

# Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

## The Wayland Group

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

SUMMER 2009

### LESSONS OF SUCCESS

Many of our clients have been tested over the past year in ways they have not been tested before. The challenges have seemed more relentless and the successes more difficult than ever. In spite of those difficulties, visits, solicitations, and gifts continue to be made and goals achieved. Several of our clients have completed campaigns or achieved significant milestones, even in this environment. In thinking about lessons that have been learned over the past year by many of our clients across the independent sector, we thought it might be useful to enumerate those that seemed most practical and broadly applicable. These are the lessons learned in difficult days—but fully applicable to the best of times as well.

- 1. Every conversation with a prospect matters and can contribute to a relationship or a gift discussion.** Although not every conversation can be anticipated and planned, we need to be prepared with a summary case for the most casual, unpredictable, sudden, and potentially valuable encounters. We need to be strategic in every encounter, advancing the conversation and the relationship.
- 2. Treat all events—Board meetings, committee meetings, leadership retreats, planning exercises, alumni gatherings, donor receptions, thank you dinners, house parties—all events large and small, real and virtual, as ultimately about prospect and leadership development.** The great temptation in event work is to be satisfied by the good will generated, to fail to embed development/campaign messages in formal agendas and/or informal remarks. Some of our best and newest prospects and leaders can surface at any event; we need to be ready.
- 3. Talk to your prospects (face-to-face whenever possible)—not just to each other.** If we find ourselves in the office or at events talking to our colleagues rather than finding prospects to visit and talk to, then we're having the wrong conversations and wasting valuable time; we need to get out of our own way.
- 4. Do not prejudge outcomes; campaigns succeed through persistence and execution. Every campaign experiences disappointments and has its share of pleasant surprises; live (or at least work) for the latter.** Campaign volunteers will often think the campaign is failing if a solicitation does not go well. They may also create unrealistic expectations of success if a particular solicitation goes better than anticipated. We need to remind our volunteers (and ourselves) that a campaign, like life, is long, and that success—though not linear—will come if we are playful and persistent.

5. **In a difficult time/environment, become even more active; to the strong goes market/donor share.** There can be a reluctance to talk to prospects when times are difficult. But if we're not talking to our prospects, you can be sure someone else will be. We need to continue and even accelerate our conversations in difficult times, positioning our organizations as priorities for philanthropic support when the time is right.
  6. **Tell the planned giving story to your donor and leadership base; testamentary gifts feed endowment, outright gifts the annual fund.** Many of our organizations can be positioned as legacy institutions with legacy opportunities. Ultimately it will be planned gifts that provide us with endowments and sustainability over the long term.
  7. **Work with staff and volunteers collaboratively; continuing success has many fathers and mothers.** Although there may be enormous pleasure and pride in successful solicitations and campaigns, it is almost always the case that major gifts would not be closed without the assistance of many staff members and volunteers over time. Continuing campaign success will depend on good spirits and high morale that come from celebrating not only our donors but also our staff and volunteers.
  8. **Think of metrics and benchmarks as incentive and not punishment; take every opportunity to move your prospects to a greater state of readiness to make a gift.** Metrics make staff accountable and provide volunteers with reasonable benchmarks—the moves necessary to get a gift or the gifts necessary to make a goal—of success. Carefully measured campaign metrics also provide an appropriate response when assaulted by those impatient with progress.
  9. **Grow your program incrementally; every new gift, every upgrade, every leadership annual gift builds the pipeline for the next major gift, the next campaign.** Major gift fundraising is hard work—it isn't magic. It's measured, strategic, sequential, and incremental steps taken over time.
  10. **Focus on Annual Fund goals and recognition; commit to the “double ask.”** Avoid if at all possible a “unified” ask. And if given a choice, always preserve the Annual Fund commitment first; it is the lifeblood of the organization. Begin any conversation about a campaign with, “First, I'd like to talk to you about your annual gift ...”
  11. **Demand a vision, a story, a case that is exciting and that links uses to sources of funds.** More and more, sophisticated donors (often from business) are asking not only for a programmatic or artistic case that is visionary and that will clearly and dramatically transform an institution and/or community, but also for a business case that clearly and transparently links sources and uses of funds. Campaign donors want to feel and understand the impact of their philanthropic commitments.
  12. **Call The Wayland Group when the glass is looking half empty.** We will try to help you see the glass as half full—or at least getting fuller in clear and measureable increments over time.
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In spite of the challenges of the past year, The Wayland Group has continued to be active with a remarkable diversity of important organizations representing the full range of the independent sector.

