

Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group, Inc.

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

2001 – 2002 REFLECTION AND RENEWAL

“I’m breathing...are you breathing too?”

In Robert Bolt’s justly celebrated play *A Man for All Seasons*, toward the end of the play, after a moment of intense sorrow and tragedy, these are the sentiments expressed by a wonderful character known only as the “Common Man.” In the aftermath of the events of September 11, 2001, perhaps there is no more fitting epigraph to 15 months of shock, sorrow, uncertainty and promise of renewal than this: “We’re still breathing. Are you breathing too?”

All of us were stunned by the events of September 11, 2001 and by the long coda of uncertainty and recession that followed. But at the same time, we at The Wayland Group have been enormously impressed by the many ways in which our clients, and others in the independent sector, have chosen to use this time for reflection, for a sharpening and recalibration of mission and purpose, and for continued outreach to their respective constituencies to partner with them in their important work. Indeed, the period of review which naturally followed the events of September 11th proved once again the remarkable variety and resilience of the independent sector, not only among those institutions directly helping those in need, but also among those whose missions are “once removed” from direct service efforts, but which are also important in building tolerance and contributing to civic life. We have never been more proud to be associated with the independent sector than over the past year and a half, when the role of non-profit organizations has seemed more central and crucial than ever.

One of the many projects undertaken by The Wayland Group over the past year forced us to sharpen our focus on how to adapt to increased competition, changing economic circumstances, and market conditions. In the spring of 2002, we were asked by the **Nonprofit Finance Fund**, one of the leading community development financial institutions in the country, to conduct a series of workshops for 28 grantees of the exciting **New Directions/New Donors for the Arts** initiative of the **Ford Foundation**. In response to this invitation, staff of The Wayland Group conducted workshops in New York, Los Angeles, and Chicago, attended by approximately 60 board, development, and management staff of these exemplary arts organizations nationwide. We were asked, not only to provide training in the transactional part of the major gifts process, but also to reflect upon other aspects of an overall advancement program that contribute significantly to success in major gifts. As the 2002 year draws to a close, we felt it might be appropriate to share some of these thoughts and comments with a wider group of clients and friends.

Synergistic Success

For nearly 20 years in the consulting business, it has become increasingly clear that success in fund-raising—particularly in the major gifts arena—is not a function of the mere “machinery” or technique of major gifts fund-raising. Rather, it is a result of a balanced approach in which the fund-raising program itself is only one feature of a triad of elements for success. Equally important are ongoing efforts in the areas of board and leadership development and institutional and long-range planning.

In the area of leadership development, it seems clear that successful development programs enjoy a high degree of “attachment” among those to whom an institution looks for support and expose their stakeholders and potential donors to the detailed content surrounding an institution’s mission and programs. Looked at in this way, in a sense board membership represents the highest form of cultivation. At the same time, with their fiduciary and oversight responsibilities and with the confidential nature of their deliberations, a statutory board cannot continue to grow exponentially in the service of attachment and cultivation alone. Accordingly, we have urged many of our clients to develop and/or refine and formalize their adjunct structures, giving those who may wish to draw closer to the organization real standing in institutional life, and creating a sense of ownership and responsibility for the future which can only be achieved through that level of attachment. More often this strategy takes the form of adjunct “Boards” with their own terms, meetings, and rotations.

Equally important to success in major gifts and/or campaigning is developing a coherent and authentic relationship between institutional program and business plans and fund-raising objectives. In our consulting practice, this has most often been achieved through a broadly held, participatory, long-range planning process, in which mission and broad institutional goals are linked to specific, time-dated programmatic goals with an accompanying five- to ten-year financial plan. Too often fund-raising is viewed as a cynical, opportunistic exercise. (Our colleague and friend Jim Hopper often glibly referred to this with a simple formula, “You have money; we need money; give us your money.”) While many such efforts are successful in some measure, an institution strengthens its case immeasurably if its institutional participants understand the real impact of their giving in light of specific institutional plans and the ways in which philanthropic revenue can contribute specifically to those plans. Indeed, an effective long-range plan includes, either explicitly or implicitly, a “gap analysis” which clearly delineates the role of philanthropic dollars in an institutional business plan. Particularly over the last ten years, we have found detailed long-range and business planning replacing the slick, four-color case statement as the medium of choice to raise sights and enter into a dialogue with key stakeholders.

