship, with personalized and meaningful ways to show donors the outcomes of their gifts and elevate their role within the York community (i.e., as guest speakers, project and/or committee advisors, subjects of articles and profiles, etc.).

Alumni are but one of the schools’ constituencies that needs attention to the extent possible given the present needs. Alumni need to see the value of a

lifetime connection to York, through adroit programming and opportunities to understand what the school is currently doing. By improving the delivery of information to them, interest and involvement, will lead to commitment and support. The school cannot just be asking for support without providing something in return.

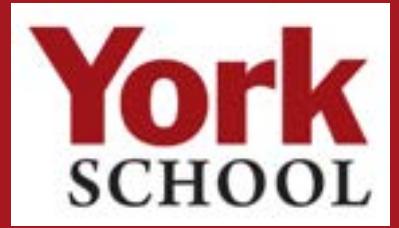
The school’s endowment is \$7.4 million, with \$5.6 dedicated to financial aid and just over \$1 million to a faculty fund. In addition, there is nearly \$2 million of donor-restricted funds for financial aid and another \$400,000 for faculty. The budget revenue is \$7.1 million, expenses at \$7.7 million. There is \$2.487 million of debt. Financial aid is \$2.481 million provided (60% of the budget). Total giving to the school in 2024 was \$1.214 million. There are 2,079 alumni; over 2,000 of them are reachable by snail/email. Tuition in 2024-25 is \$42,600.

Since the accreditation visit, during the past two years, York School has focused on cultivating donors, guided by the strategy to identify and engage more top donor prospects who can support both short-term and longer-term needs.



# Director of Institutional Advancement

## Position Statement



Here are some of the recent steps taken:

- **Acquisition of Wealth Screening Software (Windfall):** York recognized the importance of targeting the right donors and invested in Windfall software. This tool allowed the school to sift through their constituency and pinpoint potential major donors who could significantly impact the school's initiatives.
- **Conducting Donor Screenings with Trustees:** Utilizing the wealth screening, York organized two donor screenings, each tailored to specific groups – alumni and high-net-worth constituents. These sessions not only helped in refining prospect profiles but also in identifying potential trustees who could contribute not only financially but also with their expertise and networks.
- **Crafting Individual Engagement Plans:** The previous Director of Philanthropy took a personalized approach by creating engagement plans for each trustee. These plans outlined specific actions for soliciting gifts, cultivating relationships, and stewarding donors, ensuring a focused and strategic approach to donor engagement.
- **Implementing Systematic Outreach:** Collaboratively, the Director of Philanthropy and the Head of School devised a systematic outreach strategy. This included regular communication from the Head of School to cultivate prospective major donors and personally steward existing major donors, fostering stronger relationships and deeper connections.
- **Leveraging Diversity Initiative Momentum:** The school's Diversity Initiative gained traction, attracting support from both local and national foundations, as well as individual donors who shared York's commitment to equity and diversity. Partnerships, such as with the Breakers project to develop the 101 acres, were leveraged to identify and engage new major donors for this initiative. The Advancement Office leveraged a small major donor dinner for the Diversity Initiative that raised over \$50,000, including a new \$25,000 challenge gift from the Hayward Foundation.
- **Expanding Role of Alumni Relations:** Recognizing the potential of alumni engagement, York expanded the Director of Alumni Relations role to include oversight of annual giving. Through personalized solicitation and strategic enhancements to the annual Day of Giving, alumni support and buy-in for the school's philanthropic efforts were increased significantly. The Director of Alumni Relations now manages and solicits a portfolio of 30-50 potential leadership annual fund donors who are alumni.
- **Global Outreach:** The Director of Philanthropy's visit to China laid the groundwork for global philanthropic efforts, resulting in the launch of the Global Parents Giving Society. This initiative is aimed at engaging parents worldwide in supporting the school's mission through philanthropy. The Director of Philanthropy also interviewed 90 potential students, increasing the school's footprint in the Chinese market.
- **Strategic Events:** York made strategic decisions regarding fundraising events, such as discontinuing the annual gala in favor of focusing on leadership annual giving. Events like the Legacy Society members luncheon provided opportunities to engage and steward donors who have included the school in their estate plans, ensuring long-term support. By eliminating the annual gala and focusing on leadership annual giving, the school handily replaced gala revenue with annual giving.
- **Continuous Prospecting:** The Director of Philanthropy held an inaugural Legacy Society members luncheon to engage and steward donors who have included York in their estate plans. The event was well-attended and will occur annually. Through these concerted efforts, York School has not only identified top donor prospects but has also laid the groundwork for long-term relationships and sustained support, positioning itself for continued growth and impact in the philanthropic landscape.

