

Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group

Counsel to Non-Profit Organizations:
Fund-raising, Planning, and Leadership Development

SUMMER 2007

FORGING THE PARTNERSHIP

Members of our Wayland Group team are often asked to give a quick summary of what makes for a successful fund-raising advocate and volunteer. Our answer can be reduced to a simple mnemonic and which we refer to as “the five Cs and the three Ps”: great volunteers are cheerful, confident, committed, and have a “command of content,” i.e., an institution’s people, program, and plans.

Although this formulation is a helpful conversation starter and extremely useful in its way, we have been reflecting recently on the crucial importance of forging a strong partnership among staff, volunteers, and senior leadership of an institution. In our winter newsletter we reflected upon the qualities which augur for success among development officers. As a summer follow-up, we have been thinking about the qualities that seem most essential among the successful volunteers with whom we and others have worked.

1. **Successful volunteers are enthusiastic, passionate advocates for the institutions they serve.**

Success as a fund-raising volunteer begins with a genuine passion, enthusiasm, and commitment to the institution served. It is rare to find an effective volunteer who is not himself or herself engaged in the institution in many of its dimensions, and eager to enter into a conversation about many aspects of an institution’s mission and programs. Since philanthropy is also an expression of hope and belief in the future, one also finds effective fund-raising volunteers eager to talk about an organization’s future projects and plans.

2. **Effective fund-raising leaders are genuinely interested in people.**

A corollary to a leader’s interest in institutional projects and plans is a genuine interest in people. Great fund-raising volunteers will often learn a great deal about prospective donors, will ask many open-ended questions, and will be active, effective listeners. It is sometimes assumed that strong fund-raising volunteers are extroverted and have great “presentation” skills. Our experience is that there are effective fund-raising leaders with many different personal “styles”; but that all of them seem to share a genuine interest in people.

3. Effective volunteer leaders are themselves committed donors.

Great fund-raising leaders lead by example, not merely as a “technique” of fund-raising, but as a heartfelt expression of belief in an institution’s mission, plans, and leadership. Great fund-raising leaders are also generous, “capacity-level” givers. No amount of briefing, training, or mere technique can substitute for the genuine personal (and financial) commitment that a volunteer leader brings to an encounter with a prospective donor.

4. Great volunteer leaders identify as part of a total development “team.”

Although there are instances in which some experienced volunteers complete their assignments on a highly individual basis, the most effective volunteers are typically those who feel themselves to be a part of a total development team that includes the senior leadership of the institution and members of the development staff. Great volunteers work to improve everyone’s capabilities, including their own, making constructive suggestions, seeking advice, communicating frequently and easily with staff so as to coordinate their activity, and taking and trading off assignments in any way that will help advance a prospective donor considering his or her commitment. (To forge a strong partnership in this way, it is, of course, crucially important that development staff maintain a high standard of information and data integrity, so as to continue to lend confidence and credibility to the partnership!)

5. Great fund-raising volunteers put their commitment to the success of the institution above personal concerns.

Fund-raising is a complicated and very human process. Volunteer “A” may wish to retain a prospect assignment because of a pre-existing relationship with a prospect that interferes with, rather than advances, a gift discussion. Volunteer “B” may intend to make an approach to a donor, but have specific misgivings that she may not share with staff. The most effective fund-raising volunteers are ones who are not only honest with the rest of the development team, but also honest with themselves, and who are candidly willing to either set aside personal concerns or to shift leadership for a specific gift approach to others who may not face the same barriers with respect to a given individual or situation.

As in most fields of endeavor, the most important wisdom with respect to great fund-raising volunteers is the simplest: lead with committed “heart” and “head”; voice your passionate commitment to the institution proudly; work effectively with a team; and focus on the needs, hopes, and concerns of the donor, rather than personal concerns. An institution that is able, through the application and embrace of these themes, to build a strong partnership among volunteers, senior leadership, and development staff can harness the power of philanthropy to make dramatic and important changes on behalf of that institution and, in turn, on behalf of the clients it serves.