**Chestnut Hill School** is an extraordinary school with many strengths: a vibrant educational program; a warm, welcoming atmosphere; an unusually diverse student body and faculty; and strong staff and volunteer leadership. This past spring, the School engaged The Wayland Group to conduct a Development and Campaign Readiness Assessment. The consulting team worked closely with Head of School Steve Tobolsky, Board Chair Jeff Hawkins, Development Committee Chair Patty Ribakoff, and Director of Development Jeri Goetz. Key elements of the Assessment include undertaking a new strategic planning process to clarify school needs and priorities, developing a ten-year financial model that includes the role of philanthropy in financing the School, and aggressively growing the Annual Fund.

Under the dynamic leadership of President Ken Quigley, Jr., and Chief Development Officer Chris Lawson, **Curry College** in Milton continues to build a strong and growing advancement program. Although sailing into the same stiff wind as many of our clients, Curry reports more alumni and parent gifts than ever before in FY 2009. Building a pipeline of new prospects and donors will ensure the College's continuing success in its fundraising efforts.

The Wayland Group is pleased to renew its partnership with **Dedham Country Day School** (DCD). The Wayland Group worked with DCD on its successful *Securing Our Second Century Campaign* which was concluded in 2007. Under the leadership of Head of School Nick Thacher and Board Chair Neal Litvack, DCD has developed a new Strategic Plan with a number of exciting elements: creating a new summer program, *Horizons*, for economically disadvantaged children; continuing strong support for the faculty and financial aid; and increasing the size of the School by adding a second section in each grade in kindergarten through grade five to enhance the School's academic and social environment. DCD asked The Wayland Group to conduct a Campaign Readiness Assessment this spring in anticipation of a new campaign to fund the needs identified in the Strategic Plan. The consulting team worked with a board task force that included Neal Litvack, incoming Board Chair Mark Alperin, John Connors, Kathy Parent, Tim Mann, Jeff Barnes, and Ed Anderson to develop a model for a potential campaign and a communications strategy to update and engage the school community.

**Fenway Health** has successfully completed its ambitious capital campaign, spurred by a \$1.75 million challenge grant from the Kresge Foundation. In May, Fenway opened its new Ansin Building in the heart of Boston's Fenway neighborhood, in the shadow of Fenway Park. Ron and Ed Ansin generously contributed the campaign's leadership gift in memory of their nephew Peter Ansin. We congratulate the superb leadership team of President Stephen Boswell, MD, Board Chair Allison Salke, Campaign Chairs An Hinds and Stewart Clifford, Campaign Manager John Marksbury and the many leadership donors who have supported the extraordinarily successful campaign that has raised \$19 million to build and support a state-of-the-art community health center dedicated to the care and treatment of the LGBT community.

The Wayland Group continues its work with **Friends Academy** in North Dartmouth as the school proceeds with plans for a campaign to support a renewed campus master plan. One of the central features of the campus master plan is a new home for Friends' new Sally Borden School, which offers a unique educational opportunity for children with language-based differences. Friends is in the early stages of the Leadership Phase of the Campaign. We are extremely pleased to be working with Headmaster Andy Rodin, Board Chair Carol Pray, Former Headmaster and Campaign Leader Clay Stites, Director of Community Affairs Jodi Pink, and the Friends Academy community on their campaign.