# Director of Institutional Advancement

## Position Statement



### THE POSITION

The DOIA position is ideal for that experienced fundraising professional who seeks to join an independent school “on the move” and play a critical role in that “move”. The DOIA should be prepared to both lead and collaborate with a dedicated and visionary head of school, an experienced senior administrative team, key leadership donors, and a devoted faculty and staff. After taking the requisite time to know the School’s people, programs, and traditions, the DOIA will be expected to seize new opportunities and address the challenges that will move the School forward with conviction.

The successful candidate will be an outstanding professional who thinks strategically, communicates a clear and compelling case for support of the school’s mission, follows up on details, and develops and thrives in a team environment. In addition to finding financial resources to strengthen financial sustainability, there are non-monetary goals as well: extending the impact of the school, creating goodwill in the community, strengthening the school’s excellence and reputation and advancing relationships.

The DOIA will also be tasked with plans for the extension of the school’s capital needs. This person must be fluent in major gift work to maximize the total philanthropic relationship of major gift donors and prospects (both Annual Giving and other) to the School. This means strategizing to generate higher levels of support and implementation of individual multi-year fundraising plans that focuses on renewals and increased gifts, as well as blended gift opportunities. It also means establishing long-term relationships with major gift donors and converting prospects into donors, while working collaboratively with colleagues and school leaders to meet the School’s advancement objectives and mission. This major gift work focuses on the identification, cultivation, solicitation, and stewardship of leadership gift prospects and donors utilizing written solicitations,



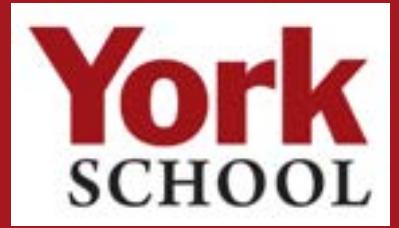
phone follow-up, outreach events, face-to-face meetings, special events, and other methods (including gift planning vehicles) to maintain regular contact with these donors and prospects. The DOIA can definitely impact the affinity a prospect and donor have for the institution (what activities will bring a prospect/donor closer; what factors will have an impact on increasing affinity) and can lead to increasing donor interest.

The DOIA will also oversee the enrollment and community partnerships departments as well as the philanthropic efforts.

The DOIA will directly oversee a two-person office that currently includes an Assistant Director of Philanthropy: Annual Giving and Alumni Relations, and an Assistant Director of Philanthropy: Operations, Grants and Stewardship (who works remotely). The school has plans to add other additional personnel as the situation warrants. The office members will want a creative and enthusiastic leader who will advocate for the advancement office and continue to raise their professional sights. The current director left to become the President/CEO of a local foundation and she has established a strong infrastructure for the new director to be successful. There is an assistant Director of Admissions who would also be managed by this person.

# Director of Institutional Advancement

## Position Statement



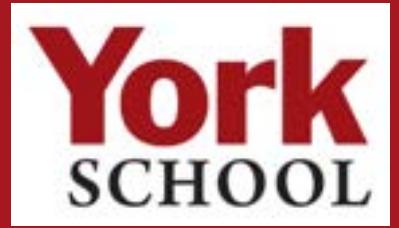
### DUTIES AND RESPONSIBILITIES

- Determines how to elicit new approaches to all advancement activities eschewing conventional fundraising practices when appropriate, ensuring a growth mindset approach in office strategies.
- Works to set an annual plan and strategy for each giving program, using innovative solutions and sophisticated data analyses to increase dollars raised, acquire and retain donors, and increase parent and alumni giving participation.
- Manages all aspects of the extended capital campaign, including campaign narrative and messaging; develop and write grant proposals to foundations and corporations.
- Leads and manages staff and volunteers, in coordination with the Admissions Department, to ensure timely and successful onboarding of new families.
- Manages a select portfolio of leadership-level annual fund and major gift prospects and executes comprehensive fundraising and stewardship plans for each donor/prospect.
- Arranges donor prospect calls for the Head of School and Trustees providing prospect research, background, information and the most effective strategies to maximize donor potential for giving.
- Co-Chair with a York Trustee the Enrollment and Marketing Committee of the Board of Trustees. Create agendas, lead the committee meetings, and follow up on meeting action items.
- Oversee the collection and interpretation of enrollment and philanthropic data for effective decision making.
- Work with the internal academic team, including classroom teachers, to understand the school's various programs in order to articulate a clear value proposition and brand image.
- In collaboration with the Head of School, devise marketing strategies to improve brand awareness, increase enrollment, and donor support.
- Lead the creation of a marketing and branding strategic plan with the Head of School as well as the enrollment and philanthropy and community partnerships teams.

