

Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group

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

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FOCUSING ON THE FUNDAMENTALS

In the highly competitive marketplace of not-for-profit advancement, it sometimes seems as though the field has become beset by over-attention to detail, complexity, specificity, and arcana. In an effort to develop an “edge” with respect to competition for donor attention among many worthy institutions, organizations and practitioners have focused on a high level of fine detail in their solicitation and stewardship programs. The occasion of The Wayland Group’s 2006 edition of our biennial Advancement Institute provided a recent reminder of the need to balance detail and complexity with continuing attention to the fundamentals.

During the 1980s, a slender but widely read and cited book by Robert Fulghum gently but definitively asserted, *All I Really Need to Know I Learned in Kindergarten*.¹ The title essay was a rumination on the fact that an individual’s search for meaning and moral compass depends upon the ability to return to fundamental truths and to find meaning and importance in the ordinary. The title refers to the fact that the fundamental guideposts for morality and human relations are the first, simple lessons taught by every kindergarten teacher and (hopefully) learned by every kindergartner. This “back to basics” approach suggested a cut across the grain of the sometimes overwhelming complexity of everyday life in a stressful, technology-rich age and provided comfort to its many readers in reaffirming the importance of the basic lessons life teaches.

In a very different context, but on a related theme, the recent volume of business analysis *Good to Great*² offers a similar but data-supported analysis of successful companies, using tough-minded empirical standards. Author Jim Collins and his research team identified a set of companies that sustained excellent performance over a long period of time, contrary to the experience of hundreds of other—in some cases more glamorous—companies. Although the analysis provided many other business-oriented insights, many of the lessons of *Good to Great* reinforced fundamental truths which make extraordinary intuitive sense: the most effective leaders are team-oriented and put themselves at the service of the enterprise; assembling highest quality, committed people in the service of an enterprise is in many ways more important than the nature of the enterprise itself; focusing on continuous quality improvement of a successful core business or product line is more important to success than radical change and restructuring; and the most successful corporate cultures combine a spirit of entrepreneurship and innovation with an ongoing commitment to discipline.

¹ A Ballantine Book published by The Random House Publishing Group © 1986, 1988, 2004 by Robert L. Fulghum.

² HarperCollins Publishers, Inc. NY, NY, © 2001 by Jim Collins.

At The Wayland Group's 2006 Advancement Institute, our Wayland Group team and a series of 12 guest panelists had the opportunity to share and reflect upon what makes for a successful major or "maximum gift" program combining an equal attentiveness to leadership development, institutional planning, and effectiveness of technique. Naturally, over a two-day session, much of the conversation was about specific details. But in listening particularly to leadership volunteers and major donors who were willing to share their own perspectives, it seemed clear that always returning to the fundamentals that all professionals and experienced volunteers know and value, is critically important to the success of a major gifts program: treat every volunteer and donor with respect; focus even more intensively on careful stewardship than on solicitation; and bring a passion, an enthusiasm, and a commitment to mission to every encounter. Consistent with Robert Fulghum's and Jim Collins's advice in a broader context, we would do well to remember these fundamental truths, even while we are trying to improve the details of our programs, and advancing our institutions, from "good to great."

During the past year, staff of The Wayland Group has been busy in supporting a very wide range of institutions as they advance themselves toward important, mission-driven goals.

Bay Cove Human Services serves children, adults, and their families who face the life-long challenges of mental illness, drug and alcohol dependence, and developmental disabilities. In 2003, Bay Cove was selected as one of seven organizations nationally to participate in a Special Opportunities Initiative funded by The Kresge Foundation. The purpose of the Initiative is to build fund-raising capacity in organizations that are providing strong services to their communities, but that have modest or start-up fund-raising programs. Since becoming part of the Initiative, Bay Cove has successfully completed a capital campaign for a new Child Development Center, created a Board of Advocates, and dramatically increased its operating support. Under the leadership of Executive Director Stan Connors, Director of Development Marion Nierintz, Board Chair Peter Pease, and Development Committee Chair Tom Haslett, Bay Cove has also launched a major gifts effort to fund key elements of its strategic plan.