Over the past year our Wayland Group team has partnered with an extraordinary range of organizations, each one of which is not only strongly focused on organizational success, but is also passionately committed to improving its work and practice on behalf of the constituencies it serves.

Applewild School is a highly regarded private, coeducational school for students in kindergarten through grade 9, located in Fitchburg. The Wayland Group is delighted to partner with Applewild for a second time, having conducted an assessment of its development program in 2001. We are conducting a Planning and Feasibility Study for a proposed campaign for a set of endowment, facilities, and programmatic objectives. We are pleased to be working with Head of School Chris Williamson, the Board of Trustees, led by Board President David Stone, and long-time Director of Development and Alumni Affairs Kelly Jennison.

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. As part of the Initiative, The Wayland Group helped Bay Cove develop fund-raising goals and volunteer leadership development benchmarks for a five-year fund-raising plan. Bay Cove has recently successfully completed the third year of the Plan, meeting both its fund-raising dollar goals and its leadership benchmarks. Under the leadership of President and CEO Stan Connors, Director of Development Marion Nierintz, Board Chair Peter Pease, and Development Committee Chair Tom Haslett, Bay Cove has also begun a major gifts effort to fund key elements of its strategic plan.

Congratulations are due to President Lou Casagrande, Senior Vice President, Institutional Advancement Deb Sinay, and Campaign Director Tricia Meyer, as well as all of the Museum's trustees, donors, and development team on the grand opening of the new **Boston Children's Museum** in April. *The Campaign for Children's Wharf* has already exceeded its original fund-raising target by \$10 million and continues to fund-raise to meet a \$1 million Kresge Challenge.

Cantata Singers is widely regarded as Boston's finest choral ensemble and one of the region's premier music organizations. In the spring of 2006, 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 and Trustee John Rutherford chaired the planning process, which was completed last fall. Music Director David Hoose and members of the Long-Range Planning Committee developed an exciting and ambitious five-year program plan that will focus in depth on the work of one composer each season, tie main concert and smaller performances together thematically, and increase the number of performances. The Plan also included the development of a detailed brand and marketing campaign to increase Cantata's visibility and audience for performances.

Strong plans and leadership are having a positive effect on **Charles River School's Potential Energy Campaign**, an effort to raise \$6 million for a gymnasium, dining facility, significant renovations to their historic Centre Street building, and endowment. To date, Head of School Cathy Gately, Director of Development and Alumni Relations Linda Fenton, Associate Director of Development and Campaign Manager Samuel Sadowsky, and a cadre of terrific volunteers have raised more than \$5 million. Demolition of portions of the old gym space has begun and construction is expected to be completed in January 2008. A significant challenge grant has further engaged the school community and helped to build the Campaign's momentum.

Community Health Connections (CHC) is a non-profit community health organization operating two federally qualified health centers—the CHC Family Health Center celebrating its fifth anniversary in Fitchburg, and the Greater Gardner Community Health Center which has been operating for two years in Gardner. Both centers serve more than 34,000 residents of North Central Massachusetts—more than 14,000 of whom are children—with a comprehensive array of services, including primary family medical care, preventive and restorative dental care, oral surgery, mental health services, sports medicine, and low-cost pharmacy. The Wayland Group is proud to be working with President and CEO Robert H. Johnson and Vice President of Community Relations and Development Dawn Casavant on strengthening the CHC development program, while at the same time providing strategic assistance to CHC on capital fund-raising projects in Fitchburg and in Gardner.

