

The Way Forward: Navigating McLean's Journey

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Senior Vice President and Chief Development Officer

Kristine M. Trustey and Sean McGraw, PhD
Campaign co-chairs

Alex Medlock
Campaign and Donor Recognition Manager

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HARVARD MEDICAL SCHOOL
TEACHING HOSPITAL

McLean Hospital: History and Mission



- Chartered in 1811 together with Mass General Hospital
- Initially called the “Asylum for the Insane”
- 1st psychiatric hospital in New England and the 4th in the U.S.
- Mission: To improve the lives of people and families affected by mental illness



Scope of Our Work

4-Part Mission

- Clinical services
- Research
- Education, training & public awareness
- Stigma reduction

7 Divisions

- Alcohol, Drugs & Addiction
- Psychotic Disorders
- Depression & Anxiety
- Children & Adolescents
- Geriatric Psychiatry
- Women's Mental Health
- Basic Neuroscience

Treatment Across the Lifespan

- Children & Adolescents
- Adults
- Older Adults

Continuum of Care

- Inpatient
- Residential
- Partial Hospital
- Outpatient/community-based



McLean Hospital: History and Mission



- Most buildings on campus constructed pre-World War I
- Average age of our buildings ~115 years
- Strategic imperative to improve physical plant



The Importance of Planning

Fall 2017 →
Spring 2018

- Assessment of prior campaign
- Readiness review
- Stakeholder feedback

Spring 2018 →
Fall 2018

- Develop case for support aligned with strategic plan
- Initiate feasibility study
- Build infrastructure for next campaign

January 2019 →
October 2019

- Complete feasibility study
- Finalize campaign goal
- Launch quiet phase



McLean Development Team



Lori Etringer
Sr. Vice President &
Chief Development
Officer



Kristin Kilbourne
Sr. Director of
Development



Jen Meyers
Director of
Development



Sue DeMarco
Senior Foundations
Officer



Jeff Smith
Senior Major Gifts
Officer



Claudia Haydon
Senior Major Gifts
Officer



Keith Raho
Major Gifts and Planned
Giving Officer



Liz Cohen
Major Gifts Officer



Sally Spiers
Associate Director of
Development,
Communications &
Donor Relations



Erin Collins-Moore
Associate Director of
Development,
Volunteer Engagement



Evangeline Bermas
Associate Director of
Development, Data
and Prospect
Management



