



NEW ROADS SCHOOL

Position Statement
Director of Advancement
New Roads School
Santa Monica, California

RG 175
Change as Opportunity

Director of Advancement Position Statement



THE OPPORTUNITY

This position is not the usual advancement position and this is not your usual school.

Like most schools, the ideal candidate will have a successful track record of raising unrestricted and restricted funds; experience in annual, major, and planned giving; increasing alumni and constituent engagement; reinforcing the operational systems to support these activities; effective analytical skills; and the ability to manage a future comprehensive capital campaign. However, the candidate needs to understand and love the special nature of this school and have the creativity to imagine how gift planning opportunities and foundation/corporate support can be equally important in expanding the resources to advance the school's mission.

This is why successful candidates must also possess an entrepreneurial spirit, function as a collaborative change-maker, and be a self-starter who can operate autonomously to develop a short and long-term strategic plan that celebrates tradition while also embracing innovative opportunities to increase philanthropic support and engagement. Individuals who are interested in relying on their advancement leadership experience to shape the future success of this remarkable school are encouraged to apply.

OVERVIEW AND HISTORY; MISSION AND VALUES

Although the school has evolved to remain relevant and to keep pace with the world around it, its steadfast allegiance to its founding principles is unchanged.

Importantly, New Roads sees academic rigor as a key part of its mission—this is not a school where an emphasis on student-based learning means students are not held accountable to high standards; in fact, many expressed that to do so would be a failure of its mission.

Because of the diversity of backgrounds and therefore the prior educational experiences of its students, there are several initiatives to support a “leveling up” so that all students can participate equally and meaningfully in the New Roads program. This is a school with its eyes wide open regarding the social and economic barriers to student excellence and has a community-wide commitment to overcome them.



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New Roads is a community of diverse cultures, backgrounds, and interests, where everyone is valued, seen, and heard. Students represent the cultures and backgrounds of the world's population and as such, the campus community and curriculum emphasize the importance of empathy, understanding, and inclusion.

Exceptional leaders understand the essential value of diversity and inclusion. They surround themselves with people of varying beliefs, backgrounds, and skill sets. Everyone benefits when exposed to a broad base of experiences. New Roads strives to deepen students' understanding of differences in race, ethnicity, gender, ability, religion, sexual orientation, age, and socioeconomic status. The school fosters empathy and respect for all. The goal is not tolerance of differences but a celebration of the unique and varied contributions each makes to the community.

All campus community members have a shared dedication to both challenge and support one another, to approach one another with curiosity rather than judgment, to celebrate both differences and commonalities, and to be critical thinkers and agents of



justice. The result is graduates who are empowered to be change makers and leaders in a global society. The enthusiasm at the school in their Mission and Values is palpable.

"In an authentically diverse community reflective of Los Angeles, New Roads prepares young people for life by developing in them a personal dedication to learning, a respect for independent thinking, an expanding curiosity about the world and its people, and a commitment to the common good."

A recent community-wide survey revealed overwhelming, massive support for the school's commitment to diversity, equity, inclusion, and belonging. All constituencies believe that New Roads must maintain its deep commitment to authentic diversity, its inclusive identity, and a strong financial aid program. A whopping 70% of the respondents highlighted Diversity, Equity, Inclusion, Belonging as critical to the School's identity. Close behind were the school's progressive approach to education, its commitment to Financial Aid, and the close relationships between students and their teachers.



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THE LEARNING EXPERIENCE AND PROGRAM

New Roads has a dynamic academic program, one that responds to current students' needs, faculty interests, and to the school's mission and values. Whether in its K-12 traditional curriculum, the extensive elective program, Human Development, or in text selections, the school's commitment to authentic diversity and to its stated values is evident across the grades and throughout the curriculum.

Philosophically drawing from its Mission, New Roads provides a college preparatory program for the authentically diverse student body. At all ages, the goal is not a race for the accumulation of facts, but rather has the goal of developing habits of mind and character and an ever-expanding awareness of the human condition. New Roads' curriculum is intellectually rigorous, challenges young people without stressing them, encourages innovation, and allows for the teacher's voice.