**The Guidance Center** (GCI) in Cambridge has recently completed a strategic plan that will guide the Agency's priorities for the next five years. We have been pleased to meet with Executive Director Susan Ayers, Board Co-Chairs Sally Lesser and Elizabeth Gilmore, and members of the

Executive Committee to assist them in implementing the goals of their Strategic Plan related to strengthening leadership development opportunities, and in identifying methods for increasing understanding and awareness of GCI and its programs and impact in the Cambridge/Somerville communities.

This past year, we have had the opportunity to continue our long-time association with the **Harvard School of Public Health** (HSPH) during Michael Voligny's successful tenure as Acting Associate Dean for Resource Development. During that period, Michael oversaw an extensive development planning effort as well as a successful introduction of and smooth transition to the School's new dean, Dr. Julio Frenk. Dean Frenk had a particularly busy spring representing the School and serving as a key global leader in the prevention of the spread of the H1N1 Swine Flu virus. We also join the Office of Resource Development staff in welcoming Ellie Starr, formerly the Chief Development Officer at Perkins School for the Blind, as the new Vice Dean for External Relations at HSPH. Special thanks to Randy Billings, Patty Shea, Julie Rafferty, and Sarah Wood for their support during the transition, and a very special thank you to former dean and friend, Dr. Barry Bloom.

The Wayland Group recently completed an Implementation Plan for **Hebrew SeniorLife** (HSL) which will serve as a thirty-six month road map for HSL in creating a culture of philanthropy that will affect the entire organization. Our work with senior management, including CEO Len Fishman, Senior Vice President for Development and Community Relations Steve Braverman, and with Board Chair Andrew Glincher, Development Committee Chair Jeff Drucker, and other staff and volunteers has been a true partnership that has led to a new model of philanthropy at HSL that is essential to the future of the institution.

The Wayland Group is proud to have been selected to serve as Senior Project Consultant to the **Hole in the Wall Foundation**, headquartered in New Haven, Connecticut. The Hole in the Wall Foundation is the fundraising and funding arm of the Association of Hole in the Wall Camps—the world's largest family of camps for children with serious and life-threatening medical conditions. The Hole in the Wall camps were founded by Paul Newman in 1988 and there are now eleven full member camps in the United States and around the world, eight camps in various stages of development, and three global partnerships. Hole in the Wall camps are free of charge to campers and their families. The Wayland Group is managing the Foundation's Major Challenge Grant Program, the purpose of which is to help build the camps' organizational and financial capacity and sustainability by guiding and strengthening their fundraising programs. As a part of our early work with the Hole in the Wall camps, we were fortunate to have the opportunity to visit and work with the **Roundup River Ranch** in Vail, Colorado. A dedicated and highly capable team of volunteers and staff there are completing a \$19 million campaign to build a new camp in the Rocky Mountain region to enrich the lives of children with life-threatening illnesses. We are extremely pleased to be working with Foundation President and CEO Ray Empson, Director of Development Hege Lauvik, Board Chairs John Forester and David Horvitz, and Co-Chairs of the Grants Committee Bob Forrester and John Marshall.

TWG is delighted to continue its consulting partnership with the **Isabella Stewart Gardner Museum**. The Museum continues to make extraordinary progress, under the leadership of Executive Director Anne Hawley and a deeply committed Board led by Barbara Hostetter, in its fundraising efforts in support of important restoration work in the historic palace as well as construction of a new building adjacent to the Museum, designed by Pritzker Prize-winning architect Renzo Piano. In May, the Board of Trustees voted unanimously to proceed with the new building and palace restoration project. The vote recognizes that the project has received all necessary regulatory approvals and that the Museum has met a critical internal benchmark in its capital fundraising. TWG continues its work in partnership with the leadership and with Director of Development and External Relations Helena Hartnett, Deputy Director of Development Lisa Bevilacqua, and their tireless and talented development team.

