



Southwestern College Feasibility Study Report

December 19, 2014

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Table of Contents

Introduction	3
Findings	6
Recommendations	14
Action Plan	20
Appendices.....	24
Appendix A: Feasibility Study Advisory Committee.....	25
Appendix B: Interviewee List	26
Appendix C: Electronic Survey Report	27
Appendix D: Preliminary Case for Support	35

Introduction

Southwestern College (Southwestern) is in the midst of a significant period of improvement, growth, and accomplishment—and is committed to continuing that forward momentum. In recent years, Southwestern has focused on improving performing arts and stadium facilities, but now intends to address a wider range of institutional priorities, including residence halls, endowment, and programmatic strengthening, while also expanding its annual base of donor support. Southwestern would like to build on the strong foundation of recent campaign success.

The proposed comprehensive campaign will include improvements to residence halls as well as academic, arts, and athletic facilities; all important projects that will enhance student life and also appeal to prospective students and parents considering Southwestern.

To gauge interest in these projects and potential support from key constituents, Southwestern asked Johnson, Grossnickle and Associates (JGA) to conduct a feasibility study. This report presents JGA's findings, recommendations, and action plan resulting from the study.

Objectives

The objectives of the feasibility study were to:

- Test whether Southwestern is prepared to undertake a campaign in the near future.
- Test whether or not the campaign goal amount is attainable.
- Help Southwestern achieve consensus regarding the campaign goal and components.
- Cultivate top prospective donors in a significant manner by involving them *from the beginning* in the activities of the campaign.
- Educate constituencies important to the campaign's success.

A feasibility study makes it possible for Southwestern to proceed strategically and sequentially as it contemplates a potential campaign.

Methodology

A Feasibility Study Advisory Committee, comprised of key volunteers and staff members, provided guidance for this study. The Advisory Committee reviewed and approved a preliminary case for support and the list of study interviewees. A total of 32 interviews were conducted with individuals or couples for the study. In addition, an electronic survey was sent to nearly 2,000 constituents to gain additional feedback for the study.

The conversations with individuals in the interviews represent the heart of the study, and the findings and recommendations in this report rest heavily on them. And while JGA has codified interview results and filtered observations, we are essentially reporting what we were told about Southwestern College by the interviewees.

The appendices contain the list of Advisory Committee members (Appendix A), list of interviewees (Appendix B), electronic survey report (Appendix C), and the preliminary case for support (Appendix D).

Project Team

Andy Canada, Consultant, directed the feasibility study as lead counsel for Southwestern, and Ted R. Grossnickle, CFRE, Senior Consultant and Founder, served as associate counsel. Juli Knutson, Senior Writer and Project Manager, assisted with case statement development and otherwise provided assistance.

Project Schedule

The first Advisory Committee meeting was held on September 18, 2014. Interviews were conducted from October through mid-November. The second Advisory Committee meeting was held on November 11, 2014, at which time counsel presented preliminary findings. On December 9, 2014, the final report will be presented at the final Advisory Committee meeting for review and subsequent action.

Scope of Study

This report, and the process it represents, was designed to be a deliberate, careful, and major step in the cultivation and involvement of major donors and prospects for the completion of a successful campaign effort. During the course of the study, interviewees shared many ideas and opinions about Southwestern and its plans for the future.

Acknowledgments

We would like to thank the members of the Advisory Committee. *(See list in Appendix A.)* Their hard work, helpfulness, and willingness to engage with important issues made this study stronger and our work easier. We would like to especially thank Nan Hinson for her good work in scheduling the many interviews required for the study.

In addition, the interview participants for the feasibility study receive our thanks. Their candor and openness made our work a pleasure, and their thoughtfulness and generosity with their time are indicative of the strong interest they have in an even stronger future for Southwestern College.

Findings

General Observations

- 1. Interviewees firmly believe that Southwestern College is a far stronger institution than it has been in the past few decades.** Alumni interviewees all felt they received a very good education and enjoyed their experience on campus, but commented that in the past, facilities were in disrepair and the College did not have strong administrative leadership. Those alumni and non-alumni who have been close to the College for many years referenced the difficult financial situation that the College experienced a few decades ago. They see the trajectory today as much stronger and many credit the Professional Studies program for helping the College to improve its financial footing.

Comments included:

“When I was in school the physical facilities were in a state of disrepair. Dorms were in bad shape, so most students didn’t want to live on campus and the classrooms were run down. Everything looks nicer on campus today.”

“Campus has really improved in the past 25 years. Best practices were not being used to manage the campus in the past and the facilities were run down. President Martin and President Merriman really turned Southwestern around and it is a very solid school today.”

“Southwestern has developed a very good product and added new programs to answer the needs of the students. Academics are good, and we like the blend of on-line and classroom education.”

- 2. There is currently a better “town and gown” relationship with the community of Winfield than in the past.** Many interviewees commented that the community “claims” Southwestern as part of its community, but they question if the community realizes or appreciates the impact the College has, both in terms of economics and the events and activities that it provides. They wish the community would attend more of the events that are held on campus and become more engaged with the College. Interviewees also feel that the campus could do a better job of being part of the community and that its leadership and faculty could be more engaged. Some interviewees commented that when the President moved out of the Winfield area, they missed running into him around town; others believe he is still very engaged in the life of the community.

Comments included:

"The campus and community have a good relationship. Students are involved in the community outreach where community members see them. I think the community could do more for Southwestern for everything the College gives back."

"Students are very involved and help keep the school connected to the community. Their (annual) work day has a very positive impact on the community."

"Overall the relationship with the community is good. The community claims Southwestern but I don't think the majority of the residents understand the impact the campus has on the community and all the activities that they could be participating in."

3. Several interviewees praise Southwestern's emphasis on spirituality and strong values.

Many alumni commented that Southwestern played a pivotal role in their spiritual growth. They believe that opportunities are abundant for current students to learn and grow in their spirituality at their own rate.

Comments included:

"Southwestern shaped our lives – both professionally and spiritually. The discipleship program has been strong, and, interacting with current students and faculty, we can see that it is still a strong point for Southwestern."

"The school is blessed with very good faculty and a strong discipleship program. The students are engaged and I can feel a spiritual surge taking place on campus."

4. The majority of interviewees believe that Southwestern's marketing efforts could be stronger beyond the campus. They commented that marketing and publications on campus is very strong and has been a strength for many years, but that more attention should be directed to those not on campus to raise its profile and promote what is taking place on campus. Alumni stated that more effort needs to be made to reconnect alumni with Southwestern and make them feel a part of the institution again. Those interviewees who live in Winfield and the surrounding area also think Southwestern should do more to promote the activities on campus and highlight student activities. They give the College credit for the student outreach projects and the publicity that those activities provide for the College, but they believe a more concerted effort needs to be made to promote the College year-round and encourage the community to attend events on campus.

Comments included:

"Not a lot of people appreciate the value the College brings. It would help to get more publicity and be more visible."

"Overall, communication to the alumni needs to increase and should provide examples of what is taking place on campus. Right now the focus is on homecoming activities and the Southwestern magazine. They need to provide more information to alumni through social media and get people reconnected with the College."