Ben Ogilvy
Sr. Leadership
Giving Officer



Alexandra Medlock
Campaign and Donor
Recognition Manager



Matt Harrington
Events Manager



Cara Rapoport
Foundations and
Corporate Relations
Officer



Jason Rubin
Communications and
Stewardship Officer



Julianna Hume
Communications
Officer



Jennifer Steeves
Senior Gift
Administrator



Ally Hull
Stewardship and
Communications
Coordinator



Sky Gibbs
Annual Giving
Coordinator



Josh Ludwig
Prospect and Data
Management
Coordinator



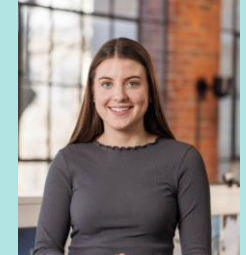
Liz Sanchez
Events Coordinator



Emily Wykowski
Development
Coordinator



Elly Hertz
Major Gifts
Coordinator



Regan Doyle
Major Gifts
Coordinator



The Way Forward Campaign Story

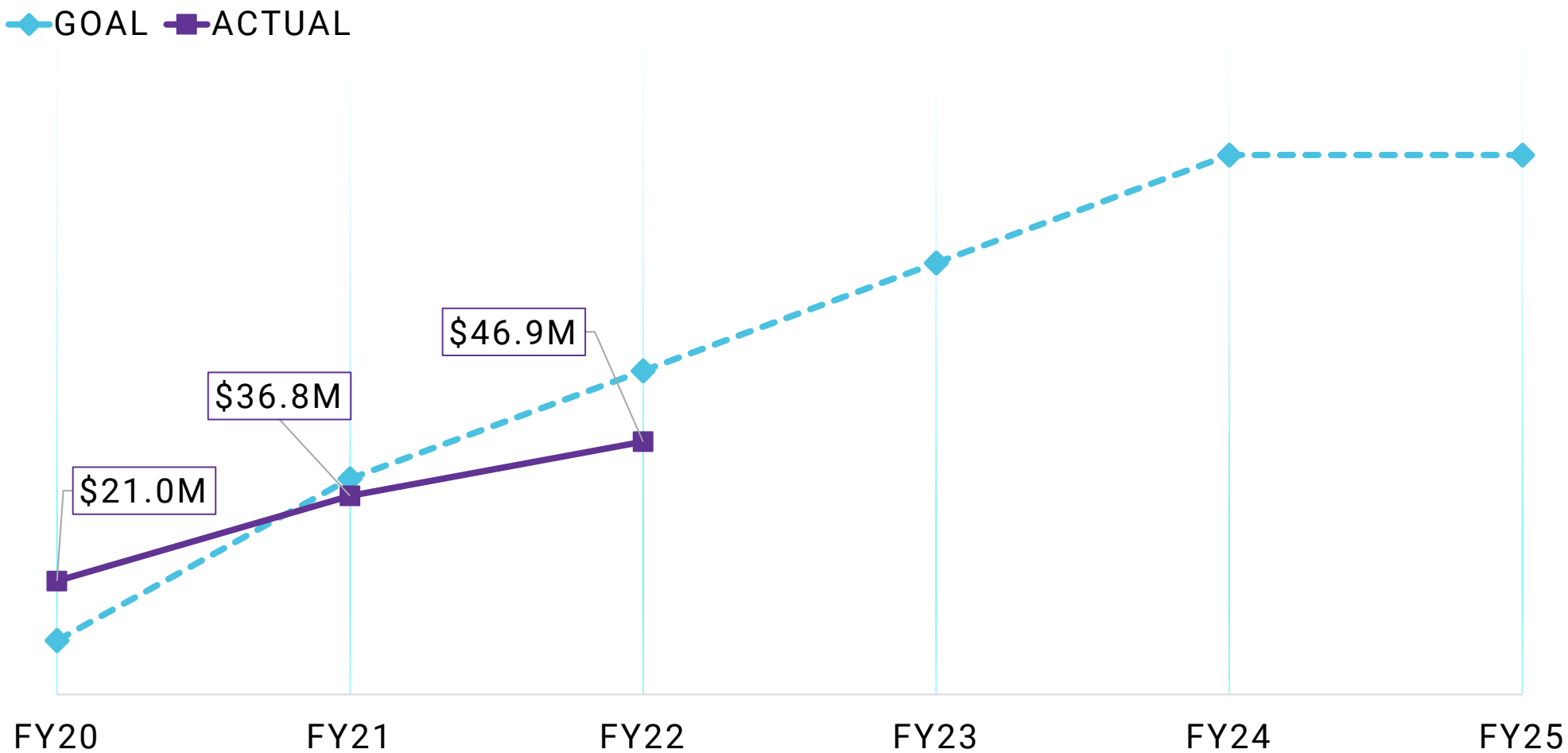


The best laid plans...