This is not a static program, but rather there is fluidity to this rigorous curriculum nurtured by a

culture that respects the individual and encourages innovation. Differentiation is the key here - both for the faculty and their style of teaching and the students' interests and learning needs.

It seems as though everything at New Roads is geared toward the students, their growth, their learning, and their well-being. This is a school that is so intentional about its Mission, committed to ensuring that students can be their true authentic selves, so mindful of the needs of each student – whether in the Spectrum Program, on the debate team, or pursuing an independent study in prosthetics – it's a place where students come first.

Not surprisingly, students thrive in an atmosphere that is at once casual – first names, no dress code – yet highly ordered – a core academic program that is traditional in its roots but progressive in its practice. (As one Trustee says, "We're progressive in how we teach, not what we teach.") The campus is tidy; students clean up after themselves. And kindness is a way of life. Student after student volunteers that everyone is kind, there is no bullying, and respect for all is a universal practice. New Roads truly comes across as a transformational place.

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FAST FACTS

- 510 students in grades JK-12
- 45% students of color
- 34% of students graduating as first generation to college
- 40% of faculty of color
- 42% of administration of color
- 28% of the Board of Trustees
- \$110 million awarded in financial aid since 1995
- 43% of students receiving financial aid

CAMPUS

Santa Monica is an eclectic community – home to a burgeoning tech and finance sector, the gamut of those involved in entertainment from celebrities to those working behind the lights, a large number of those associated with leisure travel and retail, as well as a healthy dose of businesses, warehouses, and other industrial concerns. Near the Santa Monica Airport, the campus has both a gritty, urban quality as well as a happy, oasis-like quality.

Compressed into a relatively compact area, New Roads has everything it needs from an academic standpoint but also possesses amenities that make it a truly pleasant place to be. Courtyards, picnic tables, chess boards, a game court, turfed spaces for comfort and play – it is clearly a campus built to be used and enjoyed by students. From Lower Schoolers playing games outside to high schoolers playing chess board games with faculty members, there is a clear sense that this school is about its students, putting them at the center of both classroom pedagogy and experiential learning, both on-campus and off-.

All of Los Angeles beckons with its life rich in opportunity. It may be unsurpassed in its easy access to cultural icons like the County Museum or Disney Hall; its offerings for sports fans that include recent championship teams in the Dodgers, Rams, Lakers, and Kings, as well as the L.A. Football Club, Chargers, Ducks, Clippers, Angels, and Angel City; world class higher education – UCLA, the Claremont Colleges, Caltech, USC, Occidental, and Loyola Marymount; amazing medical facilities like Cedars-Sinai and UCLA; opportunities for environmental activism with Heal the Bay or the Santa Monica Mountains Conservancy; celebrated studios and the Hollywood Walk of Fame. Los Angeles is that rare place where it is literally possible to ski and surf in the same day. New Roads reflects the intensity of those interests and innumerable opportunities.



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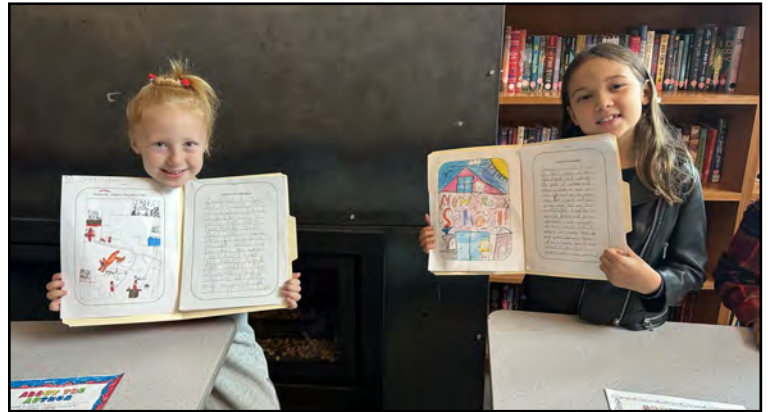
NEW ROADS SCHOOL

GOVERNANCE AND ADMINISTRATION

New Roads is governed by a Board of Directors, consisting of 20 members. Most are community leaders, former parents, and alumni and three are new to the board this year as it continues to expand leadership to better support the advancement of the school's strategic plan.

