

Advancement

A NEWSLETTER FOR CLIENTS AND FRIENDS

The Wayland Group

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

WINTER 2010

THOUGHTS ON THE CONSULTING PARTNERSHIP

Over the years we have shared our thoughts about the qualities that contribute to building a successful development team and the factors that contribute to an effective partnership between staff and volunteer leaders. In recent months we've been thinking about another dimension of many successful advancement programs: the development of a productive and mutually supportive relationship between a consulting team and a client organization.

What's the "Value Add"?

Since most successful advancement consultants see the impact of their work through the empowerment and improved results of their clients rather than through direct involvement in seeking philanthropic support, we are often asked by potential clients to whom we are being newly introduced, "What is the added value that your team will bring to our organization?" Our typical answer is something like the following:

"We think of our involvement as providing three things.

"First, what we call 'fresh eyes.' Many of our clients are looking for an objective, dispassionate, third-party perspective or analysis. Since institutions are (rightly) very involved in the day-to-day work of advancing their organizations, sometimes it is difficult to see the 'big picture' strategically or to diverge from conventional institutional wisdom in evaluating strategy and developing new ideas. It is also true that a third-party perspective can help bring diverse points of view within the organization together, in a way that preserves important relationships within the organization while still bringing to light some challenges that may involve strong feelings or difficult issues.

"Second, experience. While even longstanding consulting relationships cannot hope to approximate the depth of institutional knowledge that longtime leaders of a particular organization have, even a small, highly personalized firm like ours has worked with hundreds of organizations of a variety of different sizes and in a variety of different non-profit 'businesses,' so our team has been exposed to and learned from hundreds of volunteer leaders, development officers, and senior staff leadership and has observed and

learned from both successful strategies and ones that are less so. Accordingly, while we would never definitively bet against any 'new idea,' we are often in a position to begin a discussion with some version of 'That's an interesting idea. Many of our clients have found it most useful to [do it this way]. Let's dig in and see if we can find the right solution for your specific situation.' As the depth and breadth of our portfolio of experience increases, we are reminded almost every day of how much we have learned from our experience with the many clients with whom we have worked.

*“Finally, **time**. The fact is that many of our clients are fortunate to have very intelligent, experienced leadership—both institutionally and in development—who in the press of day-to-day business rarely have the hours to put into fact finding, one-on-one conversation, and planning that are the consultant's typical portfolio, so another significant value we add to our client organizations is actually putting in the hours to document discussions and develop draft plans for further review and discussion. Many fundraising efforts have a tough time getting off the ground when the planning portfolio is exclusively the province of internal staff who are typically fully busy with the ongoing demands of their existing responsibilities.”*

Particularly as we concluded our 25th Anniversary year in 2009, our team also had the opportunity to reflect upon the qualities and factors that contribute to a successful partnership between client organization and consulting team. In our view, these include the following.

1. Making the Right Match

Matching consulting team and client organization appropriately is a function of at least four factors: fit, experience, capability, and resonance with mission. In considering the partnership, both consulting team and client organization might well ask a combination of the following questions: Are members of the consulting team and leadership within the organization well matched and complementary in terms of temperament, style, and rapport? Does the consulting team have the appropriate experience to take on the proposed assignment, in terms of types of sectors and clients served and scope of project? Does the consulting team have the specific skill sets to complete the assignment appropriately? Does the consulting team demonstrate their interest in and identification with the organization's specific mission? Consultant partnerships are always more successful if client and consultant are well matched from the beginning.

2. Getting the Timing Right

Sometimes organizations seek consulting support before they've defined the scope of their needs. Others may wait too long before seeking outside advice. The partnership is most likely to be successful when the client can say, in fact or in effect, “We've done a fair amount of thinking about this and have some preliminary thoughts about where to go from here. We'd like to bring on a consultant to help us develop and refine our thinking and, ultimately, help us implement our strategy.” We understand that no institution can make best use of

a consultant if the timing is not right, and have advised potential clients accordingly.

3. Clarifying Expectations

Our letters of agreement with clients are not fancy, but we are always at pains not only to describe a scope of work for a project, but also a specific “work plan” which enumerates, step-by-step, every task that the consulting team will undertake on behalf of the client. We also try to ensure that the client organization has focused on this dimension of our agreement and understands it, so that any necessary adjustments in the work plan can be made at the beginning of the engagement. Clarifying expectations, and modifying them mutually on a continuing basis, is an essential part of forging a successful partnership.

