

Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group

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

SUMMER 2004

The last 18 months have been a period in which the independent sector has mirrored the mood of the country: a period of wary but welcome renewal and gathering confidence, coupled with continuing uncertainty and anxiety, represented for the nation by the war in Iraq and the ebb and flow of terrorist alerts and for the independent sector by an uncertain economy, coupled with increased demand for productivity and a continuing commitment to service. At The Wayland Group, we have continued to partner with an extraordinary group of committed and important clients (see below), and to continually reassess ways in which we can do our work even better, and in which we can offer our clients the most thoughtful advice possible.

One of the less welcome trends of the past several years has been continuing commentary, both in trade journals and in the general press, expressing concern as to whether fund-raising goals will be met in this uncertain time. In fact, our experience as a firm over the last several years only serves to reinforce what all of us know instinctively, on a continuing basis: that fund-raising programs based on relationships and meaningful exposure to the real work of an organization appeal to the generous spirit in people and continue to maintain their strength during challenging times; and that programs based on a more transactional approach to fund-raising have a difficult time delivering promised results.

CRITICAL SUCCESS FACTORS

In the capital campaign business, we often speak of the “critical success factors” of prospects, volunteer leadership, a case for support, urgency, and commitment. But even more importantly, we believe there is a set of critical success factors that form the core of any successful fund-raising program, without which any specific campaign or fund-raising effort becomes far more difficult.

ATTACHMENT

Increasingly, over the past 20 years, we find that donors are far more likely to support an organization in which they are not merely informed or engaged, but in which they have real standing in an organization through some form of formal “attachment.” This may be in a variety of forms, from board membership, to adjunct board membership, to serving on a task force or committee. Many fund-raising programs attempt to target wealthy individuals who lie outside their leadership structure and then express concern or bewilderment as to why such donor prospects do not offer significant support. Organizations that try to achieve a significant intersection between their leadership structure and their prospect group find that such an overlap greatly facilitates the cultivation and information-sharing process, and provides a solid platform for continuing dialogue between institutional leadership and donor prospects. The Wayland Group’s emphasis on the development of adjunct boards and other structures mirrors this belief.

EXPOSURE TO CONTENT

As a corollary to the “attachment” factor, for philanthropic investors to take a real interest in an organization, they need to understand the program and planning content of the organization itself. It is difficult to deliver highly detailed information through customary cultivation events. However, when people have real standing or real tasks to do, they are interested in both the mission and program content and, importantly, the “business content” of the organization. (Many wealthy individuals, while interested in the mission and program of an organization, will fundamentally view the organization through a corporate “lens.”) Some organizations are reluctant to share real financial or business content for fear that major donors will find such information dull or off-putting; we find the precise opposite to be the case. The more sophisticated the donor, the more eager – indeed insistent – he or she will be on understanding the real business content of the organization with true transparency.

IMPACT/ACCOUNTABILITY

Most sophisticated donors want to have a real understanding of the impact of their contributed dollars, and of the organization itself. Long before the current era of emphasis on outcomes and assessment, experienced donors always asked the question, “What’s the impact of this program?” or “What will my gift really accomplish?” The questions themselves imply an interest, not in bromides or formulas, but in real information as to improvements in quality, increase in number of clients served, expansion or enhancements to programs, and the like.

AFFIRMATION/RECOGNITION

While the form of donor recognition may vary from donor to donor and from organization to organization, successful programs are characterized by seamless, continuing, and appropriate modalities for making donors feel valued and included. This takes many forms: in a capital campaign, it may be in the form of a plaque or general celebration; for certain organizations or for targeted efforts it might mean continuing periodic (but regular) stewardship of key donors. Even with respect to small gifts, successful organizations are characterized by rapid turnaround of simple acknowledgements, and by some form of acknowledgement beyond a gift receipt. (As a cautionary note, some organizations are so devoted to personalization of acknowledgement letters that acknowledgement is slow and can even languish on the CEO’s desk – a systemic problem that requires gentle but firm intervention!)

EMOTIONAL RESONANCE

As a corollary to being certain to share the business content that provides the business rationale for giving, it is also critically important to continue to display and define the emotional resonances of an organization for donors. This may be in the form of hearing the actual voices and stories of clients (as in the case of a leading human services organization); in the form of exposure to the real beauty of the content (as in a performing arts organization); or simply not being reticent to assert the highest level of meaning for the work of the organization. Don’t be afraid in case development, in other words, to make the bold assertion as well as the detailed, factual case. A philanthropic investment is a meaningful one, and major donors are unlikely to make such an investment unless they *feel* as well as think in making such an investment.