With its mission expansion in 2004, **Community Servings** went from serving clients battling one primary disease (HIV/AIDS) to serving clients affected by more than 20 different disease groups, including breast cancer, other cancers, multiple sclerosis, Lou Gehrig's disease, and Parkinson's, as well as HIV/AIDS. As a result, the demand for the organization's service increased substantially, necessitating relocation to a larger facility that will provide the room to substantially increase service. On January 3, Community Servings began construction on a new \$7.2 million nutrition center in Jamaica Plain. The new 13,500 square foot facility will double the organization's capacity to provide meals to the critically ill, and will enable Community Servings to host up to 100 volunteers per day. The Wayland Group is proud to have been Community Servings' consulting partner in planning for a campaign to raise \$4 million required in philanthropy. So far, Community Servings has raised \$3.4 million, and TWG has continued to provide strategic campaign counsel. We look forward to celebrating the successful conclusion of the Campaign with Executive Director David Waters, Honorary Co-Chair Ron Ansin, Campaign Chair Joan Parker, Board Chair Ron Gibson, and the organization's dedicated staff and volunteer leadership!

The Wayland Group has been delighted to continue its work over the past year with one of New England's educational treasures, **Curry College** in Milton. Under the dynamic leadership of President Ken Quigley, Jr. and newly appointed Chief Development Officer Chris Lawson, Curry continues to fuel a ten-year period of growth in enrollment and academic programs. The high point of Curry's growth will be a beautifully designed new Student Center that will become the physical, academic, social, and even spiritual center of the College and is scheduled for groundbreaking in the spring of 2008. The Wayland Group is proud to serve as Curry's partner as it builds its development program in support not only of the Student Center but of a forward-thinking institution that continues to transform the lives of countless young men and women.

The Wayland Group recently took on a new assignment for **Emerson Health Care Foundation**, the philanthropic arm of Emerson Hospital. The Hospital, under the dynamic leadership of President and CEO Chris Shuster, had recently completed a Strategic Plan and we were recruited to partner with Vice President for Development and Volunteer Services Jack Dresser and Chair Ron Johnson in taking the next steps in planning for an anticipated capital campaign. The resulting Campaign Readiness Plan focuses on the priority activities that should be undertaken over the next 18 months to ensure campaign preparedness and success.

Fenway Community Health has increased its comprehensive campaign goal to \$18 million in its *Ten Stories...A Campaign for Fenway*, and has raised in excess of \$9.7 million toward that goal. Under the leadership of Executive Director Stephen Boswell and Board Chair Joanne Ayoub, members

of the Board and campaign leadership have worked closely with Campaign Director John Marksbury and other members of the development team to ensure the success of this ambitious effort. The Wayland Group has continued to work with members of the development team to develop appropriate strategies as the Campaign continues to unfold, and, more specifically, to assist the staff in the development of a proposal to the Kresge Foundation.

Last fall, the YMCA of Greater Boston was asked to reconsider going forward with a plan to build a YMCA as a signature project on the Greenway. The proposed **Greenway YMCA** was the only development project on the Greenway that would bring vital community services to this underserved section of Boston. After two years of working with community and civic leaders, the YMCA had withdrawn its proposal when the cost of the project made it seem unfeasible. Additional financial support for the project from the legislature and a new, less costly building plan caused the YMCA to reconsider the feasibility of the project. John Ferrell, the President of the YMCA of Greater Boston, asked The Wayland Group to conduct an assessment of institutional support for the Greenway YMCA as one input to the YMCA's decision making process. After reviewing the results of the assessment, conducting a detailed analysis of the impact of the Greenway YMCA on the YMCA's overall strategic plan, and considering the importance of the project to the city, the YMCA Board voted to move ahead with this important and historic effort.

As **Hebrew SeniorLife** (HSL) was preparing for the public kick-off of its \$100 million campaign to support improvements to its current campus and the building of New Bridge—a transformational new community for multi-generational use in Dedham, Massachusetts—The Wayland Group completed an in-depth assessment of the HSL development program. We very much enjoyed the opportunity to work with President and CEO Len Fishman, Board Chair Alan Solomont, and to re-engage with Steve Braverman, Senior Vice President for Development and Community Relations.

Over the past year, the **Higgins Armory Museum** has said good-bye to its long-time Executive Director Kent dur Russell and welcomed Interim Executive Director Rena Zurofsky. During this period of transition, The Wayland Group conducted a training session with the newly expanded Campaign Committee to assist members of the Committee in developing appropriate strategies for the successful cultivation and solicitation of potential campaign donors. Additionally, TWG has advised Board Chair Joe Hamilton and staff on an appropriate timeline for submitting a proposal to the Kresge Foundation.