"External communications is weak and sometimes nonexistent. Homecoming was last week, and there was not a mention of it around the community until the day of the game. There is strong communication on campus with faculty and staff, but not much effort to reach beyond the walls."

Leadership and Staff

- 5. President Merriman is highly praised for his leadership abilities and for putting together a strong leadership team.** Many interviewees commented that the President was the first at Southwestern with a strong administrative background and that this experience and leadership allowed the College to "turn the corner." The President is credited with stabilizing the College's financial position, even during challenging times, and making difficult decisions that benefited the College. His leadership team also received praise from many of the interviewees who have had interaction with the team.

Comments included:

"The College has done well in several ways. The President is very good. So are the faculty and administration. Top flight."

"The President is very strong and doing a great job. He has reorganized, but it is in a very good way—you can see the positive changes. The school is going in a very good direction right now, the best it has been in a long time."

"Dick has done a really good job leading Southwestern. It is a tough job and he can't keep everyone happy all of the time when making difficult decisions—but he has balanced it very well."

- 6. The Board of Trustees is viewed as very committed to the College and as key to the success of the next campaign.** Many interviewees believe that the board is ready to tackle the proposed campaign and that the members must and will play an active role. Interviewees think there is a good balance of long-tenured board members and a good

infusion of new board members. The board is perceived as working well together and has a strong relationship with the President.

Comments included:

"I love seeing all the youth on the board. It shows that the College is vital and the younger alums are engaged."

"The board is ready for this campaign. There are a number of new members who have not been through a campaign before, but that balances out with tenured board members who can help bridge the gap. The new board members bring a great energy to the board."

"The board is in a very good place. The board trusts the President and he openly shares and asks them for advice. There are very open discussions."

7. The institutional advancement department received positive feedback from the interviewees, but many are concerned about turnover on the major gifts staff team.

The advancement department is perceived as well run, and interviewees who have interacted with DeAnn Dockery think she is a strong leader. Some question if DeAnn and her staff have built the relationships with key donors and also cultivated the next group of major gift donors needed to reach a campaign goal of the magnitude being tested. Interviewees believe that the President will have to be the primary driver for the campaign during the first year to allow the team time to build the necessary relationships and prepare the donor base for the campaign. Stewardship of gifts by the College is viewed as a positive by most interviewees.

Comments included:

"DeAnn knows her stuff and is moving in a good direction. There is a big transition taking place with the staff and that will take time, but so far things look to be moving in the right direction."

"During the last campaign, the advancement staff was on the road all of the time and built very strong relationships. I worry if the current staff is building the same type of relationships or as many."

"With the staff turnover in recent years we have lost a lot of key relationships. It will take time for the new staff to rebuild those."

Case for Support

8. **The preliminary case statement was viewed as an authentic representation of Southwestern.** Alumni interviewees commented that the case caused them to reflect back on their time on campus and the impact it had on their lives. Nearly all believe that the components listed are important to Southwestern and present donors with a good variety from which to choose. In previous campaigns, the options were more limited and donors were directed to a few key projects. Interviewees like that this campaign offers a wide range of opportunities, but they also question if not having an overarching or key component will create the same level of excitement as previous campaigns. A few commented that the case did not create a sense of urgency in their minds and stated that the case needs to better articulate the vision for the campus and how these components and the campaign will play a pivotal role in reaching that vision.

Comments included:

"The case is well written and an accurate reflection of where the campus is today. Our last campaign was about curb appeal, and this is a good balance of what we need right now."

"The case represents Southwestern and I like all of the giving options so that donors can really find their passion, but I worry that donors will not get as excited since there is not a big shiny object in this campaign."

9. **Interviewees view all the campaign components as important, but the endowment for scholarships drew the strongest interest.** Most interviewees believe the emphasis on endowment is appropriate, given the investment in facilities in the recent past, and the majority believe that the endowment will provide a more stable financial environment for the College. Within the endowment component, student scholarships was the area that the greatest number of interviewees singled out as most important. Interviewees are concerned about the rising cost of education and they want to ensure that Southwestern is affordable. In addition to financial aid, interviewees consider student housing to be important. They see this as an additional recruitment tool to grow the student body and keep more of the students on campus during their time at Southwestern.
- Student scholarships, both endowed and restricted, was the most commonly mentioned priority by interviewees.
 - Facility improvements ranked second among interviewees as a priority. Student housing is a key priority for many of the interviewees and they think the

enhanced options will assist in growing the student body. Renovations to Christy are viewed as necessary and many alums think that older alumni will support the project but the types of renovations listed do not cause a great deal of excitement. Interviewees wanted to learn more about the impact the renovations could have on the student experience. Interviewees did not think they had enough information on TOMARI and the White Physical Education Building expansion to give an opinion these projects.

- c. Technology is viewed as a key priority for the campus. Interviewees are proud of Southwestern's history in being on the forefront of technology upgrades, but they wonder if the College is still staying current in this area. They believe this is an important focus for the campus, but are unsure if donors will financially support technology upgrades, since they occur so frequently. A few interviewees wonder if an endowment could be created to assist with technology upgrades.
- d. Interviewees were pleased to see the Builder Fund included in the campaign. They believe it is important to continue reaching out and getting alumni and friends to support Southwestern on a regular basis. By including it in the campaign, everyone can play a role.

Comments included:

"The focus needs to be on keeping the cost of education down, so students can attend."

"The components make sense to us and are properly focused. Facility improvements in the dorms and classrooms are critical, but growing the endowment is also an important priority."

"Student housing has to be addressed. Student's priorities are changing all the time. We are falling behind in our options to offer and it is hurting our enrollment."

"Facilities and technology could be a bigger portion of this campaign. They are areas of need that have direct impact on students and recruitment. However, I am very pleased to see the big push for endowment. We have to balance the priorities and I feel this does a good job."

"Christy has to be addressed. It is the spot on campus that everyone remembers and we need to preserve it."

"Including the Builder Fund is a very good move. This campaign needs to be about growing the base and reminding everyone of the importance of ongoing giving, which will aid the College for years to come.

The Campaign

- 10. Most interviewees stated that a goal of \$25,125,000 is a realistic number for the College to raise during the campaign, but it will be a challenge.** There is concern that new major gift donors have not been engaged or cultivated for this campaign, and some wonder if the next generation of donors will be ready to support it. Many interviewees mentioned that the same donors are asked to contribute over and over again.

Comments included:

"Donor fatigue is a real concern for me and the timing of this campaign. We have moved from one campaign to another and I question if we are reaching our breaking point."

"The goal is achievable, but I worry about donor fatigue and question if new donors have been identified and cultivated. Deferred giving will have to play a big role, if the goal is to be achieved."

"If Southwestern can get in front of the right donors and build stronger connections with them, this campaign could go over \$30 million. The College needs to use the Methodist connections in western Kansas to reach potential donors."

- 11. The majority of interviewees (70%) rank Southwestern as high (top one third) in their philanthropic priorities. However, no lead (seven-figure) gift was identified for the campaign through the feasibility study.** Several interviewees have indicated a willingness to include Southwestern in their estate plans. There are a number of additional prospects who were not a part of the study but who are identified as capable of significant gifting. JGA will confer with staff and take these prospects into consideration as recommendations are shaped for the campaign.