INVESTMENT IN INFRASTRUCTURE

Finally, no amount of brilliance, efficiency, or innovation can substitute for the staff, systems, and coordinated commitment of an institution to delivering appropriate results. This is an institution-wide commitment. Not only must development have enough budget and staff support to deliver the technical aspects of the program properly; the organization as a whole must be put at the service of the fund-raising program on an appropriate and continuing basis. Significant philanthropy for an organization will require, from time to time, collaboration with nearly every administrative, financial, and leadership function of the organization.

When such collaboration is viewed as opportunity, philanthropy prospers; when it is viewed as a burden, it is difficult for any development office, no matter how talented, to achieve its goals.

ADVANCEMENT INSTITUTE

On April 8th and 9th more than 100 senior development professionals and volunteer leaders gathered at the University Hotel at MIT in Cambridge for The Wayland Group's biennial Advancement Institute. The focus of this year's gathering was on the key synergies of fund-raising success – leadership development, institutional planning, and the “technique” of major gifts. In addition to The Wayland Group's staff presentations over the two-day program, attendees were privileged to hear four fascinating panel discussions. **Fidelity Foundation** Senior Vice President, Program **Meg Morton**, **Massachusetts College of Art** President **Kay Sloan**, the **Kresge Foundation** President and CEO **John Marshall**, and **Lasell College** President **Tom de Witt** discussed the importance of institutional planning as a platform for successful fund-raising in their own institutions. **Jane Bradley**, **Rick Burnes** and **Susie Hunter** spoke with wonderful candor about their own motivations as generous philanthropists. **David Scudder**, **Nicki Nichols Gamble**, and **Cheryl Alexander** spoke from their own extraordinary personal experience to the challenges and opportunities of major gift fund-raising. Finally, **New England Conservatory** Vice President for Institutional Advancement **Don Jones**, **Massachusetts General Hospital** Chief Development Officer **Jim Thompson**, and **Planned Parenthood Federation of America** Senior Vice President and Chief Campaign Officer **Joan Coombs** provided inspirational examples of their professional maximum gift fund-raising success.

Over the past months we have continued our work with a number of extraordinary institutions, each embodying the independent sector's spirit of idealism and commitment to service in a wonderful and different way.

Bay Cove Human Services is one of the largest human service providers in Boston, serving children and adults who face the life-long challenges of mental illness, drug and alcohol dependence, and developmental disabilities. Last spring, Bay Cove was selected to be one of four organizations nationwide to be part of a Special Opportunities Initiative sponsored and funded by the Kresge Foundation. The Initiative seeks to help organizations with strong missions and programs to build their fund-raising capacity. The Wayland Group has been privileged to work with CEO and President Stan Connors, Director of Development Marion Nierintz, and Kresge Program Officer David Fukazawa over the last year in this exciting program. In the first year of the Initiative, Bay Cove has successfully met ambitious financial objectives and key fund-raising activity benchmarks, including the successful completion of the Small Wonders Capital Campaign.

The **Boston Ballet** is one of Boston's premiere cultural organizations, and one of the nation's most important dance companies. We are thrilled to have been selected by the Company to work with Artistic Director Mikko Nissinen, Executive Director Valerie Wilder, Board Chair John Humphrey, and other key volunteers and staff, on strategic advancement and institutional goals. Having spent years working in earlier incarnations with the Ballet's administrative and volunteer leadership, we look forward to collaborating on the invention of new development strategies and tactics in support of the Company's plans and programs, and in an effort to move the Ballet to the next level of philanthropic and institutional achievement.

During the past year, we have joined with President Lou Casagrande and a core group of board volunteers at **The Children's Museum of Boston** to plan and implement the Campaign for Children's Wharf, a comprehensive fund-raising effort that will result in the implementation of Phase I of the Museum's Master Facility Plan, including KidStage – A Center for the Performing Arts, the Children's Wharf Atrium, the Adventure Center, new exhibitions and galleries, and increased endowment. The Museum has already

successfully raised \$14 million, and we continue to provide consulting support to Lou, to Vice President for Advancement Deborah Sinay, and to the Campaign Steering Committee chaired by Tom Moloney.

