



Board of Trustees
Advancement, Marketing and External Relations Committee

December 18, 2025

Time 1:15 p.m.

Loughman Living Room, Scanlon Hall

A live stream of the meeting for public viewing will also take place at the following link: <https://www.westfield.ma.edu/live>

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|--|---|
| 1. Call to Order | Trustee Gloria Williams |
| 2. Approval of Minutes
a. October 21, 2025 | Trustee Gloria Williams |
| 3. Items for Information
a. Fundraising/Engagement/Alumni/Metrics
• President Linda Thompson's Scholarship for Student Access and Success
b. Advancement
• Campaign Framework and Budget Proposal | Ms. Lisa McMahon

Ms. Kathy Howrigan
Howrigan Consulting |
| 4. Items for Action
a. Motion – Fundraising Campaign
b. Motion – Staff Emeriti | Ms. Lisa McMahon
Ms. Lisa McMahon |

Attachments:

- a. Draft Minutes of October 21, 2025
- b. Advancement Additional PowerPoint Slides
- c. Howrigan Consulting PowerPoint
- d. Westfield State Campaign Planning Study Report
- e. Motion – Fundraising Campaign
- f. Motion – Staff Emeriti
- g. Staff Emeriti Biographies



Board of Trustees
Advancement, Marketing, and External Relations Committee
Minutes

October 21, 2025, 10:45 a.m.

President's Boardroom, Horace Mann Center

A live stream of the meeting for public viewing will also take place at the following link:

<https://www.westfield.ma.edu/live>

MEMBERS PRESENT: Committee Chair Dr. Gloria Williams, Vice Chair Chris Montemayor, Secretary Barney Garcia, Trustee Michael O'Rourke, Trustee Jason Queenin, and Board Chair Ali Salehi, ex-officio member

Also present and participating were Westfield State University President, Dr. Linda Thompson, Vice President for Institutional Advancement, Lisa McMahon and Executive Director of Institutional Advancement and Westfield State University Foundation, William Hynes.

The meeting was called to order at 10:46 a.m. by Committee Chair Dr. Gloria Williams and it was announced that the meeting was being livestreamed and recorded.

MOTION made by Trustee Queenin, seconded by Trustee O'Rourke, to approve the minutes from the June 11, 2025, meetings. There being no discussion, a roll call was conducted, and the **Motion passed**.

Fundraising / Engagement / Alumni

- The fundraising goal was to reach 2.03 million, and they reached just under 2.4 million, an 11% growth.
- Funds go to scholarships, Owl athletics, and unrestricted funds across many departments.

Dashboard Presentation

- 1,314 donors last year.
- Increased crowdfunding, with recognition given to the Director of Athletics, Richard Lenfest and his coaches for embracing crowdfunding and raising revenue for their teams.
- The plan is to extend the crowdfunding approach to new deans and departments, particularly around "give-a-hoot" in March.

Homecoming/ Online Auction

- Events are scheduled starting on October 23, 2025 including a fall festival by student affairs, a ribbon cutting, and alumni poetry events.
- The Athletic Hall of Fame will be held in the evening.

- New additions include an alumni breakfast for legacy families and mini-classes offered by Nicole West (Psychology of Friendship), George Ramirez (graphic design), and PB STEM (innovation challenge).

Online Auction

- The online auction starts on October 19, 2025 and runs through the 24th.
- Attendees are encouraged to "bid high and bid often" using the QR code.
- The online auction is different because families, faculty, and staff have offered opportunities.
- Examples of opportunities: book clubs, simulation labs, working with student government.
- A high school senior interested in student government and Westfield State can spend the day with student government officers.
- The online auction is in its third year.
- People can help by passing along the QR code or link to others, even those not affiliated with Westfield State.
- There are about 100 auction items, with about 20 unique to Westfield State.
- The auction has about \$22,000 worth of items up for bids.

Fundraising Campaign Planning Update

- Since the spring, data has been gathered and stakeholders across campus have been interviewed to develop a prospectus.
- An ad hoc committee was created with representation from all three volunteer boards.
- The committee is reviewing the prospectus and will serve as a sounding board and steward for the campaign's discovery phase.
- The consultant is soliciting feedback on the prospectus from internal and external constituents.
- Prospect analysis and segmentation are being conducted to identify who will make up the donor pyramid.
- The discovery process will be completed, and findings will be presented in December.
- A full case for support, a dollar goal, and a recommended budget will be presented for consideration.

FY26 Snapshot

- The current total is about 1.5 million in gifts and grants, with 277 gifts.
- Key Performance Indicators (KPIs) to be presented each time: total dollars in donations, total number of donors, and total numbers of alumni engagement.
- Working with Advancement Services to accurately capture alumni engagement data.

Capturing Alumni Engagement

- Departments often bring in alumni without the knowledge of a central tracking system.
- It's important to capture all alumni engagement because it can take a long time to cultivate major gifts, sometimes "40 years of engagement."

Campaign Staffing

- Additional staff will be needed to "pound the pavement" and "hit the ground."
- The people being interviewed are from across the country to get different perspectives on the campaign.

Foundation and Affinity Groups

- A foundation member in the Boston area is willing to bring people together with a case for support.
- The Cape Cod affinity group has grown to over 100 people in the last couple of years.
- Efforts are being made to rebuild the Washington, D.C. cluster and create a Boston cluster.

Campaign Strategies

- Smaller receptions work well during campaigns because "there's so much noise."
 - Bringing deans, board members, the president, and staff makes a big difference in smaller groups.
- The goal is to get the information out there and get their input.

No further discussion,

MOTION made by Trustee Queenin, seconded by Trustee Montemayor, to adjourn the meeting. There being no discussion, a roll call was conducted, **Motion passed unanimously.**

Meeting adjourned at 11:03 AM.

Attachments:

- a. Draft Minutes of June 11, 2025
- b. FY25 Thank You successful year
- c. FY25 Q4 IA Dashboard
- d. 2025 Homecoming flyer
- e. Online Auction Notecard 2025
- f. Westfield State University Annual Online Auction Sponsorship (Final)

Secretary's Certificate

I hereby certify that the foregoing is a true and correct copy of the approved minutes of the Westfield State University Board of Trustees Advancement, Marketing, and External Affairs Committee meeting held on October 21, 2025.

Barney Garcia, Secretary

Date

Grant Portfolio Fiscal 25.26
Institutional Advancement, Corporate and Foundation Grants

Updated 12.15.25

Total Active Grants: \$1,915,137
 Total Planned Grants @ 60%: \$150,000
 Projected Total: \$2,065,137

Active Grants

Funder	Award Date	Paid Date	TY Letter	Award \$	Program	Grant Period	Prgss Rpt	Final Rpt	Notes
Klarman Family Foundation	07.22.25	08.13.25	President	\$ 900,000	BSW/MSW	07.01.25-06.30.27	01.31.26 07.15.26 01.31.27	07.15.27	BSW/MSW Scholarships
Mass Bee Foundation	09.15.25	09.15.25	09.15.25	\$ 500	Environment	09.15.25-06.30.26	None	06.30.25	Campus Meadow
The Irene E. & George A. Davis Fnd	09.29.25	10.20.25	10.22.25	\$ 60,000	LEAD Scholars	10.01.25-09.30.26	04.15.26	10.15.26	Renewal
Peckham Family Foundation	10.15.25	10.15.25	10.15.25	\$ 700	OwlsHOwls	10.01.25-09.30.26	None	10.01.25	Owls Helping Owls
Davis Educational Foundation	12.03.25	12.10.25	President	\$ 449,980	WISE	12.01.25-11.30.27	01.31.27	01.31.28	WISE: Gen Ed Reform
The Irene E. & George A. Davis Fnd	12.14.25			\$ 50,000	Innovation	12.01.25-11.30.26			Innovation Curriculum
MassLife Sciences Capital	06.25.25*	Reimburse	07.10.25	\$ 453,957	Biology	07.01.25--6.30.26	06.30.27 06.30.28	06.30.29	Bioinformatics Computer Lab Reno Wilson 214
Total				\$ 1,915,137					

* Recorded in FY25: Reimbursement Grant to be paid in FY26

Planned Submissions

Foundation	Due Date	Ask \$	Program	Comments	Potential
Beveridge Family Foundation	02.01.26	\$ 35,000	Finance Lab	Equipment	10
Amelia Peabody Foundation	02.03.26	\$ 10,000	Music Therapy	Capital/Program	6
Agnes M. Lindsay Trust	LOI Rolling	\$ 5,000	Common Goods	Pantry Operations	8
Mass Life Sciences Capital	03.01.26	\$ 200,000	Genomics	Collaboration	8
Total		\$ 250,000			

Awarded Grants
Fiscal 24.25
6.30.25

Foundation	Award	Paid Date	TY Letter	Award \$	Program	Grant Period	Report	Final Rpt	Notes
Irene E. & George A. Davis Fnd	9.16.24	10.21.24	10.24.24	\$ 55,000	LEAD	10.1.24-9.30.25	NA	10.30.25	LEAD Scholars
Glenn W. Bailey Foundation	12.13.24	12.30.24	1.14.25	\$ 30,000	RIDE	12.1.24-12.1.25	NA	12.13.25	Internships
Total				\$ 85,000					

Together – we did it!