Congratulations to all of our friends at the **Boston Children's Museum** who recently learned that they have been selected by The Kresge Foundation to receive a \$1,000,000 challenge grant to help complete *The Campaign for Children's Wharf*. In order to receive the approved \$1,000,000, the Children's Museum must complete its campaign within 18 months. While the campaign has built tremendous momentum, the Kresge grant will play a vital role in helping the Museum achieve its goal of \$38 million and expand its donor base.

Cantata Singers is widely regarded as one of Boston's finest choral ensembles and one of the region's premier musical organizations. This spring, Cantata engaged The Wayland Group to facilitate a long-range planning process. Executive Director Lisa Stiller and Board Chair Daniel Scharfman launched the planning process at a board retreat in May. Trustee John Rutherford will chair the planning process, which will continue over the summer, and be reviewed at a second board retreat in September. Music Director David Hoose and members of the Long-Range Planning Committee have already begun mapping out an ambitious plan to increase the scope and variety of the organization's performing activities over the next five years.

The **Currier Museum of Art**, in Manchester, New Hampshire, has temporarily closed its historic museum facility while it undergoes a major \$20 million expansion that will add new galleries and community and education facilities. The Museum kicks off the Public Phase of its campaign in the fall of 2006. Since 2003, The Wayland Group has conducted a Planning and

Feasibility Study, developed a Campaign Implementation Plan, supported the development of a Strategic Plan, and provided ongoing counsel. We have been proud of our association with this first-rate museum and have been pleased to work with its leadership, including Trustees and campaign leaders Pat Duffy, Chris Dwyer, Dave Jensen, Harry Shepler, John Swope, and Kimon Zachos. The Currier is fortunate to have outstanding leadership in its Director, Susan Strickler. We welcomed the Museum's new Director of Development, Jeff Fuller, in the spring.

Curry College has become known as one of the “hottest small colleges in New England”—a tribute to its mission and dedicated staff, faculty, and students. The Wayland Group was thrilled this spring to have been asked to conduct a strategic assessment of the College's development infrastructure and program. Working with President Ken Quigley and his talented and deeply committed senior staff, we were able to provide a set of recommendations to strengthen Curry's comprehensive development function in anticipation of ever more ambitious fund-raising goals in support of the College's continuing and extraordinary growth in programs and in facilities. Having just completed construction of a new Academic and Performance Center, the College is planning a new Student Center to better serve its growing student body. The Wayland Group looks forward to continuing its work with the College as its fund-raising consulting partner.

Fenway Community Health has continued to work hard and successfully toward reaching its \$15 million goal in its *Ten Stories...A Campaign for Fenway*. The Wayland Group has worked closely with the Capital Campaign Director John Marksbury, newly appointed Director of Development Phil Finch and other development staff to complete a comprehensive Campaign Implementation Plan. A new Board of Visitors was successfully convened last fall with the next meeting scheduled for this October. As the Campaign unfolds, Fenway has benefited from a series of small gatherings in the homes of supporters to introduce its programs and campaign plans. Fenway's efforts are led by the strong team of Executive Director Stephen Boswell, M.D. and Board Chair Stewart Clifford.

The Guidance Center, Inc., under the leadership of the highly respected Executive Director Susan Ayers, Board Chair Theresa Hamacher, Director of Development Kathy Urner, and members of its Board, continues to build a successful fund-raising program based on increasing individual leadership annual giving and an ambitious signature gala held in May. We are delighted to report that, in recognition of the Center's efforts to increase the base of constituents aware of and interested in supporting its mission and programs, The Guidance Center has secured from the Lynch Foundation a capacity-building grant to increase the staffing and outreach capability of the Center's advancement program.