- 12. Interviewees believe that increased engagement of alumni is the critical tactical goal for this campaign. Focus areas mentioned include:**

- Alumni commented that there are some "lost generations" of Southwestern alumni. These individuals attended Southwestern when the physical facilities were in a state of disrepair and there was no strong sense of campus pride. The interviewees think that these graduates still believe they received a good

education but they may not have the same emotional connection to Southwestern that other alumni have, so they believe that reengaging them will require special attention and strategy. One focus might be on the impact these alums can have on future students.

- The advancement office has had turnover over the past year and interviewees believe that the new staff will have to work very hard and quickly on building relationships with donors who previously had a relationship with other staff. Staff members will also have to grow new relationships with prospective donors who may not have been visited in the past. This finding is a key strategic element of the study and will require significant attention in the recommendations yet to be written.
- Interviewees want to see Southwestern engage Professional Studies students in new ways. They commented that these alumni may not have the same emotional connection but there may be some who want to “pay it forward” and help future Professional Studies students. Interviewees don’t believe a high percentage of Professional Studies alumni will be a source of philanthropic gifts but there may be some of them who can be identified who will be willing to help. Segmented communication and networking opportunities were the two areas that interviewees felt Southwestern might utilize with this group.
- Ideas and opinions of a larger group of alumni were sought via an electronic survey and those results are included below (in summary) and more fully in Appendix C.

Comments included:

“I question if they can really handle that big of an endowment jump from where they are now—that is a big increase. They will have to really engage alumni with the campus.”

“We have to rebuild our donor base during this campaign. Southwestern has to engage new major gift donors to replace key donors who have driven the past campaigns, but also broaden the base.”

“The integration of Professional Studies with the main campus is critical to the success of the campaign. We need all alumni and other supporters to understand what Southwestern is doing and the impact it is having. We need to paint the complete picture.”

Electronic Survey Feedback

As a part of the feasibility study process, JGA conducted an electronic survey of alumni, parents, and other friends of Southwestern to gauge their general perceptions of the College and their enthusiasm for specific communication and giving vehicles. The survey was sent to 1,991 recipients identified as potential campaign supporters. A total of 445 individuals responded to the survey. This is a response rate of 22.3%, which is above the industry average of 10-20%. It is encouraging that such a high percentage of those that received the survey responded. A full analysis of the survey results are included in Appendix C, but key findings are listed below.

- 1. Electronic survey participants expressed strong positive feelings toward Southwestern in a number of ways, including:**
 - 95 percent described the educational experience at Southwestern as “positive” or “very positive”;
 - 90 percent either agreed or strongly agreed with the statement that a Southwestern degree is a “good value”;
 - 83 percent said they would definitely recommend Southwestern to a prospective student, and another 14 percent indicated they would consider doing so; and
 - 49 percent of respondents list Southwestern as one of their top three charities that they contribute to annually.
- 2. Electronic survey participants expressed satisfaction with the way they’ve been recognized for their gifts and generally understood the impact of their gifts.** The vast majority of survey respondents (90 percent) felt they were thanked at the appropriate level for their past gifts, and 67 percent said they understood how their gifts were used.
- 3. The vast majority (78 percent) of electronic survey participants felt positive (38 percent) or very positive (40 percent) about the leadership of the College.** Another 19 percent expressed a neutral opinion about Southwestern’s leadership.
- 4. The electronic survey of donor prospects found strong interest in giving for student scholarship support, restricted giving, and the Builder Fund.** Nearly 40% of electronic survey participants identified scholarships as the highest priority for their personal giving.

Recommendations

JGA is confident that Southwestern can be successful in a major campaign. However, a number of variables make it difficult to recommend a specific goal amount at this time. JGA recommends that Southwestern move forward with a campaign, but that it follow a sequenced planning process to determine an ambitious, but achievable working goal in the months to come.

A final campaign goal will be determined by the size of lead gifts from a small number of donors, as well as a high level of commitment from the board of trustees. The ability of Southwestern to support a successful campaign will also be dependent on the institutional advancement office's ability to become fully staffed, build key relationships with donors, and strengthen its systems.

JGA believes that Southwestern can be successful in a campaign with a goal in the range of \$15,000,000 to \$20,000,000 or more, if Southwestern can execute the critical steps detailed in the recommendations below at a level that builds confidence and momentum.

Campaign planning and preparation should start immediately, but it must be undertaken in conjunction with a multi-year period of improved donor and staff readiness work. With the right kind of preparation, Southwestern can hit and exceed a campaign goal—perhaps at the higher end of the range—and as important, it can dramatically increase its ongoing base of financial support for the future. The following recommendations and action plan describe the necessary preparation for campaign success.

- 1. Shape a bold and compelling message for a comprehensive campaign that creates a strong vision for the student experience at Southwestern.** Build the campaign around creating a more dynamic experience for Southwestern students. Based upon this theme and interviewee interests, key campaign funding priorities would include: endowment for student scholarships, student housing, and the Builder Fund. Renovations to Christy and technology improvements should also be included in the campaign, but it will be critically important to fully explain how these projects will impact the student experience. Structuring the campaign around the total student experience will inspire greater philanthropic investment and provide a platform for Southwestern to engage alumni and friends in the life of the College.
- 2. Enter into an active period of lead gift discussion and intense campaign preparation.** This will likely require 12 to 18 months for systems and donors to be prepared for optimal results. A number of prospective campaign donors are prepared to give now, but overall engagement of alumni and friends in the life and work of Southwestern must be

improved to bring others to that point and to inspire increased giving for some. As critical campaign preparations are underway, the president will have to play an active role in the campaign and will be the primary contact with many of the top prospects, especially over the next 12 to 24 months. During this period, the institutional advancement staff will need to build key relationships that will result in campaign gifts as the campaign moves forward.

3. **Adopt a working goal of \$18,000,000.** Interviewees' self-ratings and review of past giving history suggests that this is a realistic and achievable goal, but there is potential to raise more. There is donor capacity to justify a higher goal, but much work remains to be done to make that attainable. The campaign needs to capture donors from the previous campaigns but also engage new donors. A final decision on the formal campaign goal can likely be made by the board of trustees upon recommendation of the campaign planning committee and administration in December 2015.

