



April 5, 2019

Rachel Evey
Interim Executive Director
Wenatchee Valley College Foundation
1300 5th Street
Wenatchee, WA 98801

Re: Campaign Readiness Proposal

Dear Rachel,

Thank you for inviting Campbell & Company to partner with Wenatchee Valley College Foundation (the WVC Foundation) as it pursues a capital campaign to fund the Wells Hall Replacement and Center for Technical Education and Innovation. I appreciated the chance to speak with you about how the WVC Foundation is approaching this campaign and the results of the feasibility study. Your candor was valuable, and we are excited to partner with you to build campaign momentum. Based on our conversation, we have developed this proposal to articulate how we can help the WVC Foundation at this pivotal moment.

Throughout our 42 years of operation, our firm has worked with a broad range of higher education institutions. This work has included capital campaigns and philanthropic initiatives, endowment efforts, development audits, and other projects that have given us insight into the strategies that help organizations like the WVC Foundation succeed. While this collective experience will benefit the WVC Foundation, we also look forward to discovering your unique challenges and opportunities and developing a custom strategy accordingly.

We appreciate your interest in Campbell & Company, and we look forward to hearing your response to this proposal. We are open to modifying our approach based on further conversation with you. If you have any questions, please don't hesitate to contact me at (206) 494-3158 or james.plourde@campbellcompany.com.

Sincerely,

A handwritten signature in black ink, appearing to read "James Plourde", is written over a light blue rectangular background. The signature is fluid and cursive.

James Plourde, Vice President

CC: Kate Effland, Consultant



CAMPAIGN READINESS PROPOSAL

April 5, 2019

TABLE OF CONTENTS

Project Context and Approach.....	1
Our Impact	1
Scope of Services	4
Next Steps: Campaign Counsel	10
Professional Staff	11
Fees and Agreement	13

Note: *This proposal contains proprietary information, and we would appreciate you sharing it only among the staff and volunteers who are involved in the decision-making process. We promise to do the same for any sensitive information you share with us.*

PROJECT CONTEXT AND APPROACH

Wenatchee Valley College (WVC) is a valued institution in both the education community and the local community. Local businesses appreciate the pipeline of talent that WVC creates for Wenatchee Valley; high school students and their parents value the Running Start programming offered by WVC; and students appreciate the educational opportunities.

WVC has identified two capital projects that will allow it to better serve its community: replacing Wells Hall and building the Center for Technical Education and Innovation. These projects have been approved, and WVC administration has secured public funding for facilities within the Wells Hall Replacement, which will provide experiential learning opportunities for WVC students as well as the general public.

The WVC Foundation has already begun preparing for the campaign—conducting a feasibility study and securing two major estate gifts. As the Foundation proceeds with the campaign, it is seeking a partner to help guide campaign progress and build momentum. As the WVC Foundation’s partner, we will leverage a range of services to lead WVC to campaign success.

OUR IMPACT

LOCAL KNOWLEDGE WITH NATIONAL EXPERTISE

Campbell & Company has operated an office in Washington State since 1979. Since then, we have worked extensively in the state and Northwest region, serving organizations like Chelan-Douglas Land Trust, Numerica Performing Arts Center, Pacific Northwest University of Health Sciences, and Wenatchee Valley Humane Society. Through our work with many of the area’s leading nonprofits and philanthropists, we have come to deeply understand the fundraising community in the Wenatchee Valley.

We combine this understanding with a national presence in the nonprofit sector. We operate offices in cities nationwide, giving us a deep knowledge of national trends and developments in fundraising. By combining these strengths, we can develop carefully tailored strategies for each of our clients.