We are delighted to have been selected by **Community Servings** as their consulting partner. Community Servings is Greater Boston's free, home-delivered meals program for individuals and families homebound with HIV/AIDS. Founded in 1990, the Agency has grown from serving the neighborhoods of Boston to serving 14 communities in Greater Boston. It has outgrown its current facility in Roxbury, and TWG is conducting a Planning and Feasibility Study for a campaign that would support a new and larger home for Community Servings. We are excited about working with Executive Director David Waters, Director of Development Tim Leahy, and the Agency's dedicated Board of Directors, led by current Chair Ed Wierman and former Chairs Joan Parker and Tony Corey, on this important undertaking.

The **Concord Museum** is a wonderful, fascinating museum focused on the history of Concord, Massachusetts and its relationship to the cultural history of the nation, especially the Revolutionary War. During 2004, we began working with the staff and volunteer leadership as they were in the early stages of a campaign to build critically needed endowment to support its operations. We have developed a strategic and tactical Campaign Plan for the Museum and are providing ongoing counsel to staff and volunteers. Board members Nancy Barnard, Peiter Schiller, Marty Wallace, and Margaret Ziering, along with Museum Director Désirée Caldwell and Director of Development Chaffe Toulmin, are key TWG partners in this effort.

In late 2003, we were delighted to be selected by the **Currier Museum of Art** in Manchester, New Hampshire as consulting partner for a proposed museum expansion. The Currier is New Hampshire's largest independent art museum and is one of the country's finest regional museums. We are impressed with the Currier's solid strategic planning, its outstanding management and board leadership, and certainly by the remarkable bequest of \$43 million from Henry Fuller in 2001! The Wayland Group is conducting a Planning and Feasibility Study for an expansion project to house its collections and special exhibitions, and to accommodate increased visitorship. We are pleased to be working with Director Susan Strickler, Board Chair Patrick Duffy, and other board leaders, including Chris Dwyer, David Jensen, John Swope, Kimon Zachos, and many others.

This past fall, **Dedham Country Day School** launched the Public Phase of its \$8 million capital campaign, *Securing Our Second Century*. The Campaign will fund a new Upper School building as well as raise endowment funds for faculty support and financial aid. DCD has a remarkably active and engaged group of volunteers supporting the campaign effort: Ed Anderson and Susie Hunter provide overall leadership as Campaign Co-Chairs; Chris Perry and Molly Cramer chair the Parents Leadership Committee; and Dan Pierce partners with Susie Hunter in leading the Honorary Campaign Committee. DCD has also benefited from the strong leadership of Head Sonia Valentine and excellent support from Director of Development Julie Hagan and Campaign Officer Jody Barron. The School has raised almost \$6 million to date and plans to complete the Campaign during its centennial next year.

Dimock Community Health Center is concluding a successful campaign for \$17 million that has helped restore parts of its historic campus, solidify and expand vital programs and establish an endowment for the Health Center. Bonnie McBride, the Vice President for Institutional Advancement and Dave Dayton in his role as the Chairman of the Development Committee, have helped Jackie Jenkins-Scott drive the Campaign into the home stretch. Realizing some of the largest gifts in the history of the organization, the Campaign has made an enormous and lasting impact. We join members of Dimock's Board and staff in wishing Jackie Jenkins-Scott a fond farewell. The Wayland Group has been fortunate to work with Jackie over 16 years through three campaigns. We wish her all the best in her new role as President of Wheelock College.

We were delighted to have been selected by **The Guidance Center, Inc.** located in Cambridge to conduct an assessment of its development program. We have thoroughly enjoyed our work with Executive Director Susan Ayers, and the enthusiastic, involved group of volunteers committed to building a stronger advancement program to benefit the Agency and its excellent programs. Led by Board Chair Josh Posner,

Board members Rob Straus, Elizabeth Gilmore, and Theresa Hamacher, in partnership with development staff, GCI began the celebration of its first 50 years of service to the Cambridge-Somerville community with a gala dinner in May honoring its founders and featuring a keynote address by Harvard President Larry Summers.