So it is this “synergy for success”—an equal attention to the fund-raising process, board and leadership development, and institutional long-range planning—that formed the basis of our key recommendations to the New Directions/New Donors grantees, and which remains the fundamental premise of our consulting practice.

Biennial Institute

Another major feature of the year 2002 was The Wayland Group’s Biennial Advancement Institute, which took place May 2nd and 3rd at the University Park Hotel at MIT. This year’s Institute was attended by more than 100 participants and was, we think, a signature success. Institutions participating included, among others, Corcoran Gallery of Art, Dana Farber Cancer Institute, Facing History and Ourselves, Harvard University, Maine Coastal Heritage Trust, New England Conservatory, Shady Hill School, and the YMCA of Greater Boston. Over the past several years, we’ve continued to reach out increasingly to guest speakers to help underpin and enliven the proceedings. At a volunteer panel on the first day of the Institute, we were joined by Trustees and longtime friends Dave Dayton, Mike Wardell, and Amey DeFriez. All were wonderful in sharing their reflections. We reprint an excerpt of Amey’s remarks, as she is always so clear and direct in any perspective that she shares:

“Reflecting on my own commitment to fund-raising, the causes for which I have chosen to work are all education related—and education is my passion. H.G. Wells described human history as more and more ‘a race between education and catastrophe’ and he published that in 1951. Human history is more and more a race between education and catastrophe. I see education, the broadening of our horizons as the key to so many societal ills—and how we need such a key today! Education creates an enormous ripple effect—not only laterally, as we affect our own peer groups, but longitudinally, as teachers affect young students. Consider, too, parents whose intellectual curiosity has been fostered and whetted by their

education. These parents cannot resist nurturing the enormous natural curiosity of those dry sponges, their children. More ripple effect.”

“Others of you may well be driven by different passions, but education is mine and I revel in it. And some of the people you connect with are the best! And if some of them are the worst....well, that’s education, too.”

“So: given education, or whatever your particular passion may be, in our capitalistic world, can funding be far behind? Its certainly neck and neck if not out in front. Remember the old Russian proverb, ‘It’s not the horse that draws the cart, but the oats.’”

“To cheer us, the New York Times last week had an article titled, ‘The Newly Rich Are Fueling a New Era in Philanthropy,’ which you may have seen. The author claims that thousands of families with relatively new money are fueling a transfer of wealth unlike anything ever seen in this country. Researchers at Boston College estimate that \$19.2 trillion to \$50.2 trillion will be spent on philanthropy by 2052, depending on economic growth rates. However, the article continues that there is no guarantee that any existing charity will get that money—new philanthropists are setting higher standards for charities and seeking to be more involved in the application of their money, so it would behoove charities to begin finding models for fund-raising that allow donors to engage in the mission of the organizations. This tells us that the money will be out there—now the question is, how to gather it for worthy causes. Note the recommendation to allow donors to engage in the charities’ missions—this is a very strong motivator—we see it when people are eager to join boards—they want to be part of the power structure...”

“It’s a given that, for a volunteer solicitor, your own contribution should be made first. And it gives you a lot more credibility if you stretch—remember, we’re talking major gifts here—if your stretch is proportional to what you seek from the prospect. Your previous gift or pledge also makes you much more comfortable as an asker...”

“You will, of course, know well the institution for which you are soliciting. You may, however, be slightly nervous at this time and if you can’t keep all the answers, figures and/or dates, in your well-organized head, bring along someone who can. You are selling passion and commitment—the hard facts can be in the crisp possession of that staff professional with you—and on paper to leave with the prospect.”

“See this whole process as a partnership with the prospect. It is not a you/me confrontation, but a guiding of someone with proven interest toward an enlightened vision of how her/his resources can make an important difference. The prospects will not be ‘giving away’—they will be investing in a very worthwhile and important endeavor—they will be joining, becoming part of a valuable and vibrant group of people like you! Remember Oscar Wilde—‘I can resist everything except temptation.’”

