

## LEADERSHIP PROFILE



**Managing Director of Campaign  
Strategy and Development Operations**  
**The Trustees**  
**Boston, MA**

To protect, for public use and enjoyment,  
places of exceptional scenic, historic and ecological value.

*The Trustees Mission*

### A COMPELLING OPPORTUNITY



**The Trustees is the largest conservation and preservation organization in Massachusetts.** With an annual budget of \$35 million and double-digit growth, The Trustees is aspirational, impactful and mission driven. The organization owns and cares for 117 unique and iconic properties for public use and enjoyment. With over 125,000 members and a 126-year history, the organization has an ambitious mission, vision and five-year strategic plan.

**As The Trustees prepares to launch a five-year \$75 million *Momentum* capital campaign,** the Development department is adding a new, very senior position: Managing Director of Campaign Strategy and Development Operations.

**The Managing Director (MD) will create competitive advantage**

for The Trustees by building a best-in-class approach to executing the *Momentum* campaign and overall development operations. As partner to the Chief of Development (CDO), the MD will lead and manage cutting-edge strategy, data, moves management, prospect and market research, analytics, reporting and development operations, infrastructure and reporting.



## THE ORGANIZATION



**The Trustees works in and with communities across the state of Massachusetts, preserving, enhancing and sharing special places.** Its origins trace back to 1891. The Trustees was the first private non-profit conservation organization of its kind in the U.S. Today, it stands at the forefront of defining conservation in the 21<sup>st</sup> century, with an expanding profile in and beyond New England.

The Trustees preserves and cares for some of Massachusetts' most treasured natural, scenic, and historic sites for public use and enjoyment. It is passionate about connecting more people to outdoor recreation, culture, agriculture, and healthy, active living via its numerous diverse properties, community spaces, and over 5,000 annual programs.

**Located within minutes of every Massachusetts resident,** and visited by two million people annually, our properties span more than 26,000 acres across the state – from working farms, landscaped and urban gardens, and community parks, to barrier beaches, forests, campgrounds, inns and historic sites, many of which are National Historic Landmarks. In addition to caring for properties, The Trustees is an active leader in land conservation.

**The Trustees' ambitious Strategic Plan 2023 focuses on five priorities:**

- Protect the places people love
- Effectively respond to a changing coast
- Ignite our cultural and agricultural experiences
- Invite the next generation outside
- Build The Trustees of the future

**The new *Momentum* campaign is key to delivering the 2023 vision.** The campaign focuses around the five strategic directions, factoring in important new Massachusetts issues such as coastal resilience and waterfront development, increasing pressure on agricultural land and the need to reach and fuel passion for the outdoors among new generations. Core themes of the campaign are:



*An enduring commitment to special places.* We believe comprehensive conservation, saving irreplaceable natural, cultural and working landscapes, protects our environment, strengthens our culture, and improves quality of life in Massachusetts.

*A dedication to and for the public.* We believe the groundbreaking vision that special places should be shared for public use and enjoyment is critical to the future of conservation, and that Trustees can lead the state in fostering healthy, active lifestyles while nurturing the next generation of stewards.

*As important now as 126 years ago.* The Trustees embraces its position as the largest conservation and preservation organization in Massachusetts, while responding to today's changing needs of our Commonwealth.

*Taking it to the next level.* Entering the next five years with a stable platform of operations, Trustees is poised to leverage its resources, reach and reputation to materially enhance the quality of life in Massachusetts today and for the long-term, elevating to the next level of mission delivery.

**This is an exciting time and opportunity for The Trustees.** Over the past five years the organization has evolved into one of the most dynamic and effective nonprofits in the country. The organization is uniquely positioned to build on that success. The range and scope of the work outlined in the strategic plan is groundbreaking. The *Momentum* campaign will play an essential part in making those aspirations a reality. The goal is nothing short of creating a legacy, not just for The Trustees, but for the people and future generations of Massachusetts.



For more about The Trustees, go to [www.thetrustees.org](http://www.thetrustees.org).

## THE RESPONSIBILITIES

**The Managing Director (MD) of Campaign Strategy and Development Operations will be a proven, proactive leader of development strategy, analytics and operations.** The MD will have capital campaign experience, acumen in analytics, research and operations, and passion for The Trustees' mission.