A FULL SET OF SERVICES

Campbell & Company provides a full set of services to help nonprofits prepare for, launch, and implement fundraising campaigns. By providing all services under one roof, we can address all strategic areas that underlie campaign success and organizational growth. We offer:

- Fundraising & campaign planning services
- Experienced fundraising counsel
- Extensive communications consulting
- A range of strategic information services
- Executive searches
- Strategic planning counsel
- Board and staff training
- Annual giving counsel

EXPERIENCE WITH HIGHER EDUCATION AND COMMUNITY COLLEGES

With a dedicated education practice, we have worked with hundreds of universities and community colleges throughout the country. Our experience has given us a strong understanding of the challenges and opportunities these institutions face as they pursue major campaigns. Our work with the Foundation will account for factors such as:

- The unique case for philanthropic support that community colleges can make as providers of affordable higher education—especially as the cost of four-year institutions continues to rise and more jobs require degrees
- The strong connection many community colleges maintain to major employers in their regions, providing opportunities for corporate partnerships that lead to significant philanthropy
- The role community colleges play as centers for economic progress and business innovation, attractive aspects for many foundations
- The challenge of serving an often non-traditional student body, including high school students in programs like Running Start
- The growing, but often relatively recent, role of philanthropy in community colleges' revenue mixes
- The importance of nurturing a culture of philanthropy among administrative leaders, key stakeholders, and others in the community who may not yet understand the potential of a comprehensive fundraising program

A TRACK RECORD OF SUCCESS

Numerous institutions of higher education nationwide have trusted our firm to help them navigate their most complex fundraising challenges. The following engagements highlight the impact we can have:

Campbell & Company provided campaign readiness services to **Pierce College** (Puyallup, WA) to help prepare the College for an unusual campaign. The College's goal is to establish an ongoing revenue stream by creating a working asset similar to an endowment, but with a much greater impact. We partnered with the College to solidify the campaign's scope, develop a case for philanthropic support and briefing materials, cultivate potential donors and leaders, establish a likely range for a campaign goal, and develop a campaign plan. We also conducted a capacity analysis to help identify and prioritize prospective donors. We are now serving as counsel for the \$3.3 million campaign and have conducted training for the Foundation Board, launched the Board campaign, and helped to recruit members of the Campaign Steering Committee. The campaign is on an expedited timeline and is expected to be completed by December 2019. It recently entered the leadership and major gifts phase and is on track to achieve its goals.

We provided campaign readiness services for the **Pacific Northwest University of Health Sciences** (Yakima, WA). PNWU is a new medical school that graduates physicians to serve the needs of rural communities, primarily in the five-state Northwest region. The school is now ready to make its first major expansion and to include additional programs in areas such as nursing, mental health, and dentistry. The study conducted in 2017 found a pathway toward a \$35 million goal. The University recently underwent a presidential transition and is waiting to begin the campaign until after undergoing a smooth leadership transition.

The Evergreen State College (Olympia, WA) retained Campbell & Company as a partner to help test the feasibility of and plan a major campaign. Our process included leveraging data, developing case messaging, and conducting extensive outreach to determine the right path for the College. The College is currently going through a 12- to 18-month advancement phase to refine campaign plans, cultivate early support, and confirm a working campaign goal, based on our recommendations.

Campbell & Company worked with **the University of Washington College of Engineering** (UW CoE; Seattle, WA) on a campaign planning study to determine readiness for a \$50 million effort. This campaign will build a new interdisciplinary engineering building and renovate a mechanical engineering building—all in aid of increasing enrollment and creating collaborative learning spaces. Over three months, from mid-June to mid-September 2018, we reviewed UW CoE's fundraising practices through a materials review and internal interviews; created a campaign preview document that explained UW CoE's campaign vision; and received case feedback through external interviews, an online survey, and a CPC meeting. At the conclusion of the study, we presented a final report with a strategy to move forward with a campaign.

This is just a sample of the experience we will bring to the WVC Foundation. We would be happy to discuss any of these engagements further as requested.

SCOPE OF SERVICES

TIMELINE

Campbell & Company anticipates that the campaign readiness work will unfold over the course of four to eight months depending on the level of communications support you select. Meeting this timeline will depend on our joint ability to schedule meetings. We will work with you to develop a more detailed timeline as part of our contract once you have made a decision.