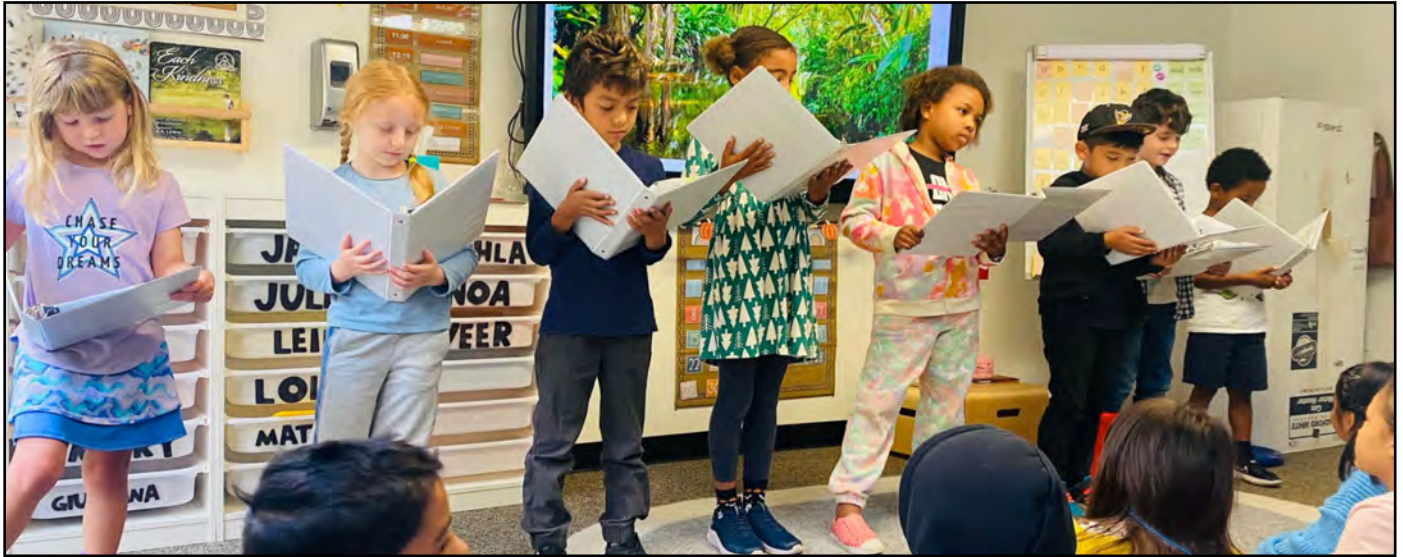
The new Board Chair is Alan L. Hoffman. Alan has his BA from Lafayette College, Master's in Public Administration from the University of Southern California, as well as his J.D. from USC. He has extensive involvement with President Joe Biden as Chief Operating Officer for VP-Elect Joe Biden, Deputy assistant to the President [President Barack Obama] and Deputy Chief of Staff to the Vice-President (VP Joe Biden); was the Senior VP for Global Public Policy and Government Relations for PepsiCo; EVP for Global Corporate Affairs and Chief Communications Officer for Herbalife; Head of Corporate Affairs at Carvana; and presently is the Chief Policy Officer for Rivian. His community involvement includes board membership on the National Alliance to End Homelessness, the California Science Center, and the Partnership for Drug-Free Kids.

