

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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THE JOURNEY AS DESTINATION—PROCESS AS “PRODUCT”

In January of each year—partly in an attempt to reflect in our own practice the advice we typically offer clients—our Wayland Group team meets in an annual off-site retreat to review the year past, try to understand and infer emerging themes and lessons from our work, and identify goals for the new year. Although we do spend some time talking about our “business”—including identifying sectors and types of projects we would like to tackle in the coming year—we focus mostly on the large themes of our consulting practice and assistance to clients, discussing at length and trying to understand how what we have learned can continue to be used to help move our clients toward their goals.

Sometimes we have used these occasions to review and explicate distinctions among our various work products, and understand what kinds of planning projects could fill in “gaps” in the continuum of our work. A number of years ago, for example, we recognized that, while a major fund-raising project may begin with a Development Assessment or a Planning and Feasibility Study and may move through a tactical planning stage (for which the work product, a Campaign Implementation Plan, has become a signature of the firm), there was a need among some institutions, particularly those experiencing dramatic change, for a plan which would describe a seven- to ten-year “arc” of a development strategy, incorporating and reflecting strategies and activities in leadership development and institutional planning as well as fund-raising. Accordingly, at one of our prior retreats, we described and attempted to codify the elements and areas of focus which would be reflected in such a plan; since that time, we have suggested this approach to a number of clients, including Massachusetts College of Art, Wildlife Trust, the Union of Concerned Scientists, and Wheelock College, among others. As another example, at this year’s retreat we reviewed in detail the recommendations of an internal task force (consisting of Margot Biggin, Charlie Marz, and Jennifer Rice) with respect to our training programs for staff and volunteers in securing leadership annual and major gifts. This emphasis on continuous quality improvement in our work, on both a continuing and periodic basis, is something we continue to work hard at and believe is important.

This year’s retreat was also devoted to another important and emerging theme in our work. Our shorthand and informal rallying cry for this notion has become, “the process is the product.”

As we have learned more about both the spirit and the mechanisms of advancement, and as we have become involved in more and more complex projects involving many layers of stakeholders, we have felt increasingly that the process of collaboration, and the attendant understanding and consensus that emerges from such a process, are in many ways more valuable than the work product or plan which actually emerges from the process. Like all consultants, we have a tendency to focus on our “work plan” or “deliverable,” because it represents a very concrete measure of what we have been asked to do, and certainly we are always focused on delivering the work plan as agreed to and prescribed. But it is axiomatic that a plan is useless if it simply “sits on the shelf.” Accordingly, in this year’s retreat we focused more on what should be—and are—the central questions of our consulting practice. “How can we be more effective in helping our clients?” “How can we communicate the ideas we are recommending in a way that is graphic and visual, and not merely verbal?” “If there are key leaders who need to understand, refine, and affirm the strategy, how can we make that possible? Should we have a series of conversations with representatives of the respective constituencies? Should we have a working group that meets throughout the process and that represents all constituencies? Should we have a small core steering team to work with through the project, and bring constituencies together with that team periodically?”

We see this metaphor of “process as product” reflected often in team-oriented activities in development. When senior management, trustees, development staff, and consulting staff work together, they often produce ideas, plans, and “products.” More importantly, however, such collaborative activity is a metaphor for the way development works, making manifest a key set of lessons—that philanthropy is a shared responsibility, that fund-raising is an arena that requires honest, transparent conversations, that progress is often incremental rather than bold and immediate, and that a successful philanthropy program for a leading not-for-profit organization requires collaborative leadership representative of all levels of an organization.

In other words, if a report is brilliant but an organization has not internalized it and moved forward, something has been lost in the process. Whether or not a report is read, if the process has created understanding and moved an organization forward, progress has been made.

In ancient days, first-year business school students learned that the railroad industry in the 19th century represented a singular failure in strategic planning. Railroad executives did not realize that they were in the transportation business, rather than the railroad business, and failed to adapt accordingly. At The Wayland Group, we try to remember that we are not in the business of writing reports, but rather intend—to quote our corporate mission—“to serve not-for-profit organizations in advancing themselves toward worthy, agreed-upon, mission-driven goals.” Our key “product” should always be this process.

During the past several months The Wayland Group consulting teams have begun a number of exciting new projects—some as extensions of ongoing relationships, and some as initial projects with leading not-for-profit organizations.