STRATEGIC COUNSEL

We will help the WVC Foundation ready itself for the campaign, focusing on engaging staff and volunteers and increasing fundraising capacity. Through regular meetings with staff and leadership, as well as supplementary phone conversations as needed, we will focus on:

- Identifying, qualifying, and prioritizing key prospects, including potential foundation and corporate donors
- Developing tailored leadership gift cultivation and solicitation strategies
- Providing strategic guidance to leadership to guide the campaign through the leadership gifts phase

In addition to strategic counsel, we will provide the following additional services to help prepare the WVC Foundation for campaign achievement.

INTERNAL ASSESSMENT

The first stage of our work together serves multiple aims. By preparing staff and volunteers to participate in the study, we can lay the groundwork for an engaged, energized campaign leadership, in addition, by reviewing materials and gathering staff feedback, we can begin developing our recommended strategies and adjust the following stages of our process. We will:

- **Hold a kickoff meeting** in which we outline responsibilities and confirm the study process with the WVC Foundation's leadership. As part of this meeting, we will develop a detailed project schedule that articulates important meetings and due dates, as well as any important dates on the WVC Foundation's calendar.
- Engage staff and leadership in the campaign planning process through **internal interviews**, gaining a deeper understanding of how the WVC Foundation's fundraising team operates and building consensus for campaign plans. During this early phase of our work, we will conduct one-on-one conversations with staff and leadership involving in fundraising to allow the WVC Foundation's leadership to share their opinions of the organization, its operations, and its campaign plans. Our learnings from this process will help us outline what staff and resources will prepare the WVC Foundation for a transformative effort. In

addition, our conversations with these staff members will engage them further with the campaign and grow their understanding of their fundraising roles.

Our internal assessment will focus on key strategic areas, including strategic plans for fundraising, development organizational structure, volunteer and donor engagement efforts, and the capacity of the WVC Foundation's fundraising staffing and systems to support campaign goals.

ANALYTICS

Fundraising is as much a science as it is an art, and nonprofits can benefit greatly from applying a quantitative approach to strategic decisions. From what campaign goal to pursue to what prospects to prioritize, our process helps to inform these decisions with data. We will begin by **facilitating a wealth screening** using a variety of publicly available sources of data to provide a wealth rating for each prospect¹. Building on that data, we will **conduct a capacity analysis** of prospects in the database, which will quantify each prospect's philanthropic potential. This metric will be based on each prospect's wealth rating, likeliness to give, and giving history to Wenatchee

The results of the capacity analysis will then inform an **assessment of WVC's campaign potential**. We will **develop a gift table** articulating the number and level of gifts that the WVC Foundation will need achieve its goal, populate the table with prospects, and highlight levels where the WVC Foundation will need to identify additional prospects or advance relationships with existing prospects. By conducting this analysis, the WVC Foundation can determine the level of work and number of prospects necessary to meet its goals, as well as prioritize prospects with the highest giving capacity for solicitation. This process will provide the WVC Foundation with a list of prospects to prioritize for the campaign.

CASE FOR SUPPORT

To motivate major giving to its campaign, the WVC Foundation must communicate a powerful campaign vision and case for philanthropic support.

After reviewing a range of background materials, a member of our Communications Consulting team will lead a case development workshop and additional one-on-one interviews with key stakeholders to clarify the campaign vision and funding priorities. Through these interactions, we will work to answer:

- What does the aspirational vision for WVC look like, and how will this campaign help the WVC Foundation take a meaningful step toward that vision?

¹ We typically use DonorSearch for wealth screening services, but we are open to using other vendors based on the WVC Foundation's preference. If the Foundation chooses to use a vendor other than DonorSearch, we will have to adjust our cost to accommodate the cost of the screening.

- Why is realizing this vision urgent?
- What projects, programs, and priorities will gifts fund?
- Why is the WVC Foundation a powerful investment opportunity for donors, and what impact will their gifts make?

To prepare for leadership briefings, we will draft preliminary messaging in the form of a **brief campaign preview document** in a lightly-designed format that articulates the impact, urgency, and philanthropic appeal of the campaign. External interviewees will receive the guide in advance of their conversations with us, giving them the chance to prepare feedback and questions. The preview will also be used as a cultivation tool for early conversations with major and leadership donors.