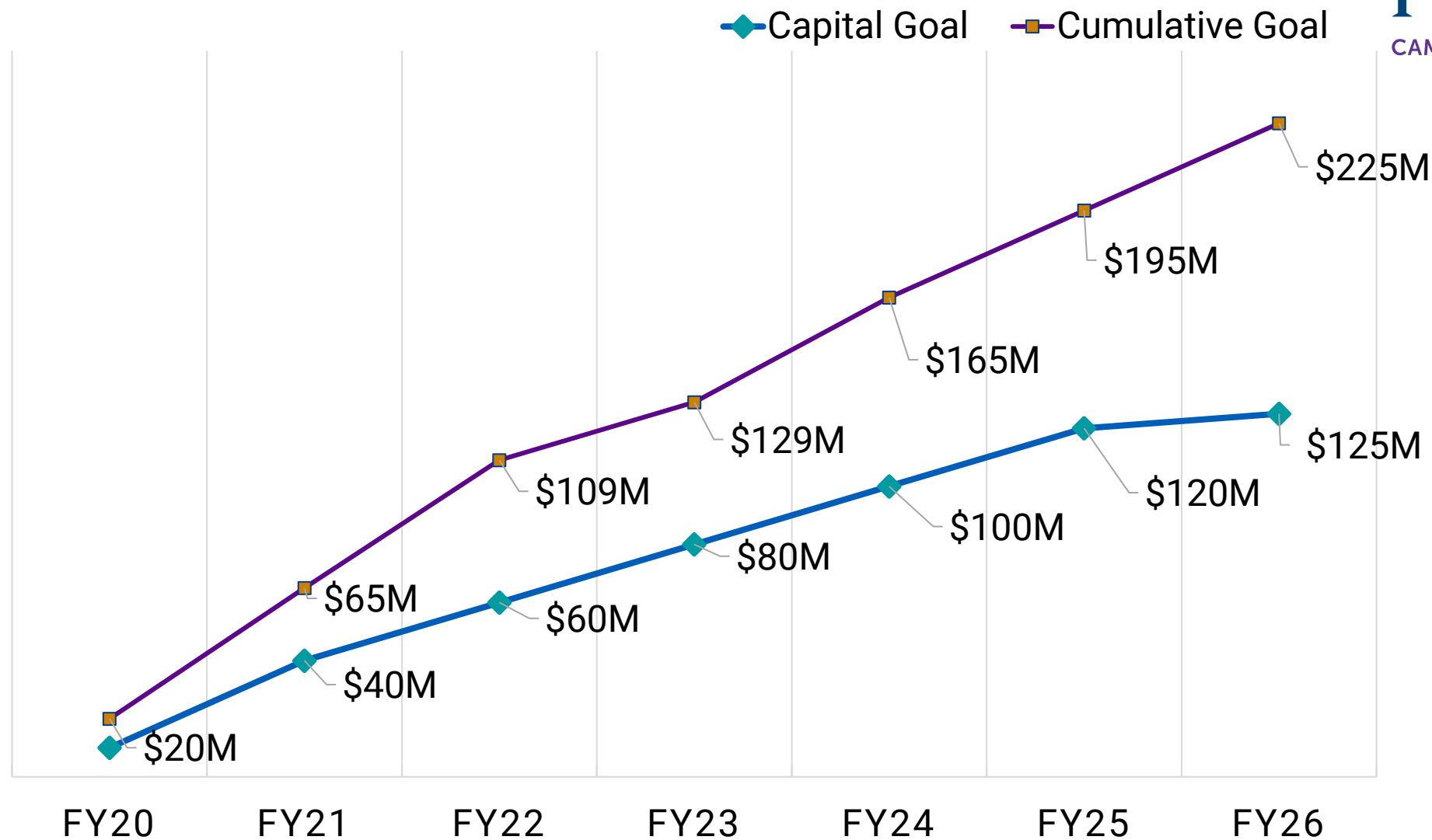
- Launched Oct. 2019, then COVID!
- Donor uncertainty
- Negative impact on hospital finances
- Increased construction costs
- MGB pause on capital spending



