

# Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group

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

WINTER 2007

## BUILDING THE RIGHT TEAM

In January, The Wayland Group held its annual day-long offsite meeting to take stock, to review the year past, to consider potential improvements in our practice, to breathe, and to reflect on important trends in the increasingly complex environment in which we and our clients operate. In the recent past we have been using various texts as pre-reading to spur discussion. This year we returned to *Good to Great*—both the original, extremely popular and effective 2001 book by Jim Collins, and the 2005 monograph, “Good to Great and the Social Sectors.”

One of the key concepts in *Good to Great* (described in the book as “first who—then what”) is that a critical dimension of building a “great” enterprise is to be highly disciplined in assembling and retaining the very best people working on the enterprise.

In our Wayland Group retreat discussion, this dimension of *Good to Great* led to a lengthy discussion of one of the most critical problems in the independent sector in general—the recruitment and retention of excellent, motivated professionals. In an environment where tens of thousands of not-for-profit organizations are being “invented” each year, and where expectations in advancement are rising, perhaps the most critical problem in building a successful development program is putting together a successful development team. Some organizations are moving appropriately to increase levels of compensation and compete for top talent; others have chosen to withdraw from that competition per se and “grow” their own advancement team, recruiting and cross-training from other fields or from other parts of the organization itself.

All of these approaches and variations have their advantages and their challenges. But irrespective of the approach to building a successful advancement organization that a particular institution selects, an important dimension of building an effective team and a potential dimension of disappointment if not attended to is understanding the particular qualities (as opposed to qualifications) that characterize the successful advancement officer and leader. We often see job descriptions that are filled with specifications regarding experience and technical skills or command of content; but when we hear the stories of why a particular executive or advancement officer was not successful, those stories most often tie back to personal characteristics or qualities.

So what are the personal qualities that tend to be predictors or to contribute to success? With full awareness of the many and various profiles that are available, our own discussion led to the following six sets of characteristics.

- 1. Successful advancement officers have confidence, leavened with personal humility.** In our experience, successful development officers are self-confident, comfortable in their own skin, and have a strong belief in their own ability to succeed. At the same time, great development officers are not arrogant, but have a strong sense of perspective, a sense of personal humility, and often a strong sense of humor (which is, after all, just another form of perspective).
- 2. Successful development officers have a very strong drive to succeed.** While “driven” is often seen as a pejorative, successful development officers are typically highly self-motivated, hard working, and goal oriented. A great development officer is not afraid of accountability and goals; on the contrary, she or he typically welcomes them and finds them motivating. Great development officers are persistent and conscientious and understand that development has several “arcs” that are equally important, e.g., this month’s goals, this year’s goals, longer term goals (as in “campaign” goals).
- 3. Great development officers are enthusiastic—they lead with their “hearts” as well as their “heads.”** Successful advancement officers are typically enthusiastic, caring people who feel a very strong emotional resonance with an institution’s mission. While professional development in the advancement field is often thought of as continued growth in numbers of staff supervised and scales of campaign—as a sort of technician’s exercise rather than an advocate’s—our experience is that the best development officers either have a strong pre-existing interest in an organization’s mission or characteristically embrace an institution’s mission with “heart” as well as “head.”
- 4. Great development officers are “people people”—and are natural “connectors.”** In another popular business book of some years ago, *The Tipping Point*, author Malcolm Gladwell drew attention to the importance in cultural trends of the “who” of such trends—observing that a key element of a trend that reaches “a tipping point” is its adoption by people who have large networks and who are naturally “connected.” “Connectors” in the present context are people who like being with other people, who are interested in others, who are well liked, naturally friendly, and who are good listeners. Although relationships with donors are often forged and sustained over a very long period of time, it is also true that successful development officers are able to achieve what we at TWG sometimes refer to as “instant intimacy”—the sense that a development officer is someone whom donors feel comfortable with and who have a natural gift for connecting with people.
- 5. Development officers are excellent communicators.** While job descriptions always include facility in writing and speaking as an important element of job qualifications, writing and speaking clearly is also a function of natural intelligence, the ability to synthesize ideas, and the ability to listen and feedback appropriately and responsively. These are personal qualities and capabilities that are not always present, even among development officers who have very long and deep experience, but are necessary for success.