4. **Increase the level and quality of donor contact.** Staff and volunteers must both engage more individuals in conversations about giving and expand the follow-up to those discussions. This expansion should be comprised of:
 - a. A careful and thorough review of the current prospect profiles is critical. The institutional advancement staff and the president need to develop a list of the top campaign prospects and then ensure that all prospects are assigned to the right staff members. The president's portfolio should focus on the top rated prospects and the prospects with whom he has the closest relationships. Many names in the current portfolios may not be included in the new portfolios. Personal visits should focus on prospects who have the greatest inclination and capacity to give to Southwestern over the next five years.
 - b. The rates at which alumni and friends receive personal one-on-one visits by staff and by which persons are met with in "discovery" visits by volunteers must increase and be focused on the right individuals. Increased personal visitation by advancement officers for both annual gifts and major gifts should begin within a well-structured and cohesive plan that is based on accountability for results. There are two key desired outcomes of this initiative:
 - i. an expanded annual fund goal that reflects higher alumni participation and increased dollar support; and

- ii. an expanded base of major donors for gifts in the \$5,000 to \$25,000 range. Both of these are critical requirements for growing the philanthropic support base for Southwestern in the next decade.
 - c. The major gift staff must be fully staffed and completing their visits; and
 - d. A moves management system should be established and maintained in the database, so that it can be used by all staff and leadership involved with fundraising.
- 5. **Secure lead and major gifts to comprise 50% of a proposed campaign goal before confirming a final campaign goal amount.** In order for Southwestern to have a successful campaign, a lead gift of 10% of the campaign total is necessary, as are several other seven-figure gifts and high six-figure gifts from a few lead donors who will set the stage for a larger campaign. December 2015 should be targeted for setting the final campaign goal.
- 6. **Publicly announce the campaign when a minimum of 60% of the final campaign goal has been secured.** Also ensure that the institutional advancement office has completed all campaign preparations and the number of personal visits is averaging a minimum of 45 per month for the staff and president.
- 7. **Establish campaign financial goals that are integrated into Southwestern's overall financial model for sustainability and growth.** Southwestern has the opportunity to engage its donors in both commitments of cash and deferred gifts to maximize current philanthropic investment. The campaign's financial goals for both cash and deferred gifts must be clearly articulated in the campaign planning. Based upon the campaign components and the desired impact on students, Southwestern can define what percentages of campaign funds will be raised in cash and deferred gifts.
- 8. **Create a campaign planning committee to guide the campaign.** This group would meet regularly for the next 12 months to guide the implementation of these recommendations and to prepare for the formal approval of a final campaign goal. The primary purposes of the committee would be to:
 - a. Assist with lead gift cultivation, solicitation, and stewardship of prospective donors;
 - b. Assist in the solicitation of the board of trustees;
 - c. Monitor the implementation of the recommendations in the feasibility study;

- d. Work with the institutional advancement staff to prepare and finalize a campaign plan;
- e. Review and approve campaign policies and procedures;
- f. Recommend a final campaign goal to the board of trustees by December 2015; and
- g. Transition to a formal campaign cabinet after a final campaign goal is approved.

9. Develop a campaign plan to guide the sequential implementation of the campaign. This campaign plan will contain the following documents that will provide the policy and structure to support the campaign:

- a. Campaign volunteer and staff structure
- b. Campaign gift table with prospects assigned to each giving level
- c. Campaign budget
- d. Gift acceptance policies
- e. Gift counting policies (specifically the role of cash and planned gifts)
- f. Conversion ratios and a prospect pipeline
- g. Timeline for solicitation and stewardship with benchmark goals
- h. Donor recognition and naming opportunities
- i. Metrics to evaluate campaign success
- j. Communications plan

10. Engage the board of trustees as campaign leaders, donors, and advocates. The board will play a critical role in making early leadership gifts to the campaign to model philanthropic investment for other donors. Successful higher education campaigns have leadership gifts from their boards of trustees in the range of 15% to 25% of the final campaign goal.

11. Create a multi-faceted communications plan to support a campaign. A detailed communications plan is critical to the success of this campaign. The communications plan should be built around the segmented communications vehicles that the task force is currently exploring. The plan must create a message platform that is concise and compelling and define the particular communication methodologies for various constituent groups. Specifically, the communications plan must include, but not be limited to, the following:

- a. Providing financial transparency and a plan for institutional sustainability.
- b. Explaining why Southwestern is a wise philanthropic investment.
- c. Articulating the impact of the campaign on students.

- d. Sharpening communications messaging to support the president's vision.
- e. Creating ways to re-engage the "lost generations" of Southwestern alumni.
- f. Beginning to explore how to integrate Professional Studies graduates into the communications plan with segmented and targeted messages.

12. Revise the case for support in light of the final campaign goal and the communications plan. As the campaign components are further defined and the communications plan is created, Southwestern must revise the case for support accordingly. The case for support will be used in personal campaign solicitations and will also form the basis for all future campaign communications. This document must convey the compelling vision of the campaign and describe the impact on student lives.

13. Improve the effectiveness of the database. Currently a great deal of manual manipulation is required to pull reports and dig into the data in the database. As more segmented communications take place, the database will need to operate at a higher level. This could require additional investment in software and/or a consultant to come in and assist in identifying issues and improving outcomes.

14. Pursue the campaign timeline as described in this report. These steps, while not rigid, are strategically sequenced and build upon each other. Accomplishing these will build momentum, raise funds, and make a higher campaign goal possible.

Action Plan

Assumptions:

1. The campaign goal will be defined after lead gifts are solicited, and the goal is expected to be raised over a five-year period.
2. Board of trustee members will collectively contribute between 15% and 25% of the final campaign goal.
3. Volunteer campaign leadership will enthusiastically engage in helping to raise campaign funds.
4. The institutional advancement office will be fully staffed, will have completed all campaign preparations, and is operating at high level.
5. This campaign timeline runs from 2015 through the end of 2020.
6. The national and state economies will continue an uneven recovery over the life of the campaign.

Detailed Campaign Timeline for December 2014 – December 2020

December 2014 – January 2015

- The advisory committee reviews and approves the Feasibility Study report to be discussed at the board.
- The board of trustees reviews and approves the Feasibility Study report.
- The board of trustees approves moving forward with a campaign with a working goal of \$18 million.
- Institutional advancement reviews and updates all prospect portfolios.
- Next steps on how to improve the effectiveness of the database are developed.

February 2015 – May 2015

- Send thank-you letter to interviewees with a brief overview of what was learned from the feasibility study.

- Conduct personal briefings regarding the feasibility study and campaign components with selected interviewees and other individuals.
- Finalize the campaign components.
- Identify and prioritize lead and major gift prospects for the campaign; create a master prospect list.
- Develop strategies for lead gift solicitations and begin discussions with select prospects.
- Develop a gift range chart for the campaign and begin to identify prospective donors at the various levels of the chart.
- President and IA staff are cultivating and building key relationships for the campaign.
- Begin identification and recruitment of campaign planning committee (to be completed by April).
- Begin development of core campaign messaging around the student experience.
- Begin the solicitation of the board of trustees for campaign commitments.
- Create a timeline for the creation of the communications plan.
- Begin drafting a written campaign plan, including a timeline, campaign counting policies, volunteer structure, campaign budget, job descriptions for the campaign leadership, and benchmark goals.
- Begin revising the case for support.
- Hold first campaign planning committee meeting.
- Brief the board of trustees on campaign progress at the May board meeting.

June – December 2015

- Begin development of campaign education and communication plan, including campaign materials and electronic and social media elements.
- Continue to develop strategies for lead gift solicitations and solicit select prospects.
- CPC continues to meet and CPC solicitations take place.
- Solicitation training is provided to the CPC members.
- Begin creation of the communications plan – working with communications and task force.