A search for the Head of School is being conducted presently with an announcement of the new head expected in the spring. The current operation is being helmed by Ryan Hawley who has been at the school for over 20 years. He is ably supported by other long-term administrators, among them being Elisa Schultz who is the Director of the Spectrum Program, Dawn Fairchild who is the Director of Communication and Marketing, Yoon Mi Checchi who is the Director of Financial Aid and Enrollment, and Zahir Robb who is the Director of Admissions. The team is highly collaborative and enjoys a close camaraderie nourished by shared commitment to mission.



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FINANCE AND FUNDRAISING

The aforementioned survey also revealed an uncommon awareness of the school's need to do a better job of fundraising, especially since it needs to improve its facilities. It's unusual in such a survey to see parents, teachers, and trustees all expressing the same opinion on what needs to be done. Most stakeholders acknowledge the tension between maintaining tuition support for financial aid and the need for New Roads to have solid financial underpinning. This need is heightened by the widening income gaps between various communities in Los Angeles.

The school has made a lot of progress in the last decade in understanding and addressing its financial position given its remarkable commitment to financial aid. It reorganized debt incurred by the construction of the theater building, purchased the middle school building so that almost all of the school operates in facilities it owns and made strides in increasing fundraising.

However, software changes, personnel changes, and the pandemic all played a role in leading the school

to an unbalanced budget that has resulted in a current operating loss.

The school's projected (2023-2024) operating expense budget is \$25.1 million, with operating income at \$21.7 million, equating to a \$3.4 million deficit. The school's self-reported total philanthropic support (unrestricted and restricted) was \$2.160 million (\$3.049 million with pledges) in 2023 with nearly \$1.4 million attributed to the New Roads Fund. Tuition currently ranges from \$38,600 (K-5) - \$47,300 (6-12); and \$62,350 for students enrolled in the Spectrum program. The school's endowment is \$2.1 million and it is carrying \$10 million in debt.

An immediate task this year for the Acting Head and the Board's Finance Committee is the restoration of a balanced budget and an increase in giving. An inherent challenge in budgeting at New Roads is that currently (and historically) 43% of the student body receive assistance that accounts for nearly one-third of the operating budget and there needs to be sufficient support to make that commitment viable. With that partly in mind, the annual fund goal for the current year has been increased from \$1.4 million to \$2.0 million.

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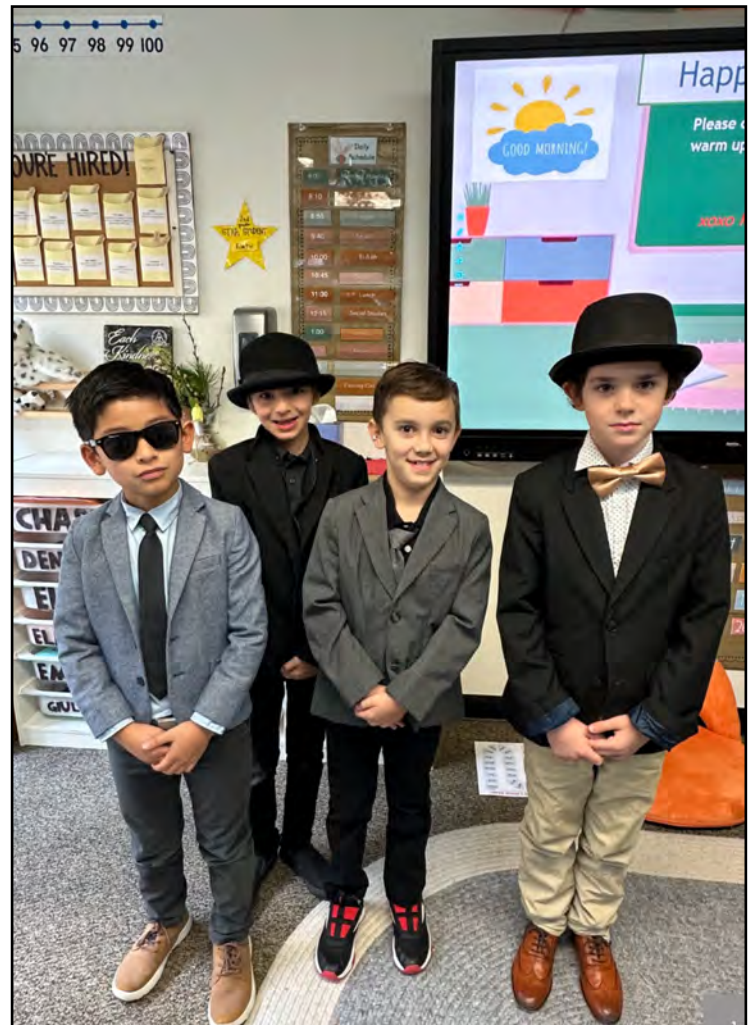
DIRECTOR OF ADVANCEMENT