Adaptation is Vital



Revised Campaign Goal



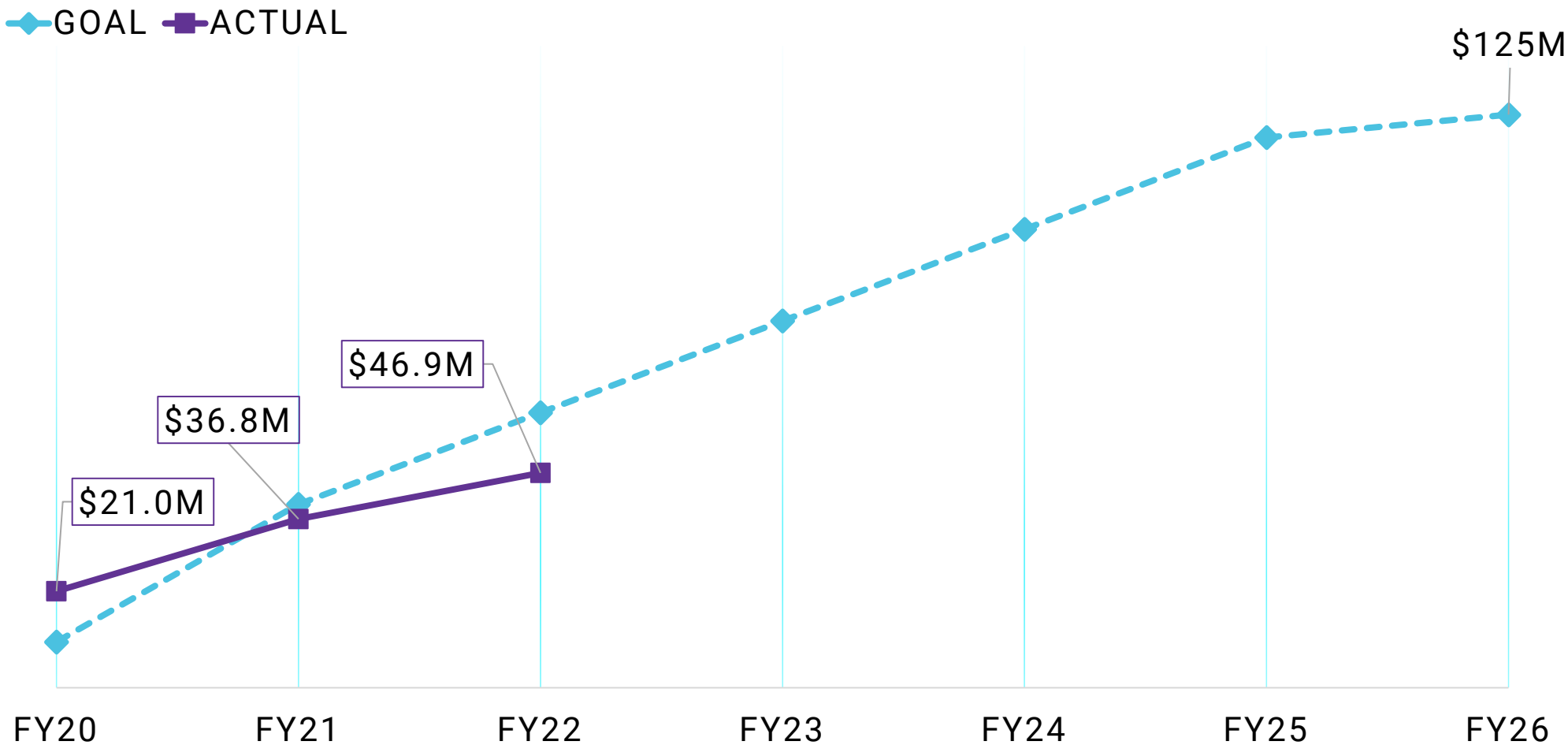
Campaign Overview: \$225M Goal

Priorities:

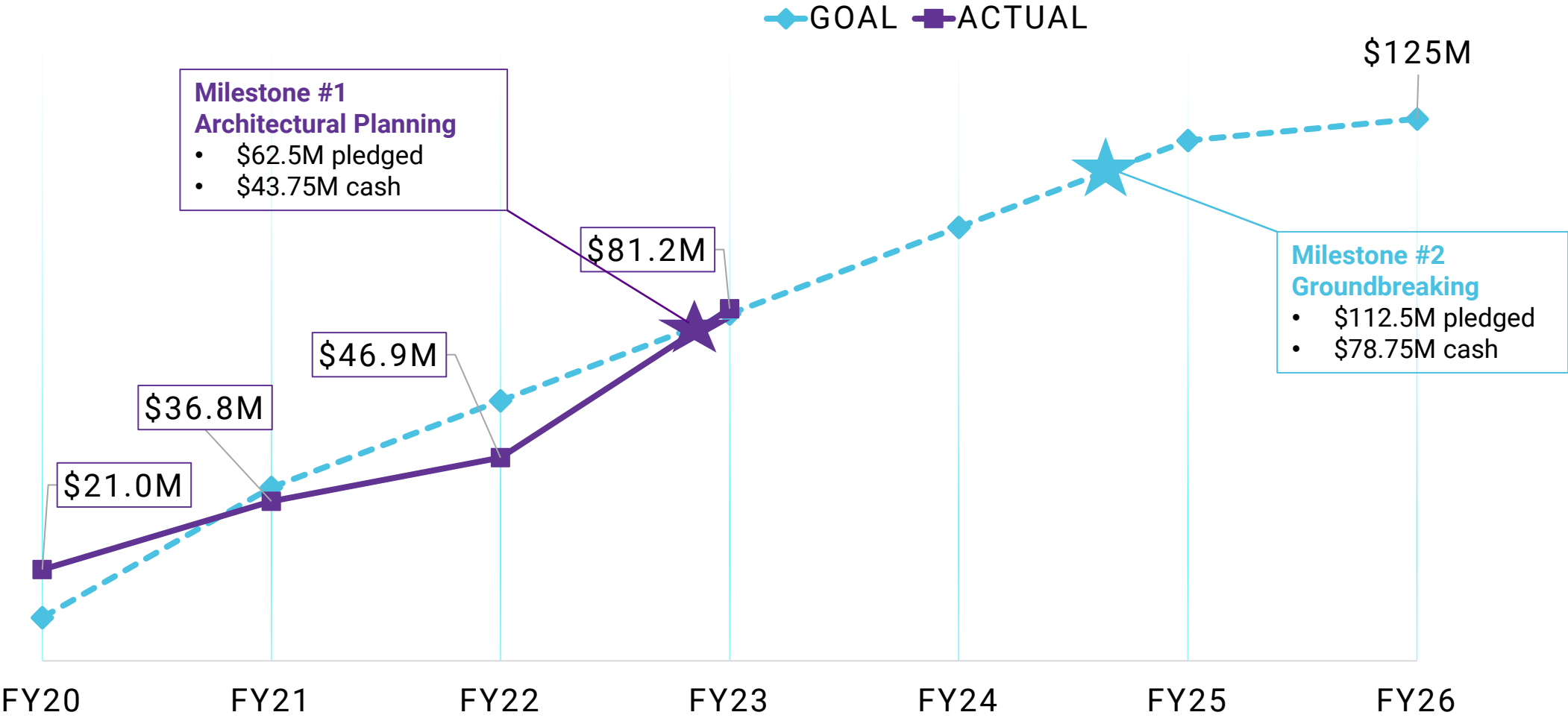
- Build comprehensive new child & adolescent center
- Advance research, training and clinical care across our seven divisions
- Support digital health and technology
- Garner unrestricted support