- Present and review the campaign plan with the advancement committee.
- Finalize the campaign plan.
- Finalize the case for support.
- All board and CPC gifts are documented by end of the calendar year.
- Brief the board of trustees on campaign progress.
- Recommend a campaign goal amount to the board of trustees for the December meeting.
- Final campaign goal is approved by the Board.
- **Reach \$9 million in commitments by December 31st.**

January 2016 – December 2016

- Complete the solicitation of lead gift prospects.
- Continue meetings of the CPC.
- Complete the creation of the communications plan and begin implementation.
- Transition the work of the campaign planning committee into a formal campaign cabinet.
- Host cultivation events with major gift prospects.
- Begin meetings of the campaign cabinet.
- Cabinet will undergo solicitation training.
- Prospect list is widened and major gift cultivation and solicitations are taking place.
- **Reach \$14 million in commitments by December 31st.**

January 2017 – December 2017

- Continue the solicitation of major gift prospects.
- Create benchmarks for the remaining campaign goal to be raised and update the action plan.
- Host cultivation events.
- Conduct refresher training sessions with cabinet and other volunteers.
- Brief the board of trustees.
- Prepare plans for public announcement in the fall of 2017.

- Broaden the campaign to all alumni and friends.
- **Reach \$15.5 million in commitments by December 31st.**

January 2018 – December 2019

- Complete major gift solicitations.
- Review conversion ratios and prospect pipeline to prepare for broad-based solicitations.
- Host cultivation events.
- Revisit selective donors and cultivate for a second gift to campaign.
- Continue meetings of the Campaign Cabinet.
- Host campaign stewardship events for select gifts.
- **Reach \$17 million in commitments by December 31st.**

January 2020 – December 2020

- Host campaign stewardship events for selective gifts.
- Donor cultivation and solicitation is ongoing.
- Continue with broad-based campaign communications and solicitations.
- Plans drafted for donor recognition and campaign conclusion messages.
- Fulfill donor recognition commitments.
- Hold final meeting of campaign cabinet.
- Continue implementing communications program to engage alumni.
- **Reach campaign goal of \$18 million by December 31st.**
- Host campaign celebration and celebrate!
- Conclude campaign.
- Conduct “lessons learned” session and report review.

Appendices

Appendix A: Feasibility Study Advisory Committee

Members

DeAnn Dockery

Scott Hecht

Ronnie Jenkins

Michael Lennen

Michael Lewis

Dick Merriman

Florence Metcalf

Madeline Norland

David Smith

Counsel

Andy Canada

Ted Grossnickle

Appendix B: Interviewee List

1. Craig Anderson
2. Warren & Colleen Andreas
3. Phyllis Bigler
4. Craig Duncan
5. Darrel & Yvonne English
6. Jim Farney
7. Janice Frahm
8. Pat & Carolyn Gaughan
9. Sue Hale
10. Scott & Shelley Hecht
11. Ron Holt
12. Bishop Scott Jones
13. Eric Kurtz
14. Mike Lennen
15. Mike Lewis
16. Charles Maddin
17. Carl and Mary Lou Martin
18. Angela Mayorga May
19. Gayle & Jane McMillen
20. Steve McSpadden
21. Ted & Florence Metcalf
22. Daniel & Sarah Miller
23. Kim Moore
24. Lyn Nichols
25. Madeline Norland
26. Bill Seyb
27. David & Linda Smith
28. Rodger Steffen
29. Rod Strohl
30. Max Thompson
31. Tom & Mari Wallrabenstein
32. Bishop Richard Wilke

Appendix C: Electronic Survey Report

Overview

As a part of the feasibility study process, JGA conducted an electronic survey of a selected group of alumni, parents/grandparents, and friends of the College. This survey further informed the study with opinions and feedback from a broader group of Southwestern supporters – beyond the targeted individual interview pool. Those invited to participate in the electronic survey were chosen based on their relationship to Southwestern and their capacity to make gifts to a potential campaign. These individuals were asked to complete a brief online survey about their impressions of Southwestern. The survey probed respondents' perspectives on Southwestern's educational experience, institutional leadership, donor experience, communication, and proposed campaign components.

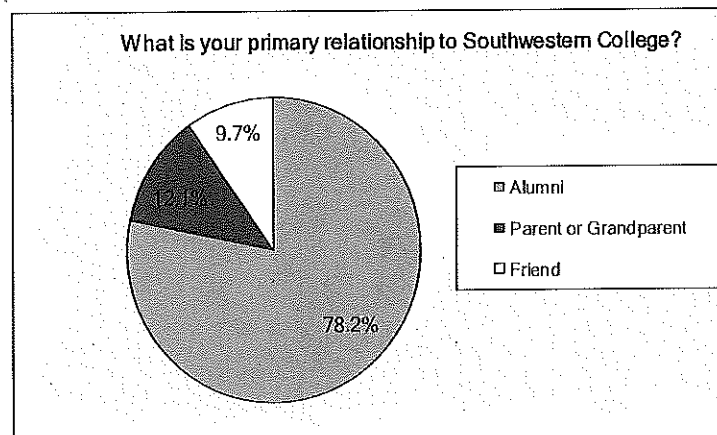
Methodology

A total of 1,991 individuals were asked to participate in the electronic survey via an email from the College. Potential participants were directed to an internet-based survey platform where they were presented with a structured series of questions. In total, 445 respondents chose to participate and provided answers to some or all of the survey questions. This represents a 22.3 percent response rate, which is very positive. The industry standard is in the range of 10 to 20 percent for this type of survey.

Participant Characteristics

Relationship to Southwestern

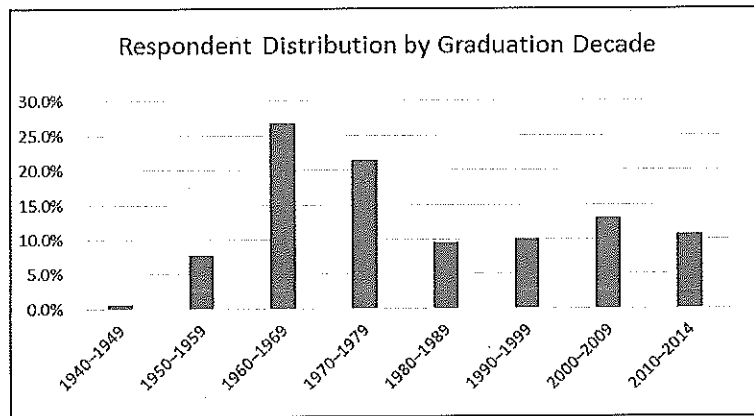
The vast majority of respondents (78 percent) identify primarily as alumnus/a, most of the remaining quarter (12 percent) identified as parents or grandparents, and the remaining 9.7 percent consider themselves "friends" of Southwestern.



Alumni Graduation by Decade

Alumni participants were asked to indicate the decade in which they graduated.