The Wayland Group recently worked with **Jewish Community Day School** to complete a Long-Range Plan. We were privileged to work closely with Head of School Ruth Gass, Board Chair Betsy Hecker, Co-Chairs of the Long-Range Planning Committee Jon Levisohn and Jerry Silverman, founder and committee member Arnee Winshall, and other members of the Long-Range Planning Committee, Joel Alter, Shira Deener, Miriam Newman, Tom Schwarz, Ilan Segev, and Paula Sinclair to develop the Plan. In addition, we worked closely with other Board members, including Alex Sagan, Ina Bachman-Saperstein, and Winnie Sandler, to guide the Board in its long-range planning efforts and in improving its leadership role and function.

**Lasell College** is thriving, with growing enrollment, new academic programs and faculty members, and a strong financial position. Under the leadership of President Michael Alexander, the College has developed an ambitious Strategic Plan and a new Campus Master Plan. In the fall of 2008, The Wayland Group developed a Strategic Development Plan for Lasell that provides a framework for funding the Strategic Plan and the first phases of the Campus Master Plan. The Strategic Development Plan proposes a \$50 million fundraising effort in three phases over the next ten years. A central element of the Plan is a vigorous leadership development strategy involving the Board of Trustees, the Board of Overseers, and a new President's Advisory Council. With the help of Dean of Institutional Advancement Ruth Shuman and Director of Development Kathy Urner-Jones, President Alexander launched the implementation of the Plan with a full-day Board Retreat in June.

This year marks the centennial celebration of **Lesley University's** founding. Today, Lesley is a university of some 6,700 undergraduate and graduate students in education, human services, the arts, environmental studies and a variety of other professional fields. Lesley is a national leader in quality teacher preparation and has also pioneered programs in many other fields, including expressive therapies, integrated teaching through the arts, art therapy, and urban environmental leadership. The Wayland Group is extraordinarily pleased to be working with Lesley's senior management, trustee leadership, and advancement staff on a range of pre-campaign planning activities. We are actively working with President Joseph Moore, Board Chair Deborah Raizes, Advancement Committee Chair Carol Moriarty, Vice President for Advancement Colm Renehan, Associate Vice President for Advancement Randy Stabile, Senior Major Gifts Officer Jane Carroll, and the advancement staff team.

**Mass General Hospital for Children (MGH/C)** has already made great progress on the goals of its Strategic Development Plan. Since The Wayland Group completed the plan last winter, Director of Development Anne Maclean, Co-Chiefs Dr. Ron Kleinman and Dr. Joseph Vacanti, administrative leaders Joan Sapir and Sandra Dodge, and Board Chair John Blasberg have continued to expand the MGH/C Advisory Board, have further clarified funding priorities, and have secured several significant gifts to support the wonderful programs serving the MGH's youngest patients.

We are pleased to continue our work with the **Massachusetts General Hospital (MGH)** as *The Campaign for the Third Century of MGH Medicine* successfully continues in its Leadership Phase. For the past four years, The Wayland Group has worked with hospital, physician, and development staff leadership in the planning and initial execution of a major, comprehensive, hospital-wide campaign to coincide with MGH's bicentennial celebration in 2011. In addition to our extensive work with the MGH Cancer Center, MassGeneral Hospital for Children, and the Center for Community Health Improvement, we have recently worked with Director of Development for Psychiatry Carol Taylor to outline a process for strategic development planning as the Psychiatry Department approaches its 75<sup>th</sup> Anniversary in October. MGH has longstanding recognition as the #1 hospital psychiatry program in the country. The Wayland Group has enjoyed its work with MGH hospital and physician leadership, including President Peter Slavin, MD; Co-Chairs of the Philanthropy Program Jerry Austen, MD and Patty Ribakoff; development staff leadership Jim Thompson, Katelyn Quynn, and David Woodruff; Allen Peckham, Chief Development Officer, Partners HealthCare; and many others.