The Wayland Group is pleased to renew its consulting partnership with the highly respected **Hebrew SeniorLife** (formerly known as Hebrew Rehabilitation Center for Aged), a nationally recognized organization providing housing and superb long-term care to elders and conducting cutting edge research on aging. Working closely with President and CEO Len Fishman and Senior Vice President for Development and Community Relations Stephen Braverman, The Wayland Group will conduct an in-depth Development Assessment to help HSL build on its successful advancement program and to develop strategies to better position the organization for greater recognition and a broader-base of increased philanthropic support.

The Wayland Group continued to provide campaign counsel over the past year to the leadership of the **Higgins Armory Museum**, Executive Director Kentur Russell, Board President Joe Hamilton, and members of the Campaign Steering Committee, including Jim Donnelly and Paul Morgan. The Museum is in the early stages of a \$5 million campaign to

improve its facilities and increase its endowment. TWG's most recent work with the Museum focused on developing strategies for approaching regional foundations, and on developing a national strategy for attracting philanthropic support to the Higgins from collectors and connoisseurs interested in arms and armor.

The **Isabella Stewart Gardner Museum** is at once an intimate collection of fine and decorative art and a vibrant, innovative venue for contemporary artists, musicians, and scholars. In uniquely installed galleries surrounding the renowned garden courtyard, the Gardner exhibits one of the preeminent personal collections of art in the world. The Museum is a work of art in itself that serves as inspiration for artists, children, and visitors through concerts, lectures, symposia, and educational classes. In that spirit, the Museum has commissioned world-renowned architect Renzo Piano to design a new building, a work of art that will house visitor services, administrative offices, and artists' facilities while leaving Mrs. Gardner's original installation in the palace unaltered. The Wayland Group feels privileged to have been asked to complete this past spring an assessment of the Museum's development program in order to recommend specific enhancements to the development function in order to strengthen ongoing fund-raising programs as well as to prepare for a larger capital fund-raising effort in support of the Piano building. The Wayland Group will continue its work with the Museum, specifically with Director Anne Hawley, Board Chair Barbara Hostetter, Director of Development & External Relations Helena Hartnett, and members of the volunteer leadership and development staff on the strategic and tactical planning necessary to mount a major capital fund-raising effort.

Following the completion of a Strategic Signature Events Assessment, the **Massachusetts General Hospital** (MGH) invited The Wayland Group to develop a Strategic Development Plan for its Cancer Center. The MGH Cancer Center is the largest provider of care to cancer patients in New England and is a leading center in the United States, operating within one of the nation's elite, top-rated hospitals. We are extremely proud of our association with MGH and have thoroughly enjoyed a strong working partnership with development staff and hospital and physician leadership. We have worked with Hospital and Cancer Center leadership, including Dr. Daniel Haber, Dr. Bruce Chabner, President Dr. Peter Slavin, Chairman of the Board Ed Lawrence, Co-Chair of the Philanthropy Program Dr. Gerry Austen, and President of the Massachusetts General Hospital Physicians Organization Dan Ginsburg; as well as with development staff leadership, including Jim Thompson, Katelyn Quynn, Kate Todd, and Denis Bustin, among others.

Milton Academy continues to make progress in its \$150 million campaign in support of critical capital and endowment needs. Having completed an assessment of the School's development program followed by a Planning Study to assess the Academy's capital fund-raising potential, TWG has continued serving as Milton's consulting partner. Under the leadership of Head of School Dr. Robin Robertson, the Board of Trustees, led by Board Chair Fritz Hobbs, and a Campaign Steering Committee chaired by former Board Chair Marshall Schwarz, the School continues to focus on its facilities master plan and endowment goals—with science as a near-term priority. The Wayland Group continues to work with Assistant Head of School Gordon Sewall and Director of Development Stephanie Truesdell on the implementation of this ambitious fund-raising effort.