\$1 MILLION+



President Linda Thompson

Scholarship for Student Access and Success

Empowering students to achieve academic excellence, engage in valuable internship opportunities, and graduate with less debt – setting them up for a greater success in their careers and lives



Together We Soar: A Campaign for Westfield State University

Campaign Framework and Budget Proposal

Lisa McMahon, Interim Vice President for University Advancement

Kathy Howrigan, KHow Consulting

Agenda for Today

- Background
- Findings and Recommendations
- Next Steps - Approval and Funding Framework

Background

- Prior fundraising efforts and campaign history
- 2019 philanthropic planning study
- Factors prompting engagement of external consulting support
- Organizational preparation underway (2024–2025): assessment, staffing, data & systems
- Formation and charge of the Ad Hoc Committee

Campaign Priorities / Preliminary Prospectus

Three Pillars:

- Advancing Access for Student Success
- Innovation in Teaching, Learning & Career Readiness
- Regional Impact in Health, Human Development & Community Well-Being

TOGETHER WE SOAR!

The Campaign for Westfield State University

Together We Soar! represents Westfield State's commitment to students, to Massachusetts, and to the future of public higher education. These pillars define our strategic focus and where donor partnership creates the greatest impact.

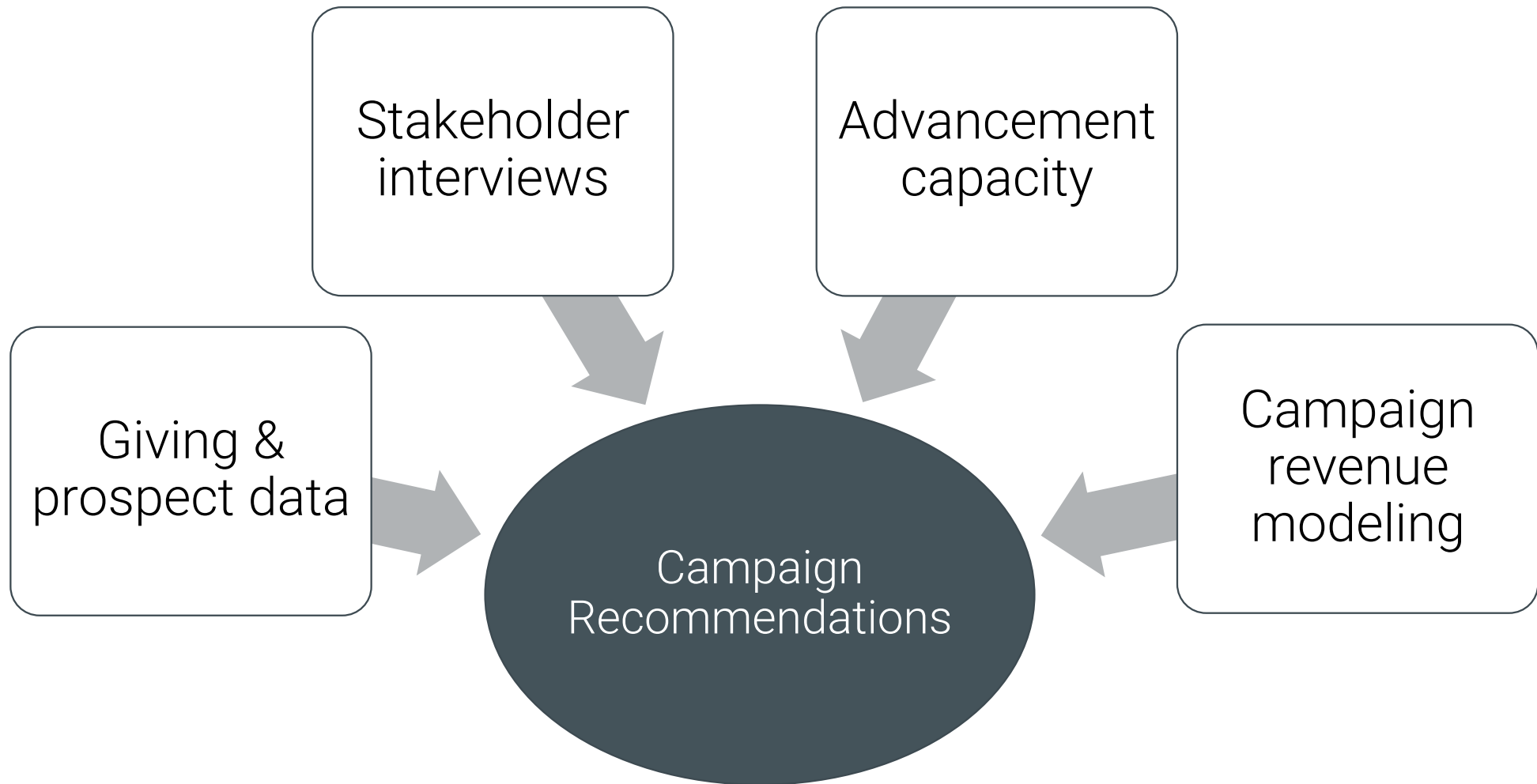
Each priority transforms opportunity into achievement, and potential into lasting impact.



Campaign Study: Purpose & Approach

Prospect Analysis and Stakeholder Interviews

How We Assessed Campaign Feasibility



Stakeholder Perspectives: Appetite, Leadership & Expectations

- **Strong Appetite for a Campaign**
 - Viewed as timely and very important
 - Sense of momentum: *"It's time. People are waiting to be asked."*
- **High Confidence in Leadership**
 - Strong trust in the President's vision
 - Leadership seen as a major institutional asset
- **Desire for Sharper Focus & Outcomes**
 - Interest in a concise set of priorities
 - Need for clearer metrics and impact
 - Expectation of disciplined, consistent execution

Stakeholder Takeaways: Readiness, Capacity, & Engagement Needs

- **Supportive, but Aware of Readiness Gaps**
 - Believe WSU can be campaign-ready
 - Concerns about follow-through and shifting priorities
- **Call for Stronger Advancement Infrastructure**
 - Need for deeper major-gift capacity
 - Desire for better data and more coordinated strategy
 - Stronger stewardship and relationship management
- **Interest in a More Robust Engagement Platform**
 - Clearer roles for volunteers, trustees, academic leaders
 - Eagerness to participate when structure and guidance are provided

Stakeholder Feedback on Priorities & Case for Support

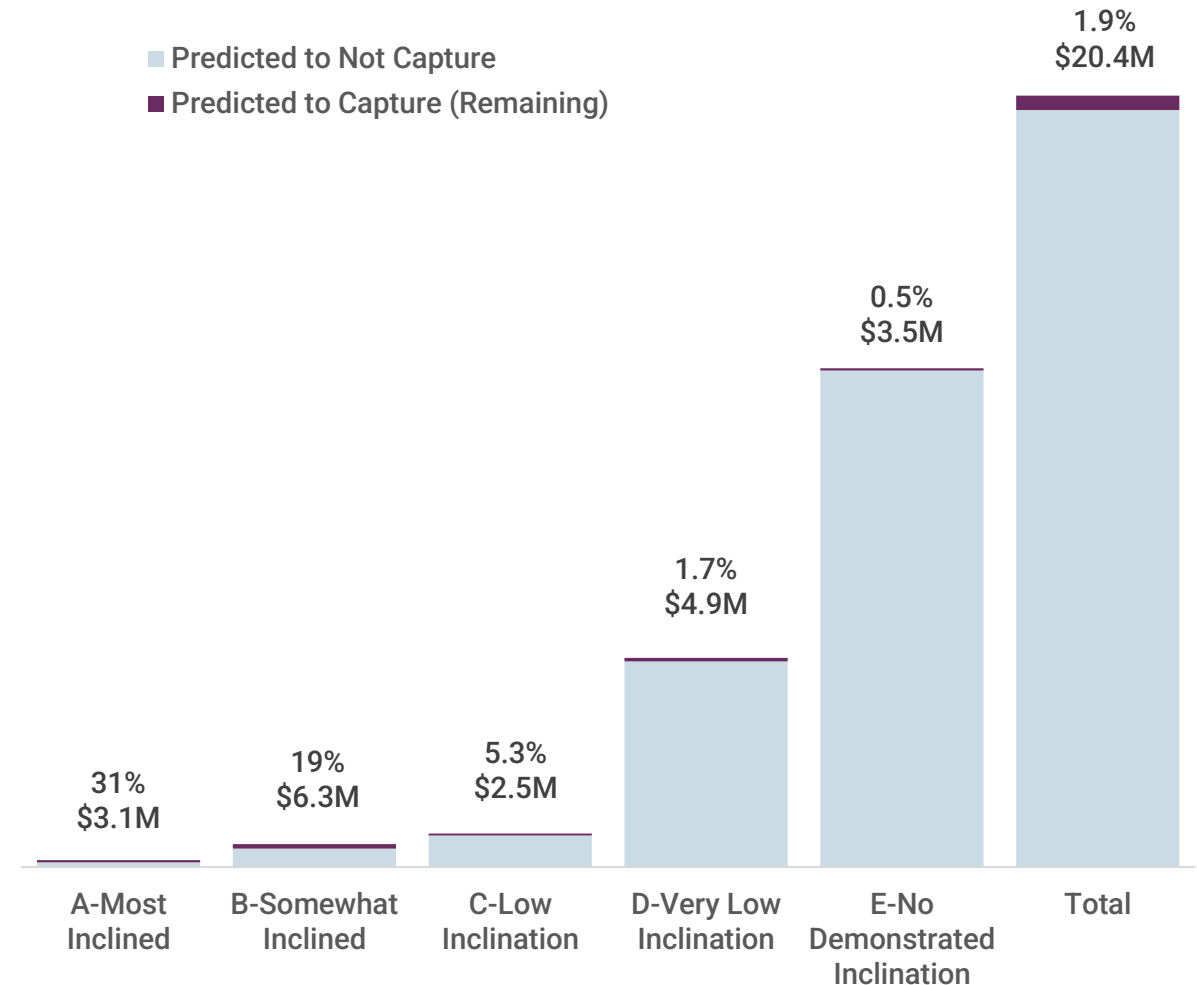
- **Strong Resonance**
 - Student access, scholarships, affordability
 - Workforce-aligned programs (nursing, PA, education, behavioral health, business, CJ)
 - Innovation in teaching, applied learning, and career readiness
 - Interest in a tangible capital anchor (e.g., Health & Human Development Building)*
- **Areas Stakeholders Want Refined**
 - More focused, streamlined priorities
 - Clearer outcomes, metrics, and impact (student reach, jobs, ROI)
 - Less abstraction; more specific, concrete language
 - Greater differentiation from other institutions

*Note: HHD was not presented in detail, though a few donors were aware of it.