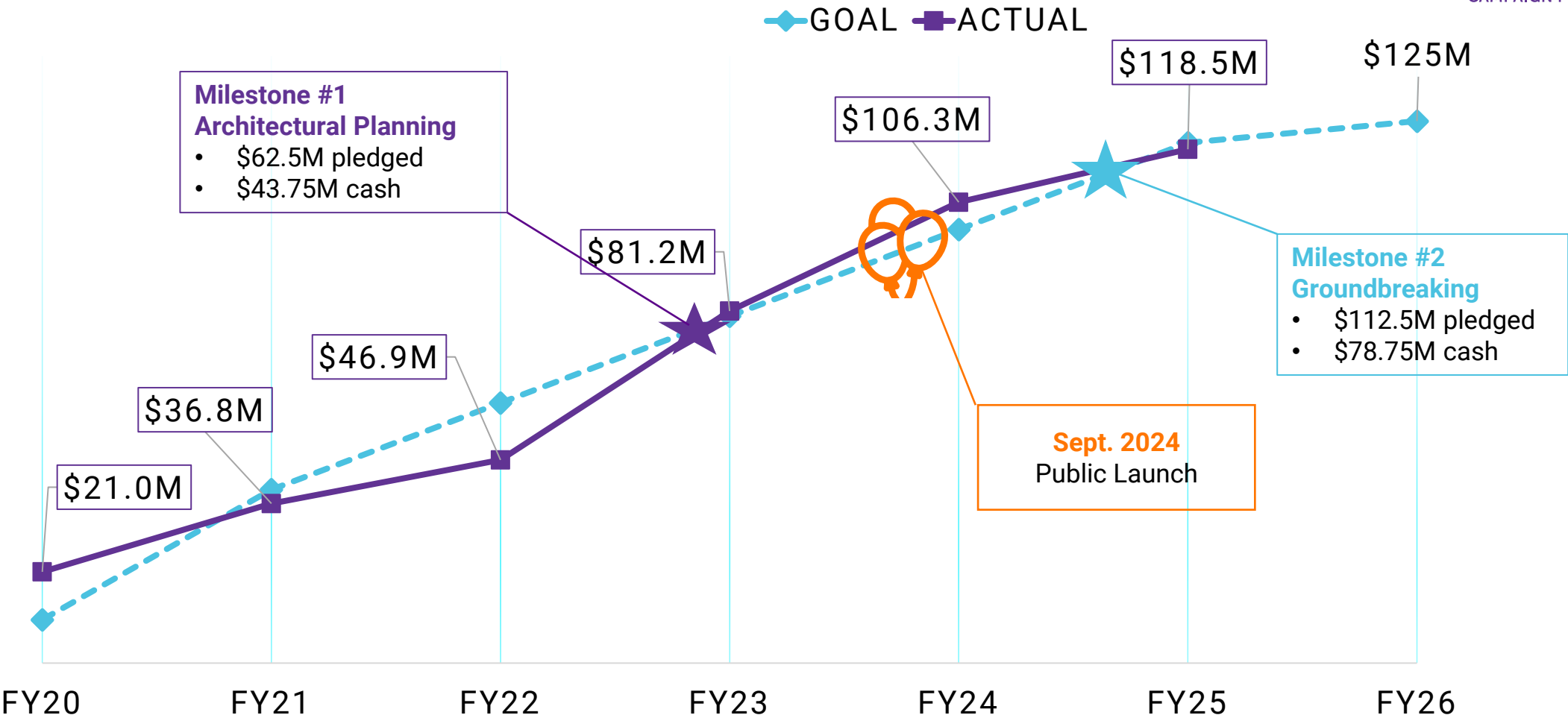
The Journey



The Journey



The Journey



Surprises and Successes



Donors Embrace Capital Giving

Capital Giving by Campaign

- FY12-FY16: **\$8M**
- FY20-Present: **\$118M**



9 Gifts of \$5M+
to The Way Forward



7 Capital Gifts of \$5M+
to The Way Forward

Donors Embrace Capital Giving

Top 5 Campaign Donors	Increase Factor
Donor A	30x
Donor B	6x
Donor C	4x
Donor D	2x
Donor E	2x

