

Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group, Inc.

Counsel to Non-Profit Organizations:
Resource Development, Marketing, and Strategic Planning

1999 was an extraordinarily busy, important, and productive year for The Wayland Group. During the past twelve months the firm has taken on a number of interesting, complex, and important assignments, both in fund-raising and capital campaigning, and in leadership development and institutional planning. It was also the year in which we celebrated our 15th anniversary of service to the independent sector, marking the occasion with a day-long, 15th Anniversary Symposium on leadership, held at the University Park Hotel at MIT on May 18, 1999.

This was an extraordinary gathering, at which over 100 clients, colleagues, and friends gathered to hear a series of presentations and thirteen guest speakers reflect on the concept of leadership from their personal perspectives. We chose this theme to mark our 15th Anniversary because, while we continue to work with clients on the details and “machinery” of building successful fund-raising programs, it is clear today, more than ever, that institutions with strong, committed, tightly “attached” leadership teams will succeed in fund-raising almost inevitably, while those which do not have such teams are unlikely to succeed in the advancement arena, no matter how tactically brilliant their fund-raising strategy. In addition, building a strong leadership team builds an organization’s “corporate capabilities” in a broader and more generalized sense, benefiting areas of planning, stewardship, marketing and brand development, as well as fund-raising.

Our May 18th session began with an overview of critical issues and ways of thinking about leadership development, ranging from new perspectives on Board Development, to adjunct boards, to the role that staff can play in leadership development. Following that opening session, a Board/Staff team from Walnut Hill School presented a case study, taking the longitudinal view of leadership development at the school over a dozen years. This lively panel included **Stephanie Perrin**, long-time Head of School; **Wendy Wheeler**, Trustee and former Board Chair; **Bob Keiter**, former Development Committee Chair and present Board Chair; and **Lola Baldwin**, a long-time Wayland Group friend and colleague and Dean for External Relations (now Associate Dean). Although each of the four speakers spoke from his or her own point of view, the common themes that emerged set the table for the commonalities that would run throughout the day: the need to become a personal and passionate advocate; the need to engage people in a real dialogue about the real issues impacting an institution; the need to be clear and explicit about institutional goals; and the need for a persistence of effort, ideally committing to a given leadership team over a long period of time. (In the case of Walnut Hill the panelists had worked together consistently and continuously over a period of nearly thirteen years!)

At lunchtime we were treated to the lifetime leadership reflections of a triad of extraordinary speakers. **Anna Faith Jones**, President of The Boston Foundation, commented on the need for commitment to strong social goals and ideals combined with the need to be flexible in the approaches and tactics pursued to achieve such goals. **Reverend Charles H. (Kelly) Clark**, Rector Emeritus of St. Paul’s School (among many other career assignments) spoke movingly of leadership as the product, rather than the intent, of answering a series of calls to important assignments through, in effect, a lifetime “journey” of service. **Aaron Lazare**, Chancellor of the University of Massachusetts at Worcester and Dean, University of Massachusetts Medical School, spoke of the need for direct “truth telling” and the need to encourage people to look beyond bureaucratic titles and functions to the underlying humanity and spirit of the real people who hold those titles as a way of breaking down barriers to mutual understanding and progress.

Our afternoon session consisted of two panels. The first, organized under the theme of “Managing Through Crisis and Change,” was comprised of **Nicki Nichols Gamble**, then-President of the Planned Parenthood League of Massachusetts; **Suzanne Murray**, former Board Chair of Lincoln School in Providence, Rhode Island; and **John Nelson**, former CEO of both Norton Company and Wyman-Gordon Company in Worcester, Massachusetts. Nicki spoke movingly