The **Harvard Center for Neurodegeneration and Repair** is a decentralized community of Harvard neuroscience and neurology researchers working in the Harvard Medical School and seven affiliated teaching hospitals. Its defining objective is to reduce the impact of neurodegenerative disease. We are proud to have been selected by HCNR Director Adrian Ivinson to develop, on behalf of HCNR, a Strategic Development Plan outlining a coherent overall strategic approach to fund-raising. HCNR has successfully launched a new approach to biomedical neuroscience that is collaborative, supportive, integrated, and unprecedented in leveraging the extraordinary resources of the Harvard medical neuroscience community. We were delighted to be able to work with Dr. Ivinson, Harvard Medical School Dean and Chair of HCNR's Governance Committee Joseph Martin, and Harvard Medical School Professor of Neurologic Diseases, Co-Director of Brigham and Women's Hospital's Center for Neurologic Diseases, and Co-Chair of HCNR's Governance Committee Dennis Selkoe on a development plan that addresses the need for the Center to develop a stable and sustainable financial future.

In 2003, TWG completed for the **Harvard Divinity School** an assessment of its development program, making recommendations to strengthen the program and to position it most effectively as the School moves inevitably toward its next major fund-raising initiative. Following the assessment, we have been pleased to provide continuing counsel to the Divinity School's visionary Dean William Graham, to Associate Dean for Finance and Administration Tim Cross, who also provided extraordinary service over the past six months as interim Chief Development Officer, and to members of his development team. We were pleased to welcome this spring Elizabeth Sloane as Associate Dean for Development and Alumni/ae Affairs.

Newly created as a joint project of the Partners Health Care System and Harvard Medical School, the **Harvard-Partners Center for Genetics and Genomics** is in the process of changing the way medical care is provided by unleashing the potential of genetic science in the prevention, diagnosis and treatment of disease, personalized for the individual patient. In addition to its remarkable primary contributions in research and education, the Center will serve as the gateway for philanthropic activity for the Partners' \$300 million system-wide investment in genetics and genomics. A collaborative effort drawing from the resources of all Partners' affiliates, the Center also provides the most advanced, state-of-the-art technologies available for use in genetics research. We have had the special opportunity of partnering with the Center's Scientific Director Raju Kucherlapati, Ph.D. and Partners' development staff, Allen Peckham, Betsy Rigby, Eileen Donohue, and Joe Loftus to create a Strategic Development Plan that will serve as the foundation for the Center's advancement activity.

During the past year, we completed an intensive and rewarding assignment for the **Harvard School of Public Health**. Working with Dean Barry Bloom and Associate Dean Jim Ware, we provided consulting support to the School's development operation during a period of transition in staff leadership. We were delighted to welcome the new Dean for Resource Development David Woodruff from his previous assignment at MIT, and to join him in planning for the launch of the inaugural meeting of the School's Leadership Council. Over 100 founding members of the Council met in October 2003 with a remarkable program that included luncheon speaker, Harvard President Larry Summers, the presentation of the Julius B. Richmond award, the highest award conferred by the School, to Katie Couric of NBC's *Today Show*, and break-out groups on a range of issues important to the public health.

The **Higgins Armory Museum**, located in Worcester is the only museum in the Americas dedicated solely to arms and armor, and is the only collection that survives intact and within its original structure – a building listed on the Register of Historic Places. This fall, The Wayland Group was selected to partner with the Museum and its leadership, under the direction of Executive Director Kentur Russell, and a group of dedicated Trustees including Board Chair Joe Hamilton, former Chair Steven Pitcher, Steve Batchelder, and Leo McManus to undertake a planning project which will encompass an assessment of the development program, a

series of workshops focused on leadership development, and a Planning and Feasibility Study for a capital campaign to support facilities expansion and improvement.

Horizons for Homeless Children provides homeless children in Massachusetts with the nurturing, stimulation, and opportunities for early education and play that all children need to learn and grow in healthy ways. This spring, we have had a special opportunity to partner with members of Horizons' Leadership Giving Committee in the development of a Strategic Development Plan designed to create a comprehensive fund-raising program to help Horizons fund its recently completed Strategic Plan. Under the leadership of Executive Director Sue Heilman, Board President Mark Edwards, and Leadership Giving Committee Chair Josh Bekenstein, Horizons has committed to a significant expansion of its programs and services that, when completed, will result in a dramatic expansion of its Play Spaces located in homeless shelters throughout the state, the creation of a third Community Children's Center, and special initiatives in public policy, advocacy, and training.