The preview document will be used in the outreach activities described below. The feedback we receive will support the additional campaign communications work that we will complete, as described below. The campaign preview document can also be used as an interim cultivation document while subsequent case development efforts are underway.

OUTREACH

WVC's plans for Wells Hall and the Center for Technical Education and Innovation will require investments in the Foundation's fundraising programs and developing personal relationships with its current and potential supporters. To gain information on the capacity and philanthropic inclination of a wide range of donors and to cultivate prospects for future giving, Campbell & Company will conduct outreach to prospective supporters through:

- A **Board focus group**, aimed at gathering opinions about the proposed campaign. This session will be an informal, small-group discussion about the WVC Foundation and its campaign and will help to gauge the opinions of the Board as a whole, as well as to gain insights from Board members not participating in the leadership briefings. This focus group will also serve as an orientation to campaign fundraising, helping Board members better understand their roles in the campaign.
- **Leadership briefings** with key stakeholders and leadership gift prospects. The briefings will be small-group discussions, aimed at generating conversation and feedback about the WVC Foundation's campaign plans and key case messages. Through the briefings, the WVC Foundation will have the opportunity to build buy-in from prospects for its campaign plans, providing a valuable cultivation opportunity. Following the briefings, we will provide the WVC Foundation with resources to conduct additional briefings as the campaign proceeds. We envision two briefings led by the President and Executive Director for college staff and leadership with an additional three to five briefings led by members of the Board of Directors for Board members and donor prospects.

This process will gather specific feedback on the WVC Foundation, its plans and case messages, each prospect's likelihood of making a major gift, and their recommendations for any additional prospective donors or volunteers.

CAMPAIGN OPERATING PLAN

To support the strategic implementation of the campaign, we will develop a comprehensive campaign operating plan. The plan—a complete road map to help ensure momentum and early achievement—will include specific metrics, action steps, and tools surrounding the following, as appropriate:

- A detailed, metric-rich campaign timeline and plan that provides benchmarks for fundraising and a comprehensive schedule for the effort
- A schedule for Campaign Steering Committee meetings, Committee member job descriptions, and a volunteer handbook for the campaign
- Recommended donor engagement activities to enhance identification, qualification, cultivation, solicitation, and stewardship efforts for prospects at every level
- Investments in staffing and systems to support expanded fundraising activity, including an accompanying budget
- Recommendations around coordination of staff efforts, including reporting structure and responsibilities, as well as any additional staff needed to support enhanced fundraising activity
- Overview of volunteer roles in fundraising, as well as recruitment, onboarding, and training strategies for new and current Board members
- Effective relationship management strategies, including system usage, information tracking, and reporting policies and procedures
- Tactics for making the case to the WVC Foundation's prospects, potentially including recommendations for communications materials that should be delivered

The campaign operating plan will also include tools and guides, such as the campaign progress report dashboard, a prospect tracking document tailored to the WVC Foundation's database system, and gift acceptance and recognition policies.

CAMPAIGN COMMUNICATIONS

In addition to the preliminary case development, we have developed three options for building out preliminary messaging into finalized campaign materials and tools to support the WVC Foundation's campaign. All three of these tiers include the discovery and case development work as described above. Each subsequent tier includes all services as described in the above tiers as well as the services described for the specific tier. Each tier can be adjusted to better suit the WVC Foundation's needs based on further discussions.

OPTION I: CAMPAIGN MATERIALS CORE ESSENTIALS

In addition to the case development work described earlier in this proposal, we will create:

DONOR MATERIALS

Building on the campaign identity and case for support, we will create a designed donor cultivation deliverable that makes the case for WVC in visionary terms. We expect the format of the piece to be **one of two options**, depending on what best fits the WVC Foundation's donors:

- A **designed narrative brochure** that captures the full campaign case along with photography, stories, graphics, and other elements. The brochure will be approximately 12 to 20 pages and will be primarily useful as a leave-behind for major donor conversations.
- A **designed presentation** of the case for support in PowerPoint format. This presentation will capture high-level messages and campaign details and will include a set of talking points for presenters. As needed, the presentation can be printed out or loaded onto an iPad for use as a conversation guide or presented to groups of potential donors at cultivation events.