Other guest speakers who joined us included: Louis W. Cabot, Barbara Dobkin, Kris Anne Hormann, Martha Kleinman, Brian K. Lee, Michael Moskow, and Christopher Reaske. This is a special event which provides us, as a firm, with renewed energy and focus, and we continue to feel, outstanding service to our clients.

In addition to some of the special projects outlined above, 2001-02 has been a very busy period in our consulting practice, involving us in a variety of wonderful partnerships with clients in education, the arts, health and human services, and science and the environment.

Boston Baroque performs music of the Baroque and Classical periods using period instruments. It is now widely recognized as one of America’s leading period-instrument ensembles. Under the dynamic artistic leadership of its founder, Martin Pearlman, Boston Baroque has received the highest critical

acclaim, and its recordings have garnered three Grammy nominations. To celebrate its 30th anniversary, Boston Baroque is conducting its first capital campaign. This \$1.5 million effort will establish Boston Baroque's first endowment funds as well as funding an Artistic Ventures Fund that will support artistic programming. Trustee Marshall Goldman is leading the campaign effort with excellent staff support from Executive Director Carole Friedman. An anonymous donor has provided a \$500,000 challenge grant to jumpstart the effort.

During the year 2002 we have enjoyed working with one of Boston's most beloved and distinguished cultural institutions, **The Children's Museum**. Working with President Lou Casagrande, Chief Operating Officer Neil Gordon, and development staff, our first assignment for the Museum was a comprehensive assessment of the organization's development operation. Following the completion of that initial assignment, The Wayland Group began conducting a broad Planning and Feasibility Study for an effort that would transform the Museum's waterfront facilities. Under the leadership of President Casagrande and Board Chair Tom Moloney, The Children's Museum's leadership is united in its desire to secure its status as one of the country's leading children's museums by transforming the Museum in a significant way. The results of The Wayland Group's Assessment and Planning and Feasibility Study will be useful to the Museum in its planning for a new capital fund-raising effort directed toward meeting that goal.

College of the Atlantic has grown rapidly since its founding in 1969 in its beautiful oceanfront location on Mount Desert Island, Maine. In recent years, under the dynamic leadership of President Steve Katona, it has completed a strategic plan, raised \$21.5 million to complete successfully its first major endowment campaign, and completed an ambitious Master Plan for its campus. Just over a year ago, the College selected The Wayland Group to work on a Strategic Development Plan that would address continuing operating needs as well as funds for capital projects. Following completion of that assignment, the College engaged The Wayland Group to conduct a Planning and Feasibility Study for a comprehensive capital campaign that would include increased Annual Fund support, priority operating needs, support of student financial aid and faculty development, and an initial investment in the campus Master Plan. The Wayland Group presented the results of its study to the College's Board in the spring of 2002 and worked with COA's new Director of Development Ellie Courtemanche, on an Implementation Plan for a \$20 million fund-raising effort. We have particularly enjoyed our work at COA with President Katona, as well as with Board Chair John Kelly, Development Committee Co-Chairs Dan Pierce and Bill Foulke, and Planning Committee Chair Sam Hamill.

For almost one hundred years, **Dedham Country Day School** has provided an outstanding academic program in an environment that is both stimulating and nurturing to its students. This fall, Dedham Country Day is preparing to launch an ambitious \$8 million capital campaign for endowment for faculty support and financial aid and for renovation of its Upper School facilities. The Campaign is driven by the School's visionary strategic plan, developed under the leadership of Board Chair Susie Hunter. In addition, in preparation for the Campaign, Trustees Molly Cramer and Gail Radley, Head of School Sonia Valentine, and Director of Development Julie Hagen attended TWG's Advancement Institute in the spring.

Bonnie McBride joined **Dimock Community Health Center** last spring as the Senior Vice President for Institutional Advancement to help lead their \$21million campaign. Along with Jackie Jenkins-Scott, Dimock's President, and David Dayton, Chairman of the Institutional Advancement Committee, Bonnie has helped to solidify the development team and continues to make strong progress in the Leadership Phase of the Campaign. Off to an impressive start, the Campaign will help renovate campus facilities, build internal capacity and infrastructure, and provide a vital endowment for this historic institution and long-time Wayland Group partner.