The **Huntington Theatre Company** continues to make exciting progress toward the completion of its ambitious campaign goals. Its two new theatres adjacent to the Boston Center for the Arts in the South End will open to the public on schedule in the fall of 2004. The Huntington is the recipient of a \$1 million grant from the Kresge Foundation, and TWG congratulates Director of Development Howard Breslau, Director of Institutional Giving Catherine Robe Schumacher, Managing Director Michael Maso, Artistic Director Nicholas Martin, Board Chair J. David Wimberly, and Vice Chair for Development Bill McQuillan on not only the Kresge achievement, but all the good and hard work that has made it possible for the Theatre to raise more than \$13 million toward its first phase goal of \$16.5 million. We are proud of the role we have played as the Huntington's consulting partner in this continuing effort.

We are delighted to continue our work with **Lawrence Academy** where we are providing ongoing consulting services to the Academy's \$25 million capital campaign. It has been a pleasure to work with new Head of School Scott Wiggins, as well as Assistant Head of School Rob Moore and Campaign Co-Chairs Bill Achtmeyer and Bruce MacNeil, as they move toward the completion of the Campaign at the end of the calendar year. We were excited to tour the new dorm this fall and to watch construction progress on the new School House. As part of end-of-campaign planning, we were pleased to partner with the School this winter in a re-assessment of the development function as Rob and Scott begin to plan for "life after the Campaign."

We are delighted to acknowledge that the Campaign for **Lincoln School** has raised over \$8 million to date. The striking Murray Middle School opened last fall, named for Suzanne Young Murray '58, Campaign Co-Chair. Under the leadership of the new Board Chair Marj DeAngelis, Head of School Joan Countryman, and Campaign Co-Chairs Suzanne and Terry Murray and Marjorie and Ron Boss, we believe that Lincoln will achieve great success toward raising more money than at any time in the School's history.

In September 2003, TWG was engaged by the **Longy School of Music** to develop a Strategic Plan for Longy's advancement activity over the next several years, a plan to secure the resources necessary to support Longy's mission, program priorities, and strategic initiatives articulated in the School's recent, integrated, strategic and business plan. The focus of our work from the beginning was on board and leadership development, though it included review and recommendations made in the areas of development operations, staffing, and infrastructure. It was a pleasure working on this project with Longy's President Kwang-Wu Kim, Executive Vice President Anna Kuwabara, Director of Institutional Advancement Debbie Mayerson, Dean Rob Shay, and the School's dedicated volunteer leadership, led by Board Chair Adelaide Zabriskie and Vice-Chairs Jeannette Taylor and Anita Lincoln.

As the first and now the only public college of art and design in the United States, **Massachusetts College of Art** holds a unique position in the history of Massachusetts and the nation. In July 2003, the Massachusetts legislature granted MassArt "special status" as a college within the state system. MassArt's newly acquired status challenges the College to demonstrate that it can exist on a lower state appropriation, become more enterprising, and sustain and enhance a MassArt education of the highest quality, in part, through

increased private support. Having conducted an assessment of the development program and collaborated with the Trustee Development Committee in creating a Strategic Development Plan for the College in 2001, TWG was delighted to begin its work again with President Kay Sloan, Vice President for Institutional Advancement Richard MacMillan, and the Trustee Development Committee, including MassArt Foundation President Ralph Stuart and Board of Trustees Chairman Simon Young, on a Planning and Feasibility Study for a campaign that would begin to address the College's growing and critical need for increased philanthropic support.

Under the dynamic leadership of Head of School Dr. Robin Robertson and the Board of Trustees, led by Board Chair Fritz Hobbs, **Milton Academy's** leadership is united in its desire to realize successfully the ambitious goals of its most recent strategic and master planning process. The Wayland Group has been working with the Academy toward that end. Its first assignment was an assessment of the School's development program, making staffing and infrastructure recommendations to enhance Milton's campaign readiness. TWG then conducted a Planning Study to assess the Academy's capital fund-raising potential. Currently, TWG is working with Assistant Head of School, Development and Alumni Relations Gordon Sewall, newly appointed Director of Development Stephanie Truesdell, and Director of Communications Cathy Everett on an Implementation Plan for a comprehensive campaign for \$150 million in support of critical capital and endowment needs. At its April 22 Board meeting, the Milton Board of Trustees passed a resolution to go forward with that campaign. We look forward to working with the volunteer leadership, including a Campaign Steering Committee chaired by former Board Chair Marshall Schwarz, with Dr. Robertson, and with development leadership on this important and ambitious effort.