Prospect Analysis

Individual Prospect Capacity Overview

- Modeled individual donor campaign potential (conservative): \$20.4M*
- Represents ~1.9% of potential total maximum capacity
- Capacity is concentrated among a relatively small number of high-capacity households
- ***Data from Prospect Analysis (2025): Individual Major Gift Potential (excludes grants, planned gifts, and annual giving)*



Individual Prospect Pool: Strengths & Gaps

Strengths

- **~550 A/B-rated households** show moderate-strong inclination
- Adequate prospects for most major-gift levels below \$1M
- Extraordinary level of untapped potential capacity among **non-alumni and Alumni**
- Strong loyalty and giving patterns among alumni donors

Gaps

- Only **1 known A/B prospect** at the \$1M+ level
- Limited qualification of high-capacity households
- **~850 major gift prospects will need to be cultivated** - exceeds current staffing
- Need stronger data, systems, and prospect strategy infrastructure

Individual Donor Gift Table Feasibility & Coverage

- Strong coverage for most major-gift levels based on current **A/B prospects**
- Key vulnerability is insufficient qualified prospects at the \$1M+ tier
- B–C level prospects require targeted qualification to fill mid-level leadership roles
- Early presidential engagement is critical to build the top of the table

Gift Level	Gifts Needed	Coverage Status	Notes
\$1M+	4 gifts (\$7M)	⚠ Needs Qualification	Only 1 known <i>high-inclination</i> prospect
\$500K–\$999K	9	✓ Adequate	Requires cultivation
\$250K–\$499K	12	✓ Adequate	Strong A/B representation
\$100K–\$249K	29	✓ Adequate	Good depth
\$50K–\$99K	54	✓ Adequate	Strongest mid-level pool
\$25K–\$49K	80	✓ Adequate	Large prospect base
\$10K–\$24K	100	✓ Adequate	Largest pool segment

Major Gifts Must Lead the Campaign

- Estimated *individual* capture potential: \$20.4M
- Does **not include** corporate, foundation, government, and planned gifts
- Principal gifts (\$1M+) represent 35% of the goal
- Annual donors & mid-level donors represent <30% of dollars
- Campaign must be driven by major gifts and principal gifts.

***Data from Prospect Analysis (2025): Individual Major Gift Potential (excludes grants, planned gifts, and annual giving)*

Staffing Requirements: What Analytics & Stakeholders Say Is Needed for Campaign Success

Analytics Show:

- Campaign requires managing **~850 prospects**
- Need to close **~250 major + principal gifts** over 5–7 years
- Only **1 known \$1M+ prospect** today → early qualification essential
- Current staffing cannot support required portfolio volume or cadence
- Major gifts must lead the campaign → requires disciplined portfolios

Stakeholders Emphasized:

- Need for **stronger advancement structure and leadership**
- Desire for **clear roles**, better systems, and consistent follow-through
- Concern about limited major-gift depth and uneven cultivation
- Expectation for **better donor stewardship** and impact reporting
- Want WSU to demonstrate campaign readiness and stability

Recommended Additions:

- **Campaign Director**
(coordination, planning, reporting, volunteer structure)
- **Major Gift Officer**
(qualification + major gift cultivation)
- **Director of Donor Relations**
(impact reporting, stewardship, recognition)

Campaign Recommendations

Campaign Scale & Shape

- **\$25–\$30M** comprehensive campaign over **5–7 years**
- At least **\$20M** from *individual* major gifts
- Additional support from **corporations, foundations & planned gifts**
- **Health & Human Development Building (HHD)** as the **anchor project**
- All aligned to the **three Together We Soar pillars**



Advancing Access for Student Success



Regional Impact in Health, Human Development & Community Well-Being



Innovation in Teaching, Learning & Career Readiness

Flagship Priority: Health & Human Development Building

- Aligns with **regional workforce demand** in health & human services
- Home for **nursing, PA, public health, movement science, gerontology, behavioral health including social work, and psychology**
- Potential for **integrated health services (clinical)** and **public-private partnerships**
- **General purpose** classrooms with innovative technology
- Creates **seven-figure and naming opportunities**
- Provides a **tangible centerpiece** for early leadership conversations

How We'd Phase the Campaign

Phase 0: Readiness (6–12 months)

- Hire **Campaign Director**
- Advance HHD concept & case
- Launch prospect qualification & portfolio alignment
- Strengthen systems and data

Phase 1: Quiet Phase (Years 1–3)

- Focus on principal and major gifts
- President + VP in front of top prospects
- Engage first campaign volunteers

Phase 2: Public Phase (Years 3– 5/6)

- Broader alumni and community giving
- Campaign events & visibility
- Strong stewardship of lead donors & prospects.

Recommended Campaign Organizational Structure

- **President:** Chief external champion; leads top-tier relationships
- **VP Advancement:** Strategic lead; **principal gift partner** with President
- **Executive Director:** Player-coach for MGOs + stewardship
- **Campaign Director (new):** Operations, reporting, volunteers
- **MGOs (2–3):** Major & leadership gifts
- **Director of Donor Relations (new):** Stewardship & impact reporting
- **Alumni, Annual Giving, Advancement Services:** Broad base & data support

Campaign Staffing & Multi-Year Investment

- Campaign requires managing **~850 prospects and ~250 major/principal gifts**
- Current team cannot support **required portfolio volume & cadence**
- Stakeholders expect **stronger structure, systems & stewardship**
- Recommended new roles:
 - Campaign Director
 - Major Gift Officer
 - Director of Donor Relations

Six-Year Investment (Start-Up + 5 Yrs)

Purpose:

To ensure Westfield has the **capacity, structure, and discipline** necessary to run a competitive \$25–\$30M campaign.

Category	Estimated Total
Staffing (salaries + fringe)	\$2.52M
Programs & Operations	\$1.24M
Total Multi-Year Investment	\$3.8M

Proposed Multi-Year Campaign Investment

Period	Staffing** (w/ fringe)	Programs & Ops	Total	Recommended University Investment
Start-Up (3 months)	\$113.7K	\$205.0K	\$318.7K	\$188.7
Year 1 (full year)	\$463.9K	\$325.0K	\$788.9K	\$756.4
Year 2 (full year)	\$473.1K	\$165.0K	\$638.1K	\$505.5
Year 3 (full year)	\$482.6K	\$165.0K	\$647.6K	\$512.5
Year 4 (full year)	\$492.3K	\$165.0K	\$657.3K	\$519.3
Year 5 (full year)	\$502.1K	\$215.0K	\$717.1K	\$576.4
Multi-Year Totals	\$2.52M	\$1.24M	\$3.8M	\$3.1M

**Campaign Director to be funded by the Foundation.

Note: Planning estimates developed by consultant; final budget will be refined by incoming VP and finance team.

Rounded for presentation

If Investment is Deferred

- **Risks of Deferring Investment:**
 - Slower fundraising; unrealized major-gift potential
 - Harder to secure **\$1M+ gifts**
 - **HHD Building** progress may lag donor interest
- **For staff:**
 - Challenges are structural, not personal
 - Team will work hard—but with limited tools

Upcoming VP Transition: A Strategic Moment

- **President:** external champion
- **VP Advancement:** strategic + principal gifts lead
- **ED Advancement:** major gifts + stewardship, grants
- **Campaign Director:** operations & volunteers
- VP transition provides and opportunity to:
 - Clarify roles & expectations
 - Strengthen coordination
 - Support staff stability

Summary & Board Ask

- **We know:**
 - Strong philanthropic opportunity and stakeholder support
 - Advancement has real strengths to build on
- **We recommend:**
 - Plan for a **\$25–\$30M campaign** anchored by **HHD Building**
 - Endorsing the **multi-year capacity investment framework** (~\$3.8M, \$3.1M from *University*)
 - Using the VP transition to **clarify roles & strengthen support**
- **Board action requested:**
 - **Affirm the campaign direction & scale**
 - **Commit to invest \$3.1M over five years**

Questions & Discussion

Appendix: Additional Detail

Estimated 5-year Campaign Goal by Source of Revenue

These figures are illustrative and will be refined with the VP and Advancement team as campaign planning progresses.