and insightfully about her 25-year tenure as President of Planned Parenthood, stewarding this wonderful organization through a period of periodic stress and renewal and extraordinary growth; and focused most particularly on the events of December 30, 1994. Sue Murray spoke thoughtfully and at times humorously of the dark days of real jeopardy in the life of a school and the subsequent “workout,” illuminating the importance of a partnership between a Board Chair and CEO, and a need for the lay leadership not only to perform their functions appropriately, but also to lead a community through their own expressions of confidence in the ultimate outcome—holding one’s head high even in the face of extraordinary difficulty and stress. John Nelson spoke with insight and extraordinary candor both of his experience as CEO of Norton Company during the period of a hostile takeover bid; and in even greater detail of the turnaround of Wyman-Gordon Company. In this connection, he shared a concept which he called “Personal Leadership.” Since we so often associate the concept of “leadership” with high office or major “corporate” responsibility, this was a particularly provocative and important concept. With John’s permission, an excerpt from his remarks on this topic:

I learned, through personal experience, that there are four critical attributes that I look for in people who are managing an organization—whether it’s day to day or in a crisis. Together, these four comprise what I call personal leadership. And it’s personal leadership that I want to see in the people around me.

*The first attribute of personal leadership is **vision**. Vision is the ability to imagine a desired future and articulate it in such a way that others will freely align themselves with it. For example: John Kennedy’s vision of placing a man on the moon within a decade. Martin Luther King’s articulated in his ‘I Have a Dream’ speech. When we were trying to save Wyman-Gordon, we tried to hold a vision of what the company would be like if we could pull it through.*

Vision is particularly important during a period of crisis. Questions are coming at you from all sides and you frequently have to make on-the-spot decisions. A shared vision helps sort out the serious from the trivial. It keeps you from spending your time on side issues and dead ends. It prevents you from panicking or being thrown off-course by short-term setbacks. The shared vision keeps you focused.

*The second attribute of personal leadership is **integrity**. To me, integrity has two parts. The first is the willingness to accept full responsibility for your own actions and decisions. The second is the commitment to act in the best interests of the people and organization you serve.*

Everybody knows about one plaque that President Harry Truman used to keep on his desk. It said, “The buck stops here.” He also had another plaque that said, “Always do right. This will gratify some people and astonish the rest.”

In times of crisis, each member of the team has to trust the others. You have to be able to believe that each of you will know the right thing to do, and will accept the responsibility for doing it.

*The third attribute of personal leadership—along with vision and integrity—is **passion**. Leaders energize others when they feel deeply about their vision and live it emotionally.*

The most remarkable example of passion that I’ve experienced personally occurred during BTR’s takeover attempt. I had assumed that Norton employees would be spectators to the events, while management fought the battle in traditional ways. I was absolutely wrong. Leaders rose spontaneously from the ranks of employees. These people had a passion for the company. Many of their parents and grandparents had worked there. These leaders literally led employees to the streets in protest, and they kept it up until the final bell, and that gave us in management very strong negotiating leverage.

Passion is particularly important during a crisis because there are so many times when you’re tempted to feel overwhelmed and discouraged. Passion keeps you going. It prevents you from giving up.

*The final critical attribute of personal leadership is **humility**. By humility, I mean a willingness to accept your weaknesses, and to bring on people whose strengths complement yours.*

We all prefer to work with people who are like us. It’s easier. But in a time of crisis, a homogeneous team could be the death of an organization—because you need to cover all the bases. The big-picture person needs to hear the details. The introvert may need to be pushed forward, the extrovert may need to hold back. The right-brainer needs the left-brainer. The action-oriented person

needs the deliberator. It's true that, on some level, you might drive each other crazy because of these personality differences. But, if you share the vision and the passion, and have confidence in each other's integrity, you will develop the trust that, in the final analysis, may be the most reliable predictor of your success.