Miss Hall's School concluded its \$23 million campaign on May 22, 2004 having raised \$25 million! The unusual vision, fortitude and devotion of the School's leadership including Head of School Jeannie Norris, Board Chair Susan O'Day, a dedicated group of campaign volunteers including Campaign Chair Patricia M. Smith, Honorary Chairs Anne Cross, Barbara Euston and Dorothy Thatcher, and a superb development team led by Janis Martinson in partnership with Dallas Briney, Sharon Brigham, Regina Mooney and others, has led to this stunning success. Surely Jeannie and her team have demonstrated a leadership commitment – both personal and collective – that is unsurpassed in our 20 years of consulting experience. Bravo!!

In the fall of 2002, we completed an assessment of the development program at the **New England Baptist Hospital**, making a set of strategic recommendations for improving the Hospital's ongoing fund-raising operation. More recently, The Wayland Group was selected to conduct a Planning and Feasibility Study in support of the Baptist's Strategic Plan for FY04-08. Our Wayland Group team very much looks forward to working with President and CEO Joe Dionisio, Vice President and Chief Development Officer Jim Campbell, and other Baptist leadership on this very important and exciting project for one of New England's most important health care institutions.

The **New England Center for Children** is an extraordinary school in Southborough for children with autism. A tour of the School convinces any visitor that this is a rare and wonderful educational program, serving some of the most challenging students and in turn changing the lives of their families. The Wayland Group has been working with NECC on their \$5 million campaign effort for more than a year, conducting a Planning and Feasibility Study, developing an Implementation Plan, and now working with staff and the Campaign Steering Committee to manage the Campaign. The NECC campaign is chaired by Governor Michael Dukakis. NECC has a deeply dedicated senior administrative team, many of whom have been with NECC from its inception in 1975. Vincent Strully is the founder and CEO, and RoseAnn Lovely, the Director of Development, has been with the School for more than 19 years.

In October 2003, the **New England Conservatory** officially kicked-off and announced its \$100 million campaign – the *Gift of Music* – with a remarkable lead gift of \$10 million from Ginny and Pete Nicholas. To date, NEC has raised well over \$50 million, with the Campaign scheduled to run through 2007. The Campaign's goals are to significantly boost endowment, to aggressively increase the annual fund, and to address its facility needs. Campaign leadership includes Campaign Chair David Scudder; Campaign Steering Committee Co-Chairs Ginny and Pete Nicholas and Carolyn and Peter Lynch; President Daniel Steiner;

Development Committee Chair Harry Pratt; Board Chair Jack Vernon and many others. The Campaign is ably supported by Don Jones, Vice President for Institutional Advancement, and his staff team. The Wayland Group has worked with NEC since 2000 throughout all phases of campaign planning and implementation.

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, Chairman of the Board John Parker, and Chairman of the Museum Development Council Rob Shapiro, the new Museum opened its doors in June 2003 to critical and popular acclaim. More than a quarter of a million square feet of new and renovated galleries, public spaces and gardens, the Museum has instantly become one of the nation's most beautiful and most important museums of art and culture. Our congratulations to the leadership and to Director of Development Brad Voigt with whom we continue to work on completion of this \$175 million effort.

During the summer of 2003, The Wayland Group was selected by **Pine Manor College** to conduct an Assessment of Campaign Readiness and to develop a Strategic Development Plan. Working closely with visionary and dynamic President Gloria Nemerowicz, members of the Board of Trustees including Co-Chairs of the Board Anne Edwards and Phil Geier, and Vice President for Development and Alumnae Relations Susan Webber, we have begun the work of conducting an ambitious campaign for current use funds, as well as endowment for faculty development, financial aid, academic programs and campus improvements – in support of completing the ten-year repositioning and transformation of Pine Manor College.

Through our work with Planned Parenthood Federation of America, we met President and CEO Bryan Howard of **Planned Parenthood of Central and Northern Arizona** (PPCNA) in Phoenix, who is a highly regarded leader within the Planned Parenthood movement. In 2003, the Wayland Group was retained by PPCNA to assist in the planning for a major capital fund-raising effort. We conducted a Campaign Readiness Assessment and conducted a major gifts training workshop for board leadership to prepare them for major gifts solicitation. PPCNA's campaign will focus on the expansion of reproductive services to targeted areas of the expanding Phoenix region. We have enjoyed our work with Bryan, Board Chair Shawn Dralle, Vice President of External Affairs Beth Meyer-Lohse, and new Director of Development Kim Knotter.