Source	Goal Amount
New Individual Donor Major Gifts	\$20 Million
Corporate & Foundation Gifts (including private philanthropic grants)	\$3.5 Million (\$700K/yr * 5)
Regular Baseline Giving	\$2.5 Million (\$500K/yr * 5)
Total	\$26 Million
<i>Planned Gifts</i>	<i>"below the line" as not currently spendable</i>

***Note that Government Grants are not included in Campaign totals according to CASE Reporting Standards*

People Investment (Staffing) by Year

Proposed Position	Proposed Salary	Start-Up (3 mo.)	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Campaign Manager	\$130.0K	\$32.5K	\$132.6K	\$135.3K	\$138.0K	\$140.7K	\$143.5K	\$722.6K
Gift Officer	\$100.0K	\$25.0K	\$102.0K	\$104.0K	\$106.1K	\$108.2K	\$110.4K	\$555.8K
Director, Donor Relations	\$100.0K	\$25.0K	\$102.0K	\$104.0K	\$106.1K	\$108.2K	\$110.4K	\$555.8K
Subtotal including contract increase (2%)	\$330.0K	\$82.5K	\$336.6K	\$343.3K	\$350.2K	\$357.2K	\$364.3K	\$1.83K
Total Salaries with 37.81% Fringe	\$454.8K	\$113.7K	\$463.9K	\$473.1K	\$482.6K	\$492.3K	\$502.1K	\$2.52M

**Rounded for presentation*

Programs and Operations Investment

- Purpose
 - Give the team the tools, partners, and travel/event resources they need to run the campaign well—without overextending existing staff.
- Key lines over the full period (totals)
 - Consulting & Training – \$270K
 - Campaign counsel, staff training, coaching and case refinement.
 - Slightly reduced to make room for a dedicated Health & Human Development Building planning line (no change to the overall Programs & Operations total).
 - Health & Human Development Building Planning / Pre-Design – \$100K
 - Program visioning and early concept work.
 - Preliminary design, renderings and naming opportunities to support leadership-level donor conversations.
 - Communications & Marketing – \$160K
 - Campaign-related print/digital materials, web content and light media/digital support.
 - Cultivation & Stewardship: Travel & Events – \$650K
 - Donor and volunteer travel, cultivation events and stewardship activities tied to the campaign.
 - Technology & Prospect Intelligence – \$60K
 - Prospect research tools, screening/analytics and incremental CRM/tech enhancements.
- Programs & Operations total (start-up + 5 years)
 - Combined, these lines total \$1.24M; Health & Human Development Building planning is now called out explicitly.

Programs & Operations by Year (with HHD Pre-Work)

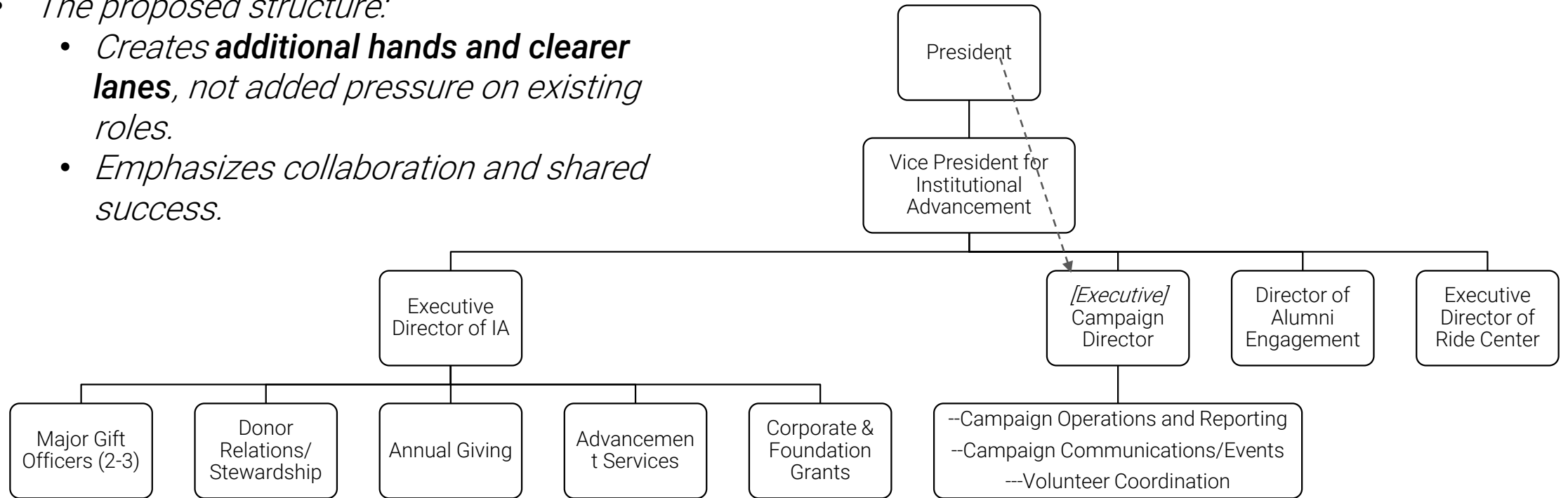
Line Item	Start-Up (3 mo.)	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Consulting & Training (counsel, staff training, case)	\$85K	\$85K	\$25K	\$25K	\$25K	\$25K	\$270.0K
Health & Human Development Building Planning / Pre-Design	\$50K	\$50K	\$0K	\$0K	\$0K	\$0K	\$100.0K
Communications & Marketing	\$10K	\$30K	\$30K	\$30K	\$30K	\$30K	\$160.0K
Cultivation & Stewardship: Travel & Events	\$50K	\$150K	\$100K	\$100K	\$100K	\$150K	\$650.0K
Technology & Prospect Intelligence	\$10K	\$10K	\$10K	\$10K	\$10K	\$10K	\$60.0K
Programs & Operations Totals	\$205.0K	\$325.0K	\$165.0K	\$165.0K	\$165.0K	\$215.0K	\$1.24M

**Rounded for presentation*

Visual Campaign Org Chart (Simplified)

Key Message for Staff

- *The proposed structure:*
 - Creates **additional hands and clearer lanes**, not added pressure on existing roles.
 - *Emphasizes collaboration and shared success.*





Board of Trustees

December 18, 2025

MOTION

The Advancement, Marketing, and External Relations Committee recommends approval to the full Board:

To approve the granting of staff emeriti status, effective December 18, 2025, to the following individuals:

- Louisa (Tina) Bonés
- Janet Garcia

Janet Garcia:

Janet Garcia's 20-year career at Westfield State University is marked by innovation, leadership, and a deep commitment to both the institution and the greater Westfield community. Joining the University in 1999, Janet was its first Director of Marketing, laying the foundation for a modern, cohesive brand identity. She introduced high-level print publications, strategic social media engagement, professional photography, and effective website development—transforming how Westfield State presented itself to the world.

Her efforts extended beyond campus borders, fostering community engagement through neighborhood mailings and public event postings. Janet played a vital role in annual strategic planning, served as class advisor for the Class of 2015, and contributed to campus safety as a member of the Emergency Response Team. Early in her career, while working in DGCE, she earned multiple awards for the College for Kids program, showcasing her creativity and dedication to educational outreach.

A proud two-time alumna of Westfield State, Janet brought a unique and valuable perspective to her work, understanding the University as a student, employee, and citizen of Westfield. Her influence reached statewide through her participation in marketing and communication meetings, where her work was recognized by peers across Massachusetts. She also served as a guest speaker at the Carnegie Communications marketing conference and contributed to local initiatives as a board member for the Boys & Girls Club and the Aviation Program at Westfield Technical Academy.

Throughout her career, Janet adapted to the rapidly evolving world of marketing—from black-and-white newspaper ads to digital campaigns and early explorations of AI. Her ability to stay ahead of trends and educate herself on emerging tools and platforms ensured Westfield State remained relevant and forward-thinking.

In retirement, Janet continues to serve her community as the marketing director for the Friends of the Columbia Greenway Rail Trail, a foster volunteer at the Dakin Humane Society, and a member of the Run Stanley committee. She has also embraced travel with enthusiasm, saying, "I haven't been everywhere, but it's on my list."

Janet Garcia's selection for Staff Emerita honors a career defined by creativity, service, and a lasting impact on Westfield State University and beyond.

Tina Bonés Bio for Staff Emerita 2026

For over 35 years, Tina Bonés was a cornerstone of the Human Resources department at Westfield State University, serving with unwavering dedication, precision, and care. Beginning her career in 1987 as a Payroll Clerk and later advancing to the role of Benefits Manager, Tina consistently provided professional, informative, and accurate support to faculty and staff across the institution.

Her deep understanding of complex policies and procedures, coupled with her meticulous attention to detail, made her an invaluable resource in navigating life-changing situations for employees and their families. Whether assisting with retirements, leaves of absence, health benefits, or moments of personal transition, Tina approached every interaction with patience, respect, and compassion.

Tina also carried an extraordinary amount on her shoulders. She was often the first person employees turned to when facing personal needs, health concerns, or life's unexpected challenges. Many colleagues found themselves leaning on her not just for guidance, but for comfort and reassurance. She became the quiet glue holding together both the personal and professional aspects of many employees' lives. Her steady presence, calm counsel, and genuine care made her a trusted confidant; someone colleagues knew they could rely on without hesitation.