We have recently taken a new assignment in our long-time consulting partnership with **Miss Hall's School**. Working closely with Head of School Jeannie Norris, Director of Development Janis Martinson and members of the development staff, The Wayland Group has undertaken a comprehensive Assessment of the School's successful advancement program. Jeannie Norris's ten years of leadership of the School have resulted in a transformation of Miss

Hall's and great success not only in building a stable student population, but also in bringing a broader base of stakeholders to the table interested in the long-term health and future of the School. With this work has come a strong base of philanthropic support. The challenge now is for Miss Hall's to continue to build on this success. To that end the consulting team has worked hard with MHS leadership to develop strategies to maximize philanthropic support.

We are delighted to continue our work with **New England Baptist Hospital** as the Hospital completes the Planning and Organization Phase for a \$30 million capital campaign. The campaign will provide funds for a major renovation of the Hospital's historic physical plant, for significant expansion of its perioperative facilities, and for important investments in its research program. Over the past year, Vice President and Chief Development Officer Deborah Coleman has been working to strengthen the Hospital's development infrastructure in anticipation of a capital campaign and working with hospital President Joe Dionisio, Chairman of the Board John Wilkins, and Campaign Chairs Dr. Ben Bierbaum and Barr Clayson to develop the Hospital's case for support and plan for the proposed campaign. Our work with the Baptist has also given us the opportunity to work with past Board Chairman Helen Streider as she assists in planning for the Hospital's inaugural meeting of its Board of Visitors to take place in September. Special thanks to John Wilkins, Board Chair, for joining us at The Wayland Group's Advancement Institute in May.

The Campaign for a new Therapeutic Aquatic Center for **The New England Center for Children** continues to build momentum. The New England Center for Children is an extraordinary school that provides education and individualized treatment for children with autism and other related disabilities. With an indoor swimming pool and fitness center, the Therapeutic Aquatic Center will complement NECC's strong academic and clinical programs by providing state-of-the-art equipment for the physical education program. For students at NECC, physical education—and in particular swimming—is critical in fostering coordination, cooperation, and independence. RoseAnn Lovely, Director of Development, and Vincent Strully, Executive Director, have recently secured two of the largest gifts in NECC's history to support the Aquatic Center project. In addition, NECC recently held its inaugural Board of Advisors meeting in Boston. It was an exciting and highly successful event co-hosted by Tom Hollister and Governor Michael Dukakis, NECC's Campaign Chairman.

We were extremely saddened by the death of **New England Conservatory** President Daniel Steiner in June. Under his leadership, NEC recruited world-renowned faculty and, as a result, students began applying to this premier music school in record numbers. He also launched an ambitious \$100 million campaign, which stood at the \$72 million mark at the time of his death. Daniel Steiner was truly a great man and we will miss him. NEC's successful *Gift of Music* Campaign continues while a presidential search is underway, with the extraordinary leadership of Campaign Chair David Scudder, Leadership Giving Co-Chairs Ginny and Peter Nicholas and Carolyn and Peter Lynch, Vice Chair Harry Pratt, and Board Chair Jack Vernon—ably supported by Vice President for Institutional Advancement Don Jones, Executive Director of Development Laurie LaMothe and their staff team.

The Wayland Group is proud to continue its consulting relationship with the **New Jersey Performing Arts Center** (NJ PAC), a magnificent facility that opened to critical acclaim in 1997. Since that time, the Center has remained true to and focused on its five-part mission as: a world-class arts center; a home for New Jersey's best performing arts groups; a place for diverse communities to come together; a center for children and their families; and an economic engine for Newark and for New Jersey. Additionally, NJ PAC is committed to being a model of innovative, sustainable, ethical business practices among urban arts centers. Under the

continuing and dynamic leadership of President and CEO Larry Goldman, Executive Vice President and Chief Operating Officer M. John Richard, and a group of dedicated Directors including Board Co-Chairs Ray Chambers and Prudential Financial Chairman and CEO Art Ryan, the Center has raised more than \$100 million of its \$180 million comprehensive campaign goal to secure a stable and sustainable financial future for the Center.

