



# **Brookwood School**

## **Position Statement for Director of Development**

**Manchester, Massachusetts  
Start Date: July 1, 2023**



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BROOKWOOD  
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### INTRODUCTION

Nestled along Boston's North Shore is Brookwood School, a community of inspiring, bold, and remarkable learners and leaders. It is a coed day school for grades PreK-8, enrolling students 292 on a 30-acre campus in the beautiful traditional New England town of Manchester-By-The-Sea. The town has orderly neighborhoods full of large clapboard homes and a population with a deep appreciation for learning that comes from living in a long-standing educational market with high expectations. It is a school "where kids grow into their best selves."

At Brookwood School the path to preparation is clear: when students learn with curiosity, think deeply and take risks, those students walk confidently into the future. This is nurtured every day through hands-on, interdisciplinary work that grounds the academic experience in the real world. Faculty are experts at offering each individual the right level of challenge and support. Students are known well by the faculty. As a result, students build a strong sense of themselves. An excellent and well-executed process helps the eighth grade graduates go on to the high schools with an impressive matriculation list, where each student is embraced as a confident self-advocate and leader in their new school communities.

At Brookwood, the commitment to Diversity, Equity, Inclusion, Justice,



and Belonging centers on striving to cultivate belonging, dignity and respect, and advance just outcomes for all members of our community. The School is committed to honoring people's multiple identities, including but not limited to ability, age, appearance, ethnicity, family structure, gender expression, gender identity, nation of origin, race, religion, sex, sexual orientation, and socioeconomic status. Brookwood School works to be an antiracist and inclusive school.

### MISSION

Brookwood School's mission is to foster a joyful community of lifelong learners and upstanding global citizens who embrace a culture of curiosity, kindness, and academic accomplishment.

The "mission in practice" is embodied in the following way:

- "I communicate respectfully, directly, and clearly.
- I collaborate at school and in the world.
- I think critically, creatively, and globally.
- I honor differences and diverse perspectives.
- I take risks and when I struggle or fail, I grow more resilient.
- I take responsibility for myself, the care of others, and my environment."



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### STATEMENT OF PURPOSE

Brookwood School was founded in 1956 by a group of community leaders and educators seeking to build an exceptional school. Today, as then, the school's program guides and challenges the intellectual, social, emotional, moral, artistic, and physical growth of each child.

Educational rigor has a different face these days. It is no longer enough to require the memorization of important facts and figures. It is not enough to learn to compete against peers in a host of challenges. Instead, the student of today must learn to build and sustain the collaborative relationships demanded by the interconnectedness of our world.

Students need analytical skills in order to deconstruct the complexity of his/her life and the problems he/she will face. Instead of simply finding answers, he/she needs to learn to make good decisions. To make these decisions, each student needs to know himself/herself well and understand the principles each individual seeks to advance. Above all else, Brookwood students come to love learning as a process that lasts for life.

Just as understanding students today has evolved, what is known about learning has also changed. The traditional face of rigor in an academic environment is not necessarily the best. We know now that emotions actually influence thought and students learn best when they feel physically healthy, personally recognized, and emotionally safe.

At Brookwood, academic excellence includes the means and methodologies known to be best suited to that end. Brookwood is "warm" and "child-centered" because it is educationally sound to be both. The school is especially mindful of the relationships offered. The school knows that

students will be required to solve problems of currently-unimagined complexity; that the safety and survival of the world depends ultimately on having not just the intellectual acuity to understand problems but also the skills work with others of diverse backgrounds and the “conscience, character, compassion and cultural competence” required to persevere.

As one drives onto the campus and sees the deep woods and pond that surround the school (and serves as a “classroom” in its own right), a palpable sense of belonging and energy becomes evident. Children bound from their cars to be with their friends (and sometimes need a friendly reminder to not forget their backpack); adults and students accompany visitors to a campus location rather than just providing verbal directions; and a teacher continues to send his former students birthday cards as he enters his 34th year at the school (and these cards are treasured as keepsakes.) When people come to campus and get a sense of the physicality of the place and the family atmosphere, they often leave describing it as “magical” and “amazing.”