**McLean Hospital**, under the leadership of Scott Rauch, MD, is a comprehensive psychiatric hospital and a world leader in the treatment of mental illness and chemical dependency, research into the cause of mental illness, and the training of generations of mental health care providers. The Wayland Group is honored to have been selected by McLean to work with Dr. Rauch, Chair of the Board of Trustees David Barlow, Development Committee Chair Kate Feldstein, Senior Vice President and Chief Development Officer Cathie Cook, Director of Development Lori Etringer, and the development staff team on a variety of campaign planning and readiness activities in support of the realization of the Hospital's new Strategic Plan. We are thoroughly enjoying our early work with McLean and look forward to a rewarding partnership.

Working with Dr. Azzie Young, Monique Screen, Alice Krapf and others at **Mattapan Community Health Center** (MCHC), we have recently completed a Campaign Plan for a new facility in Mattapan Square. Excitement continues to grow as MCHC has gained site control of the new property and vibrant schematic drawings have illustrated the true impact that the new facility will have. MCHC supporters and neighbors recognize that not only will the community receive vital health benefits resulting from the expanded capability of the Health Center, but the project will also have significant positive economic impact on the neighborhood. New jobs, expanded health care services, and a bright and inviting new building will help set the tone for the revitalization of the entire neighborhood.

**Milton Academy** has just welcomed to campus new Head of School Todd Bland, who will spend much of the next year meeting with K-8 and Upper School day and boarding parents and alumni, faculty, and staff in consultation/planning gatherings in order to identify and articulate potential campaign goals. TWG has been working intensively with Assistant Head of School for Alumni and Development Gordon Sewall, Director of Development Stephanie Truesdell, Director of Annual Programs Kathleen Kelly, and members of the Campaign Steering Committee to prepare a comprehensive planning document to guide the work of the new Head of School and Board as they move into the next phase of a campaign that has already raised nearly \$100 million.

**Miss Hall's School** is continuing to make its mark as a national leader in education for girls. The School has moved forward with its efforts to raise up to \$50 million to secure Miss Hall's future and has successfully raised more than \$23 million toward that goal. We continue to appreciate our ongoing partnership and friendship with Head of School Jeannie Norris, Director of Development Janis Martinson, Board Chair Susan O'Day, and many other dedicated staff and volunteers.

We are delighted to continue our work with **New England Baptist Hospital** as it moves toward the final stages of its capital campaign, *Campaign for Care*, under the guidance of Deb Coleman, Vice President and Chief Development Officer. This last year has been a particular pleasure working with Helen Strieder, Interim President and CEO of the Hospital, and John Wilkins, Sam Fleming, Gene Reppucci and other members of the Board and President's Cabinet. Helen and her team of leaders have done a tremendous job during this difficult economic period, making dramatic progress in enhancing their physical plant and building their research program. Congratulations to the Hospital for its continued national recognition for patient satisfaction and quality care.

The **New England Center for Children** launched a long-range planning process in early June and meetings have been held throughout the summer to help develop the plan that will guide the school for the next six years. Led by Planning Co-Chairs Harry and Laura Slatkin and Glenn Tso, NECC has engaged more than 50 volunteers and reached out to its faculty and staff of 700 to help generate the plan. The Senior Management Team (Vinnie Strully, RoseAnn Lovely, Mike Downey and Kathy Foster) will compile the plan and prepare it for the Planning Committee to present to the Board in the fall. Director of Donor Relations Joe Ziska and the development office have orchestrated the process perfectly and have engaged a great group of dedicated volunteers. Initial planning conversations have been fascinating and have elicited a variety of viewpoints and new ideas, energizing all participants.