First-Time Donors	Capital Gift Amount
Donor F	\$1M
Donor G	\$500,000
Donor H	\$250,000
Donor I	\$150,000
Donor J	\$100,000



The Secret Sauce

Master Chefs aka Campaign Co-Chairs:

Kristine M. Trustey
Sean McGraw, PhD

Essential ingredients:

- Leadership by example
- Hands-on involvement
- Guidance
- Patience
- “Good” pressure
- Generosity
- Fun!





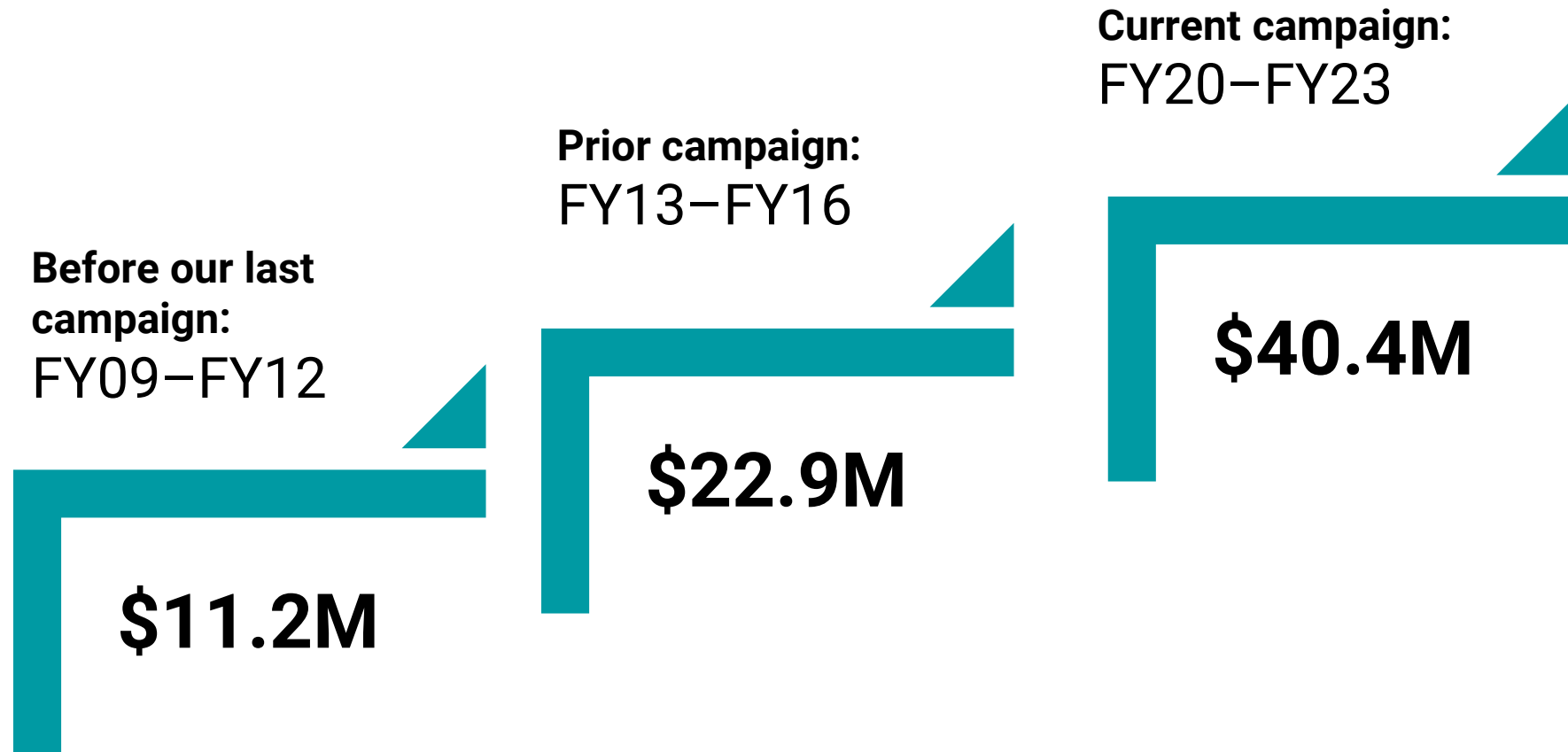
The Way
Forward
CAMPAIGN FOR McLEAN



Mass General Brigham
McLean

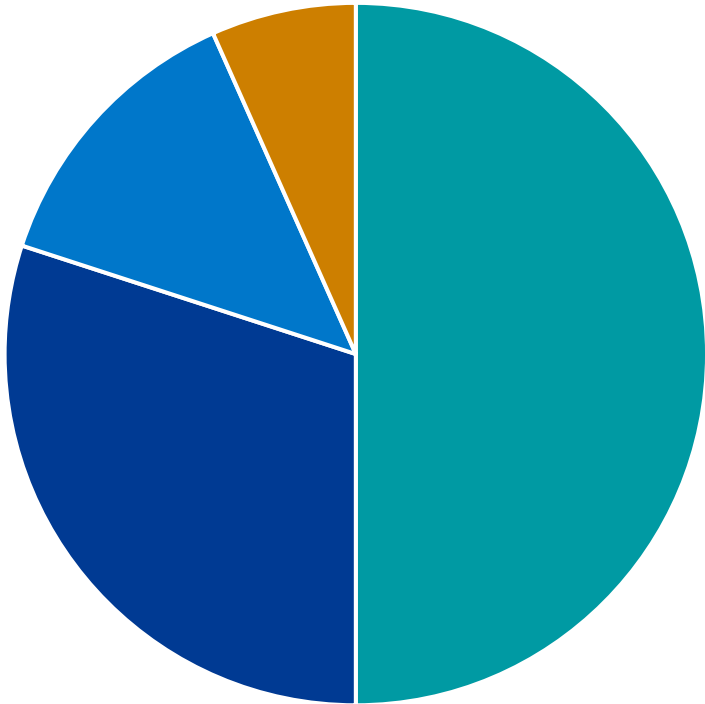


Philanthropic History: The Impact of Campaigns



An Unprecedented Campaign

Campaign Priorities



■ Child and Adolescent Campus



■ Focused Care and Research



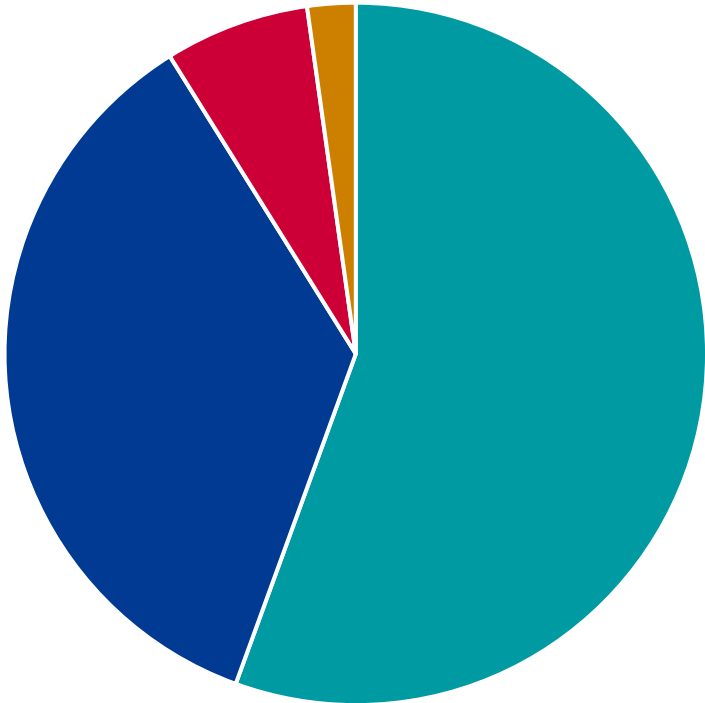
■ Women's Mental Health



■ Technology

An Unprecedented Campaign

Campaign Priorities



■ Child and Adolescent Campus



■ Clinical Care, Research and Education



■ Unrestricted



■ Technology

Child & Adolescent Campus: Key Developments

Oct. 2019	Campaign launches
2021	~\$40M raised for capital project
2022	MGB announces spending freeze on all new capital projects
Spring 2023	Project team revises costs. Capital goal increased to \$125M.
June 2023	MGB affirms project scope and approves moving forward against established milestones; expectation of 100% funding through philanthropy .
Sept. 2023	McLean Board affirms revised project scope and budget; approves increasing campaign goal to \$225M and extending timeline through FY26.
Oct. 2023	Met fundraising milestone #1; engaged NBBJ architects.
April 2024	Completed schematic design phase; reviewed design & construction cost estimates
May 2024	Initiated communications with Town of Belmont and regulatory partners
Sept 2024	Public launch of fundraising campaign
Nov. 2024	Met fundraising milestone #2 (pledges)
Dec. 2024	Submitted site plan application to Town of Belmont
April 2025	Site plan approved by Town of Belmont \$118.4M raised for capital; \$236M overall