For years, Tina was also the first person outside of a search committee to welcome new employees to Westfield State University. She greeted countless new hires with warmth and professionalism, helping them feel supported and valued from day one. Her ability to make others feel at ease created a strong foundation for their success, and her kindness set the tone for their experience as members of the WSU community.

Beyond her technical expertise, Tina's legacy is defined by her commitment to service and by the depth of the relationships she built across campus. Her willingness to go above and beyond, her quiet leadership, and her steadfast support left a lasting impact on countless individuals. She embodied the University's mission and values not through words, but through consistent action, integrity, and heartfelt dedication.

Staff Emerita status honors Tina Bonés' outstanding career and celebrates the profound contributions she has made to Westfield State University. Her legacy of excellence, compassion, and unwavering integrity will continue to inspire and shape the WSU community for years to come.



Board of Trustees

December 18, 2025

MOTION

The Advancement, Marketing, and External Relations Committee recommends approval to the full Board:

To affirm the campaign direction and scale, and commit up to \$3.1M for a multi-year(5+ years) campaign budget to be refined by the next Vice President of Institutional Advancement.

Together We Soar: Campaign Planning Study

December 2025

CONFIDENTIAL

Not meant for on-screen presentation

Campaign Planning Summary

- Purpose of This Document
 - Share key learnings from the planning study and prospect analysis.
 - Provide a high-level roadmap for a next-stage comprehensive campaign.
 - Outline a multi-year investment strategy (~\$3.8M) that strengthens existing Advancement work and supports a successful campaign.
- Headline Takeaways
 - Westfield State has:
 - A strong mission and story.
 - Supportive stakeholders and promising donor capacity.
 - With focused preparation and added support, a \$25–\$30M comprehensive campaign—anchored by a Health & Human Development Building—is a realistic next step.

Purpose & Approach

- What We Were Asked to Examine
 - Readiness for a significant campaign.
 - Alignment between case for support and donor interests.
 - Prospect capacity and gift table modeling.
 - Internal structure, roles, and resources needed to sustain a multi-year effort.
- Inputs
 - Prospect Potential Analysis (PPA) – philanthropic capacity and gift-level modeling.
 - Case for Support – Together We Soar!
 - Feasibility Interviews – 14 stakeholders reflecting a range of perspectives.
 - Current and proposed leadership role descriptions (President, Vice President for Institutional Advancement, Executive Director, Campaign Director).
- Tone & Intent
 - Designed as a planning tool, not an evaluation of individuals.
 - Focused on supporting the existing team with additional colleagues, tools, and clarity—similar in approach to other campaign planning studies.

Building on a Strong Foundation

- Current Strengths to Celebrate
 - Deep commitment to students, access, and regional impact.
 - Strong belief in the President's leadership and vision.
 - A core group of engaged donors and volunteers.
 - Advancement staff who deliver high-touch stewardship to key supporters and maintain important relationships.
- What This Plan Aims to Do
 - Reinforce and extend what is already working.
 - Add focused capacity so that the team can:
 - Reach more prospects.
 - Manage a larger and more complex pipeline.
 - Support the President and VP with the infrastructure they need to succeed.

Philanthropic Potential: The Opportunity

- **Capacity Snapshot (Individuals)**

- More than **\$1B in estimated, 5-year philanthropic capacity** among alumni, donors, and friends.
- At a conservative capture rate, Westfield can reasonably aim **for approximately \$20.4M** in major and principal gifts from individuals in a campaign (excluding organizations and planned gifts).

- **Prospect Pool Highlights**

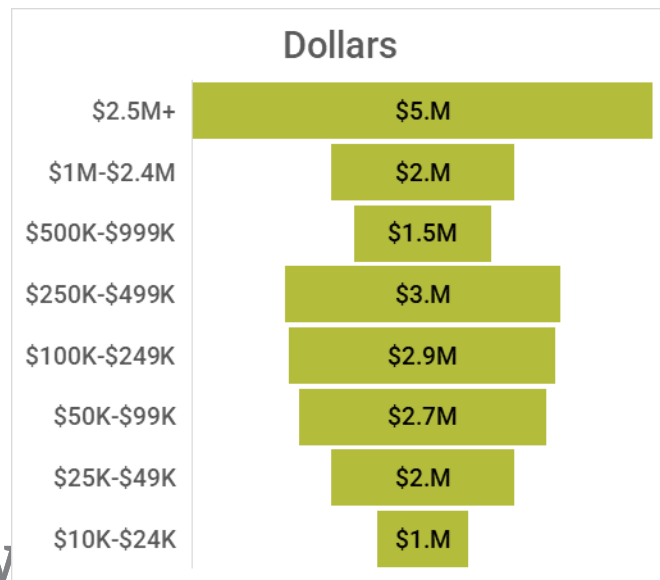
- Roughly **550 households** show moderate-to-strong philanthropic inclination (A/B ratings).
- A meaningful portion of capacity sits with **non-alumni**, presenting new relationship-building opportunities.

- **Implication**

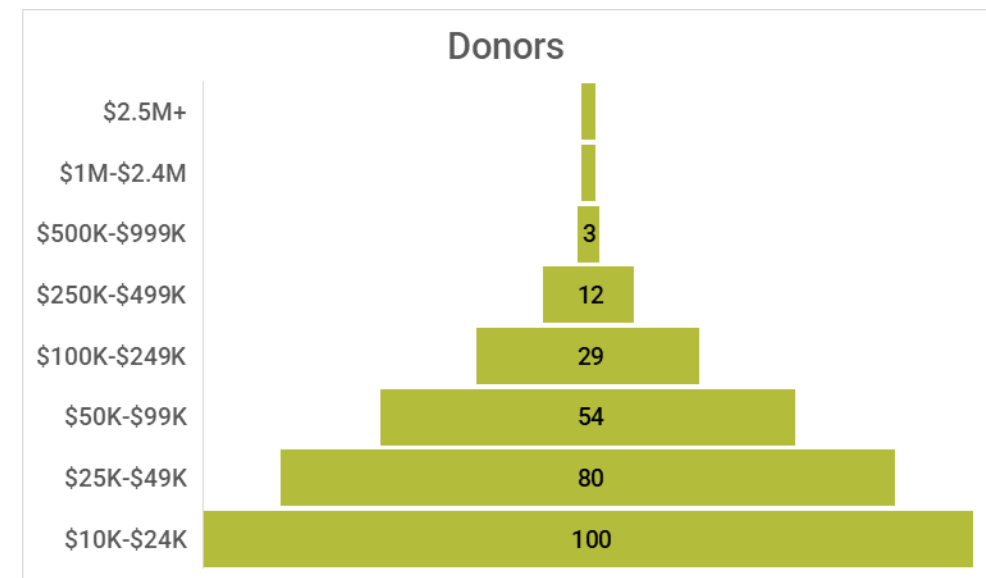
- The data **supports a bold but achievable goal**—provided the institution supports Advancement with the time, staffing, and tools needed to fully engage this pool.

Gift Table Shape & Leadership Gifts

- Modeled Major Gift Table (Example)
 - 282 donors of \$10K+ during the campaign.
 - 4 donors at \$1M+ totaling \$7M, about 35% of the \$20M major gift goal.
 - About 28% of funds come from gifts under \$100K.
- Key Insights
 - The campaign depends heavily on major leadership gifts.
 - Success requires increasing prospects for large commitments.
 - This table is illustrative, based on the PPA, and will be refined as we qualify more prospects.



Campaign success will be highly dependent on leadership gifts at the top of the pyramid



Prospect Coverage & Capacity-Building

- Current Coverage
 - When both A- and B-level prospects are considered, coverage for many gift levels is within reach.
 - The one area that will require particular focus is \$1M+ gifts, where the pool is understandably small at this stage.
- What This Means in Practice
 - Westfield can be successful if it:
 - Systematically qualifies new prospects into the leadership pool.
 - Maintains disciplined portfolio management.
 - Involves the President and VP with a carefully curated set of top relationships.
- Role of Additional Support
 - Added capacity allows the existing staff to:
 - Spend more time in front of donors.
 - Share the work of cultivating new and emerging prospects.

Level of Giving	Donors Needed	Prospects Needed*	A Prospects	A Prospects vs. Prospects Needed	B Prospects
\$2.5M+	2	6	0	-6	0
\$1M-\$2.4M	2	6	0	-6	1
\$500K-\$999K	3	9	5	-4	7
\$250K-\$499K	12	36	8	-28	28
\$100K-\$249K	29	87	22	-65	69
\$50K-\$99K	54	162	29	-133	125
\$25K-\$49K	80	240	53	-187	204
\$10K-\$24K	100	300	42	-258	256
Total	282	846	159	-687	690

Estimated 5-year Campaign Goal by Source of Revenue

These figures are illustrative and will be refined with the VP and Advancement team as campaign planning progresses.

Source	Goal Amount
New Individual Donor Major Gifts	\$20 Million
Corporate & Foundation Gifts (including private philanthropic grants)	\$3.5 Million (\$700K/yr * 5)
Regular Baseline Giving	\$2.5 Million (\$500K/yr * 5)
Total	\$26 Million
<i>Planned Gifts</i>	<i>"below the line" as not currently spendable</i>

***Note that Government Grants are not included in Campaign totals according to CASE Reporting Standards*

Stakeholder Perspectives: Appetite & Alignment

- Support for a Campaign
 - All interviewees rated a campaign as “very important.”
 - Many described it as timely and necessary given funding realities and Westfield’s impact on students.
- Perception of Leadership
 - Widespread confidence in the President’s leadership and direction of the university.
- Alignment with the Case
 - Strong resonance with:
 - Scholarships and student success.
 - High-demand programs in health, education, and related fields.
 - Innovation in teaching and applied learning.
- Emerging Priority
 - Growing enthusiasm for a Health & Human Development Building as a concrete way to advance these themes and signal long-term commitment.