Based on the WVC Foundation's needs, we can also produce both deliverables instead of one for an additional cost.

OPTION II: CAMPAIGN MATERIALS ESSENTIALS PLUS

In addition to all activities described in option I, we will work with the WVC Foundation to provide:

CAMPAIGN IDENTITY

Campbell & Company will work with you to develop two to three potential identity concepts—each of which will include a campaign name, tagline, and sample messaging. We will then develop a visual identity for the chosen concept to include a logo/wordmark, color palette, typefaces, and other visual guidelines. The visual identity will be reviewed and approved by relevant staff.

CAMPAIGN OVERVIEW (ONE PAGER)

We will develop a "cheat sheet" for staff and volunteers. This document will provide an overview of the campaign and synthesize the case messaging platform to its most salient points, helping ambassadors develop personalized talking points and donor cultivation pitches.

OPTION III: EXPANDED CAMPAIGN MATERIALS

In addition to all activities described in options I and II, we will work with the WVC Foundation to provide:

PUBLIC PHASE COUNSEL

Members of our Communications Consulting team will provide spot counsel to the WVC Foundation during the six month period ramping up to and during the public phase. This counsel will include time to be used at WVC's discretion, and may include a range of activities supporting a more outward-facing campaign strategy. Services may include: reviewing and developing copy, adapting messaging to a public phase print piece or mailer, integrating campaign messaging into existing communications, advising on public phase and events strategy, and serving as an all-around thought partner on public phase strategies.

NEXT STEPS: CAMPAIGN COUNSEL

Once the campaign operating plan is complete, we will be available to provide ongoing strategic counsel to help the WVC Foundation launch its campaign and drive fundraising progress. The scope of work would be determined in consultation with the WVC Foundation and arranged under separate agreement. We can provide:

Campaign Management	Campaign management provides significant on-site and off-site support for the WVC Foundation’s campaign. This model is most useful for organizations currently dealing with a development leadership gap, with no development staff, and/or where significant preparatory work will be necessary before launching a campaign.
Tactical Counsel	Our services provide support for ongoing fundraising operations, developing individual donor tactics, and guiding overarching strategy. Tactical counsel can help the WVC Foundation build their fundraising teams, prepare for a campaign, and develop more effective infrastructure, all focused on the most critical tasks. Counsel will involve hands-on support and regular onsite meetings with staff and volunteers.
Strategic Counsel	This counsel model gives the WVC Foundation advice and mentorship on all areas of fundraising throughout its campaign. Organizations that benefit most from strategic counsel will likely have full staff capacity, well-coordinated fundraising practices, and a strong culture of philanthropy, needing only regular check-ins and occasional in-person participation in key meetings to maintain momentum.
Campaign Communications	To help the WVC Foundation tell the story of its campaign in a powerful, donor-focused way, we can offer a full set of communications services. Our work focuses on developing messaging that your supporters can embrace and materials that they can use, ensuring the case for support comes through in every conversation.
Strategic Information Services	Data can be a powerful fundraising tool. Our Strategic Information Services team helps to get you the most value from your existing data, helping to prioritize existing prospects, identify new ones, survey your community, manage your data, and more—giving you the right insights to make smart decisions.
Executive Search	A great leader makes an impact in every area of an organization they touch. With a broad network of potential candidates and deep research capabilities, our Executive Search team can find individuals with the skills and vision you need.
Additional Services	Innovation and creativity are driving values for our firm. We can work with you to solve whatever challenges you face, including annual giving, digital philanthropy, mid-level giving, prospect research, staffing, and more.

PROFESSIONAL STAFF

Our proposed team offers the skills and experience that the WVC Foundation requires.