- Attends Board meetings and is involved in strategic planning and keeping the board fully apprised of the school's enrollment, philanthropic, and marketing endeavors.
- Along with the Head of School, serve as the key spokesperson and brand ambassador for the school's mission and programs at various events.
- Works with the appropriate staff to secure project information and uses this information to develop materials directed at individual donors/prospects, such as highly personalized proposals that are in line with donor interests and programmatic priorities.
- Ensures portfolio activity and progress is recorded in the school's database.
- Develops special cultivation and stewardship opportunities, such as small events for select donor/prospects, and participate in larger donor cultivation and fundraising events that have a productive return on investment.
- Assists in the identification and training of potential leadership volunteers and other partners to engage in major gifts outreach.
- Works on developing and implementing a proactive planned giving program.
- Works closely with appropriate staff members, attends and participates in the organization and implementation of functions such as new parent events, reunion activities for purposes of cultivation and stewardship.
- Collaborates with the senior administrative team, focusing on content and brand strategy to make sure these are integrated into donor segmentation and fundraising initiatives so as to advance the mission of the school.
- Stays current in the use of various media sites (e.g., Facebook, YouTube, LinkedIn) to communicate with school constituents.
- Participates in professional development, accountability skill and performance assessment tools to ensure maximum results.
- Prepares reports and other materials to facilitate evaluation of progress toward meeting objectives, submits monthly reports to the Board of Trustees.

# Director of Institutional Advancement

## Position Statement



- Manages the Advancement Office budget.
- Encourages enthusiastic parent participation in the school community.
- Working with the Assistant Director of Philanthropy: Annual Giving and Alumni Relations, helps to develop an alumni fundraising program that meets the school's current and future goals of engagement, involvement and financial support.

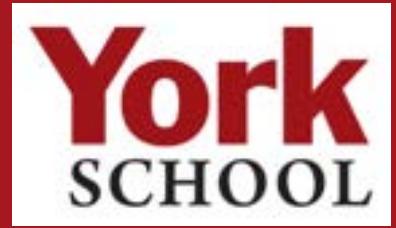
- Vision, creativity, flexibility, and the capacity to develop a departmental strategic plan for raising philanthropic support to execute the school's strategic plan.
- Strong understanding of current digital communications, social media, fundraising software, and email-based solicitations.
- Active listener and skillful communicator with excellent oral, written, presentation skills.
- The personality, energy, intellectual integrity, warmth and leadership ability to inspire a school community; positive, passionate, can-do spirit; character, a strong ethical compass, a midwestern sensibility consistent with the mission and culture of York School, as well as warmth, humility, and a sense of humor.
- A strong work ethic, with the passion and capacity to invest full days; yet also establish, uphold and model appropriate boundaries and standards for others in the community.
- Understanding of independent school communities and culture.
- The ability to meet deadlines within the context of a complex office/school/community calendar.
- Leads from the front, confronts challenges head-on with appropriate transparency, building trust across all constituent groups within the school community.
- Active engagement in professional development and understanding of current best practices.
- Demonstrated ability to use good judgment and maintain confidentiality.
- Detail oriented with excellent organizational skills.
- Ability to manage and prioritize multiple-- and at times competing--responsibilities, and adapt to frequent or unexpected changes.
- Effective manager of people and resources who hires well and delegates appropriately.