**6. Great advancement officers are well matched to the institutions they serve.**

As in all settings, the issue of “fit” is crucial. In a high-end, knowledge-based environment—a research university or academic medical center, for example—successful development officers must, on the one hand, be appropriately respectful of highly accomplished, brilliant leadership throughout the environment; but must also be able to express a strong point of view when necessary, since experienced leaders often expect strong feedback and welcome it, when cast in respectful terms. By the same token, a small, family-oriented independent school could find that a development officer who was an excellent technician but did not have the personal warmth that the constituency values might have difficulty developing a successful program.

In the “Mission and Values” statement of The Wayland Group we claim as one of our animating themes, “the recruitment and retention of friendly, collegial, intelligent staff.” A prospective client once asked us, in regard to this assertion, “Are you talking about your clients or yourselves?” To which the answer, of course, is yes.

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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.

In the fall of 2005, The **Detroit Youth Foundation** opened the doors of YouthVille, a large youth-serving facility with high visibility in downtown Detroit, to community-wide interest and acclaim. In the summer of 2006, The Kresge Foundation asked The Wayland Group to assess the capacity of the Detroit Youth Foundation to broaden and increase its private philanthropic support, and to outline potential strategies for increasing such support. The Wayland Group consulting team was pleased to work with our highly respected colleague Elizabeth Sullivan, Senior Vice President of Program at The Kresge Foundation, as well as with the leadership of the Detroit Youth Foundation—President and CEO Gerald Smith and Vice President and Chief Operating Officer Judith Jackson—and with leading funders in the Detroit metro area.

In 2003, the YMCA of Greater Boston’s proposal to build a Y as a signature project on the Greenway was accepted by the Massachusetts Turnpike Authority, and the YMCA was designated as site developer. As proposed, **The Greenway YMCA** would be the only development 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 Y regrettably was forced to withdraw its proposal when the cost of the project became unfeasible. Then, in December 2005, the legislature approved \$16 million to cover the cost of building a platform over the ramps at the site, causing the Y to reconsider the project. John Ferrell, the President of the YMCA of Greater Boston, asked The Wayland Group to conduct a Feasibility Study of institutional support for the project as an input to the Y’s decision on whether or not to resubmit their proposal for a Greenway YMCA.

**Nichols College** provides the best practically-oriented business education in New England as well as the largest MBA program in Central Massachusetts. Under the leadership of President Debra Townsley, Vice President for Advancement Joe Cofield, and Director of

Development Debbie Mayerson, Nichols is in the early planning stages of a major capital campaign. The Wayland Group is partnering with Nichols to develop a campaign plan that includes an assessment of its advancement program, a Planning and Feasibility Study, and a Campaign Implementation Plan.

The **Special Opportunities Initiative** (SOI) is a Kresge Foundation initiative to build the fund-raising capacity of high potential/high impact organizations, while providing opportunities to deepen the Foundation's understanding of successful nonprofit advancement programs. The initiative involves seven organizations from across the country and four national consultants. The Wayland Group is one of the designated national consultants and has worked with Bay Cove Human Services for the last three years as part of the Initiative. In October, Kresge held a SOI Conference in St. Louis for the SOI organizations. The conference, organized by Kresge Program Officer David Fukuzawa, offered advancement workshops and featured speakers such as Rip Rapson, the new President and CEO of the Foundation, Billie Sue Shulze, the former Director of the Kresge Historically Black Colleges and Universities Initiative, and Program Director Sandra McAlister Ambrozy, who spoke on the Kresge Perspective on Campaigns. Wayland Group President Jim Kitendaugh was a featured speaker and addressed a plenary session of the conference on how to plan and execute a capital campaign.

In January, The Wayland Group became a partner in a process sponsored by the City of Boston to restore and revitalize **The Strand Theatre** in Dorchester. Plans for the theatre will include a major renovation of the theatre itself and the development of vibrant and diverse arts programming which will reestablish The Strand as a cultural hub and community center within the Upham's Corner neighborhood. We are working closely with Julie Burns of the Mayor's Office of Arts, Tourism, and Special Events and other partners to develop a fund-raising strategy to engage the city and the region in support for The Strand and its planned program.