4. Openness to New Ideas

While most of our clients hire us because of their sense of our experience and capability, they also want to be sure that we are open to new ideas and new solutions, and are not captive to the “tried and true.” As a firm, we pride ourselves on finding the right balance between proven methods and creativity and entrepreneurship. By the same token, it is important that a client organization not engage a consultant simply as a political exercise or to confirm previously developed plans or received wisdom within an organization. Our most productive partnerships have been those in which consultant and client institution have a continuing dialogue and are each seeking to continuously modify, improve, and redirect strategy based on actual experience as it unfolds and the developing opinions of key stakeholders.

5. Continuous Communication

While meetings, formal discussions, and conference calls are often spelled out in advance and regularly scheduled, it’s critical that neither party be bound by the limitations of formal, scheduled encounters. Rather, leaders on both sides of the partnership should be encouraged to pick up the phone, shoot off an email with a quick question, and otherwise stay in touch on a continuous basis to avoid permitting any momentary misunderstanding to develop into a problem, and to ensure that the mutual understanding with which a project begins is maintained throughout the term of the entire engagement.

6. Connectedness/Relationship at all Levels of the Client Organization

Our most successful consulting partnerships have been those in which the consulting team has a relationship with and connectedness to all levels of the organization—board leadership, senior management, and, of course, the development team. While our day-to-day communication is most often with development team leadership or with an organization’s CEO, in forging institutional consensus and creating maximum understanding, it is most useful that the consulting team have an opportunity to communicate with volunteer leadership as well, and to answer questions and receive feedback and comments.

(This relates to one of TWG’s most frequently used metaphors: we try to encourage everybody within an organization to be involved in “one conversation” about the organization’s vision and plans.)

7. **Mutual Confidence and Trust**

Finally—and perhaps most importantly—the most rewarding partnerships are those in which the consulting team and the client share a mutual confidence, trust, and respect. In such an environment, members of a consulting team will always want to “go the extra mile,” be promptly and especially responsive, and ensure that they are giving thought to advancing the client at every opportunity, and certainly more often than scheduled calls and meetings. By the same token, in such a relationship, the client is more likely to accept and value advice.

In addition to our ongoing consulting partnerships, over the past several months, The Wayland Group has taken on a number of new assignments, and several of our clients have passed significant milestones.

The Wayland Group recently took on a new assignment for the **Benson-Henry Institute for Mind Body Medicine** at the **Massachusetts General Hospital**. The Benson-Henry Institute (BHI), founded by the renowned Herbert Benson, MD, is a world leader in the study, advancement, and clinical practice of mind/body medicine and its integration into all areas of health. We were invited to work with BHI and the MGH Development Office to develop a Strategic Development Plan for the Institute to help build philanthropic support for its important work. The Wayland Group is pleased to be working with Director Emeritus Herbert Benson, MD; senior staff of BHI, including Greg Fricchione, MD, Marilyn Wilcher, and Joy Rosen; and development staff leadership including Denis Bustin, Eugene Mahr, and Barbara Dunderdale.

We are delighted to be working once again with **Brimmer and May School**, partnering with Head of School Anne Reenstierna, Director of Development and Alumni Affairs Nancy Drourr, and Trustee and Development Committee Chair Kennie Grogan. Brimmer is about to successfully complete its most recent capital campaign—a \$10 million fundraising effort in support of endowment and capital projects—and members of The Wayland Group team have been asked to work with leadership to enhance the School’s annual giving program and to support the implementation of its recently approved strategic plan as it affects the School’s development program. We are delighted to rejoin old friends in this timely and thoughtful project.

The **Charles Hamilton Houston Institute for Race and Justice (CHHIRJ)** at **Harvard Law School** was launched by internationally known legal scholar, litigator, and activist, Charles Ogletree, Jr., Professor of Law at Harvard Law School. The Institute honors and continues the unfinished work of Charles Hamilton Houston, one of the 20th century’s most brilliant legal scholars and litigators. Houston engineered the legal strategy that led to the unanimous Supreme Court decision, *Brown vs. Board of Education* in 1954. The Charles Hamilton Houston Institute marshals the resources of Harvard and beyond to advance Houston’s dreams for a more equitable and just society. The Wayland Group is delighted to be invited to work with CHHIRJ to develop a

Strategic Development Plan to help advance the Institute and broaden its philanthropic efforts. We are working with Founding and Executive Director, Charles Ogletree, Jr., Managing Director David Harris, and Director of Strategic Planning and Development Johanna Wald.