Having conducted an assessment of the development program at the **Isabella Stewart Gardner Museum** in the spring of 2006 and a Planning Study for a capital campaign in the fall/winter of 2006/2007, The Wayland Group was delighted to continue its work with Director of Development and External Relations Helena Hartnett, Deputy Director of Development Lisa Bevilaqua, and their talented development team, with the assistance and support of Executive Director Anne Hawley, Board Chair Barbara Hostetter, and members of the volunteer leadership, on an Implementation Plan for a fund-raising campaign in support of a new building on the Museum's property, designed by world renowned architect Renzo Piano. The new building will house visitor amenities, an exhibition gallery, performance hall, education resource room, a greenhouse, artists' facilities, and administrative offices, while preserving Mrs. Gardner's original installation in the palace. At its spring Board meeting, the Trustees of the Museum resolved to go forward with the leadership phase of a major capital and endowment campaign, and significant fund-raising progress has already been made. TWG is proud to continue serving as the Gardner's consulting partner in this important project.

Having conducted an assessment of the development program and a Strategic Development Plan for **Massachusetts College of Art** in 2001, a Planning and Feasibility Study for a capital campaign in the spring of 2004, and an Implementation Plan for a \$10 million Leadership Campaign in 2005, The Wayland Group is delighted to continue its work with Vice President for Institutional Advancement Richard MacMillan and his development team. The College, still in the quiet phase of its campaign, has currently raised over \$11 million of an increased goal of \$15 million in support of endowment for faculty development and growth; endowment for student financial aid; a new Center for Design Innovation which will also house the Bakalar and Paine galleries; endowment for the Center for Arts & Community Partnerships; and an Annual Fund supporting faculty development, financial aid, and new media and technology. TWG looks forward to celebrating the College's successful conclusion of this important effort.

The Wayland Group is proud to continue to broaden and deepen its consulting relationship with the **Massachusetts General Hospital** (MGH), a world renowned academic medical center in our own backyard. We have been working intensively and in parallel on two major assignments throughout the year—first, to help plan and organize a proposed major hospital-wide campaign; and second, to continue to support the aggressive fund-raising ambitions of the MGH Cancer Center, which is chosen by more cancer patients than any other hospital in New England. The Wayland Group is privileged to be working with hospital and physician leadership, including President Peter Slavin, MD; Co-Chair of the Philanthropy Program Jerry Austen, MD; Chairman of the Board Ed Lawrence; Director of the Cancer Center Daniel Haber, MD, PhD; Chief of Hematology/Oncology Tom Lynch, MD; President of the MGH Physicians Organization Dan Ginsburg; and others in advancing the Hospital's philanthropy program. We feel especially grateful for such a rewarding partnership with the MGH's extremely talented and able development staff leaders, including Jim Thompson, Katelyn Quynn, and Allen Peckham from Partners HealthCare—as well as many others on the development staff team.

The Wayland Group completed a comprehensive assessment of the development program at **Miss Hall's School** in July 2006. We are delighted to have been recently selected to conduct a Planning Study for an anticipated \$50 million endowment campaign, enabling us to continue our longstanding and highly valued partnership with Head of School Jeannie Norris, Director of Development Janis Martinson, Board Chair Susan O'Day, and other members of the volunteer leadership and staff development team. This outstanding school for girls has experienced extraordinary growth and success over the past decade, and is poised for even stronger performance in the years to come.

Nashoba Brooks School is an outstanding primary independent school in Concord. It has a unique program that is coeducational from preschool through grade three and for girls only in grades four through eight. The Wayland Group is delighted to partner again with Nashoba on a second capital campaign beginning this fall. Nashoba has a very strong leadership team in place for the upcoming campaign. Head of School Kay Cowan is both a respected academic leader and a seasoned fund-raiser. Director of Development Karl Kussin has a long history with the School and is an experienced fund-raising professional. Board Chair Paul Parisi and Development Committee Chair Sarah Robinson are both experienced fund-raisers who were involved in the last campaign. In preparation this summer for the Campaign, Nashoba is completing its strategic plan and developing a new facility master plan.