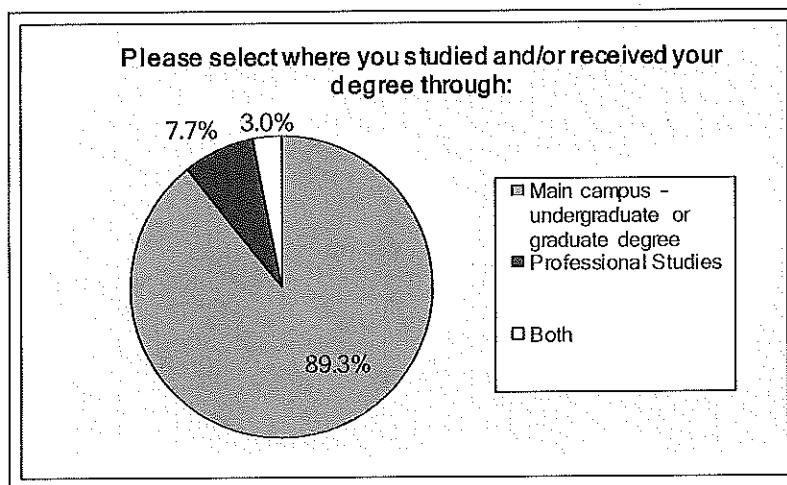
The largest concentration of respondents graduated in the 1960s and 1970s, which is reflective of a realistic major donor pool. The number of responses from the 1970s in particular is encouraging, because many feasibility study interviewees noted this decade as the start of the “lost generations” at Southwestern. It is also encouraging that the two most recent groups of graduates responded at 13% and 10.7%.



For the purposes of analyzing different perspectives of Southwestern by age group, respondents were divided into three age cohorts: those graduating before 1969, those graduating between 1970 and 1989, and those graduating after 1990. Each cohort captured approximately one third of respondents.

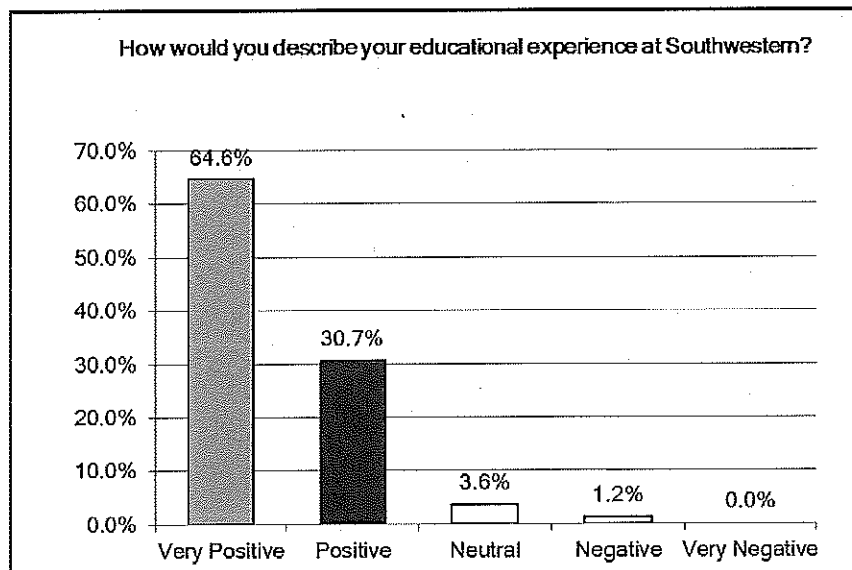
Main Campus or Professional Studies

The vast majority of the respondents to the survey (89.3%) received their Southwestern education from the main campus, while 7.7% graduated in Professional Studies, and 3% have degrees from both.

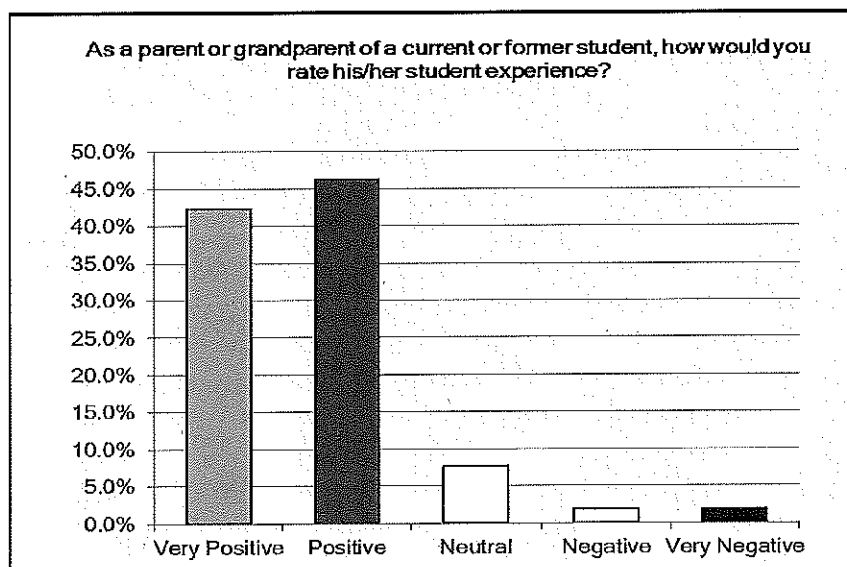


Educational Experience

When looking at the alumni responses, nearly all respondents reported feeling positive (64.6 percent) or very positive (30.7 percent) about the educational experience they received from Southwestern. Only 1.2 percent had negative feelings about the educational experience at Southwestern. Of the three age cohorts, the 1970–1989 group gave the highest rating, with 98% of very positive or positive responses.

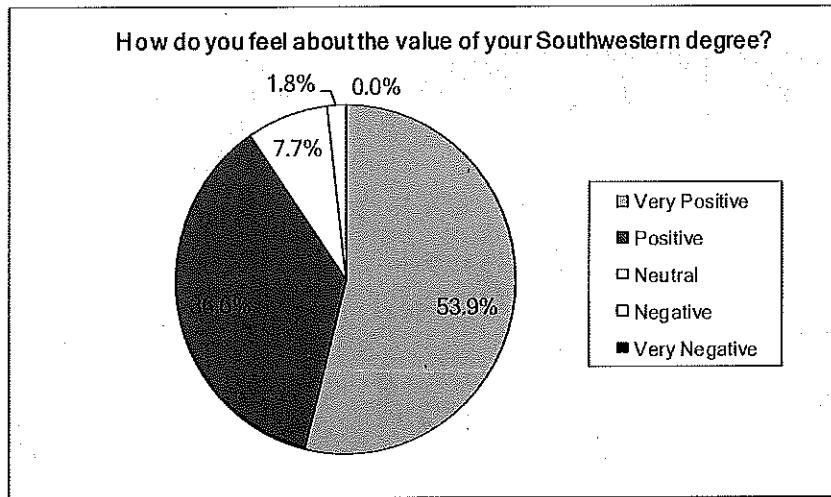


Parents and grandparents also had positive feelings about the educational experience of their children and grandchildren; 88.5% had either very positive or positive feelings.