What Stakeholders Asked For

- Sharpened Focus
 - Preference for a clear set of priorities rather than a long list—“pick a few big ideas and really lean into them.”
- Clarity on Outcomes
 - Desire for data-informed goals and impact statements—how many students, what programs, what regional effects.
- Stronger Platform for Giving
 - Interest in:
 - A campaign that invites meaningful engagement across giving levels.
 - Clear roles for volunteers, boards, and academic leaders.
- Takeaway
 - Stakeholders are ready to be engaged; they are asking for structure and support to participate fully.

Internal Context & Upcoming Transition

- Current Leadership Roles
 - President – chief external champion and institutional storyteller.
 - Vice President for Institutional Advancement (VPIA) – oversees Advancement, Alumni Relations, and the Foundation; cabinet-level role.
 - Executive Director of Institutional Advancement (ED) – focuses on fundraising for scholarships and strategic initiatives, stewardship, and Foundation Board liaison.
 - Campaign Director (proposed) – dedicated to campaign planning, operations, and volunteer management.
- Upcoming Change
 - The planned VPIA transition at the end of January creates a natural moment to:
 - Clarify roles and expectations.
 - Confirm reporting lines and decision-making for the campaign.
 - Ensure the existing staff is well supported during the transition.
- Approach
 - The intent is to **stabilize and support** the current team while adding targeted capacity as the campaign moves forward.

Recommended Campaign Framework

- Scale and Scope
 - Pursue a \$25–\$30M comprehensive campaign over 5–7 years.
 - Plan for at least \$20M in major/principal gifts from individuals, with additional support from corporations, foundations, and planned giving.
- Three Integrated Pillars (as in Together We Soar!)
 - Advancing Access for Student Success
 - Empowering Innovation in Teaching, Learning, and Career Readiness
 - Building a Regional Driver for Human Health & Development, Creativity, Industry, and Community Well-Being
- Flagship Capital Priority
 - Position a Health & Human Development Building as the lead capital project and major naming opportunity within Pillar 3. *This is the focus of the quiet/leadership phase.*

Health & Human Development Building

- Strategic Fit
 - Houses or supports programs such as nursing, PA, public health, behavioral health, and related disciplines.
 - Aligns closely with regional workforce needs and community partnerships.
- Campaign Role
 - Provides a clear, tangible centerpiece for early leadership conversations.
 - Creates structured seven-figure and naming opportunities.
 - Helps translate abstract themes (health, well-being, workforce) into a visible project donors can see and visit.
- Planning Implication
 - Early investment in concept and planning will help the Advancement team tell a more concrete and compelling story from the outset.

Campaign Phasing (High Level)

- Phase 0: Readiness (Next 6–12 Months)
 - Recruit Campaign Director as the first incremental campaign hire.
 - Confirm campaign direction and pillars.
 - Confirm scope and timing of the Health & Human Development Building planning work (academic/program + facilities).
 - Launch a prospect qualification and portfolio-alignment effort.
 - Refine case materials with an emphasis on the Health & Human Development Building and top student-success priorities.
- Phase 1: Quiet / Leadership Phase (Years 1–3)
 - Focus on lead and leadership gifts, especially for the building.
 - Utilize coordinated portfolios for the President, new VPIA, ED, and MGOs.
 - Engage a small group of volunteers in early leadership outreach.
- Phase 2: Public Phase (Years 3–5/6)
 - Broaden outreach to alumni, community, and friends.
 - Emphasize mid-level and community giving, building on the leadership commitments already in place.

Multi-Year Capacity Investment Overview

- Purpose of this investment
 - Give the existing Advancement team the time, tools, and colleagues to manage a multi-year comprehensive campaign.
 - Focus on capacity-building, not restructuring – clearer roles, more bandwidth, better data, and targeted outside expertise.
- Scale (planning view)
 - Approximately \$3.9M over six years (startup partial year + five full years).
- Broad allocation
 - People (Campaign Manager, Gift Officer, Donor Relations + fringe) – ≈ \$2.52M (~68%)
 - Programs & Operations (consulting, communications, cultivation, tech, and Health & Human Development Building pre-planning) – ≈ \$1.24M (~32%)
 - Total Multi-year capacity Investment – \$3.8M

Figures are planning estimates based on current draft salaries and program costs. Final numbers and timing would be refined with the VP, Advancement staff, HR and Finance.

Multi-Year Budget Summary (Start-Up + 5 Full Years)

Period	Staffing (w/ fringe)	Programs & Operations	Annual Total
Start-Up (3 months)	\$113.7K	\$205.0K	\$318.7K
Year 1 (full year)	\$463.9K	\$325.0K	\$788.9K
Year 2 (full year)	\$473.1K	\$165.0K	\$638.1K
Year 3 (full year)	\$482.6K	\$165.0K	\$647.6K
Year 4 (full year)	\$492.3K	\$165.0K	\$657.3K
Year 5 (full year)	\$502.1K	\$215.0K	\$717.1K
Multi-Year Totals	\$2.52M	\$1.24M	\$3.8M

**Rounded for presentation*

People Investment (Staffing)

These roles are **additions** to the current team, designed to protect existing capacity while adding focused campaign leadership and major-gift bandwidth.

- Goals
 - Ensure no one is asked to “do a campaign off the side of their desk.”
 - Protect and support the current team while adding targeted capacity where it helps most.
- Key roles funded in this plan
 - Campaign Manager (new)
 - Coordinates the campaign plan, calendar, reporting and volunteer structure.
 - Acts as “air traffic control” so the President, VP, Executive Director and Gift Officer can focus on donor relationships.
 - Gift Officer (new)
 - Adds dedicated major-gift capacity aligned with campaign priorities.
 - Helps keep portfolios at a manageable size and expands coverage of leadership-level prospects.
 - **Note: if Westfield State is successful in the early phases of the campaign, additional investment in front-line staffing would likely have a high rate of return.
 - Director of Donor Relations (new)
 - Strengthens stewardship, impact reporting, and recognition for leadership donors.
 - Extends the high-touch experience the team already provides to top supporters.
- Financial summary (start-up + 5 years)
 - Salaries for these three positions, with 2% annual increases and 37.81% fringe, total approximately
 - \$3.8M over the 3-month start-up period plus five full years.

People Investment (Staffing) by Year

Proposed Position	Proposed Salary	Start-Up (3 mo.)	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Campaign Manager	\$130.0K	\$32.5K	\$132.6K	\$135.3K	\$138.0K	\$140.7K	\$143.5K	\$722.6K
Gift Officer	\$100.0K	\$25.0K	\$102.0K	\$104.0K	\$106.1K	\$108.2K	\$110.4K	\$555.8K
Director, Donor Relations	\$100.0K	\$25.0K	\$102.0K	\$104.0K	\$106.1K	\$108.2K	\$110.4K	\$555.8K
Subtotal including contract increase (2%)	\$330.0K	\$82.5K	\$336.6K	\$343.3K	\$350.2K	\$357.2K	\$364.3K	\$1.83K
Total Salaries with 37.81% Fringe	\$454.8K	\$113.7K	\$463.9K	\$473.1K	\$482.6K	\$492.3K	\$502.1K	\$2.52M

**Rounded for presentation*

Programs and Operations Investment

- Purpose
 - Give the team the tools, partners, and travel/event resources they need to run the campaign well—without overextending existing staff.
- Key lines over the full period (totals)
 - Consulting & Training – \$270K
 - Campaign counsel, staff training, coaching and case refinement.
 - Slightly reduced to make room for a dedicated Health & Human Development Building planning line (no change to the overall Programs & Operations total).
 - Health & Human Development Building Planning / Pre-Design – \$100K
 - Program visioning and early concept work.
 - Preliminary design, renderings and naming opportunities to support leadership-level donor conversations.
 - Communications & Marketing – \$160K
 - Campaign-related print/digital materials, web content and light media/digital support.
 - Cultivation & Stewardship: Travel & Events – \$650K
 - Donor and volunteer travel, cultivation events and stewardship activities tied to the campaign.
 - Technology & Prospect Intelligence – \$60K
 - Prospect research tools, screening/analytics and incremental CRM/tech enhancements.
- Programs & Operations total (start-up + 5 years)
 - Combined, these lines total \$1.24M; Health & Human Development Building planning is now called out explicitly.

