Project Steps

• Strategic Analysis
• Quantitative Research
• Presentation of Key Findings and Implications
• Presentation of Recommendations
• Implementation Planning Workshops with Key Staff
  ‣ Set the stage for **July 2009** roll out of key initiatives by establishing priorities, designating lines of responsibility, and developing an implementation timeline.
  ‣ Collaborate on the refinement of strategies and tactics.
  ‣ Ensure recommendations are made an integral part of the implementation of the W&M strategic plan (to be finalized September 2009).
Alumni Study Research Methodology

• 501 completed interviews
• Requirements for participation:
  ‣ Attended the College of William & Mary as an undergraduate
• Telephone interviews conducted between January 15 and February 8, 2009
• Average interview length – 27 minutes
• Interviews conducted “blind” (i.e., without revealing sponsorship of study)
• Sample weighted by giving history and era to represent actual distribution in general alumni pool
Alumni Study Research Methodology – Quota groups

• Three giving cohorts:
  - Current givers (alumni who have given within the past 5 years)
  - Lapsed givers (alumni who have given but not within the past 5 years)
  - Never given

• Four class-year cohorts:
  - 1997 - 2008
  - 1985 - 1996
  - 1972 - 1984
  - 1920 – 1971
Critical Questions Explored in the Study

• What is the nature and degree of alumni affinity for W&M? Are there particular traditions or activities that inspire affinity?

• To what extent are alumni concerned about the recent controversies surrounding former President Nichol and have these concerns had a negative impact on alumni engagement and giving?

• To what extent are alumni aware of the actual contribution made by the state of Virginia to W&M’s operating budget? And to what extent will the knowledge that VA provides a very small percentage of W&M’s operating budget inspire greater financial support from alumni?
Critical Questions Explored in the Study (cont)

- How can W&M position itself in such a way as to inspire greater support from alumni?
- How can W&M communicate more effectively to its alumni?
- What opportunities does W&M have for educational, extracurricular, and other initiatives to maximize alumni interest in and commitment to W&M and improve fundraising results?
- Are there ways of structuring gifts that would be more appealing to alumni and inspire more support?
Key Findings and Strategic Implications
High Degree of Affinity for W&M

• **W&M has a strong foundation on which to begin inspiring stronger and higher levels of support** from its alumni.

• **William & Mary can count on the general positive regard of alumni**, and as it moves ahead in the strategic-planning process should not become distracted by concerns about recent controversies surrounding President Nichol.
Nature of Affinity for W&M

• Alumni seem to feel a strong overall affinity for W&M but beyond W&M’s distinguished history and beautiful campus did not identify many distinctive qualities that they are passionate about.

• New traditions W&M has created over the past several years, such as the Yule Log, clearly have an appeal and value to some, although a small proportion of, alumni.

• The prominence of civic engagement in the minds of young alumni and acknowledgement that opportunities for civic engagement have improved among cohorts of older alumni suggests that W&M’s efforts to increase opportunities for civic engagement and make civic engagement more central to its identity have been successful.
Philanthropic Activity

• *W&M alumni are givers.* Their income profile puts a significant number of alumni in a position to give and to give more generously to W&M than is currently the case.

• The strong feelings for the University combined with giving disposition and capacity suggest that *W&M has neither made a compelling case for giving nor cultivated the kind of relationships with alumni that would provide a stronger impetus for philanthropic support.*
Motivations for Giving/Not Giving

• While it is clear that preservation of the W&M experience and the beauty of the campus is important to alumni, there’s a danger that too much emphasis on preservation will continue to consign W&M to a secondary giving priority. It is critical to talk about the value and characteristics of W&M (including its size) and the beauty of the campus, but to do so in a way that emphasizes more specific goals that will be personally compelling to alumni and make W&M a more urgent priority for support.

• A high proportion of alumni believe they can’t make a gift that is large enough to make a difference. This is a substantial barrier to giving.