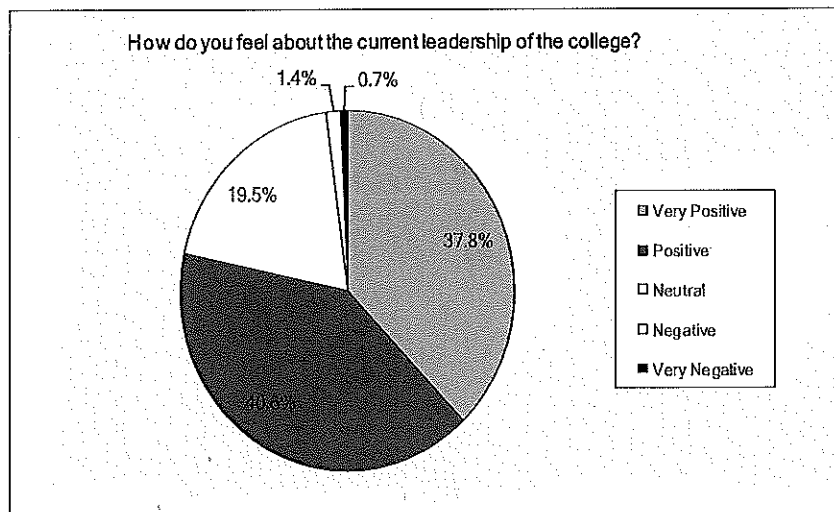
Value of Degree

The vast majority of alumni feel very good about the value of their Southwestern degree. More than 90% gave either a very positive or positive response about their degree, but the youngest cohort expressed the lowest “very positive” rating at 47%. Eighty-two percent of all survey respondents would recommend Southwestern to an incoming student.



Leadership

More than three out of four respondents felt positive (40.6%) or very positive (37.2%) about the current leadership of the College, with the most positive responses coming from the cohort graduating before 1969. Only 2% expressed negative or very negative perceptions of leadership.



Vision

Survey participants were provided with the vision statement for Southwestern:

Southwestern College in Winfield, Kansas, is a learning community dedicated to:

- *Intellectual growth and career preparation*
- *Individual development and Christian values*
- *Lifetime learning and responsible citizenship*
- *Leadership through service in a world without boundaries*

More than nine out of ten survey respondents (93.8%) believe that Southwestern's vision is important and relevant for the future. Seventy percent of those that responded to the survey want to play a role in advancing the vision of Southwestern in the future. This is a very positive sign for engaging people in the life of Southwestern moving forward.

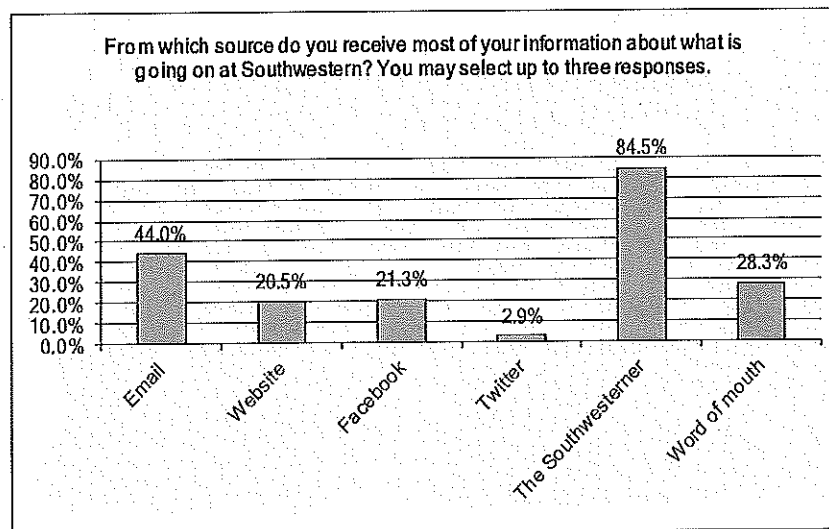
Communication

Level of Information

Nearly 92 percent of the survey respondents feel they are well informed by Southwestern's communications, including print, email, and social media. When looking at only alumni, that percentage increases slightly up to 92.7%. Friends of Southwestern feel the most informed with a positive response of more than 94%.

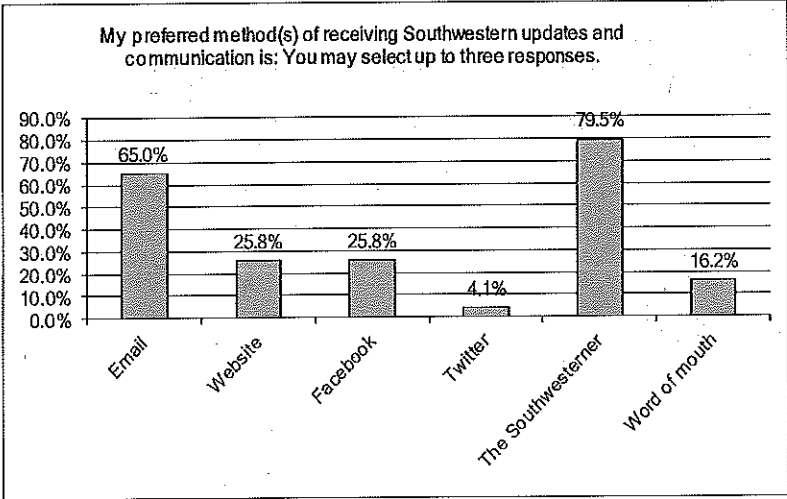
Methods of Communication

More than 84% of survey respondents get most of their information about Southwestern from *The Southwesterner*. Email was the second key source of information, with 44% selecting it in their top three communication options. More than a third of respondents in the youngest cohort identified Facebook as a significant source of information as well.



Communication Preferences

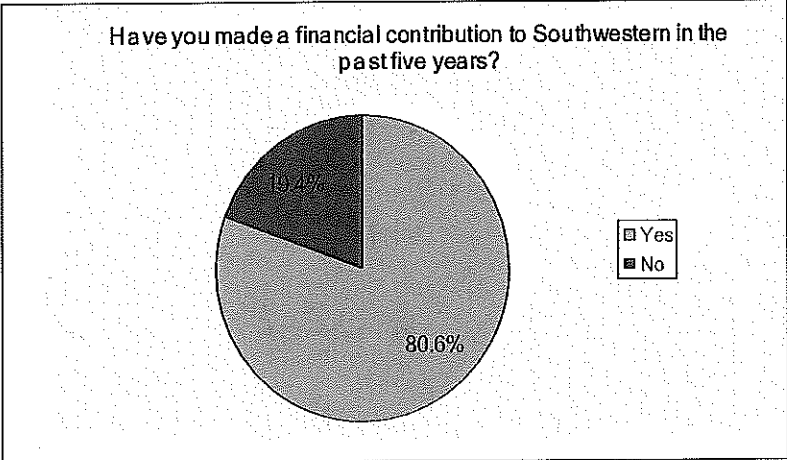
When looking at how the survey respondents want to receive information from Southwestern, *The Southwesterner* remains the primary vehicle, with almost 80% of the respondents selecting it as their preferred method. Of the three cohorts, the 1991–2014 cohort rated it the lowest, at 64%. The overall preference for email communication jumped to 65% overall, which indicates that more email communication from Southwestern would be well received. Facebook and the website both received just over 25%, but the youngest cohort rated Facebook as a significant preference (44%).