Programs & Operations by Year (with HHD Pre-Work)

Line Item	Start-Up (3 mo.)	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Consulting & Training (counsel, staff training, case)	\$85K	\$85K	\$25K	\$25K	\$25K	\$25K	\$270.0K
Health & Human Development Building Planning / Pre-Design	\$50K	\$50K	\$0K	\$0K	\$0K	\$0K	\$100.0K
Communications & Marketing	\$10K	\$30K	\$30K	\$30K	\$30K	\$30K	\$160.0K
Cultivation & Stewardship: Travel & Events	\$50K	\$150K	\$100K	\$100K	\$100K	\$150K	\$650.0K
Technology & Prospect Intelligence	\$10K	\$10K	\$10K	\$10K	\$10K	\$10K	\$60.0K
Programs & Operations Totals	\$205.0K	\$325.0K	\$165.0K	\$165.0K	\$165.0K	\$215.0K	\$1.24M

**Rounded for presentation*

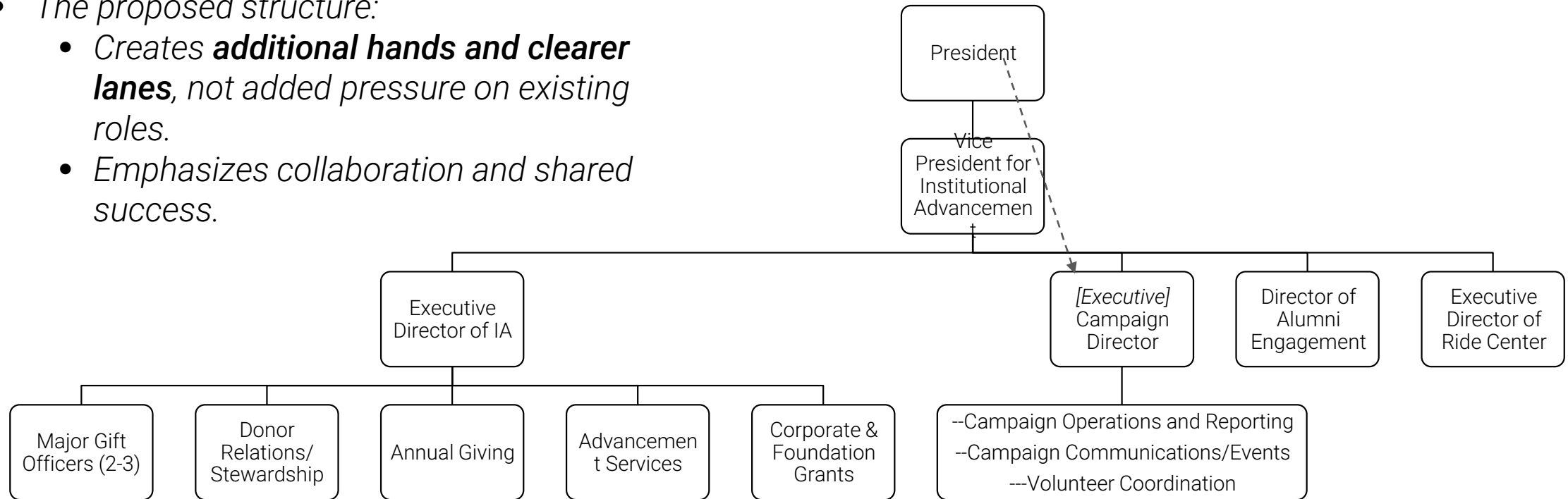
Recommended Functional Structure (Campaign Lens)

- **President**
 - Chief campaign champion; leads select top-tier relationships and solicitations.
- **Vice President for Institutional Advancement**
 - Cabinet-level leader for Advancement, Alumni Relations, and the Foundation.
 - Oversees campaign strategy in partnership with the President.
 - Leads principal gift strategy in partnership with the President and Executive Director
- **Executive Director of Institutional Advancement**
 - Player-coach on major gifts and scholarships.
 - Manages MGOs (**One New**) and Donor Relations (**New Director**).
- **Campaign Director (New)**
 - Coordinates campaign operations, reporting, gift table, and volunteers.
 - Serves as the **“air traffic controller”** so staff can focus on donors.
- **Other Key Roles**
 - Director, Alumni Engagement & Annual Giving – broad-based engagement and annual support.
 - Director, Advancement Services – data, research, CRM, and reporting.
- **Intent**
 - This structure is **designed to support the existing team**, clarify roles, and ensure no one is asked to carry campaign responsibilities alone.

Visual Campaign Org Chart (Simplified)

Key Message for Staff

- The proposed structure:
 - Creates **additional hands and clearer lanes**, not added pressure on existing roles.
 - Emphasizes collaboration and shared success.



If Investment is Deferred

- Potential Risks
 - Pace of fundraising may not match the full philanthropic potential identified in the PPA.
 - Staff may need to continue prioritizing immediate needs over longer-term cultivation, limiting pipeline growth.
 - It may be harder to secure multiple \$1M+ gifts without dedicated campaign leadership and enhanced tools.
 - The Health & Human Development Building could move forward more slowly than stakeholder interest suggests.
- Framing for Advancement Staff
 - These are structural, not personal, challenges.
 - The investment is about making sure the team has what it needs to succeed, not about changing the team's commitment or effort.
 - Even without this investment, the team will continue to do strong work; the risk is that we **leave some of the documented philanthropic potential on the table** or move more slowly than the moment allows

Summary & Next Steps

- **What We Know**

- There is **real philanthropic opportunity** and strong enthusiasm for Westfield's mission.
- Stakeholders are supportive of a campaign and confident in leadership.
- The Advancement team has important strengths to build on.

- **What We Recommend**

- Move forward with planning for a **\$25–\$30M comprehensive campaign** anchored by a **Health & Human Development Building**.
- Commit to a **multi-year \$3.8M investment** in people, systems, campaign infrastructure, and early project work.
- Use the upcoming VP transition as a **chance to clarify roles and strengthen support** for the staff.

- **Next Steps for Leadership Discussion**

- Confirm campaign scale, timing, and broad priorities.
- Align on **staffing sequence** (e.g., Campaign Director as first incremental hire).
- Charge Advancement and campus partners, including a newly hired campaign director, with developing a detailed implementation plan and **refined budget (timing, phasing, sources)**

Appendices

P.25. Draft Campaign Prospectus

P.35 Feasibility Study Report (2025)

P55. Prospect Potential Assessment (2025)



•TOGETHER WE SOAR!

- The Campaign for Westfield State University*
 - Prospectus Case / Confidential Consultative Draft / September 2025
-

•WESTFIELD STATE IS CONSIDERING LAUNCHING AN UNPRECEDENTED FUNDRAISING CAMPAIGN SHAPED BY BOLD VISION AND STRATEGIC OPPORTUNITY.

- This document shares the rationale behind our transformative initiative, centered on elevating student success and strengthening communities.
- Inside, you'll see the compelling case we're building—and we welcome your partnership in this exciting work.

•**WHY HERE — WHAT MAKES WESTFIELD STATE A GREAT INVESTMENT?**

•**WESTFIELD STATE UNIVERSITY WAS BUILT FOR MOMENTS LIKE THIS.**

•**We are the origin and the future of accessible education and professional opportunity— rooted in integrity, dignity, and service to others.**

•**WESTFIELD STATE HAS BEEN PIONEERING ACCESSIBLE HIGHER EDUCATION SINCE DAY ONE.** As one of America's first coeducational public colleges, Westfield State has always educated students who choose accessible, purpose-driven education. Affordability and belonging remain central to our mission, creating pathways for students seeking meaningful careers and community impact.

•**WE FORGE LEADERS IN EVERY FIELD—DRIVEN BY PURPOSE, GROUNDED IN SERVICE.** Westfield State prepares leaders who teach, heal, govern, and strengthen communities. This leadership focus is woven throughout our institution—integrated across academic programs, athletics, performing arts, and student organizations.

•**WE ARE A REGIONAL WORKFORCE ENGINE WITH A SOUL.** Westfield State powers Massachusetts with educators, nurses, and problem-solvers. Partnering with 500+ regional employer partners, Westfield State offers high-need degrees, keeping talent local and strengthening economies and communities.

•**WESTFIELD STATE LEADERSHIP AND INNOVATION HAVE CREATED UNPRECEDENTED MOMENTUM.** President Linda Thompson brings visionary and vibrant leadership. With strategic alignment across campus, data-driven initiatives fuel momentum and deliver distinctive impact that demonstrates our educational excellence.

•**AT WESTFIELD STATE, PHILANTHROPY SIMPLY GOES FARTHER.** Even modest gifts spark transformational change—keeping students enrolled, opening doors, and improving lives. Student-centered support and innovative programs deliver lasting results. Here, philanthropy creates real transformation.

•**1ST**

•One of the 1st
• coeducational
public colleges in
the United States

•**87%**

•of students
receive
financial aid

•**500+**

•regional
employer
partners

•*WHY NOW—WHAT FORCES ARE DRIVING THIS CAMPAIGN?*

•**MODERN URGENCIES DEMAND A NEW KIND OF EDUCATION—NOW.**

•**The landscape is shifting toward institutions that deliver real-world outcomes and infinite opportunities. Westfield State is perfectly positioned to lead this transformation.**

•**STUDENT-CENTERED EDUCATION IS NO LONGER THE EXCEPTION—IT’S THE EXPECTATION.** Today’s undergraduates demand education that fits their lives. They’re adults returning to complete their degree. They’re part-time students with full-time jobs. They’re parents or taking care of parents. Westfield State has always served this student population with distinction, and now the rest of higher education is catching up to our model.

•**WORKFORCE AND LEADERSHIP NEEDS ARE URGENT AND LOCAL.** Our region actively seeks teachers across rural and urban districts and health professionals as communities prioritize mental and physical wellness. As one of the fastest-aging states, Massachusetts is creating new roles in public service and community leadership that require the skills Westfield State develops. Employers across sectors actively recruit the purpose-driven graduates our programs produce.