• As the findings show, a gift that is “too small” in the estimation of many alumni could be substantial in comparison to current average gifts at various levels. Educating alumni about the value of gifts to W&M has the potential to substantially increase participation as well as dollars raised.
Motivations for Giving/Not Giving

- \textit{It is critical to find ways to encourage giving, even of small gift amounts.} For example, in 2007, 43\% of alumni givers (roughly 9\% of all W&M alumni) gave less than $100, and almost 45,000 alumni gave nothing. (In FY 2007 there were 9,220 alumni donors out of total of 53,862 active alumni.) Three strategies to motivate giving from these groups are to
  
  - Make a more compelling case that every gift, whatever its size, makes an important difference, and suggest appropriate gift sizes for donors to emphasize the point and dispel current misperceptions.
  
  - Develop matching gifts to leverage alumni gifts of a certain size.
  
  - Enable alumni to designate gifts in areas of personal importance to them and that are aligned with key W&M goals.
Declining State Support for W&M

• *Alumni consistently overestimate the amount of support given to W&M by the state of Virginia*; only a very small percentage of alumni give to compensate for declining state support.

• There is some indication that raising awareness may inspire more support among some alumni. However, emphasis on declining state support is only one among a number of messages we tested; we found no significant differences between the power of this message as opposed to other messages (small gifts add up, support ensures deserving students can attend W&M, etc.).

• *Declining state support is not the basis on which W&M can motivate dramatically greater giving, but it is an element of the argument that needs to be made* about serving and advancing the specific goals required to preserve and enhance the qualities of W&M that are important to alumni. All things considered, W&M should focus on educating its alumni about this issue, but not give it inordinate emphasis.
Communications

• Around a fifth of alumni consider themselves “very informed.” The issue here does not seem to be inadequate availability of information about the University, but lack of interest and engagement on the part of alumni.

• The *Alumni Magazine*, which is mailed to all alumni on a non-subscription basis, is *the single most popular source of information among alumni and remains an important communications tool*. This, along with communications from the President, should remain an important part of W&M’s communications efforts.

• *Communications from the President* present an opportunity to win more attention and greater engagement from alumni.
Communications

• Although younger alumni are more likely to prefer electronic communications, even this group cited the Alumni Magazine as an important source of information about the University. So, **while the move toward increasing electronic communications is inevitable, print materials continue to be important.**

• While alumni are interested in the activities of their fellow alumni, it is important also to focus on the University’s strategic goals and priorities.

• **The Alumni Magazine needs to be made to play a more proactive role** in identifying W&M’s vision, strategic goals, and needs and articulating the reasons these merit the support of alumni who are eager for their giving to make a difference.
Positioning William & Mary

- Currently, many alumni highly value W&M and their undergraduate experience it provided. However, *a fairly low percentage give back to the University.*

- Nothing in the research findings suggests that generalities are appealing to alumni or that typical “fundraising fluff” will be an effective motivator. Rather, *alumni will be motivated to give or increase their giving through particular goals of personal interest.* W&M needs to become a personal cause for each alumnus/a. The challenge for W&M is to articulate how support of particular goals and objectives of individual alumni will serve W&M as a whole, helping to sustain its distinctive character and to further its institutional goals.

- Nothing in our qualitative or quantitative research suggests that W&M alumni have a clear idea of what the University stands for besides quality education, a lovely campus, and a rich history.
Positioning William & Mary (cont)

- Strategically, **W&M has to move from a “preservation” to a more forward-looking position** that gives W&M’s rich history a contemporary, proactive meaning and builds a sense that W&M serves an important leadership role in higher education, especially in the public sector.

- It is important to recognize that of all the goals W&M might adopt, the two that would generate the most financial support are preserving the beauty of the campus and preserving the fundamental characteristics of the College (current size, quality of teaching, strong community, and balanced academic and social life). No other strong preferences emerged from the research regarding possible University goals.