Giving

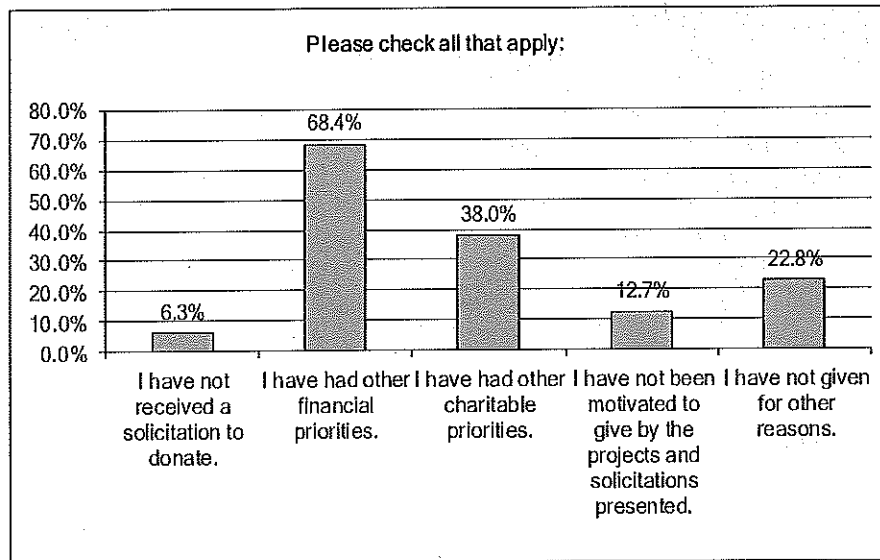
Donors vs. Non-Donors

Approximately four out of five respondents (80.6 percent) reported making a donation to Southwestern in the past five years. About 85% of the cohorts graduating before 1989 reported donating, as compared to 61% of the youngest cohort. Donors were more likely to be very positive about leadership.



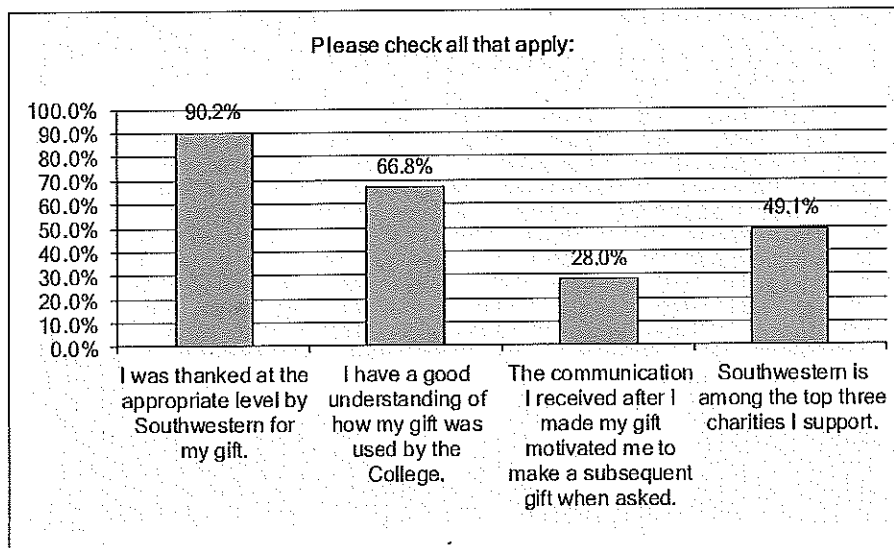
Reasons for Not Giving

The most frequently cited reason for not giving was “other financial priorities,” cited by 68.4 percent of respondents. Two out of five non-donors said they did not donate to Southwestern because they had other charitable priorities, and 12.7 percent said the projects for which they have been solicited simply did not motivate them to give.



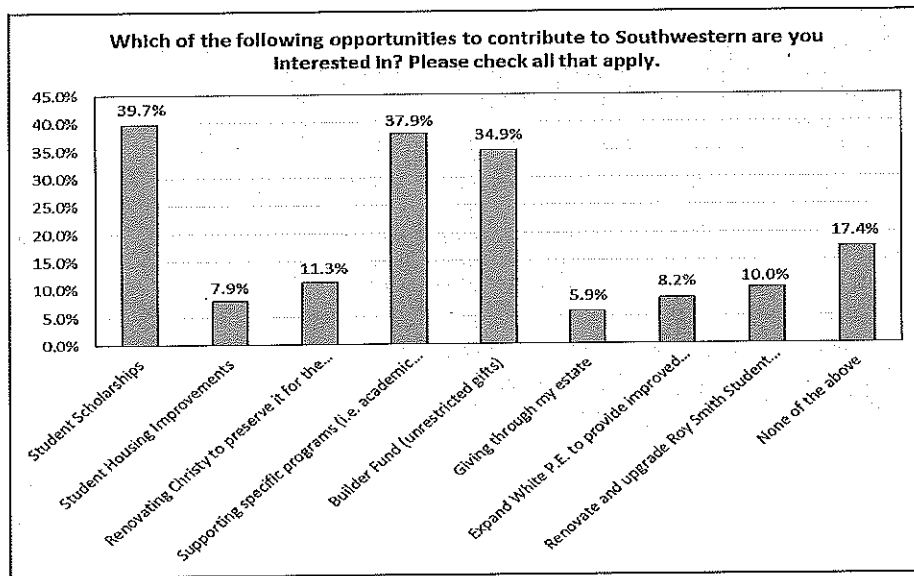
Stewardship

The vast majority of donors said they were thanked at the appropriate level (90.2 percent), and understood how their gift was used (66.8 percent). Friends rated Southwestern in their top three charities at a rate of 54%, alumni at 50%, and parents at 38%.



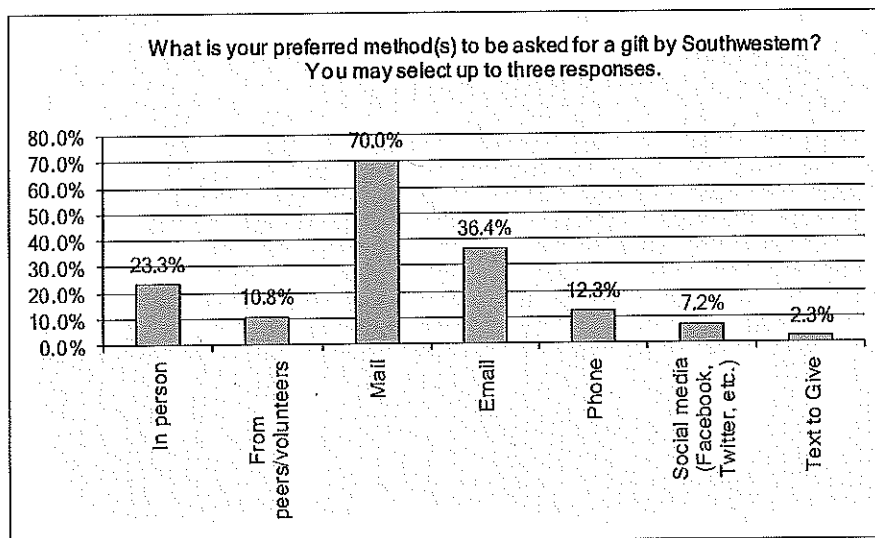
Giving Priorities

Nearly two out of five respondents identified support for scholarship students as the top priority for their giving. Giving to specific programs and the Builder Fund were also highly rated at rates of 37.9% and 34.9%.



Contact preferences

A majority of respondents (70 percent) prefer to be contacted about giving opportunities by mail. More than a third (36 percent) also cited email as an acceptable method of learning about giving opportunities.



Appendix D: Preliminary Case for Support

See separate document.