In January of 2002, The Wayland Group was engaged for a second time to conduct a new Planning and Feasibility Study for the **Fayerweather Street School**, a wonderful, progressive independent school

located in Cambridge. We worked once again with the respected Head of School Susan Kluver, a devoted Board of Trustees chaired by Therese Hendricks, Director of Development Arlene Treacy-Montgomery, and newly-appointed Capital Campaign Manager, past parent Carol Goss. Having successfully raised \$850,000 during their last campaign to accomplish the move to the wonderful new school house on Concord Avenue in Cambridge and completed a long-range plan and master plan, the Board now seeks to increase the size of the Upper School, build a new science lab, and expand outdoor facilities. Accordingly, Fayerweather has launched a \$1.5 million campaign.

First Nations Development Institute, located in Fredericksburg, Virginia, is a new client of The Wayland Group and has impressed all of us with its incredible track record as a community foundation dedicated to serving the Native American Community. First Nations helps American Indian tribes and Native communities strengthen their economies through asset-based community economic development. Through grants, micro-lending and strong technical assistance, First Nations helps Native communities control, create, leverage, utilize, and retain their assets. Under the leadership of its Founder and President Rebecca Adamson, First Nations has earned strong and consistent support from several national foundations. The Wayland Group worked with First Nations on a campaign readiness assessment for an endowment-building effort that will create sustainable support for the organization's grant-making efforts.

This fall, The Wayland Group completed an intensive 12-month assignment for the **Harvard School of Public Health**, during which members of The Wayland Group conducted a Development Assessment and provided ongoing advice and counsel to Dean Barry Bloom, the senior management team, development staff, and the School's Development Task Force. The Task Force, an ad hoc committee comprised of members of the School's senior management team and senior development staff, was formed to guide the School through a period of transition in development leadership and to provide ongoing support to Dean Bloom in the advancement arena. We were excited to welcome David Woodruff, formerly Director, Office of Campaign Giving at MIT, as Dean for Resource Development, and look forward to continuing to support the School's development program.

The **Huntington Theatre Company** is in the midst of an exciting campaign. This past June, The Druker Company broke ground on its development of the Parcel 8 site in the South End, which will include not only luxury condominiums and retail space, but also two new theatres adjacent to the Boston Center for the Arts (BCA) with additional spaces for artists and youth programming. The Huntington will be the anchor tenant of the larger theatre. And although The Druker Company will build the "shell and core" of the facility, the Theatre must raise the balance of funds necessary to complete the interior of the new space. The Wayland Group, having worked on the planning of this major new arts facility with the BCA and the Huntington, is delighted to continue its work with the Huntington's Managing Director Michael Maso, Artistic Director Nicholas Martin, Board Chair J. David Wimberly, and Vice Chairman for Development Bill McQuillan, on a capital fund drive that will also generate endowment funds to support the company's operations. So far nearly \$8 million has been committed toward the \$15 million campaign.

During the fall of 2001, The Wayland Group was selected by the **Jewish Women's Archive** to serve as their consulting partner in an effort to assess their development program, and to develop a long-range plan and a strategic development plan. This six-year-old organization has established a preeminent "virtual archive" using web-based technology to chronicle, record, and transmit the rich legacy of Jewish women's history in the twentieth century. We have found our work with Gail Reimer, the visionary founding Executive Director, founding Board Chair Barbara Dobkin, and a dedicated Board of Directors, including Linda Perlmutter (Chair of the Sustainability Task Force which guided the long-range planning process), Prudence Steiner, Nicki Tanner and Penina Glazer, to be both extremely collegial and productive.

With nearly \$16 million raised towards its campaign goal of \$25 million, **Lawrence Academy** launched the Public Phase of its capital campaign in March by hosting enthusiastic donors and friends at a gala

event at the School. In conjunction with the Campaign, the School also launched this fall an expanded and re-structured Board of Visitors with a first annual meeting in November. Working closely with Director of Development Rob Moore and Campaign Director Rich Napolitano, as well as school leaders – Head of School Steve Hahn, Chairman of the Board Ron Ansin, and Campaign Chairs Bill Achtmeyer and Bruce MacNeil—members of The Wayland Group have provided advisory support throughout the Campaign. Of special note, Head of School Steve Hahn has recently announced his decision to leave LA at the end of the academic year after nearly 20 years of service to the School. We wish him the very best!