### GOVERNANCE AND SCHOOL LEADERSHIP

- Brookwood School is governed by a 19-member board of trustees. The Board Chair is Kira Fabrizio P’20’23. The board’s members include the president of the PA, the head of school, and an educational board advisor.
- The Board of Trustees works alongside the Head of School to craft and oversee the school’s mission, vision and its short and long-term strategic goals, review and support important school policies and plans, ensure resources are adequately provisioned and effectively managed for the short and long-term, establish and maintain bylaws and ensure the School’s compliance with applicable laws and regulation, and promote and advance the School’s mission. Trustees do not have authority over the day-to-day operations of the school.
- The Board of Trustees meets regularly throughout the academic year. In addition to attending Board meetings, members typically serve on two Board committees. Trustees are expected to contribute actively to the work of the Board, attend meetings, and provide guidance and expertise as needed. As leaders in the School community, Trustees are expected to support the School through their advocacy and ambassadorship, their time and expertise, and their philanthropic efforts.
- The sixth Head of School is Jonathan Bartlett. Jon started his teaching career in 1996 as an eighth grade social studies teacher. As he states, “For a young man from England, Brookwood was, and still is, refreshingly traditional at being untraditional in the way it encourages children to discover their true talents and passion for lifelong learning.” He joined Brookwood in 2021, coming from St. Andrew’s Pangbourne in Berkshire, England where he was Head of School for six years. Jon is well-liked by parents, students, faculty, administrators and his easy and well-grounded manner, sense of humor, and interest in the students is evident to even the first-time visitor.



BROOKWOOD SCHOOL AT A GLANCE

Founded:	1956
Grades:	Pre-K through 8
Campus Size:	30 acres
Enrollment, 2022-2023:	292 students (from 23 local communities)
Alumni:	2,196
Operating Budget:	\$12 million
Endowment:	\$12.5 million
Financial Aid:	\$1.8 million





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### FACULTY

Brookwood School faculty are exceptional. They are deeply committed to the school and its mission, grateful to be a part of its warm and welcoming community, and excited to have the opportunity to share their knowledge and love of learning with children.

The faculty are dedicated to bringing their best skills and commitment to each child. They play many roles, from the more obvious one of working with students in creative and inspiring ways to the less obvious of volunteering to cover a colleague's duty, serving on a committee, coaching a sports team, or attending weekend admissions open house events.

Brookwood faculty are committed to the learning process, as illustrated by the hundreds of combined hours they spend in professional development workshops furthering their own learning. They explore topics like differentiation, formative assessment, and writing across disciplines. Over 75% of the faculty have advanced degrees, and most are highly experienced in the classroom. They are important members of the school community.



### FINANCES AND FUNDRAISING

The school's budget is \$12M with approximately \$1.8M of that designated for financial aid. Tuition currently ranges from \$33,600 (K-4) to \$41,370 (grades 7-8). The school has \$3.7 million of debt in the form of tax-exempt bond liabilities. Long-term plans for salaries and benefits and understanding the school's overall fundraising capacity for increasing financial aid along with improvements to facilities are strategic initiatives that lie ahead.

Annual Giving in 2021-2022 was \$449,470 (pledges + donations), with total giving of \$570,000. Total giving includes the auction, endowment gifts and a one-time major gift/pledge in support of *Changemaking*. Annual Giving education needs to identify the tangible way a donor's gift has impact on the students and for the faculty.

Donor capacity at Brookwood is considerable. The advancement office needs to navigate the terrain of changing demographics, high expectations, and where Brookwood School is headed as the school embarks on this next exciting chapter of school history. This position is about finding resources for the faculty, staff and students at Brookwood School; but it also about being an active part of the community and collaborative conversations to keep Brookwood School at the forefront of education on the North Shore.

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### THE POSITION OVERVIEW: DIRECTOR OF DEVELOPMENT

The Director of Development (DOD) will be responsible for helping to carry out the strategic goals and plans for the Development Office working closely with the Development Committee and the Board of Trustees under the leadership of and in partnership with the Head of School Jonathan Bartlett. This collaboration with the Head of School is especially important in building out the development strategy, creating milestones and targets and in its execution.

The goal for the DOD is to execute programs of giving that attract the maximum gift support possible to the institution while helping engage diverse audiences of stakeholders and advancing the spirit of community that marks a Brookwood School education.

The school encountered an enrollment decline which occasioned a faculty downsizing which bruised the community. Fortunately the situation has stabilized and is now beginning to grow. The school also had significant turnover in the development office and was vacant some time which accounts for the sub-par performance numbers in fund-raising.