- **By itself, the “preservationist” motivation cited above is unlikely to inspire a significant increase in giving.** Alumni must be offered a compelling vision of what the University stands for and why what it represents is important. This argument is all the more important in the current economic circumstances as W&M must compete for fewer available dollars with other giving priorities that may seem more urgent to alumni.
Positioning William & Mary (cont)

- Ratings for the three positioning models tested—Liberal Arts for the 21st Century, Citizen Leaders, Students to Change the World—were virtually identical for all groups. The relatively high mean (7.3 mean overall for each model) is good news insofar as it suggests alumni would embrace any of these directions. But the lack of differentiation supports the idea that a strong, forward-looking vision for the University consistent with its values and historic distinctions would have strong appeal among alumni. Whatever vision is embraced by the University, great care must be taken to ensure that alumni see it as a relevant and inspiring giving priority.
Summary of Strategic Recommendations
The recommendations that follow support three “Grand Challenges”:

- **Grand Challenge 3**: Build an ever more engaging educational environment that maximizes student learning, fosters personal development, and inspires a lifelong commitment to W&M.

- **Grand Challenge 4**: Develop and implement a business plan that maximizes revenue sources and ensures transparent resource allocation in support of College priorities and needs.

- **Grand Challenge 6**: Articulate more clearly W&M’s identity, mission, and goals, and implement a more effective model for internal and external communication.
Strategic Recommendations in Relation to Grand Challenges

A. Adopt a Positioning Platform and Key Themes and Messages to Guide Communications about William & Mary (Grand Challenge 6)

B. Increase Levels of Support among Alumni (Grand Challenge 4)

C. Build Stronger Engagement and Interest among Alumni (Grand Challenge 3)

D. Build Stronger Engagement and Interest among Current Students (Grand Challenge 3)

E. Enhance Major Communications (Grand Challenge 6)

F. Cultivate Key Alumni Segments (Grand Challenge 6)
A. Adopt a Positioning Platform and Key Themes and Messages to Guide Communications regarding William & Mary

- **Summary of recommendations supporting *Grand Challenge 6***

  1) Develop a positioning platform that inform alumni relations, development, and annual fund communications. The platform should also inform communications from the President and other senior leadership of the University.

  2) Appropriate key themes and messages should be touched on in all major communications.
Positioning Platform

There’s only one William & Mary

• (Note. A Word document has been provided that gives a full description of the full position strategy and platform)
Key Themes and Messages

• **William & Mary is an essential model for public university education at its best.** As public institutions grow to mammoth size, become more preoccupied with research at the expense of teaching, and adopt an increasingly mass-market approach to education, William & Mary has preserved a very human scale and character.

• **Exceptional quality.** William & Mary offers an exceptionally challenging curriculum and an extraordinarily rich experience for its students, some of the brightest in the nation and the world.

• **Liberal arts for the 21st century.** Working closely with faculty, students conduct research and scholarship on important questions; develop strong analytical skills, learning to see all sides of an issue; fashion balanced solutions to problems; and communicate effectively—qualities essential for the kind of young men and women these challenging times demand.
• **A beautiful and historic campus with profound meaning for alumni and the nation.** The community formed within the bounds of its historic campus, with its venerable brick buildings and walkways, its ancient trees and graceful landscapes, is cherished by students, faculty, and alumni alike. Perhaps more than any campus in America, it symbolizes the historic value of higher education to our nation.

• **A storied history.** Steeped in the nation’s Colonial heritage W&M has a celebrated history of educating citizen leaders who have been at the heart of our nation’s life, liberty, and happiness.

• **A source of leadership.** Here, students from all backgrounds thrive in an environment of extraordinary rigor built on a shared academic and social experience that prepares them for leadership in their professions, community, and personal lives. Its students arrive yearning to change the world for the better. Here they find the knowledge, know-how, and courage to do just that.
B. Increase Levels of Support among Alumni

• Summary of recommendations supporting *Grand Challenge 4*

1) Reposition and restructure annual giving for W&M. Treat each year’s annual-giving effort for the College as a mini-campaign focused on a major strategic theme.