This past spring **Lincoln School** kicked off the Public Phase of its \$12 million capital campaign, having already raised \$6 million toward that goal. A gala dinner celebrated the generosity of early leadership-level donors, and a day of family-oriented festivity capped the kick-off celebration. The Wayland Group team is pleased to continue to serve as campaign counsel to the School. Head of School Joan Countryman and Director of Development Kris Davitt have become a dynamic fund-raising team. With the leadership of Board Chair Bill Allen and the Campaign's honorary co-chairs Sue and Terry Murray and Marge and Ron Boss, the Campaign for Lincoln School is headed for success.

Massachusetts College of Art is the only publicly assisted, independent college of art and design in the United States. During the past several years, it has become increasingly clear that there is a growing need for the College to raise significant private philanthropic support in order to advance its ambitious and necessary capital, programmatic, and endowment needs. The Wayland Group was engaged by the Trustee Development Committee of the MassArt Board of Trustees to conduct an assessment of the current development program, and to work with the Committee to develop a set of strategic and tactical initiatives for the College's advancement program over the next five years. Working with members of the Trustee Development Committee, chaired by Lindsey Kiang and including Ralph Stuart, President of the MassArt Foundation, along with Vice President for Institutional Advancement Richard MacMillan, and MassArt's dynamic President Kay Sloan, The Wayland Group helped to develop a Strategic Advancement Plan for the College.

Merrimack Repertory Theatre has made remarkable progress under the leadership of Artistic Director Charles Towers, Board of Trustees President Jack O'Connor and Board of Trustees Chair Nancy Donahue. The Wayland Group was selected last fall to conduct a Planning and Feasibility Study for the Theatre, testing campaign objectives in capital, program, and financial stability needs. The Study recommended a \$1.5 million Leadership Campaign in support of financial stability and capacity-building needs, and in January of 2002 the Board resolved to go forward with that campaign. To date, the Theatre has raised more than \$800,000 toward its campaign goal.

Our consulting partnership continues with **Miss Hall's School** in western Massachusetts. The School has raised close to \$20 million toward a recently increased goal of \$23 million. This fantastic success is due to the strong leadership of Head of School Jeannie Norris, the hard work of a dedicated group of Trustees, alumnae and volunteers, along with superb staff leadership under the guiding hand of Director of Development Janis Martinson, and Director of Alumnae Relations and Annual Giving Dallas Briney. Persistence and commitment are paying off; not only has the Cross Athletic Center opened, but the Euston Library and Klein Arts Centers have been built and are now also open for use by the school community.

In September of 2002, **Nashoba Brooks School** celebrated the most successful capital campaign in the School's history. Nashoba began the planning for the Campaign with a goal of \$5 million and successfully raised the goal three times to a final goal of \$10 million. The Campaign was led by Co-Chairs Steve and Judy Kaye and Ed Kane and Marty Wallace. Nashoba, which had never received a \$1 million gift before the Campaign, secured three gifts of \$1 million or more during the Campaign. At their Annual Meeting in June, Nashoba announced that \$600,000 had been raised in Head of School Kay Cowan's honor to celebrate her 10th anniversary at the School. This fund, which will underwrite an endowment for faculty support, also successfully concluded the Campaign, with over \$10 million raised

for endowment and major facility improvements. Director of Development Karl Kussin describes this new endowment as a perfect conclusion to a campaign that has brought the whole school community together.

This fall The Wayland Group initiated a Planning and Feasibility Study for **The New England Center for Children**, working with NECC Founder and Executive Director L. Vincent Strully, Jr. and Director of Development RoseAnn Lovely. NECC, located in Southborough, provides state-of-the-art education and individualized treatment for children with autism and other disabilities. NECC has plans to expand and improve their current facilities to allow the Center to enhance its applied research program, attracting and retaining top-notch junior and senior level faculty, and improving the student experience through the addition of a pool and gymnasium.