Reporting to the Chief of Development (CDO), the Managing Director will:

- 1. Be a strategic partner to the CDO, driving campaign and development success.** The Managing Director will have the authority and experience to direct campaign strategy and operations in support of the \$75 million *Momentum* initiative. On a day to day basis, the MD will act as a Chief of Staff, ensuring that the Development department as a whole is coordinated and working at the highest level of efficiency and professionalism, both internally and externally. The MD will be responsible for close coordination across the Development team and with other departments. The MD will

chair weekly moves meetings and ensure effective campaign oversight and progress, as well as support for the CDO.

- 2. Build a best-in-class development operations capacity.** The MD will be a strategic leader whose work fuels and facilitates the *Momentum* campaign and overall fundraising success. The MD will manage a high-performing team that delivers timely, insightful data analytics and prospect research, moves management counsel, processes, infrastructure and reporting. The MD will build a strong operational foundation that supports achievement of ambitious goals and milestones.
- 3. Provide analytics, tracking and reporting in support of growth.** The Managing Director will be expert at donor segmentation, analytics and insights, and will assess and prioritize prospect pools and individuals. The MD will strategically track and report on trends and progress, identify gaps and be a source of fresh approaches, ongoing and unexpected targets and opportunities. The MD will be a resource on internal and external data, will highlight and continually enhance a pipeline of prospects, and will play a key role in strategizing growth. The MD will be a valued source of ideas on how to move prospects forward in the right way at the right time.
- 4. Be a trusted resource for executive leadership and the development teams.** The MD will work effectively and proactively with the Executive Team and the entire Development staff. The MD will build a solid operational and communications framework to underpin progress and success. An excellent listener and communicator, the MD will be a sought-after source of information, analysis, ideas and solutions. The MD will interact easily and effectively with the Executive Team, Board members, colleagues and donors.
- 5. Be a great manager of people, projects and operations.** The Managing Director will build and lead a high-performing development operations team that embraces proactivity, urgency, customer service and long-haul strategic planning. The team will set ambitious goals and standards for every aspect of fundraising support including gift acknowledgement, personalization, financial efficacy, data quality, donor profiles, prospect research, event support, mailings and appeals. The MD will manage a talented, collaborative team that provides top-notch donor service and works collaboratively with Development peers and across the organization.

## PERSONAL CHARACTERISTICS

**The ideal candidate is a proactive, strategic and collaborative leader of development analytics, moves, research and operations.** Passion for the Trustees' mission is essential.

Personal characteristics being sought include:



- High emotional intelligence and ability to listen and communicate well.
- Superior team building, relationship and people management skills.
- A self-starter with an entrepreneurial streak.
- Skills and enthusiasm for systems, processes and technology.
- Ability to thrive in a fast-paced and results-oriented culture.
- Ability to think on their feet and take thoughtful action.
- Strong ability in written, oral and persuasive communications.
- A marketing sense.
- A balance of self-confidence and humility.
- The maturity and gravitas to interact with senior and Board leaders.
- A high achiever who can roll up the sleeves and gets things done.
- A courageous, respectful and direct communicator and presenter.
- A bright, curious and inventive nature.
- A proactive, organized and forward looking leader who seeks to move things forward now, and with a view to the months and years ahead.
- A sense of humor.

## THE RELATIONSHIPS

The Managing Director reports to the Chief of Development (CDO) and works closely with the entire Development team. The MD will manage a staff that includes an Associate Managing Director of Development Operations, a Development Associate responsible for data operations, a Market Research Analyst who conducts prospect research, and a part-time Administrator.

## THE LOCATION

The MD position is based at Trustees headquarters in the heart of Boston. The Trustees employs over 200 year round staff and 400 seasonal staff, located at almost 100 locations across Massachusetts.



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**For potential consideration or to suggest a prospect, please email**  
**[TrusteesMD@BoardWalkConsulting.com](mailto:TrusteesMD@BoardWalkConsulting.com)**

**or call**

**Kathy Bremer or Patti Kish at 404-BoardWalk (404-262-7392).**

**For the current status of this and other searches, please visit**

**[www.BoardWalkConsulting.com](http://www.BoardWalkConsulting.com)**

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