2) Develop and promote a matching-gifts program.

3) Provide alumni options for making gifts that support particular areas of interest.

4) Educate alumni about levels of state support and other issues related to financial consequences of being a state-supported university.

5) Emphasize in all communications the differences that gifts make at every level.

6) Honor and reward smaller gifts as well as consistent giving (cumulative and loyalty giving).
Examples of about how the Annual Fund might be rebranded

- **William & Mary Annual Renewal Fund**
  - *Sustaining William & Mary as a standard for public higher education*
  - Use the Wythe phoenix crest as the symbol for the fund.

- **William & Mary Fifth Century Fund**
  - *Helping William & Mary redefine public higher education for the 21st century*
  - Use imaginative rendering of W&M weathervane (featured on website) to suggest direction.
B. Build Stronger Engagement and Interest among Alumni

- **Summary of recommendations supporting Grand Challenge 3**

  1) Institute a W&M Past & Future Day designed to illustrate how W&M’s history is relevant to its goals for the future.

  2) Launch an Ask-a-Friend “Buzz” Campaign to increase level of conversation about W&M.

  3) Institute a W&M Fifth Century Today program to bring potential alumni leaders and donors to campus.
C. Build Stronger Engagement and Interest among Current Students

- **Summary of recommendations supporting Grand Challenge 3**

1) Adopt more positive and supportive rhetoric in introducing freshmen to the W&M experience.

2) Provide more and richer opportunities for students to interact with alumni.

3) Consider launching an ambitious, campus-wide freshman experience designed to generate discussion each year around topics related to one of W&M’s strategic goals.

4) Make students and parents more aware of alumni contributions to financial aid and other initiatives.

5) Memorialize alumni giving on campus.
D. Enhance Major Communications

• **Summary of recommendations supporting *Grand Challenge 6***

1) Develop a coordinated plan to drive the content of all major communications.

2) Create a cross-functional communications task force with a mandate to coordinate and oversee implementation of new communications initiatives.

3) Use the *Alumni Magazine* as a tool to promote the new annual giving structure, with each issue focused on a theme related to the strategic plan.

4) The class notes section of the *Alumni Magazine* should provide regular features that address giving, e.g., updates on annual fund, recognition of donors, and examples of how annual-fund gifts are being used.
E. Cultivate Key Segments of Alumni

- Surprisingly, similar themes and college objectives important to alumni have roughly the same appeal across all the subgroups studied. This means that differentiation in message across age cohorts and other subgroups is a matter of emphasis, not of content. However, three groups will be especially important for W&M to reach—younger alumni, who demonstrate a high affinity with W&M; alumni with children near or at college age; and alumni couples. We recommend that W&M develop activities, messages, and direct communications to these three groups.
Cultivate Key Segments of Alumni (cont)

• Summary of recommendations supporting Grand Challenge 6

1) Capitalize on the enthusiasm of W&M’s younger alumni, especially that of the 1997-2008 era. For example, provide online or in-person social or professional networking opportunities.

2) Develop activities, messages, and direct communications to alumni with college-aged children. For example, develop communications and events around the issue of college application and selection.

3) Consider W&M couples as a potentially important segment for cultivation. Develop special communications and events for W&M couples. These might include Valentine’s Day cards, homecoming events, and special giving clubs for couples who donate over a certain amount or with a certain frequency.
Next Steps

• Revise and submit final versions of full research report and report of findings and recommendations (April 30).

• Plan implementation planning workshops with key staff. Goals of workshops will include the following:
  ‣ Set the stage for **July 2009** roll out of key initiatives by establishing priorities, designating lines of responsibility, and developing an implementation timeline.
  ‣ Refine strategies and tactics.
  ‣ Ensure recommendations are made an integral part of the implementation of the W&M strategic plan (to be finalized September 2009).