During the past year, we have continued our rewarding consulting partnership with **New England Conservatory**. Under the leadership of Board Chair Jack Vernon, past Board Chair and campaign leader David Scudder, Development Committee Chair Harry Pratt, and President Daniel Steiner, the Conservatory is in the nucleus/leadership phase of an ambitious \$100 million campaign for endowment, facilities, and annual fund—a campaign to help secure the Conservatory’s position as a cultural linchpin in the Boston area, as well as a first-rate professional conservatory both nationally and internationally. The early stages of the Campaign are proceeding extremely well. The Wayland Group conducted a Planning and Feasibility Study, created a detailed Campaign Implementation Plan, helped complete a five-year Long-Range Plan, and is now providing ongoing advice and counsel to the Campaign. Don Jones joined NEC as Vice President for Institutional Advancement in March 2002 and is providing outstanding leadership to the effort.

The **Nonprofit Finance Fund** (NFF) was established in 1980 and is now one of the nation’s leading community development financial institutions (CDFIs), providing financial and advisory services to nonprofit organizations nationwide. NFF is providing support services to the New Directions/New Donors for the Arts program for the Ford Foundation. Ford’s \$42.5 million effort includes \$40 million in one-time challenge grants to 28 exemplary arts institutions drawn from across the arts disciplines and located in cities nationwide. The grants are designed to help organizations develop the financial foundation to sustain their programmatic initiatives, increase support from individuals, and enhance board leadership. As part of the initiative, NFF has asked The Wayland Group to conduct Major Gift fund-raising workshops for the 28 participating organizations at convenings in New York, Los Angeles, and Chicago. We are delighted to be working on this project with Sharon Combs, NFF Senior Director, National Alliances; Norah McVeigh, Vice President, Financial Services; and the President of NFF, Clara Miller.

Last year, The Wayland Group worked with the **Patriots’ Trail Girl Scout Council**, an innovative, highly effective organization providing vital services to a diverse population of girls in the greater Boston area. The Girl Scouts are working to build an individual giving program in support of expanded programs in anticipation of a capital campaign. Working with Executive Director Laura Watkins, Associate Executive Director Debbie Deacetis, Board Chair Deborah Kolb, and development staff, The Wayland Group conducted a Development and Campaign Readiness Assessment.

We are delighted to continue our work with the **Peabody Essex Museum**, the oldest continually operating museum in the United States, on the completion of its *Third Century Campaign* in support of capital construction, renovation, and endowment. Under the leadership of Director Dan Monroe and Chairman of the Board John Parker, the Museum has raised more than \$90 million towards its campaign goal of \$125 million. This ambitious fund-raising effort will result in more than a quarter of a million square feet of new and renovated galleries and public spaces and gardens, more than doubling the size of the Museum. The Peabody Essex will be among the nation’s leading museums of international art and culture. Working closely with Director of Development Brad Voigt, members of The Wayland Group are providing advisory support on a continuing basis to the Campaign.

We were delighted to be selected by **Planned Parenthood Federation of America** in mid-2002 as consulting partner for a major national, federation-wide campaign. The *Campaign to Power the Promise of Planned Parenthood* is an ambitious campaign with a working target of \$340 million to fund a set of bold goals that would change the social and political climate for reproductive rights and improve reproductive health on a global level. The Wayland Group is developing a detailed Campaign Implementation Plan, as well as providing intensive ongoing consulting counsel. We are pleased to be working with President and CEO Gloria Feldt, Senior Vice President and Chief Campaign Officer Joan Coombs and members of the campaign and development staff, affiliate CEOs Paula Gianino and Chris Charbonneau, Foundation Trustee Annette Cumming, as well as renewing our connection with Nicki Nichols Gamble, former President of the Planned Parenthood League of Massachusetts, who is serving as Co-Chair of the PPFA federation-wide Campaign Steering Team.