*In the most difficult crises of my career, I've been fortunate to be able to surround myself with people who share these attributes of personal leadership—**vision** to keep us focused—**integrity** to insure that we make the right decisions—**passion** to keep us going—and **humility** to keep us balanced.*

Our final panel was devoted to a variety of perspectives on leadership, and the “entry paths” or different roles from which individuals could exert leadership influence on organizations. **Beth Klarman**, Executive Director of the Seth A. and Beth S. Klarman Foundation, spoke of the ways in which as a family foundation she and her husband Seth had assisted organizations not only through specific grants but also through informal advice, technical assistance, and networking. **Susan Whitehead**, Chair of the Board of Planned Parenthood and of the Whitehead Institute, spoke of her own personal “style” of leadership: becoming familiar with a number of organizations, selecting a small number for personal attention and involvement, fully informing and involving herself in the programs and activities the organizations thus selected, and then being willing to assume formal and personal responsibility when her interest and the strength of the organization seemed to justify such an involvement. Finally, **John Marshall**, President of the Kresge Foundation, spoke of the work of the Kresge Foundation, not only in helping organizations achieve key project goals, but also in using the grant process to help identify areas of institutional strength and challenge, to rally the Board around a common, focused objective, to invite the participation of others to broaden the base of support, and to build long-term capacity for institutional advancement. We were particularly pleased and honored to have John, as CEO of one of the most important and enlightened grantors in the nation, as a participant in our conference.

We were delighted to be included in a recent Board planning retreat held at Trinity Conference Center in West Cornwall, Connecticut for **Miss Hall's School**. Under the leadership of visionary Head Jeannie Norris and with the extraordinary assistance of Director of Development Janis Martinson, Director of Alumnae Relations and Annual Giving Dallas Briney, and Campaign Chair Patsy Smith, the School has already surpassed its original campaign goal of \$10 million, has raised its goal to \$15 million, and is in the final stages of planning for multiple construction and renovation projects on its historic Berkshire County campus. The repositioning of the School under Jeannie's leadership has included an intensive emphasis on quality in faculty, students, and curriculum and has benefited from a series of potentially “transformational” gifts on the part of senior alumnae leaders.

During the second half of calendar 1999 a staff team of The Wayland Group was intensively involved in assisting the **New England Aquarium**, working closely with President Jerry Schubel, Campaign Co-Chairs Barbara Hostetter and George Lovejoy, and Board Chair Rudy Pierce on a series of initiatives designed to provide strategic focus, energy, and momentum to the completion of the very ambitious *Aquarium 2000* plan and campaign. For 30 years a New England landmark and a linchpin of the cultural fabric of Boston, the Aquarium's robust and expanded mission, including not only education and entertainment, but also research and conservation, environmental education, and public understanding of science, provide a platform for both regional attention and national support.

We are proud to have continued our work with **Thunderbird, the American Graduate School of International Management** in Phoenix/Glendale, Arizona. Under the leadership of President Roy Herberger and Campaign Chair Ken Seward, Thunderbird is within reach of its \$50 million *Thunderbird Rising* campaign goal, and is already looking beyond the present campaign to an even more ambitious one in the new century. Staff of The Wayland Group have provided advisory support on a continuing basis to the present campaign, and conceptual and strategic support to issues of organizational and planning for their next effort, working closely with Vice President for External Affairs Jenny St. John and Associate Vice President and Director of Development Richard Tollefson.

Although many of The Wayland Group's assignments are in fundraising and marketing, we have been increasingly involved, in recent years, in projects involving planning, leadership development, or a combination of the two. For example, between September 1998 and May of 1999, Jim Kitendaugh, Lynne Cavanaugh, and Melissa von Stade worked with staff, faculty, administration, and Board of **Walnut Hill School** to develop a new long-range plan with a commitment to “maintain or increase the steep trajectory of success of the School.” Under the leadership of long range planning committee co-chairs and trustees Joe Keefe and Linda McLane, the process involved over 100 Walnut Hill friends and constituents in a variety of subcommittees and task forces, all funneling to a set of goals and a specific, quantitative

five-year business plan. (As evidence of the power of such a process and commitment, the School received three new commitments of \$1 million in response to the excitement of the long-range plan, even absent a formal capital campaign!)