We are thrilled to report that **The New Jersey Performing Arts Center** (NJPAC) has achieved and exceeded its campaign goal of \$180 million. At its June 10 Board meeting, Vice President, Development Peter H. Hansen announced that the Campaign had reached \$183 million+ with three weeks to go before the June 30 deadline. TWG (which was extremely proud to be acknowledged and thanked at that Board meeting) has been campaign consultant to NJPAC since 2005 and looks forward to attending the victory celebration in Newark in the fall. We will raise our glasses to Peter Hansen and his extraordinary development team, President and CEO Larry Goldman, and a group of generous leadership donors including Board, Campaign, and former Prudential Financial Chair Art Ryan. (We also recall fondly our past partnership with former Chief Operating Officer and Executive Vice President John Richard and former Vice President of Development Diane Nixa, as well, now at the Adrienne Arsht Center for the Performing Arts and the New York City Ballet, respectively.)

On May 14, **North Shore Medical Center** (NSMC) held its opening celebration event for the Mass General/North Shore Center for Outpatient Care, and on June 1, the spectacular center opened its doors to patients at its new 122,000 square-foot outpatient facility in Danvers. The new center is a collaboration between Massachusetts General Hospital and North Shore Medical Center, the North Shore's largest community hospital, with campuses in Salem and Lynn. NSMC continues its \$20 million *Best Care, Right Place* Campaign for the new center and renovations to update facilities and improve the patient experience at Salem Hospital. We congratulate NSMC's leadership team on its great success— President and CEO Bob Norton, Board Chair Gary Spiess, Development Committee Chair Rich Bane, and Senior Vice President for Development Sara Andrews and her able staff team.

We were delighted to be invited to work with the **Radcliffe Institute for Advanced Study** to undertake a strategic review of its advancement program as it celebrates its tenth anniversary. The Institute faces an unusual challenge: to continue to develop its profile as a leading institution for advanced study, while celebrating the proud and unique history of its predecessor, Radcliffe College. Many Radcliffe College alumnae support the Institute, and The Wayland Group has been asked to develop a Strategic Development Plan to maintain and strengthen this traditional base of support while at the same time developing new constituencies for the Radcliffe Institute's exciting work. We are delighted to be working with Dean Barbara Grosz and her leadership team on this exciting project.

Having completed a Development and Campaign Readiness Assessment and Planning and Feasibility Study for **Roxbury Latin School** (RL), and having facilitated most recently a successful strategic planning process for the School, TWG is now working with Director of Development Phil Thornton and his development team, Headmaster Kerry Brennan, Board Chair Dennis Kanin, and Development Co-Chairs Paul Massey and Bruce Evans on the tactical steps necessary to raise the funds required for implementation of the Strategic Plan. Working with staff and volunteers, TWG is providing training and support to all of RL's Annual Fund and major gift fundraising efforts.

**Worcester Academy** continues to move forward in the Leadership Phase of its proposed \$50 million campaign. We are delighted to continue our partnership with Head of School Dexter Morse, Board Chair Jim Pietro, Director of Development Marillyn Earley, members of the Campaign Steering Committee, and staff. The Academy has celebrated its 175<sup>th</sup> Anniversary this year and continues to grow and provide a superb independent school education in an urban setting. Worcester Academy has made good progress toward its fundraising goals this year. In particular, they have continued to grow their Annual Fund and increase support from both alumni and parents.

## TRANSITIONS

This summer we said goodbye both to a Wayland Group veteran and to a TWG newcomer.

Vice President Ann Peterson retired in June of 2009 after 21 years of service to the firm. All of us here and all of her clients know Ann to be intelligent, diligent, thorough and helpful in every possible way. We are enormously grateful to Ann for all that she has done for us and for our clients, and we wish her well in retirement.

David Kitendaugh has left the firm to enter the MBA program at Babson College. In his short time at The Wayland Group he served as a project team member for New England Center for Children, Roxbury Latin School, and most recently, Mattapan Community Health Center. Our veteran staff has been impressed with his quick intelligence, marvelous sense of context, and good humor, and we wish him well.

We look forward to a fall season of challenge and hope, filled with the energy of renewal that is the continuing promise of the independent sector.

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