As Massachusetts' leading anti-hunger organization, **Project Bread** has a vital mission—to alleviate, prevent, and ultimately end hunger in the Commonwealth. Its annual Walk for Hunger is the oldest and largest one-day fundraiser to alleviate hunger in the United States, attracting more than 40,000 participants and raising more than \$3 million each year. To further its mission and extend its work, Project Bread's goal is to conduct its first-ever capital campaign, as well as to develop a major gifts program. The Wayland Group conducted a Campaign and Development Readiness Assessment, including a "mini-feasibility" study, and is continuing to work with Project Bread to help implement our recommendations. We are pleased to be working with Executive Director Ellen Parker, Director of Development David Hirschberg, and Project Bread's Board of Directors on this project.

We were delighted to be selected to conduct a three-phase comprehensive planning effort for **Spaulding Rehabilitation Hospital**, the region's premiere provider of multi-level rehabilitative care. In preparation for a capital campaign, members of The Wayland Group worked with the Hospital to develop a preliminary case for support and conducted a Development Assessment and Planning and Feasibility Study. In addition, working with Jacquie Stepanian and other members of Spaulding's Development Committee, The Wayland Group developed an Implementation Plan for the Leadership Development and Planning Phase of the Campaign. Spaulding's comprehensive campaign will significantly increase the hospital's endowment, dramatically improve the physical plant, provide seed funding for special program initiatives and significantly strengthen the annual fund. This was a wonderful opportunity to work closely with Spaulding leadership—John Cupples, President, and Diana Barrett, Board Chair—as well as with Partners Health Care representatives David Storto, Allen Peckham, and Sara Andrews.

In February of 2002, The Wayland Group began working with **Thayer Academy**, a co-educational independent day school in Braintree, grades 6-12, as it celebrated its 125th anniversary. Working with a highly-regarded Headmaster Eric Swain, outgoing Board Chair Troy Shaver, incoming Board Chair Bill Smith, and Director of Development Mark Gutierrez, we conducted a Planning and Feasibility Study for a comprehensive campaign for increased endowment, an investment in new and renovated facilities, and an increased annual fund. The Wayland Group presented its report to the Board of Trustees in June and is now working with Thayer on a Campaign Implementation Plan.

This past spring The Wayland Group conducted a Development Assessment at **Thunderbird, the American Graduate School of International Management** in Phoenix, Arizona. While members of The Wayland Group have worked with Richard Tollefson and Thunderbird's President Roy Herberger for many years, it was a great pleasure to meet with members of Richard's development team. The development operations we saw at Thunderbird were exemplary for their strong, well-executed systems, data precision, and donor relations. The recently appointed Senior Vice President for Institutional Advancement and Alliances John Seybolt will be leading a strategic planning process this winter, as The Wayland Group continues to work with the development team in preparing for a possible future campaign. We also want to send our congratulations to Richard Tollefson for his recent promotion to Vice President for Institutional Advancement and Director of Development.

The Walker Home and School in Needham provides services for the most troubled children and their families, both in highly specialized therapeutic environments and in community settings. Walker is in the final months of a highly successful \$9 million capital campaign which will transform its campus. As of the end of its fiscal year in June of 2002, it had raised the \$5.5 million capital portion of the Campaign and nearly \$3 million of the \$3.5 million annual fund goal. Walker received a \$750,000 challenge grant from the Kresge Foundation, which will be met when it raises the balance of its annual fund goal by December 31, 2002. The Campaign has had the benefit of strong volunteer leadership from Board Chair Michael Moskow and Campaign Co-Chairs Susan Mayer and Linzee Coolidge, as well as exceptional staff leadership from Executive Director Rick Small and Director of Development Kris Hormann. (Both Michael and Kris shared their experience at Walker and with other projects as featured speakers at our Advancement Institute.)

We have continued our nearly 15-year partnership with **Walnut Hill School**. We were delighted to be present at Lincoln Center in New York on the occasion of the 5th Annual Walnut Hill Gala, during which a new campaign for \$17.5 million to support the School's long-range plan was announced. This comprehensive campaign, supporting a new Academic and Technology Center (already completed), new residential facilities for Walnut Hill's boarding program, increased endowment, and dramatically increased annual giving, represents the flowering of a long-term effort to strengthen the School and to imbue the entire Walnut Hill "culture" with an advancement orientation. Alumni, parents, trustees, overseers, and members of their Board of Visitors have partnered with students, faculty, and staff to create the kind of celebratory culture toward fund-raising and giving which would be a model for many institutions. Although we have many partners at Walnut Hill, we have continued to work closely with long-time Head of School Stephanie Perrin, Dean for External Relations Martha Kleinman, Associate Dean Lisa Drake, and long-time Wayland Group friend and colleague Lola Baldwin.