In October, **Suffolk University** kicked off *The Power to Change, The Campaign for Suffolk University* to a proud and enthusiastic crowd of hundreds of supporters at the Boston Public Library. The campaign kick-off was another milestone in Suffolk's Centennial year. President David Sargent announced that the Campaign had exceeded its nucleus fund goal of \$35 million by raising over \$40 million towards its overall goal of \$75 million. The Campaign has already raised significantly more than Suffolk's last capital campaign and has been remarkable in a number of ways. It is the first Suffolk campaign that is University-based rather than focused on individual schools within the University. It has secured the largest gift in the University's history, a gift of \$17 million dollars, as well as the University's first two endowed chairs. The Campaign's success is also a result of Vice President for Advancement Kathryn Battillo's focused effort to build a professional advancement team that can support such an ambitious campaign, assisted by Assistant Vice President for Advancement Matthew Eynon and Campaign Director Shelagh O'Brien.

The Wayland Group was pleased to have been selected by the **United Way of Massachusetts Bay** to conduct an assessment of its already strong development program. United Way is a vitally important institutional leader in the community working to improve and strengthen people's lives. President and CEO Milton Little, who has led the organization since 2004, has framed a bold new vision for the United Way—that in ten years, this region will be the best place for children in the country. TWG's consulting team has worked closely with both

development and volunteer leadership to undertake a review of its successful development program, which raises approximately \$45 million annually. We have worked closely with Milton Little, Development Committee Co-Chairs Kevin Callaghan and Kathy Plazak, Senior Vice Presidents Chuck Gordon and Kevin Stone and members of their staff, and other senior staff and volunteer leadership.

The Wayland Group is excited about and eager to begin a new partnership with **Worcester Polytechnic Institute**. We have been asked by WPI to develop a plan for a new comprehensive campaign for the Institute. WPI is one of the best technological institutes in the country, offering students a unique program that includes a strong academic foundation in science, engineering, or technology combined with real world projects, often done in a global setting. Although WPI's focus is on science and technology, it requires every student to do a major project in the humanities or the arts. Since he came to WPI in 2004, President Dennis Berkey has been identifying critical issues for the Institute through a series of presidential commissions. He has developed a clear vision for WPI's future and is in the process of sharing it with alumni around the country. The Wayland Group will be working closely on campaign planning with WPI's Vice President Development and Alumni Relations Dexter Bailey and members of the advancement staff.

### **Kresge Challenge Grant Recipients**

The Wayland Group is pleased and proud to announce that several of its clients are recent recipients of The Kresge Foundation's Capital Challenge Grant Program. Those organizations are:

- Boston Children's Museum for a \$38 million campaign to renovate and expand the Museum and create a newly landscaped waterfront park
- Currier Museum of Art for its \$12 million campaign—*A Museum for All of New Hampshire*—for a 30,000 square foot expansion of the Museum
- New England Center for Children for its \$5 million campaign for a new Therapeutic Aquatic Center and Conference Center
- Community Servings for its \$4 million campaign to support its new kitchen and headquarters in Jamaica Plain.

### **Launching Campaigns into the Public Phase**

Within the past several months, a number of The Wayland Group's clients have publicly announced and kicked off major campaigns. We have great confidence that each of them will meet their announced goals and will significantly advance their institutions and most importantly, their ability to serve. Congratulations and best of luck to:

- Boston Children's Museum
- Charles River School
- Community Servings
- Currier Museum of Art
- Fenway Community Health

- New England Center for Children
  - New Jersey Performing Arts Center
  - Suffolk University
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In the coming weeks we will be launching an updated and refreshed website, brought to life by Systems Administrator Phyllis Boot and supported by her colleagues Lynne M. Cavanaugh and Jennifer Rice who together form the TWG marketing team. The website features a refreshed look, new testimonials from client partners, and a new “user-friendly” format for navigation. Visit us at [www.waylandgroup.com](http://www.waylandgroup.com)!

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We wish all of our clients and friends a productive, healthy and peaceful 2007. Please keep us apprised of all of your successes—together we are working to support the independent sector and its many contributions to our community, our region, and our nation.

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