Reporting to the Head of School, with a team of 3 direct reports, the Director of Advancement (DOA) provides strategic leadership and management for communications, engagement, and fundraising efforts. The DOA is responsible for advancing the mission of New Roads by developing an innovative strategy to tell the school's story in a compelling manner that increases, diversifies, broadens, and sustains support for New Roads. The DOA will develop and grow strong relationships both internally and externally, demonstrate a track record of fundraising success, and provide strategic leadership for the school's engagement programs.

A member of the school's leadership team, the DOA will collaborate in developing priorities and strategies to advance the mission of the school. It is expected the candidate will make better use of data analytics and provide more comprehensive reporting to the Board of Directors.

The DOA will serve as a strategic thought leader who will communicate and must exemplify the school's mission, vision, and values to internal and external audiences. The DOA will lead and develop a staff capable of significantly increasing philanthropic support for New Roads and will work with the Leadership team and Board to cultivate an increased level of major giving through alumni, parent, community, foundation, and corporate partner engagement.

New Roads seeks to employ people with a high degree of cultural competency, passionate about the school's mission, and who have a willingness to fully engage in New Roads's unique and welcoming community. Ideal candidates will possess strong emotional intelligence, an entrepreneurial spirit, and desire to move forward the work of advancement in order to provide a best-in-class experience for New Roads scholars.



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KEY RESPONSIBILITIES

Leadership

- Develop and implement clear and comprehensive short- and long-term advancement plan for all aspects of New Roads' fundraising and engagement work to meet aspirational goals and objectives
- Partner with the Head of School and work closely with key stakeholders across divisions and departments to ensure that the school's fundraising plan is metrics-driven and aligned to support overall school priorities
- Clearly articulate and promote a case for support for the school's philanthropic needs and build opportunities to enhance and sustain a culture of philanthropy that ensures New Roads is equal to its students' greatest aspirations
- Manage, develop, and grow a team who perform at the highest levels with sustained success in managing individual, corporate, foundation, and planned gift activity, working in close coordination with the Head of School, Board of Directors, and program leaders to identify key initiatives for private funding.
- Work closely with the Director of Communications and Marketing to effectively and powerfully communicate the school's story, value proposition, and impact
- Serve as a leader within the school community participating in daily life and operation of the school, extending beyond the direct responsibilities of the role
- Be a champion and model for the school's diversity, equity, inclusion and belonging initiatives among the Advancement team, broader school community, and community at large
- Know how to tell the compelling story of New Roads and build on its core identity
- Serve on the Administrative Leadership Team, serve on the BOT Governance Committee, the Development Committee, and Campus Task Force of the Future
- Participate in at least one conference for professional development annually (ISANNE, CASE, Blackbaud Conf., etc.)