Adaptation is Vital

Adjustments to Gift Table in Select Categories				
	Original #	Adjusted #	Original \$	Adjusted \$
>\$20M	1	2	\$20,000,000	\$50,000,000
\$10M to 19.9M	2	3	\$20,000,000	\$30,000,000
\$5M to 9.9M	4	5	\$20,000,000	\$26,000,000
\$2.5M to \$4.9M	6	9	\$15,000,000	\$24,000,000
\$1M to \$2.49M	20	20	\$20,000,000	\$22,000,000
\$500k to \$999k	30	17	\$15,000,000	\$10,000,000
\$250k to \$499k	50	28	\$12,500,000	\$9,000,000
\$100k to \$249k	100	100	\$10,000,000	\$18,000,000
<\$100k	Many		\$17,500,000	\$36,000,000
		Total:	\$150,000,000	\$225,000,000



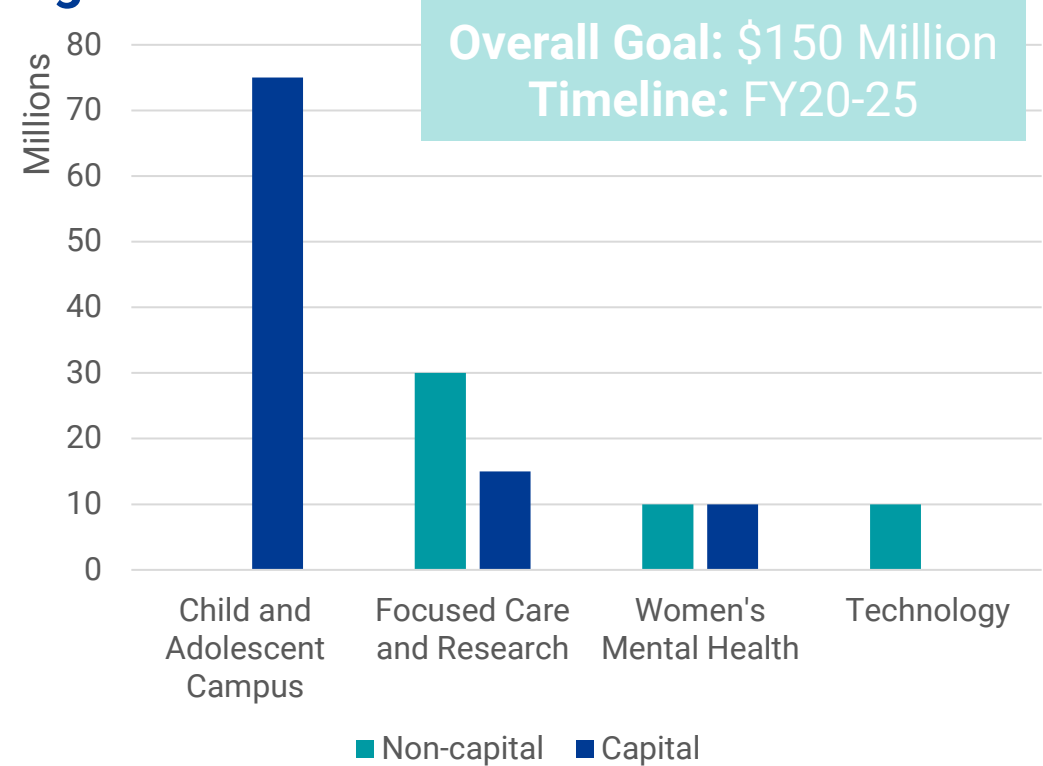
Adaptation is Vital

Priority Area	Original Goal	Adjusted Goal
Child & Adolescent Campus	\$75 million	\$125 million
Care, Research & Education	\$45 million	\$80 million
Women's Mental Health Center	\$10 million	No explicit goal
Technological Innovation	\$10 million	\$5 million
Unrestricted	No explicit goal	\$15 million
Total goal	\$150 million	\$225 million



Setting New Goals

Original Goals



Adapted Goals