The school seeks a strong, strategic, fair-minded, open-hearted, communicative leader to re-establish stability and trust. There is energy, optimism and a readiness by those close to the school to add a confident, even-handed, transparent leader who lives the values of the school and

wishes to enthusiastically join the traditions that have held the community together. Among these values is the desire to uphold the community commitment to diversity, equity, inclusion, and justice as an institutional lens for advancement work. For more detailed information regarding the school's DIJB work, please see the school website.

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 DOD will be tasked with plans for the extension of the school's needs, both operational (Annual Giving) and capital (facilities, endowment, programmatic). 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. 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.

The DOD will manage a staff of two full-time team members. Katie Mullen is a graduate of Brookwood and currently is the only person in the office. Recruitment efforts are being made currently to add an administrative assistant who can help with data entry, gift processing, receipting, ongoing correspondence and some event planning and execution. There is the potential for one additional hire in the office as efforts evolve. Everyone in the office will need to have the goal of elevating the development office's performance and productivity as it prepares to re-establish the annual fund, fundraising events, community engagement, and then lay the plays for a major gifts program as part of a hoped-for capital campaign and moves forward an active strategic plan.

The DOD also manages a portfolio of high-level prospects and donors, developing comprehensive annual and multi-year plans for major gifts, planned giving, annual giving. Utilizing the best of Brookwood School's resources - a committed Board of Trustees, an experienced and well-regarded Head of School, an active development committee, supportive faculty, a devoted parent and alumni community, and a strong capacity for giving—this highly knowledgeable and



experienced fundraiser will need to bring a demonstrated passion for independent education and a commitment to advancement excellence. This is a full-time, 12-month position.

Brookwood School's current development program focuses on annual giving, major gifts, events, collaborations with the parents' association, and overall stewardship and community outreach in all constituent groups including: current parents, parents of alumni, alumni, grandparents, and friends. Targeted outreach takes place via publications, direct mailing, one-on-one meetings, community gatherings/forums, fundraising events and social media/Web.

The candidate should be someone with a track record of achievement developing and advancing fundraising strategy with measurable success, a comprehensive knowledge of fundraising best practices, and a desire to have a significant impact on the school's growing program.

The four focus areas for this role are:

1. Oversee the comprehensive Annual Giving program with the supervisory support of the Director of Annual Giving.
2. Create and execute a major gifts program that includes an alumni strategy and a legacy giving program.
3. Set in motion the planning and execution of a capital campaign with a focus on building donor enthusiasm to support the school's strategic plan.
4. Manage special event programming for community engagement and stewardship.

## RESPONSIBILITIES

### *Relating to Strategy and Fundraising Goals*

- **Work closely with the Head of School in setting and meeting fundraising goals for the various activities for which the department is responsible; participate in the annual budgeting process to help determine fundraising goals and metrics for the Development Office.**
- Develop and implement appropriate donor/volunteer recognition programs.
- Provide accurate and timely communications to prospects, donors and volunteers.
- Manage a team of Development staff and provide direction and input on implementation of the goals.
- Oversee and manage the development office budget.
- Create a productive and positive work environment for development staff, inclusive of regular team meetings, individual meetings with staff, retreats, supervision and evaluation, and professional growth.
- Oversee donor record keeping and reporting systems to ensure accurate tracking of fundraising and accounting. This will involve the hiring of a fulltime database manager who will report directly to the Director of Development.
- This fulltime database manager will also be responsible for pulling queries and generating reports from the school's database as needed for mailings and reports.
- Supervise the Director of Annual Giving to ensure a successful and increasing Annual Fund program.
- Solicit top annual gifts from a portfolio of prospects.
- Develop and launch an alumni program encompassing alumni of recent and more historical past; and wider family networks (i.e. grandparents, parents of alumni).
- Manage weekly agenda for 1 on 1 meeting with Head of School.
- Oversee Annual Giving, funding priorities, volunteer training, capital giving, leadership giving, planned giving, alumni relations, stewardship, donor research; lead and support the development office to reach annual goals in each of these areas.
- Design a multi-year roadmap for building a donor pipeline using wealth screening and predictive analytics.