Fundraising

- Design and implement fundraising strategies that ensure resources are in place to support the school's strategic priorities and growth
- Identify, qualify, cultivate, solicit, and steward a portfolio of major donors who have the capacity and inclination to contributions at a range between \$50,000 and above
- Prioritize prospects for the Head of School and volunteers; provide strategic guidance for cultivation, solicitation, and stewardship of donors
- Create a robust plan to increase support for the annual fund. Develop a program that elevates leadership giving while broadening the community of supporters who give to New Roads
- Know how to diversify the donor base and build different relationships
- Craft and oversee an annual budget that supports programs and activities that drive philanthropic investment
- Find ways to partner with alumni to connect with students through internships, mentorships, Career Days, etc.
- Work collaboratively and creatively with Parent Association

Board Engagement

- Prepare comprehensive reports and updates that reflect fundraising activity for the Board and Advancement Committee
- Lead and collaborate with the Advancement Committee to ensure 100% participation in the school's philanthropic effort
- Work closely with the Advancement Committee to plan and implement annual and restricted fundraising events and campaigns
- Orient board members to the advancement operation and foster involvement and understanding about the advancement process
- Continue to improve stewardship efforts with long-established donors

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Qualifications

- Bachelor's degree required. Master's degree preferred, but not required
- Minimum of 10 years of progressive advancement/advancement experience and a strong understanding of the factors that create transformative philanthropic outcomes
- Knowledge and successful experience in solicitation, including annual, major, and planned gifts
- Culturally competent with strong dedication to diversity, equity, inclusion, and belonging
- Demonstrated managerial and leadership experience
- Experience in soliciting corporate and foundation support
- Superior interpersonal skills and a high EQ
- Excellent verbal and written communication skills with an ability to effectively communicate with all school stakeholders
- Strong organizational skills, with high attention to details and accuracy
- Strategic thinker and creative problem solver with the ability to see the big picture while orchestrating tactics to move work forward
- Self-starter with the ability to successfully prioritize and multi-task
- Demonstrated ability to use good judgment and maintain confidentiality
- Flexibility to accommodate changing priorities and deadlines
- A high level of integrity, a strong work ethic, and a friendly and energetic personality
- Experience managing budgets and financial reports, working with various technologies including advanced knowledge and experience with Microsoft Office Suite, mass email applications, database and project management software, and CRM systems.

Are You the Right Person for the Job?

- Is your EQ high and are you culturally competent such that you can embrace and participate fully within a highly diverse community?



- Are you a champion for the power of education to transform lives and societies?
- Do you have a growth mindset that allows you to be a flexible, entrepreneurial, and creative problem solver who encourages innovation?
- Do you have the vision and strategic thinking skills to lead and strengthen an institution that has great fundraising potential? Do you strive for sustainability beyond your tenure?
- Are you a person of high energy who can manage a considerable range of tasks from major gift solicitations to executing events?
- Are you a “roll up your sleeves” type who is willing to do what it takes to get the job done?
- Do you have the ability to lead, develop, and manage up, down, and sideways? Do you share responsibility for success and empower others?
- Do you have the personality, energy, intellectual integrity, warmth and leadership ability to inspire a school community; positive, passionate, can-do spirit; unbridled curiosity, relentless optimism, and boundless energy?
- Are you a person of unquestioned integrity who has an impeccable reputation, who honors commitments, and who deals with people in a straightforward and personal way?
- Are you someone who responds well to criticism and deals successfully with difficult and challenging people and circumstances? The individual must possess resilience, humility, and a good sense of humor. This means dealing diplomatically and comfortably across the community and in a variety of circumstances while always maintaining the presence, approachability, demeanor and skills necessary to represent New Roads effectively.

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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 will be expected in this position. A valid driver's license and passport are required.

For Candidates

- At New Roads, salaries are one component of a compensation package that includes retirement matching, health & dental insurance, and life, AD & LTD insurance. The school expects to pay a competitive compensation package with excellent benefits depending on factors such as years of experience.
- 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.
- The anticipated salary range for this position is \$150,000-175.000.

- New Roads is fully committed to a culturally diverse faculty and student body.
- 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.
- 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. New Roads will conduct thorough background checks prior to finalizing an offer.

TO APPLY

If the possibilities in this opportunity excite you, please apply online at the RG175 website: <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 either of the RG175 consultants: James E. Pattison jpattison@rg175.com or Emilie Henry emilie.henry@rg175.com