New England Baptist Hospital continues in the Leadership Phase of a capital campaign that will establish the Hospital as a world-class center for innovative, patient-centered, musculoskeletal

care. *The Campaign for Care* will provide \$30 million in philanthropic support towards an \$85 million project that will create an expanded environment for surgery; enhance clinical infrastructure and physician amenities; and create a clinical and translational research center. Aided by the President's Cabinet, President and CEO Joe Dionisio, Chairman of the Board John Wilkins, and Vice President for Development and CDO Deb Coleman continue to lead this ambitious effort, successfully keeping the Campaign on target as it nears completion of the Leadership Phase.

The **New England Center for Children** (NECC) is fast approaching its \$5 million campaign goal and has been able to begin construction of the Therapeutic Aquatic Center that will augment its already nationally-recognized curriculum for children with autism. While this extraordinary school for autistic children has been running an ambitious campaign, fulfilling a Kresge Challenge grant, and breaking ground on its facility expansion, it has also been working to open by December a branch of NECC in the Emirate of Abu Dhabi. The Wayland Group is proud to serve as NECC's consulting partner.

The **New England Conservatory** (NEC) is now in the final year of its successful, record-breaking \$100 million *Gift of Music Campaign*, having raised \$83 million to date. We are extremely pleased to join the NEC community in welcoming new President Tony Woodcock to NEC. Tony has led a career as an orchestra administrator, most recently as President of the Minnesota Orchestra. He succeeds President Emeritus Laurence Lesser who served as interim leader since the death of President Daniel Steiner last summer. NEC continues to benefit from the extraordinary leadership of Campaign Chair David Scudder, Vice Chair Harry Pratt, Leadership Giving Co-Chairs Ginny and Peter Nicholas and Carolyn and Peter Lynch. In addition, Vice President for Institutional Advancement Don Jones and Executive Director of Development Laurie LaMothe lead an outstanding development staff team.

On October 21, 2006, the **New Jersey Performing Arts Center** (NJPAC) kicked off its *Legacy* campaign to raise \$180 million in support for endowment, capital improvements and technology, annual operating support, and reserves. As of June of 2007, nearly \$135 million had been raised with approximately \$45 million still to be raised by July 1, 2008. The Wayland Group is proud to have served as NJPAC's consulting partner in this ambitious effort. Under the extraordinary leadership of President and CEO Larry Goldman, Executive Vice President and Chief Operating Officer M. John Richard, returning Vice President of Development Peter Hansen, and a group of dedicated and generous Directors including Board Co-Chairs Ray Chambers and Prudential Financial Chairman and CEO Art Ryan, NJPAC continues to demonstrate its leadership as a world-class arts center, a home for New Jersey's best artists, a place for diverse communities coming together, a center for children and their families, and an economic engine revitalizing and transforming Newark.

This is an exciting time in the history of **Nichols College**, a small business college in Dudley, Massachusetts. Over the last ten years, under President Debra Townsley's leadership, the College has completed an impressive turnaround that has improved the College's finances, developed new, innovative programs, increased enrollment, dramatically improved college facilities, and raised \$13 million in a prior capital campaign. All of these accomplishments have set the stage for additional institutional growth and for a new, more ambitious capital campaign. In preparation for a new campaign, The Wayland Group conducted an assessment of the development program this winter and a Planning and Feasibility Study for the campaign this spring. The consulting team will be partnering with the President, Board leadership, and Vice President for Advancement Joe Cofield, and Associate Vice President for Advancement Deb Mayerson to implement the recommendations of the Study.