North Shore Medical Center (NSMC) is embarking upon an exciting project and time in its history. A new major ambulatory care center in Danvers, jointly developed by both NSMC and the Massachusetts General Hospital (MGH), will bring the highest quality care from NSMC and MGH physicians to residents of the North Shore. A master facilities plan for the Salem and Lynn campuses is underway as well. NSMC, in partnership with MGH, is preparing for a major fund-raising effort to support these initiatives, under the leadership of President and CEO Bob Norton, Board Chair Gary Spiess, Development Committee Chair Rich Bane, and Senior Vice President for Development Sara Andrews. The Wayland Group completed a Strategic Development Plan in the fall of 2005 and is now working with NSMC on an ongoing basis in support of campaign planning and implementation.

Having participated in the celebration last year of the completion of its \$194 million *Third Century Campaign*, The Wayland Group is proud to continue its consulting partnership with the **Peabody Essex Museum**. Under the dedicated leadership of Executive Director and CEO Dan Monroe, Chairman of the Board Dick Carlson, President of the Board Rob Shapiro, Chief Operating Officer Josh Basseches, and Director of Development Steve Solomon, the Museum is committed to further strengthening and enhancing its exhibitions, programs, and collections, and to growing its endowment in support of its dramatically expanded physical plant and program. The Wayland Group is deeply involved in the Museum's strategic and tactical planning for raising more than \$150 million over the next decade in order to sustain and preserve the Museum's transformational growth.

Pine Manor College has had another successful year, highlighted by the Gala dinner held in May to celebrate ten years of the College's mission focused on inclusive leadership and social responsibility and the charismatic and dynamic leadership of the College's President Gloria Nemerowicz. The evening was capped by the announcement of Pine Manor's second multi-million dollar challenge grant from the Brown Foundation. The Wayland Group enjoys its continued partnership with President Nemerowicz, Board Co-Chairs Anne Edwards and Phil Geier, members of the Campaign Task Force and Vice President for Development and Alumnae Relations Susan Webber. The College has raised over \$4.5 million this year in its efforts to reach its ambitious campaign goal of \$32.5 million.

The Wayland Group is delighted to continue its productive partnership with **Shady Hill School**. At its December meeting, the School's Board approved a bold vision for Shady Hill's future, a vision that emerges from a strategic and master planning process, as well as from extensive community dialogue. Specifically, the School plans to support curricular innovation in math, science, and technology; strengthen the performing and visual arts; incorporate curriculum-based service learning for every child in every year; strengthen physical education and athletics through construction of a new gymnasium; increase faculty salaries, benefits, and professional development opportunities; and maintain a commitment to providing substantial support for financial aid. Having completed a Campaign Planning and Feasibility Study in the spring of 2005, TWG continues to work closely with Director Bruce Shaw, Board of Overseers Chair Renee Landers, and a deeply committed staff on campaign planning and strategies.

In September, **Suffolk University** will celebrate its Centennial. Under President David Sargent, Suffolk has become a stronger and nationally respected university. It has significantly enhanced its campus by building a new Law School building and two new dormitories and, most recently, by becoming the master leaseholder on 73 Tremont Street and creating a state-of-the-art undergraduate library on its lower floors. Suffolk has launched a \$75 million capital campaign which will be kicked off in October. The Campaign will fund the cornerstones of Suffolk's strategic plan: academic excellence, student life and learning, and the evolving campus. Under the leadership of Vice President for Advancement, Kathryn Battillo, Suffolk has raised nearly \$35 million, including a lead gift that is the largest in Suffolk's history.