During 1999 we were happy to be identified as a consulting partner for **Hebron Academy** in Hebron, Maine. Under the leadership of long-time faculty member and Head of School Dick Davidson, the Academy has worked through a period of enrollment and financial difficulty to renewed vigor and strengthening fundamentals, culminating in a school-wide celebration of their *Hebron at 200* campaign in October of 1999, which in turn was a preamble to their Bicentennial in 2004. During 1999 we helped Assistant Head Paul Domingue, Dick Davidson, and trustee leaders including Chairman Jack May, Vice Chair Eric Morse and Campaign Co-Chairs Dean Ridlon and Payson Perkins to review and adjust campaign plans and reconfirm the Academy's commitment to fundraising success. During the current academic year a Wayland Group consulting team is focused on facilitating the creation of a five-year plan, working with trustees Steve Gates and Eric Morse and Dick Davidson as Co-Chairs of an institution-wide long range planning committee. The School's commitment to core values of excellence, community, and integrity are reflected throughout their program, setting the stage for a lively review of mission and principles and an articulation of five year's worth of "next steps" in the Academy's continued repositioning and development.

During 1999 we were pleased to celebrate the completion of **Shady Hill School's** successful *Pathways to the Future* campaign, which surpassed its \$10 million goal to close at \$11 million. Director Bruce Shaw, Director of Development Jennifer Evans, and Campaign Chairs Adele Pressman, David Pilgrim, and Fred Wang teamed up to lead a "breakthrough" effort—all in the context of preserving and strengthening Shady Hill's essential and specific commitment to progressive, child-centered education, a "village-like" atmosphere, and very deep commitments to teacher training and diversity. Congratulations to all!

In our fourth year of partnership with the **Worcester Art Museum**, we are pleased to report that their *Centennial Campaign* is surpassing all expectations. The original goal of \$25 million was subsequently increased to \$30 million, and \$26 million has been achieved to date. The campaign is enabling the Museum to reinforce its national reputation and leadership position by funding investments in facilities, contemporary art, conservation, and audience development. The team behind this success includes Co-Chairs Tony Tilton and Howard Jacobson, Museum Director Jim Welu, Board Chair John Nelson, Campaign director Deborah McKean, and Development Director Marillyn Earley.

The **YMCA of Greater Boston** is nearing a successful conclusion of its \$10.5 million capital campaign *Keeping Families Strong*. The purpose of the campaign is to expand and/or build YMCA facilities in key Boston neighborhoods. Last spring the YMCA celebrated the start of renovation at the new Chinatown/South Cove YMCA at the site of the former Don Bosco Technical High School. The YMCA received a \$700,000 Kresge challenge grant in support of the South Cove project and to help complete the campaign. The Wang family has stepped forward with a 7-figure commitment for the South Cove YMCA. During this same period, the YMCA also raised \$2.5 million for an expanded facility with a major aquatic center in Reading. Campaign Chairman and lead donor Nelson Burbank and Branch Executive Paul Gorman led a successful community-wide effort for the project.

Having successfully completed its first capital campaign, **The Whitehead Institute for Biomedical Research**, under the leadership of Director Gerry Fink, Chairman of the Board Susan Whitehead, and Director of Institutional Advancement Eve Nichols, enlisted The Wayland Group to assist in the creation of a comprehensive two-year Development Plan. The plan, designed to build a diversified fundraising program and a strong base of private support, identified ambitious goals and appropriate strategies in leadership annual giving, research support, education and outreach support, and capital and planned giving. A key element of the plan was the strategic re-organization of the development function at both the board and staff level.

The *Lasell 150 Campaign* for **Lasell College** has been nothing less than spectacular. Due to the success of the leadership phase of the campaign, the College has increased the goal and is expanding the scope of the Campaign. Alumnae and Campaign Co-Chairs Joan Weber and Peggy Kraft lead a cadre of dedicated volunteers. The continued vision of President Tom de Witt, and the steady hand and excellent staff work of Vice President for Institutional Advancement Ruth Shuman, Director of Campaign and Gift Planning Kathy Urner, and Major Gift Officer Cathy Black have helped campaign leadership develop the skills and confidence to reach out to their peers and make the case for supporting this worthy institution.