The **Episcopal Divinity School (EDS)** in Cambridge has been shaped throughout its history by several key commitments: to live out the Gospel values of justice, compassion, and reconciliation; to liberate institutions and people from the grip of all forms of oppression; and to lead the Church and society with courage and compassion in an ever-changing world. The Wayland Group is delighted to be working with EDS President and Dean Katherine Ragsdale, Chief Financial and Planning Officer Robie White, Director of Institutional Advancement William Vaughan and their colleagues – faculty, staff, Board members, and students on the design and facilitation of a long-range planning process to identify and address the institutional goals and resource requirements of the School.

Congratulations to Dr. Azzie Young and her team at **Mattapan Community Health Center (MCHC)** on the wonderful news that the Health Center has received an award of federal stimulus funding in the amount of \$11.55 million! One of only eight health centers in the state to receive an award, the funding ensures that MCHC will be able to begin construction of a new Health Center building in Mattapan Square this coming spring. We are very proud to work with President and CEO Azzie Young, PhD, MPA, Monique Screen, Vanessa Wong, and other talented MCHC staff on this important campaign. To date, the Center has raised approximately \$8.6 million of the \$12 million in philanthropic funds required by the \$32 million project. Our friends at MCHC are now one giant step closer to bringing improved quality health care and economic revitalization to the Mattapan community and beyond. Raising the final \$3.4 million in philanthropic funds required now becomes more important than ever.

We are delighted to begin a partnership with the **Museum of Science**—our region’s largest museum in terms of visitorship. The Museum has made extraordinary progress in recent years under the leadership of President and Director of the Museum Ioannis Miaoulis and Chairman (and longtime TWG friend) Rick Burnes. A strong development team led by Senior Vice President of Advancement Joan Hadly and Executive Director of Development Jim Kraus is in the process of refining the scope and scale of the next phase of the Museum’s development activity, and TWG is delighted to be assisting them in this effort.

We are pleased to renew our partnership with the **New England Center for Children (NECC)** with a Planning and Feasibility Study as NECC begins to consider its next campaign. NECC has come a very long way from its early days working with six students on the grounds of Taunton State Hospital to its current enrollment of more than 320 students, with campuses in Southborough and Abu Dhabi, and with extensive training and research capability. Over the past twelve months, TWG has been working closely with volunteers and staff at NECC to develop a long-range plan for the Center. To accomplish the Plan’s ambitious goals, NECC will need to expand its Southborough campus facilities by building a new research and training facility. We continue to enjoy our partnership with CEO Vinnie Strully, Director of Development RoseAnn Lovely, and Director of Donor Relations Joe Ziska.

Having completed a Strategic Development Plan, we are delighted to continue our work with the **Radcliffe Institute for Advanced Study**. During 2010, we will be helping to facilitate a Long-Range Planning process led by Dean Barbara Grosz. The Radcliffe Institute is a true jewel in the crown of Harvard University, a nimble and entrepreneurial “engine” of ideas through its Fellowship Program, the Schlesinger Library on the History of Women in America, and its growing Academic Engagement Programs. In addition to our work with Dean Grosz, we also look forward to working closely with Administrative Dean Helen Ouellette and Senior Development Officer and Interim Associate Dean of Advancement Diane Mercer.

The mission of the **Rhode Island School of Design (RISD)** in Providence, RI, through its college and museum, is to educate its students and the public in the creation and appreciation of works of art and design, to discover and transmit knowledge, and to make lasting contributions to a global society through critical thinking, scholarship, and innovation. The RISD IDEA (intuition, design, emotion, art) has critical thinking and critical making at its center. The Wayland Group is proud of its work supporting a long-range planning process at RISD, a process that has benefitted from the participation of dozens of faculty members, senior staff, and students, and has been led by the institution’s dynamic new President John Maeda, Provost Jessie Shefrin, Associate Provost of Academic Affairs David Bogen, Assistant Director of Planning and Research Mara Hermano, and Vice President of Human Resources Candace Baer.

We wish all of you who work hard to support the crucially important fabric of the independent sector a hopeful and prosperous 2010!

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