## KEY QUALIFICATIONS AND QUALITIES

- Commitment to York School's mission.
- Bachelor's degree required and relevant advanced degree preferred.
- A minimum of five years of experience and a proven track record of progressively challenging fundraising success, including annual operating support, major gifts, capital campaigns and planned giving.
- An engaging and enthusiastic school professional, fully participating in school life and genuinely interested in faculty, students and parents, and who is also accessible to them.
- Strong and demonstrated success in leading, managing and dealing diplomatically and comfortably with a diverse community of parents, students, alumni, volunteers, partners and colleagues and have the presence, demeanor, and communication skills necessary to represent all of York School's constituency effectively; excellent responsiveness to all constituencies.
- Outstanding analytical skills and proven success in using data-analytics and prospect wealth screening resources to develop programs and drive results.
- Demonstrated ability to build successful fundraising initiatives and appeals using current best-practices and new technologies to produce outstanding results.

# Director of Institutional Advancement

## Position Statement



### Are You the Right Person for the Job?

- Do you believe in the unlimited potential of young people to help shape our world and are committed to that excellence? Do you love being around teenagers?
- Do you have an outgoing personality and a sense of humor?
- Do you have a growth mind-set to create a culture of philanthropy and have successfully solicited and closed modest and major gifts?
- Are you a natural born marketer and storyteller?
- Do you have the experience in education, preferably in an independent school setting, to build upon York School's educational programs, promoting pedagogical excellence and work towards overcoming any insularity of thought?
- Can you encourage and actively support change and innovation while retaining the core values and traditions of a school?
- Are you committed to getting to know the children and the families well? Faculty and staff too?
- Do you know how to prioritize your and your team's responsibilities?
- Do you know how to use technology to maximize your time and impact?
- Can you lead, develop and manage well in all directions, including Trustees?
- Do you have the ability and interest to unleash the full giving potential of York School?
- Have you developed or managed a proactive planned giving program?
- Are you a person who is ambitious, organized, determined, fearless – a “go getter”?
- Are you sincere and authentic?
- Are you comfortable with knowing that York School has a culture and personality all its own?
- Are you comfortable in a small but growing advancement office with untapped giving potential?

### EQUAL EMPLOYMENT OPPORTUNITY STATEMENT

*York School provides equal opportunity to all employees and applicants for employment without regard to race, color, religion (including religious dress and religious grooming), gender, gender identity (defined as each person's internal understanding of their gender), gender expression (a person's gender related appearance or behavior, whether or not stereotypically associated with the person's sex assigned at birth), sexual orientation, national and (or) ethnic origin, citizenship, ancestry, age, marital status, registered domestic partner status, military or veteran status, physical or mental disability, legally protected medical condition, sex (including pregnancy or perceived pregnancy, childbirth, breastfeeding, or related medical conditions) genetic information or characteristics, or any other characteristic protected by federal or state law or local ordinance.*

#### Compensation and Benefits

York School uses a salary scale that is based on education and years of experience and is anticipated to be in the \$150-175,000 range, a robust benefits package, and professional development opportunities. The school is committed to supporting team members in their personal and professional growth.

#### Work Environment

Employees may be asked to perform their work duties at home and/or on campus. In both settings, the employee is required to maintain a professional environment. If employees are required to work remotely due to campus closure, they are expected to be present and accessible for the entire workday.

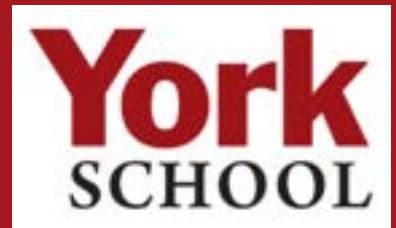
#### Physical Demands

While performing the duties of this job, the employee is regularly required to talk and hear. This position is active; it requires standing and walking, including stairs. Travel: Local and regional travel as needed.

This job description is not designed to cover or contain a comprehensive listing of activities, duties, or responsibilities that are required of the employee. Other duties, responsibilities, and activities may change or be assigned at any time with or without notice.

# Director of Institutional Advancement

## Position Statement



## Application Process

If the possibilities in this opportunity excite you, please apply online at the RG175 website:

Apply online at:  
<https://rg175.com/candidate/signup>

The application includes:

- Letter detailing interest in the position and suitability for it
- Updated curriculum vitae or resume
- Copy of original writing on any subject of interest to the candidate that can be written for this exercise or provided from something written previously

Timeline: Application submission screening and interviews will be completed on a rolling basis until filled.  
For any questions or additional information about the position, please contact the RG175 consultant:

James E. Pattison [jpattison@rg175.com](mailto:jpattison@rg175.com)