One of our most interesting and gratifying partnerships over the last several years has been with the **Jackson Hole Land Trust**. The Land Trust is in the closing stages of a \$25 million capital campaign to intensively pursue land protection projects in the Jackson Hole area. In addition to supporting their development effort and assisting them in meeting an ambitious Kresge Foundation challenge grant goal, The Wayland Group is also supporting a new long-range planning effort which will chart the course for JHLT for the next five to seven years. Campaign Co-Chairs Mike Wardell and Allan Tessler, Board Chair Scott Pierson, Executive Director Leslie Mattson-Emerson, and committed entrepreneurial development staff Julie Jones and Pam Case form the nucleus of the development and planning contingent at the Land Trust, and we look forward to continuing our partnership with them in the years ahead. (As a special note, long-time JHLT Board member and Campaign Co-Chair Mike Wardell was a featured speaker at our 2002 Advancement Institute and spoke beautifully, and, as always, "from the heart," to much comment and acclaim.)

The Winsor School, a superb independent school for girls in grades 5-12, located in Boston, is in the final, Public-Phase year of a three-year campaign to raise \$30 million—*The Essential Winsor*. Winsor's success throughout the Campaign has been spectacular and we expect that they will exceed their goal. The Campaign has been led by a dynamic Campaign Steering Committee, Director Carolyn McClintock Peter, and Director of Development Kathy Cole. The Wayland Group conducted a Planning and Feasibility Study and designed a Campaign Implementation Plan—and has continued to provide ongoing support throughout the Campaign.

We are delighted to report that the **Worcester Historical Museum** has raised approximately \$7 million over the past year in gifts and pledges in a Leadership Campaign in support of the Museum. The Wayland Group team has worked closely with Bill Wallace, Executive Director; Laurie Davis, Chair of the Campaign; members of the Campaign Task Force, including Board Chair Jim Paugh, and Board members John Nelson and Robin Whitney. Support from many of the Worcester-area family foundations, including the Fletcher and Stoddard Foundations, has been generous and transformational in support of

the wonderful work of this precious gem of a Museum. We are proud to have played a part in the success of this important advancement effort on behalf of this deserving, but, under-resourced institution.

In 2000, the **YMCA of Greater Boston** completed its *Keeping Families Strong Campaign*, a \$15 million fund-raising effort that dramatically improved the quality of the YMCA facilities in a number of city and suburban communities. John Ferrell, CEO and President of the YMCA, and the general Board recently completed a new strategic planning effort, *Innovation and Excellence*. This plan sets an even more ambitious agenda for the YMCA over the next five to six years, including raising \$30 million in new capital projects and \$30 million in additional operating support and new program initiatives. In the fall of 2001, The Wayland Group completed a Strategic Development Plan to assist the YMCA in securing the resources to implement its strategic plan. As a first step in this new effort, in the summer of 2002, the YMCA convened a task force of community leaders, chaired by Gary Countryman, to review the plan and to receive community input on it.

The Wayland Group currently has a core of seven senior consultants who work together in every conceivable combination to “deliver” service and project work to our many clients. We continue to stay in close touch with Wayland Group alumnae Melissa von Stade, Sue Kinney, Alice Tobin, and Lola Baldwin, each of whom continues to contribute in important ways to the independent sector.

We are also delighted to welcome Carol Bloem as a third member of our support team. Carol has instantaneously become a very important member of the group, not only in ongoing project work and in particular areas of strength and facility, but also in managing our entire office operation when needed, giving Rachel Fagone and Phyllis Boot some much-needed respite and flexibility! Welcome, Carol.

The year 2002 also saw improvements in our technology capability, with the launch of an improved email system and new website which (regrettably, to some) now features photographs of our consulting staff.

We continue to look forward to staying in touch with our extended family of colleagues and friends in the year ahead, and wish for all of us not only continued success, but also a greater serenity and more peaceful atmosphere in the world community in the months and years to come.

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