The **Union of Concerned Scientists** (UCS), headquartered in Cambridge, is a national alliance of scientists and citizens that combines rigorous scientific analysis, policy development, and citizen advocacy to build a cleaner environment and safer world. We are extremely pleased to be invited back by UCS to conduct a Planning and Feasibility Study for a proposed campaign effort in support of a new Strategic Plan for 2006-2010. The Wayland Group developed a Strategic Development Plan for UCS in 2003; since that time, the organization has successfully built its major gifts program and has significantly exceeded all of its targets and projections. UCS will be expanding its focus in several vital areas, including global warming, global peace and security, and scientific integrity—an effort to harness the scientific community's widespread concern about the abuse of science on the federal level. We are working with UCS President Kevin Knobloch, Executive Director Kathy Rest, Board Chair Kurt Gottfried, and Director of Development Dave Whalen and his able staff team.

The Wayland Group recently completed a Planning Study for a campaign to move Beacon High School to a new location in Watertown. Beacon High School has been part of the **Walker Home and School** family of programs since 1995. It provides an academically challenging education to high school students who are unable to function in traditional school programs because of psychological or emotional problems. Under Director Nancy Lincoln, Beacon has developed a highly successful model that integrates a strong academic program within a therapeutic setting. Beacon will move from Brookline to a new school building in Watertown in September. Walker has begun a campaign to raise at least \$2 million in private support to create an arts and physical education building for the Beacon High students.

In order to provide **Walnut Hill School** with an assessment of its capital fund-raising potential, The Wayland Group undertook a Planning Study in the fall of 2005. The Study field-tested a set of campaign objectives in support of the priorities articulated in the School's Long-Range Plan: *Rising to the Challenge of Success* (which TWG had also facilitated). TWG recommended that Walnut Hill take a multi-phased approach to capital fund-raising, the first phase of which would coincide with the completion of much-loved Head of School Stephanie Perrin's Headship, celebrate Stephanie's extraordinary work and tenure, and more specifically: make a significant investment in campus life—including construction of a new campus commons; provide critical support for faculty development and financial aid; and incorporate and strengthen the Annual Fund. Walnut Hill's strong leadership team includes not only Stephanie Perrin, but also Board President Betsy McClendon, Dean for External Relations Martha Kleinman, and Dean for Admission and Placement Matthew Derr.

Working in partnership with Wheelock's Ad Hoc Committee on Advancement Planning, The Wayland Group recently completed a Strategic Advancement Plan for **Wheelock College**. Our project goal was to develop a comprehensive, actionable Strategic Advancement Plan incorporating and integrating institutional planning, leadership development and fund-raising strategies to position the College for strong and sustainable progress, particularly pointing toward

the College's 125th Anniversary in 2013. Long-time Wayland Group friend President Jackie Jenkins-Scott, working with an active Board of Trustees and a Strategic Planning Committee, has developed an emerging Strategic Vision and Plan for the College which will not only strengthen the College's fundamental excellence and competitiveness, but which will also broaden the College's standing and "reach." Our work also included close collaboration with an Ad Hoc Committee co-chaired by Board leaders Bob Lincoln and Abby Perelman, and Vice President for Institutional Advancement Linda Welter.

Over the past year, The Wayland Group successfully partnered with **Worcester Academy** to conduct a Planning and Feasibility Study and to complete an Implementation Plan for a proposed campaign in the range of \$50 million dollars. Our work with the Head of School Dexter Morse, energetic and deeply committed Board Chair Jim Pietro, Director of Development Marillyn Earley, and members of a Campaign Planning Committee has resulted in several early gift commitments and the Board's agreement to go forward with this ambitious campaign focused on campus improvements, construction of a new athletic center, increased endowment for financial aid and faculty support, and increased annual giving.

2006 to date has been an exciting and productive year for the firm, taking us from our very busy backyard to Newark, Detroit, New York, San Francisco, Los Angeles, and Chicago. We are proud of our strong partnerships with all of our clients and move into the fall season with a healthy respect for the level of complexity and challenge that awaits us, but a joy and confidence in the ability of the independent sector to make a difference.

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