The Wayland Group continues its proud, rewarding, and deep partnership with **Planned Parenthood Federation of America** and many of its affiliates as consultant to *Power the Promise*, a national, federation-wide campaign to raise \$340 million to fund a set of bold initiatives that will change the social and political climate for reproductive rights nationally and internationally. This is Planned Parenthood's first collaborative, fund-raising effort of the national organization and the 125 affiliates. The Campaign secured a \$20 million lead gift within the past year and launched a national Leadership Council of high-level leaders in the reproductive rights movement. We continue to provide intensive ongoing counsel at many levels at PPFA's New York offices and around the country – including the central campaign staff led by Senior Vice President and Chief Campaign Officer Joan Coombs; CEOs and development staff at many affiliates across the country, including Paula Gianino from St. Louis, Chris Charbonneau from Western Washington; Steve Trombley from Chicago, and Dian Harrison from San Francisco, among others; and volunteer leadership for the Campaign, including Annette Cumming, Co-Chair of the Fund-raising Committee, and Nicki Nichols Gamble, former President of Planned Parenthood League of Massachusetts, who is serving as Co-Chair of the *Power the Promise* Campaign Steering Team.

In 2002, The Wayland Group completed a Campaign and Development Readiness Assessment for **Project Bread** and subsequently helped the vital anti-hunger organization build a major gifts program. In addition, we did extensive leadership development work with the Board of Directors as it sought to expand its ranks. We were pleased to work with Executive Director Ellen Parker, former Board Chair Margot Kaplan Sanoff, and former Director of Development David Hirschberg. We completed our assignment with Project Bread by helping them hire former Wayland Group consultant Sue Kinney as a part-time major gifts director.

Founded in 1915 on 11 acres of land in a quiet Cambridge neighborhood, **Shady Hill School** educates children from Beginners (4-year-olds) through Grade 8, focusing on a core set of principles: simplicity; discipline; depth-over-breadth; childcenteredness, in which discovery and imagination are the main vehicles for learning; and freedom coupled with responsibility. TWG is proud to have served as counsel to Shady Hill's successful *Pathways* Campaign in the 90s, and is delighted to have been asked to return to Shady Hill to work again with its Director Bruce Shaw; its new Director of Development and External Affairs Monique DeVane; and a new generation of volunteer leadership led by current Board of Overseers Chair David Thomas. TWG's assignment begins with an assessment of the current development program and of institutional readiness – with particular focus on leadership and communication issues – to undertake a capital campaign in support of the important goals articulated in the School's recent strategic and master planning efforts. Once the plan and message are refined, TWG will test their feasibility in the larger Shady Hill community.

Since its founding in 1990, **The Steppingstone Foundation** has developed one of the most effective academic programs to improve college access for underserved children in the country. Steppingstone accomplishes this by preparing fifth- and sixth-grade schoolchildren, who would not otherwise have the opportunity, to enter and succeed at Boston's best independent and public exam schools. Ninety-one percent of Steppingstone students (called Steppingstone Scholars) are placed at independent or exam schools and ninety-two percent of Scholars who graduate from high school go on to attend a four-year college. Steppingstone recently completed a strategic planning process that calls for doubling the number of Scholars served in the program to 1,000 per year over the next five years. Steppingstone asked The Wayland Group to conduct a Planning and Feasibility Study to develop a plan to fund the expansion of the program. Under the leadership of President and Executive Director Michael Danziger, Director of Development and Operations Kelly Glew, and board leaders Brian Conway and Amy Berylon, Steppingstone is in the early stages of launching a \$15 million capital campaign.

The Wayland Group continues its rewarding partnership with **Thayer Academy**, which began in early 2002. Our first assignment was to conduct a Planning and Feasibility Study. We continued by creating a Campaign Implementation Plan and we are now providing ongoing counsel and training as Thayer charges through the leadership phase of a proposed \$25 million campaign for endowment and facilities. Thayer welcomed a dynamic new Headmaster in 2003, Ted Koskores, a Thayer alumnus, who has ambitious plans for the Academy and who is proving to be an effective and fearless fundraiser. Thayer also enjoys the strong leadership of Board Chair Bill Smith, Campaign Committee Chair Rick Daniels, and an effective Director of Development Mark Gutierrez.