Having completed a planning and feasibility study and a year of careful planning, **Lincoln School** has begun the Leadership Phase of its campaign. Lincoln is fortunate to have a dynamic, thoughtful Head of School, Joan Countryman, and a strong Board of Trustees, under the leadership of Bill Allen. A group of committed volunteers have formed a

Campaign Steering Committee, chaired by Suzanne Murray, to lead this phase of the campaign. Director of Development Sandy Brunell and Campaign Manager Lesley Thurston are providing the staff support for this important effort, insuring a strong future for Lincoln School.

The Wayland Group has recently begun working with **Nashoba Brooks School** in Concord, an independent school for boys and girls in pre-K through grade 3, and girls in grades 4-8. Under the enthusiastic leadership of Head Kay Cowan, Development Director Karl Kussin, Board Chair Carl Kester, and Development Chair Marty Wallace, the School has completed a long-range plan leading to the decision to conduct a planning and feasibility study for a comprehensive capital campaign. The campaign will expand and improve the school's facilities while building endowment to support faculty compensation and financial aid.

To celebrate its 25th anniversary, the **New Hampshire Humanities Council** launched its first capital campaign to provide a permanent endowment for its programs. The Humanities Council is a small organization with a very broad reach. It leverages its modest budget of slightly more than \$1 million to provide over 1500 programs that reach over 250,000 people in all parts of New Hampshire. Under the leadership of Executive Director Charles G. Bickford and Campaign Co-Chairs Reverend Charles Clark and filmmaker Ken Burns, the Council has raised nearly \$1.5 million towards its goal of \$1.7 million. In November, it kicked off the campaign at its annual meeting, featuring keynote speaker Tom Brokaw.

This spring was both an exciting and a sad time for **Planned Parenthood League of Massachusetts**. On one hand, it joyously celebrated 70 years of work for reproductive rights. At the same time, it bid farewell to Nicki Nichols Gamble, who has been CEO of the agency for 25 years. Twenty-five years is a significant tenure for any non-profit CEO, but in the reproductive rights arena, where a leader faces the threats of clinic bombings, shootings, picketing, and personal injury, it is nothing short of remarkable. Under Nicki's watch, Planned Parenthood has grown from a budget of \$200,000 and a staff of 8 to a budget of \$7.5 million and 160 full- and part-time employees. She has successfully led Planned Parenthood through two recent major capital campaigns, raising over \$12 million to build a new clinic in Worcester in 1993 and to open a new program and service center on Commonwealth Avenue in 1996. In June, Planned Parenthood recognized Nicki's years of service in a way that it knew she would most appreciate. At an event marked by tears and laughter, Board Chair Susan Whitehead announced that Planned Parenthood had raised \$3 million for endowment and had named the Commonwealth Avenue headquarters in her honor!

For the past year we have been working with **The Cantata Singers**, one of Boston's preeminent choral ensembles, as they prepare to launch a major endowment campaign in early 2000. Funds are being sought to support enhanced artistic initiatives including commissions, major works and recordings, as well as the Cantata Singers' highly regarded community outreach and educational programs. Thanks to the dedication and commitment of Campaign Chair David Rockefeller, Jr., Board Chair John Rutherford, Executive Director Ann Marie Lindquist, and Music Director David Hoose—as well as an enthusiastic Board of Trustees and Chorus—The Cantata Singers are well on their way to success, having raised over half of the campaign's overall \$2 million objective. Bravo!

This spring, The Wayland Group began a new and exciting relationship with **Lawrence Academy**. Working with Director of Development Rob Moore, The Wayland Group assisted the Academy in assessing its current program of resource development and completed a Planning and Feasibility Study in anticipation of an ambitious, comprehensive capital campaign. For over 200 years, Lawrence Academy has provided a rigorous, co-educational college preparatory academic program and today the School is thriving. The New Campaign for Lawrence, under the leadership of Head of School Steve Hahn, Chairman of the Board Ron Ansin, and Steering Committee co-chairs Bill Achtmeyer and Bruce MacNeil, will build upon recent dramatic enhancements to the School's facilities and advances its student-centered, skill-based curriculum. The campaign will focus on endowment for faculty and financial aid, the boarding program, program innovation, and renovation of the School House.