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- Use data to inform planning and to lead change with a balance of decisiveness and collaboration.
- Solicit a portfolio of capital campaign gifts in the range of \$50,000 to \$5 million.
- Serve as liaison to top campaign and annual volunteers in their roles as solicitors.
- Provide materials, collateral, strategy, and support around all of the Head of School's donor prospect meetings, attending donor meetings as appropriate.
- Oversee all capital campaign activities, including selection and support of the campaign steering committee, volunteer management, campaign expenses, etc.
- Produce capital campaign analyses and goals for Head of School and the Board of Trustees.
- Partner with parent leadership to support volunteer engagement; identify and recruit a pipeline of volunteers for leadership positions related to fundraising efforts (annual gala, Brookwood School Parents' Association committees, etc.

- Work closely with the parents' association executive team and committees as well as grade parents in a collaborative and non-patronizing manner to support their annual events and initiatives and building community. Attend meetings as needed to ensure productive and positive volunteer/school interactions.
- Research and prepare grant applications and required stewardship reports for foundations as needed.

### *Relating to other members of the Senior Administrative Team*

- Collaborate with the Director of Admissions and the Director of Strategic Marketing and Communications, and other administration staff to ensure consistent messaging of the school's narrative and expand and enhance the school's visibility and reputation across social media, printed communications, and website.

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- Contribute development content for the school website.
- Work in partnership with the Director of Strategic Marketing and Communications to create the Annual Report, development-related publications, and campaign communications.
- Assist and advise the Head of School on speaking points at development events, cultivations and solicitation meetings with development prospects, capital projects, trustee development work, strategic planning, campaign strategy, Annual Fund, alumni relations, special events.
- Work closely with the Director of Admissions for the support of a New Parent Leadership gift drive.
- Support the Admissions Office in new family onboarding and orientation.
- Ensure productive working relationships with other school administrators, aligning and integrating development work with the other areas of the school and supporting fellow team members in their goals and aspirations.
- Serve as an active member of the Senior Administrative team representing the development needs of the School in relation to the overall leadership of the institution.

- Serve as the direct liaison with the Business Office on all items related to development office fundraising and expenses.
- Remain up-to-date on major issues to serve as an effective ambassador to the school community.
- Serve as a leader for the school community, participating in daily life and the operation of the school in a present and hands-on manner, extending oneself beyond the responsibilities of the role.
- Assist the Head of School with other duties as required.

### *Relating to the Board of Trustees*

- Work closely with the Board of Trustees as well as its development, finance and strategic planning committees to formulate goals and strategies for present and future fundraising needs. Participate in New Trustee Orientation.
- Oversee Trustee Annual Giving solicitation every year as well as capital solicitations of trustees.
- Prepare and distribute Development reports to Development Committee Chair to foster involvement and understanding of the development office in advance of Board meetings.



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### REQUIREMENTS/ QUALIFICATIONS

- B.A. degree required; advanced degree(s) preferred.
- Minimum of five years development-work experience, preferably (but not required) at an a PreK to Grade 8 independent school.
- Commitment to Brookwood School's mission.
- Demonstrated ability to conceptualize, plan, and cohesively integrate a full range of development programs.
- A proven track record of progressively challenging fundraising success, including annual operating support, major gifts, capital campaigns and planned giving.
- Significant experience overseeing alumni programming designed to support the comprehensive needs of a broad constituency.
- Strong written and personal communications skills and vision for expanded communication opportunities.
- Experience in event and community engagement planning and execution.
- Ability to support advancement services: research, prospect tracking, stewardship, gift entry, gift acknowledgement, and data entry.



- Strong management experience required with the ability and interest to work closely with staff members to achieve individual and department goals.
- 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.
- 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 Brookwood School's constituency effectively; excellent responsiveness to all constituencies.

- Vision, creativity, flexibility, and the capacity to develop a departmental strategic plan for raising philanthropic support to execute the school's strategic plan.
- Core belief in leading diversity, equity, and inclusion work forward in schools.
- Strong understanding of current digital communications, social



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media, fundraising software, and email-based solicitations.