The Board of Directors of **Community Servings** authorized in December a capital campaign with a working target of \$4 million to fund the purchase and construction of a new

home for the agency in Jamaica Plain to replace the outmoded facility in Roxbury that the agency has outgrown. The new 13,500 square foot industrial kitchen facility will, among other things, double the capacity of the meals program to 2,600 free, home-delivered meals (offering 30 different medically-tailored diets) per day to the critically ill. Community Servings has a remarkable group of volunteers supporting the campaign effort, including Board Chair Ron Gibson and Campaign Co-Chairs Joan and Robert Parker and Ron Ansin. The agency continues to benefit from the strong leadership of Executive Director David Waters and Development Director Tim Leahy. Community Servings has raised almost \$1 million to date and plans to complete the Campaign by 2007.

Following an assignment with the Massachusetts General Hospital to conduct a strategic assessment of its emerging signature events program, we were pleased to be invited to work with the **MGH Cancer Center** to develop a Strategic Development Plan. The MGH Cancer Center is a model of collaborative, patient-centered care and pioneering research situated in a world-class academic medical environment. The Center is seeking to increase strategically its philanthropy program to help support sustained growth in both clinical care and cancer research. We are working with MGH and Cancer Center leadership including Dr. Peter Slavin, Dr. Bruce Chabner, Dr. Daniel Haber, and key MGH administrative leader Dan Ginsburg—as well as development staff Jim Thompson, Katelyn Quynn, Kate Todd, and others.

The New England Center for Children proudly launched the public phase of its \$5 million campaign at a 30th Anniversary Gala held at the Boston Convention & Exhibition Center in November 2005. NECC honored its Campaign Chairman, Governor Michael Dukakis, with an award for his significant efforts on behalf of children with disabilities. The campaign will help this superb school for autistic children build a Therapeutic Aquatic Center on its Southborough campus. The Wayland Group has been continually impressed by the care and dedication that NECC staff bring to each of their students; this commitment and spirit is mirrored in their campaign.

Executive Director Rick Small of the **Walker Home and School** has engaged The Wayland Group to conduct a Planning Study to fund a new home for Beacon High School. Beacon serves 53 special needs students who show academic potential but are unable to function in a traditional high school setting. Beacon is a leader in alternative education and has a strong record of success in student retention, high school graduation rates, and college attendance. Its current home in Brookline is too small and lacks some of the facilities needed to offer a first-rate education to its students. Walker has identified a new site for the school in Watertown and is working with The Wayland Group to plan a campaign to purchase and renovate the new site. Leadership of the effort will be provided by Nancy Lincoln, the long-time, respected Executive Director of Beacon, and Tom Cornu, parent of a former Beacon student and Chair of the Campaign Steering Committee.

We have begun an exciting project with a new client and an old friend. We have started work on a Strategic Advancement Plan with **Wheelock College**, a project that allows us to once again work with Jackie Jenkins-Scott, Wheelock's new President. (We worked with Jackie on three separate campaigns during her tenure at Dimock Community Health Center.) The Wheelock project will parallel the College's strategic planning efforts and will engage an ad hoc

committee of key leaders to help manage the process along with Linda Welter, Vice President for Development and Institutional Advancement. We are excited by the prospect of teaming up with Jackie, Linda, and trustees and committee co-chairs Robert Lincoln and Abby Perelman at this pivotal moment in Wheelock's history.

TWG Advancement Institute Preview—Coming Soon....

Are you anticipating a major capital campaign for your organization, but haven't completed the institutional planning that will provide the foundation for successful capital fund-raising?

Would you like to be better versed in the technique and "machinery" of principal and major gifts fund-raising?

Do you find yourself struggling to develop new ways to engage volunteers and potential donors?

Would access to a creative, intelligent, experienced group of colleagues to learn new strategies from and brainstorm challenges with be helpful?

If so, please consider joining members of The Wayland Group and CEOs, senior development officers, and experienced volunteers from non-profit institutions charged with maximizing philanthropic support at our 7th biennial Advancement Institute: "*The Maximum Gifts Approach*" offered on May 4th and 5th at The Conference Center at Waltham Woods in Waltham, Massachusetts. Wayland Group President Jim Kitendaugh will lead the Institute, assisted by Executive Vice President Lynne Cavanaugh, Vice Presidents Margot Biggin, Charlie Marz, and Ann Peterson, and Management Consultants Jennifer Rice and Betsy Gross. In addition, we will be joined by an extraordinary roster of guest speakers.

Invitations to the Institute will be mailed shortly, but space is limited, so if you are interested or have questions, please contact The Wayland Group by phone at 978-443-3224 or visit our website at www.waylandgroup.com.

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