The Wayland Group continues its work with **North Shore Medical Center** (NSMC) in its campaign to build a major outpatient care center in Danvers, jointly developed by NSMC and the Massachusetts General Hospital—and to transform Salem Hospital, including a new ICU, pediatric unit, medical/surgical units, and special care nursery. NSMC is experiencing early success, with several seven-figure commitments, the first in its history. NSMC’s strong leadership team includes President and CEO Bob Norton, Board Chair Gary Spiess, Development Committee Chair Rich Bane, and Senior Vice President for Development Sara Andrews.

Pine Manor College capped off its year with a tribute dinner for retiring Board Co-Chairs Anne Edwards and Phil Geier. We are delighted that Anne Edwards has agreed to continue her long-time involvement with and dedication to the College by agreeing to Chair the *Campaign for Pine Manor* as the College prepares to officially kick off the Campaign this fall. The continuing visionary leadership of President Gloria Nemerowicz, the involvement of incoming Board Chair Lydia Villa-Komaroff, and the hard work of dedicated Board members have all led to Pine Manor’s growing strength and success. Our Wayland Group team continues its work with President Nemerowicz, Board leaders, and Vice President for Institutional Advancement Susan Webber.

Over the past year, The Wayland Group has been proud to continue its consulting partnership with the **Peabody Essex Museum** (PEM). 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 a growing and talented development team, the Museum has continued its strategic and tactical planning for raising nearly \$250 million over the next decade to further strengthen and enhance its world-class exhibitions, programs, and collections, and to grow its endowment in support of its magnificently expanded physical plant and program.

Having completed a Campaign Planning and Feasibility Study in the spring of 2005, The Wayland Group has continued to provide periodic strategic assistance to **Shady Hill School**. On May 18, nearly 500 members of the Shady Hill community gathered to kick off the *Blueprints for Learning Capital Campaign*. A highlight of the gathering was the announcement that so far the School had raised \$8,683,024 in a campaign anticipated to be for no less than \$16 million. TWG congratulates Director Bruce Shaw, Board President Renée Landers, Director of Advancement Erica DeRosa, and a dedicated Campaign Steering Committee on their continuing and spectacular success.

This past spring, staff of The Wayland Group conducted a Planning and Feasibility Study for **The Strand Theatre** in Dorchester. In his State of the City address in January 2007, the Mayor announced his commitment to reestablish the Strand as a vital community asset. The proposed renovations are exciting and will make possible a new program model that has been designed to best use the Theatre to meet a variety of community needs. We have enjoyed working with Julie Burns at the Mayor’s Office of Arts and Tourism and partnering with Susan Nelson of Technical Development Corporation on specific planning components of the project.

Last fall, President David Sargent announced to an enthusiastic gathering of over 200 alumni and friends that **Suffolk University** was launching the most ambitious campaign in its history. *The Power to Change: The Campaign for Suffolk* is a comprehensive \$75 million campaign. The Campaign has already secured the largest gift in the University’s history, a gift of \$18 million, as well as the University’s first two endowed chairs. Suffolk finished the first year of the public phase of the

Campaign on target, having raised cumulatively almost \$44 million. Vice President for Advancement Kathryn Battillo's strong leadership of the advancement function has enabled the University to launch its first University-based comprehensive campaign effort.

The Wayland Group was delighted to be invited for a return assignment with the **Union of Concerned Scientists** (UCS) this past year, to conduct a Planning and Feasibility Study for a proposed comprehensive campaign. UCS continues its important work in addressing the most critical issues that confront humankind, including global warming, the threat of nuclear weapons, and the over-reliance on fossil fuels—work that is based on independent, objective, scientific information and analysis. UCS has experienced remarkable results in the fund-raising arena and is building a highly effective and successful major gifts program and adjunct board—the UCS National Advisory Board. The organization's exceptionally strong leadership team includes President Kevin Knobloch, Executive Director Kathy Rest, Board Chair Kurt Gottfried, and Director of Development David Whalen.