- Excellent oral and written communication skills with experience collaborating with a Communication staff in the writing of persuasive gift appeals.
- The personality, energy, intellectual integrity, warmth, visibility and leadership ability to inspire a school community; positive, passionate, can-do spirit.
- Understanding of independent school communities and culture, including an eagerness to work hard as both leader and team member.
- The ability to meet deadlines within 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.
- High level of energy, flexibility, warmth.
- Active engagement in professional development and understanding of current best practices.
- Demonstrated ability to use good judgment and maintain confidentiality.
- Personable, positive, helpful personality; customer-service mindset.
- Sensitivity, discretion, and a sense of humor.
- Detail oriented with excellent organizational skills.
- Ability to manage and prioritize multiple

responsibilities simultaneously.

- Ability to manage competing demands, and adapt to frequent or unexpected changes.
- Active listener and skillful communicator who is approachable, empathetic, and compassionate.
- Effective manager of people and resources who hires well and delegates appropriately.

### ARE YOU THE RIGHT PERSON FOR THE JOB?

- Are you attracted to the joyfulness and creativity of children?
- Are you committed to getting to know the children and the families well, i.e. on a first-name basis? Do you enjoy getting to know, meet and engage families?
- Are you a person of high energy?
- Are you reasonable and level-headed?
- What is your vision of independent school education, especially in the area of access and affordability?



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- Are you an excellent listener?
- Do people enjoy spending time with you?
- Do you have the vision and strategic thinking to lead, strengthen and maximize an institution that wants to “get things right”, wise, professional in its operations, and committed to continual improvement?
- Do you know how to thoughtfully communicate your appreciation for people?
- Do you have a growth mindset? Are you comfortable with an experimental and entrepreneurial work environment? Do you think creatively and encourage innovation? Are you a curious person?
- What examples can you provide of how you have demonstrated forward-thinking abilities? How have you shown your mental nimbleness?
- Can you encourage and actively support change and innovation while retaining the core values and traditions of a school?
- Do you have the ability to inspire, lead, develop and attract talented staff?
- Are you a person of strength, gentleness, and authenticity?
- Do you know how to prioritize your responsibilities? Do you know how to use technology to maximize your time? Do you know how to delegate?
- Can you handle the considerable range of tasks: from major gift solicitations to helping with the smallest details of an event?
- Do you have the ability to lead, develop and manage well in all directions?
- Are you willing “to roll up your sleeves” for all the work that is needed?
- Do you get things done?
- Do you understand the cadence and rhythm of a school year? What are examples of how you work with your colleagues in a collegial manner?
- Do you have a track record of success as a fundraiser and implementing a strategy? What is your level of experience in communicating the narrative of an institution?
- Have you had experience in a capital campaign?
- Do you have business and financial savvy?
- Do you have facility, humility, and desire with equity and inclusion work required to embrace and support a diverse and dedicated community of faculty, staff, students, parents, and alumni?
- Are you comfortable with the locational realities of Boston as a major metropolitan center, knowing that Brookwood School has a culture and personality all its own?



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### *Work Environment & Complexity*

Duties and tasks in this position are varied and complex. The position works on whole problems or projects. This position directs projects and the challenges are resolved with complex and precedent setting solutions. This position requires a high degree of collaboration. This position operates in a professional school environment. The functions of this position are performed in a typical office environment with no known hazards.

### *Physical Demands*

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this position, such as the ability to see, hear, speak and understand English and use a computer. This position is active and requires standing and walking, including stairs.

### *Travel*

Occasional overnight travel may be expected in this position. A valid driver's license and passport required.

The successful candidate will receive a compensation package that includes a competitive salary plus generous tuition remission, health and retirement benefits.

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.

Application submission screening and interviews will be completed on a rolling basis until filled.

Brookwood School seeks candidates who will add to the diversity of the community. The school will always be maintained as a non-sectarian institution. The school is an equal opportunity employer. The school complies with all legal requirements in connection with admissions and access to programs, facilities and employment practices regardless of race, color, religion, sex, gender identity, sexual orientation, national origin, genetics, age, or disability.

### *Background Check*

Prior to submitting your resume for this position, please read it for accuracy. RG175 verifies academic credentials for its candidates and conducts a thorough review of candidates' social media presence. Brookwood School will conduct thorough background checks prior to finalizing an offer.

Prospective Candidates should send a letter detailing his/her interest in the position and his/her suitability for it, an updated *curriculum vitae* or *resume*, and a 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.

These materials are to be sent in one, consolidated PDF to: James E. Pattison, [jpattison@rg175.com](mailto:jpattison@rg175.com)