Families First has been in the forefront of the field of parenting education and support for the past ten years offering cutting edge programs to parents from all walks of life. As Families First begins its second decade, it is a natural time for the organization to build upon a decade of accomplishments and secure its future by embarking on a first ever campaign. The Wayland Group is delighted to be working closely with Founder and Executive Director Linda Braun, Director of Development Jill Shulman, and superb volunteers on the Board and Campaign Leadership Committees. At this early stage of campaign solicitation, Families First has received extraordinary support from its Board and friends and gifts to date total more than \$600,000 toward the \$2,000,000 goal including a lead gift of \$300,000. The campaign seeks to raise funds for the creation of a permanent endowment and to create a spendable fund for program growth and expansion.

The **Greater Boston Food Bank**, which continues to be a leader in the acquiring and distribution of food in eastern Massachusetts and in supporting nutrition and hunger efforts in the community, has recently completed a comprehensive strategic plan designed to position the organization to meet the growing demand for service and food distribution. In order to expand service to the increasing number of agencies and individuals in need, the Food Bank must also increase its financial resources for program growth. In May of 1999, the Greater Boston Food Bank selected The Wayland Group to help design a comprehensive major gifts program which will build upon their successful direct mail, event and foundation support programs. With the assistance of Jeff Otten and Trudi Veldman, Co-Chairs of the Development Committee of the Board of Directors, and President Catherine D'Amato, the Food Bank is strategically securing significant support from individuals. We are delighted to be of assistance to this dynamic organization and to play an important role in the implementation of their strategic plans.

In January, The Wayland Group was selected by **Shore Country Day School** to assist in planning for a significant capital campaign for endowment building and campus improvements. A planning and feasibility study completed in June 1999, determined that Shore was in an excellent position to launch a successful campaign with a working goal in the range of \$7.5 million. Under the extraordinary leadership of Head Larry Griffin, Board Chair Deborah McKenna, and Campaign Co-chairs Mary Higgins and John Lechner, Shore is quickly implementing campaign plans and recommendations. Shore's proposed campaign will provide funds for a new gym and expanded dining hall, and will ensure appropriate renovation of Shore's historic Winslow building which is a central administrative and programmatic emphasis on the Shore campus. It is a pleasure to be working with this distinguished school, which provides students in grades K-9 with an academically challenging education in a nurturing environment.

During the coming year The Wayland Group will be continuing its service to clients and friends through a variety of special programs and events. Two Breakfast Clinics are planned for the spring of 2000: one on the development of Adjunct Boards, and the other on the pure "management" of a capital campaign, focusing on the numbers or "metrics" which are the tactical backbone and measure of campaigning.

We are also pleased to announce the second biennial edition of our successful two-day Institute on the Maximum Gifts Approach. It will be offered on April 27 and 28, 2000 at the University Park Hotel at MIT. As in 1998, the first day of this two-day experience will be devoted to an in-depth examination of the process through which "maximum gifts"—true, capacity-level, thoughtful, transformational gifts—can be sought and secured; and the second to a series of topic-based sessions on key issues in even greater depth, aided by guest speakers. Look for detailed invitations early in 2000.

As the new year begins we say good-bye with regret to Sue Kinney, a mainstay of our consulting staff for the past seven years. After serving many TWG clients with good humor, attentiveness, and distinction, Sue will be leaving to devote her energies full-time to family. Many thanks to Sue for all of her wonderful work over the years.

Also in the new year we welcome Jennifer Carr Rice as a new member of our team. A graduate of Brearly, Bates, and Boston University School of Management, Jennifer comes to us from a 10-year experience at the John F. Kennedy Library Foundation (most recently as Director of Development), where she worked with major donors, managed large, complex special events of all types, and participated in the Foundation's recent \$10 million capital campaign.

All of us look forward to a new year of challenge and change. As always, we deeply appreciate the support and confidence of our clients and professional friends. Many thanks to all, and best wishes in the new Millennium.

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