This spring, Thunderbird announced the largest naming gift ever made to a school of business. The \$60 million gift from Sam and Rita Garvin will rename the School, which will now be called **Thunderbird, The Garvin School of International Management**. Sam Garvin is an alumnus of the School, the Chairman of Thunderbird's Development Committee, and has been active in planning their upcoming campaign. In recent months, The Wayland Group has been working with Thunderbird staff, led by Vice President for Institutional Advancement and Director of Development Richard Tollefson, on the development of an Implementation Plan for the Campaign. In the upcoming months we look forward to working in partnership with key staff, with Board Chair John Berndt, and with newly arrived President Angel Cabrera.

Over the last year The Wayland Group has been working with **Tower School** to prepare for a campaign to enhance the School's facilities and expand Tower's endowment. Tower is an elementary and middle school located in Marblehead. Tower staff and volunteers have been preparing for a campaign by holding a number of community events to communicate the exciting plans for the School's future while building the School's Annual Fund as a model for future fund-raising efforts. They are creating a groundswell of excitement for the pending Campaign, thanks in large part to their capable team led by Tom Gabel, the Chairman of the Development Committee, and Peter Philip, Head of School.

In 2003, The Wayland Group was extremely pleased to work with the **Union of Concerned Scientists** on a Strategic Development Plan. UCS is a highly regarded national organization, headquartered in Cambridge,

which addresses critical environmental issues such as clean air, energy, transportation, safe food, global warming, and the threat of nuclear war. Working with then-President Howard (Bud) Ris, Director of Development Dave Whalen and his staff, current President Kevin Knobloch (formerly Executive Director), The Wayland Group assisted the organization in building an effective roadmap for a significantly expanded major gifts program.

We have been delighted to continue our long-time and very rewarding partnership with **Walnut Hill School**. Over the past two years we have continued to work with Dean for External Relations Martha Kleinman and development staff on their current campaign, *The Path to Preeminence*, in moving toward its goal of \$17.5 million. In addition, we were asked in 2003 to facilitate the development of a five-year marketing plan and to integrate the work of Walnut Hill's Board of Overseers into the refinement of that plan. We also very much look forward to working with Walnut Hill Trustees and staff on a new Long-Range Plan which will chart the School's course for 2006 through 2010. This year-long process will be an important collaboration among Wayland Group staff, Walnut Hill staff, Head of School Stephanie Perrin, Board Chair Betsy McClendon, and a Planning Committee co-chaired by Trustees Janet Pattillo and Lynda Beck. Walnut Hill has achieved tremendous progress in its advancement program and overall institutional advancement through very hard work and careful and imaginative planning and attention to detail. Bravo!

The **Wildlife Trust** is a conservation organization based in New York with significant national and global impact. Their mission is to empower local conservation scientists worldwide to protect nature and safeguard ecosystem and human health. As they initiated a long-range planning process in the summer of 2003, the Wildlife Trust engaged The Wayland Group to develop a companion five-year Development Plan in support of the objectives of the Long-Range Plan. The parallel efforts culminated in an ambitious plan to dramatically expand the Trust's programs. It has been exciting to work with the Trust's dynamic President Dr. Mary Pearl, Board Chair Virginia Mars, and Marty Kaplan, Co-Chairman of the Development Committee. The Wildlife Trust recently secured a lead gift of a \$5 million foundation grant to help launch the fund-raising initiative in support of the Plan.

2004 is The Wayland Group's 20th Anniversary year. It hardly seems possible that twenty years have passed since the germination of our founding impulses of service and commitment to helping our clients make their vision reality. We feel blessed and honored by the trust and responsibility we have been given, and look forward to continuing to make our contribution to the vigor, profusion, and reach of the independent sector.

Margot A. Biggin
James G. Kitendaugh
Jennifer Carr Rice

Lynne M. Cavanaugh
Charles Marz
Carol A. Bloem
Rachel H. Fagone

Elizabeth S. Gross
Ann B. Peterson
Phyllis E. Boot

Tel:	978-443-3224
Fax:	978-443-0633
Email:	jkitendaugh@waylandgroup.com (Note: <i>first initial, last name@waylandgroup.com for all</i>)
Website:	www.waylandgroup.com