In January, The Wayland Group completed a Development Assessment for the **United Way of Massachusetts Bay** (UWMB). During the time of our work, the UWMB merged with the Merrimack Valley United Way to become the United Way of Massachusetts Bay and Merrimack Valley. The United Way seeks to strengthen and grow its already highly successful fund-raising program, which raises approximately \$45 million annually to help improve people's lives and strengthen the neighborhoods in our region. We were pleased to work with former President and Chief Executive Officer Milton Little, Board Chair Bob Mahoney, Development Committee Co-Chairs Kevin Callaghan and Kathy Plazak, Senior Vice Presidents Chuck Gordon and Kevin Stone and members of their staff.

At its Boston gala in April, **Walnut Hill School** announced the successful launch of its *Fund for the Future*—a focused fund-raising effort to fund a new residence hall and faculty housing complex known as the Campus Commons, and to increase endowment. This effort is timed to coincide with the capstone year of Stephanie Perrin's extraordinary 25-year tenure as Head of School. Walnut Hill is The Wayland Group's client of longest standing, and we continue to be gratified and energized by our work with Dean for External Relations Martha Kleinman, Associate Dean Kelly Wells, Board Chair Betsy McClendon, and many other members of the Walnut Hill advancement team.

In 2006 The Wayland Group worked with **Wheelock College's** President Jackie Jenkins-Scott, Vice President for Institutional Advancement Linda Welter, and a great committee of volunteers chaired by Trustees Bob Lincoln and Abby Perelman to develop a comprehensive Strategic Advancement Plan for the College. We are proud to report that Wheelock has begun to implement its Advancement Plan, and, in addition, will be launching a significant awards program and fund-raising event, "A Passion for Action," this fall.

We applaud the early successes of the Leadership Phase of **Worcester Academy's** \$50 million capital campaign, resulting to date in over \$8.5 million in support of campus improvements, construction of a new athletic center, increased endowment for financial aid and faculty support, and increased annual giving. Over the past year, our Wayland Group team has continued our valued partnership with their strong leadership team, including Board Chair Jim Pietro, Headmaster Dexter Morse, members of the Campaign Steering Committee, and the superb staff team led by Director of Development Marillyn Earley.

Worcester Polytechnic Institute (WPI) has a strong history of academic innovation. More than 25 years ago, it developed the WPI Plan, a curriculum centered on projects rather than courses and outcomes rather than inputs. Students are challenged to embrace a learning experience that provides a rich understanding of science, engineering, and technology through extensive teamwork, close interaction with faculty, and personal engagement with real-world problems. President Dennis Berkey has a powerful vision for the University, seeking to continue developing the programs, facilities, and financial resources that will drive innovation, attract more young people to science and technology-centered education, and position WPI among the finest universities in the country. He and Vice President for Advancement and Alumni Relations Dexter Bailey have asked The Wayland Group to develop a comprehensive campaign plan for a new, major fund-raising effort. Our work began with an assessment of the development operation this spring. As of this writing, TWG staff are conducting a Planning and Feasibility Study for a comprehensive, major campaign for facilities and endowment.

As many of our clients and friends are aware, The Wayland Group's **Advancement Institute: "The Maximum Gifts Approach"** has become a regular biennial event. Our next Institute will be held on **May 1 and 2, 2008**. Additional "Save the Date" information, as well as the formal Institute announcement, will be forthcoming, but for those who wish to "mark your calendar," we wanted to be sure to share the dates. For this year's Institute, while following the general framework of past editions, we will be adding a panel on leadership development featuring experienced leaders who have done important and successful work in board and other leadership development activities, and we have already invited a number of outstanding speakers to join us. Because of our guests and our invited speakers, this is always an inspirational and thought provoking two-day experience. We look forward to seeing many of you there!

As the season turns to fall, we look forward to a busy and productive year, filled with the challenges and opportunities that are so gratifying to all of us who serve the independent sector. It is a continuing privilege to work with our client partners and with each other as members of what we feel is an extraordinary Wayland Group team. Please be in touch to keep us apprised of progress, concerns, and questions, since the collective experience and wisdom of the broader Wayland Group "network" is an extraordinary resource to all of us.

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