JAMES PLOURDE
VICE PRESIDENT

RECENT CLIENTS SERVED:

Evergreen State College (Olympia, WA)
Pierce College (Tacoma, WA)
Seattle Colleges
Pacific Northwest University of Health
Sciences (Yakima, WA)

James has the admirable ability to tell it like it is and work with you to get all of your stakeholders on board and moving in the same direction. With more than 30 years of development and marketing experience and several successful multi-million-dollar campaigns under his belt, James is sought after for his collaborative and personable style.

Prior to joining the firm, James held leadership roles in three capital campaigns at Pacific Lutheran University that raised more than a combined \$220 million. James is Past-President of the Association of Fundraising Professionals South Sound. For your study, he will:

- Lead the partnership
- Provide strategic counsel
- Lead the Board Focus Group
- Participate in select leadership briefings



KATE EFFLAND
CONSULTANT

RECENT CLIENTS SERVED:

IGNITE (San Francisco, CA)
Girls' Middle School (Palo Alto, CA)

Kate brings nearly 10 years of diverse fundraising and nonprofit management experience to her work. She understands that data-driven strategies paired with sound fundraising operations are critical pillars for any successful organization and is passionate about helping organizations unearth resources to make a difference.

Kate held several leadership roles with the Taproot Foundation in Washington, DC and New York City, culminating with her role as Director of Philanthropy and Community Engagement in the Bay Area. Kate started her career in fundraising at the University of Maryland – College Park, where she spent several years as a fundraiser and administrative assistant for the Maryland Fund for Excellence. For your study, she will:

- Partner with James on the effort
- Participate in strategic counsel meetings
- Participate in select leadership briefings

Members of our **Strategic Information Services** team will conduct all analytics and contribute quantitative recommendations to our engagement.

An **additional member of our team** will provide logistical support throughout the engagement, conduct additional interviews, review materials, and schedule meetings.

Members of our **Communications Consulting** team will produce the philanthropic preview document and develop the collateral materials described. A **graphic designer** from the team will design the documents.

We request that the WVC Foundation assign one staff member to work with Campbell & Company to help coordinate our work together. One of the first components of our engagement will be to provide the WVC Foundation with a detailed list of requested materials to help us quickly assess the WVC Foundation's operations. In addition, we will ask key staff and Board members to review materials throughout our work together as appropriate.

FEES AND AGREEMENT

Based on the level of staffing and time required for this project, professional fees are projected as follows. We bill for professional fees at the beginning of each month.

CAMPAIGN READINESS WITH OPTION I COMMUNICATIONS	\$85,450
--	-----------------

This fee includes all services as described above with option I: campaign materials core essentials. The fee will be payable in four monthly payments of \$21,362.50

CAMPAIGN READINESS WITH OPTION II COMMUNICATIONS	\$96,875
---	-----------------

This fee includes all services as described above including all services in option I and option II: campaign materials essentials plus. The fee will be payable in four monthly payments of \$24,218.75

CAMPAIGN READINESS WITH OPTION III COMMUNICATIONS	\$112,475
--	------------------

This fee includes all services as described above including all services in option I, II, and III: expanded campaign materials. The fee will be payable in four monthly payments of \$28,118.75.

WEALTH SCREENING

The fees above includes the screening itself (conducted through DonorSearch) and all time needed to conduct the screening. The WVC Foundation will need access to DonorSearch's online tool through which we will deliver the screening results, and we will be able to provide a subscription to this tool at a discounted rate thanks to our partnership.

If the WVC Foundation would like to use a different organization for screening, we will help obtain quotes and adjust our costs to accommodate the changes.

EXPENSES	AT COST
-----------------	----------------

Expenses, which include travel and related costs, will be billed at the end of the month in which they are incurred.

The timeline, fees, and personnel we propose here assume that, if chosen, we will be able to begin the project within 90 days of today's date. At the time that the WVC Foundation decides to retain Campbell & Company, we will submit a letter of agreement confirming the terms of this relationship. This agreement provides for cancellation upon 30 days written notice.