•**THE STUDENTS CHOOSING WESTFIELD STATE SEEK PURPOSE ALONGSIDE THEIR DEGREES.** Today’s learners want education that connects to community impact, civic engagement, and meaningful work. They’re drawn to institutions like ours that embed leadership development, real-world problem solving, and regional connection into the academic experience. This isn’t a trend we’re adapting to—it’s who we’ve always been.

•**PHILANTHROPIC TRENDS FAVOR THE IMPACT AND ACCESSIBILITY WE DELIVER.** Donors want to see their gifts create tangible change: students who stay enrolled, graduates who remain local, communities that grow stronger. Gifts to Westfield State achieve these goals. Our student emergency fund, Owls Helping Owls, creates immediate, visible impact with support for students in times of need so they can focus on their educational goals. We don’t just promise transformation—we deliver it.

•**WESTFIELD STATE IS POSITIONED FOR LEADERSHIP.** With our new Strategic Plan, Campus Master Plan, and Enrollment Management Plan working in concert, faculty and staff see a clear path forward, united by our shared commitment to accessible excellence.



•*WHY THIS—WHAT DIFFERENCE WILL THIS CAMPAIGN MAKE?*

•**THE NEXT ERA OF PUBLIC HIGHER EDUCATION STARTS HERE.**

•**Westfield State will become a model for accessible, rigorous public higher education centered on infinite opportunities for our students and communities.**

•*With the partnership of our donors, this campaign will...*

•**ESTABLISH A NEW MODEL FOR WHAT MISSION-DRIVEN UNIVERSITIES ACHIEVE.** Westfield State will leverage its distinctive strengths and personal approach to pioneer high-impact innovation. Our work will influence public higher education, demonstrating what values-centered universities accomplish.

•**ELEVATE A NEW STANDARD FOR TEACHING AND LEARNING.** We'll establish excellence in meeting the learning needs of students. Faculty-led innovation and interdisciplinary study will connect classrooms to real-world problem-solving—adapting seamlessly to regional and global needs.

•**ENSURE THAT EVERY STUDENT IS WELCOMED, SUPPORTED, AND DEVELOPED AS A FUTURE LEADER.** At Westfield State, care is built into every system, and support is personal. Every student is invited and empowered to lead. From spaces to systems, they find a community designed not just to include them—but to believe in them.

•**BECOME THE DRIVER OF OPPORTUNITY FOR WESTERN MASSACHUSETTS.** Rooted in Western Massachusetts, Westfield State prepares students to build meaningful lives and lasting careers here. Graduates become educators, healthcare workers, entrepreneurs, and civic leaders who strengthen communities from within.

•**IMPACT THAT SOARS**

•**1 IN 100**

•regional jobs are supported by our \$369.7 million economic impact—the kind of community partnership that defines next-generation public higher education

18.6%

•average annual rate of return on students' investment in their Westfield State degree—proof that accessibility and excellence create extraordinary value

88%

•of students choose non-profit internships that strengthen hospitals, schools, and government agencies—proving we're producing graduates who transform communities from within

•TOGETHER WE SOAR!

•*The Campaign for Westfield State University*

•***Together We Soar!*** represents Westfield State's commitment to students, to Massachusetts, and to the future of public higher education. These pillars define our strategic focus and where donor partnership creates the greatest impact.

•Each priority transforms opportunity into achievement, and potential into lasting impact.



•PILLAR #1: ADVANCING ACCESS FOR STUDENT SUCCESS

•WHY IT'S IMPORTANT:

- Quality and purposeful education remains essential as students navigate diverse pathways to success. Westfield State ensures comprehensive support that leads to persistence, completion, and career readiness.

•HOW WESTFIELD STATE WILL RESPOND:

- We will expand financial aid and enhance wraparound supports for students across all life stages
- and backgrounds.

•DONORS CAN HELP BY FUNDING:

- **FINANCIAL AID** with student scholarships at the center
- **EXPANDED TRANSITION PROGRAMS** for diverse student populations navigating the critical move from high school to college
- **COMPREHENSIVE SERVICES** including advising, mentorship programs, learning support, and wellness resources
- **INNOVATIVE OPPORTUNITIES** through summer certificates, year-round assistance for housing insecure students, and targeted graduation support that ensures degree completion
- **ENHANCED STUDENT LIFE AND ACADEMIC EXCELLENCE** through expanded career services, honors and research programs, and state-of-the-art athletics, performing arts, and wellness facilities

•BRINGING THIS PILLAR TO LIFE

•LAST MILE PROGRAM

- Too often, students who are close to completing their degree program are knocked off course by an unexpected financial need—a car repair that eliminates transportation to campus, a medical bill, or a family emergency that requires immediate resources—threatening their ability to remain enrolled.
- A targeted scholarship can make a tremendous difference to these students, propelling them on to Commencement and into their professional lives. Westfield State is proud of our success rate with this program with 94% of student recipients earning their degrees, but available funds are limited.
- Donor investments would expand the program and make sure every Owl has the opportunity to graduate.

•PILLAR #2: EMPOWERING INNOVATION IN TEACHING, LEARNING, AND CAREER READINESS

•WHY IT'S IMPORTANT:

- Today's graduates need rigorous learning, real-world preparation, and comprehensive support for
- academic and career success in an evolving economy.

•HOW WESTFIELD STATE WILL RESPOND:

- We will integrate cutting-edge technologies and academic innovations with facilities that inspire
- transformative learning.

•DONORS CAN HELP BY FUNDING:

- **THE PRESIDENT'S INNOVATION FUND** to pilot breakthrough ideas in teaching and learning
- **FACULTY DEVELOPMENT AND APPLIED RESEARCH PROGRAMS** across academic disciplines
- **ADVANCED CLASSROOMS, LABS, AND LEARNING ENVIRONMENTS** that promote a new type of learning and adapt to rapidly changing technology
- **CAREER-CONNECTED EXPERIENCES** like internships, co-ops, apprenticeships, and study abroad opportunities
- **HIGH-IMPACT INITIATIVES** like the Honors Program and Athletics and Performing Arts facilities to attract, develop, and retain high-performing students

•BRINGING THIS PILLAR TO LIFE

•RIDE CENTER

•Westfield State's Research, Innovation, Design & Entrepreneurial (RIDE) Center transforms ideas into impact. In its first operating Spring 2024 semester, the Center served 160 users supporting course projects, student entrepreneurship, and community partnerships. Faculty across disciplines integrate RIDE projects into their teaching, while students develop everything from social ventures to creative businesses.

•The RIDE Center increases accessibility to technology, innovation, and entrepreneurial practices to accelerate learning and prepare students for leadership and jobs of the future.

•Donor investment will expand equipment, space, and programming to serve more students ready to turn their innovative ideas into reality.

•PILLAR #3: BUILDING A REGIONAL DRIVER FOR HUMAN HEALTH AND DEVELOPMENT, CREATIVITY, INDUSTRY, AND COMMUNITY WELL-BEING

•WHY IT'S IMPORTANT:

- Massachusetts depends on strong talent pipelines in health, education, and industry. Westfield State is
- strategically positioned to lead regional renewal and maximize community impact.

•HOW WESTFIELD STATE WILL RESPOND:

- We will expand leadership in high-demand fields like healthcare, education, and technology while
- strengthening partnerships with regional employers and government agencies.

•DONORS CAN HELP BY FUNDING:

- **EXPANDED ACADEMIC PROGRAMS** in public health, behavioral health, technology, and manufacturing aligned with regional workforce needs
- **STRENGTHENED COMMUNITY AND INDUSTRY PARTNERSHIPS** offering hands-on learning, internships, and local impact while fostering entrepreneurship and innovation
- **ADVANCED CIVIC ENGAGEMENT INITIATIVES** including public service pathways, regional problem-solving labs, arts programming, and community cultural events

•BRINGING THIS PILLAR TO LIFE

•PREPARING TOMORROW'S HEALTHCARE LEADERS

- Westfield State offered the first public Physician Assistant program in New England, designed to educate highly skilled and culturally aware healthcare providers who practice patient-centered care. Our Nursing program has been nationally recognized for its consistently outstanding NCLEX qualifying exam pass rate, recently achieving a 97.33% on the premier licensure exam.
- We offer a wide range of healthcare degree and credentialing programs, share degree and career pathway programs with area community colleges and hospitals, and offer international opportunities for healthcare students to bring their knowledge in service to the world.
- Donor support would enhance our training facilities and labs and expand the number of seats in our popular programs to help our region face the growing demand for all types of healthcare providers.



•THE MOMENT IS NOW. THE VISION IS CLEAR.
THE IMPACT WILL HELP US SOAR.

•**WESTFIELD STATE UNIVERSITY STANDS READY FOR THE NEXT CHAPTER** of public higher education. With your partnership, we will expand our ability to provide accessible education and academic excellence to students seeking purpose-driven education.

•Together, we will ensure that every student who walks through our doors finds not just an education, but a launchpad for leadership. We will strengthen Massachusetts and our entire region through meaningful partnerships and shared vision, while honoring our pioneering heritage and boldly shaping the future.

•This is more than a campaign. This is Westfield State's moment to soar—to lift our students, our faculty and staff, and our communities with us.

•***Together We Soar!***





Westfield
STATE UNIVERSITY

•Institutional Advancement

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•Westfield, MA 01085

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Campaign Feasibility Interview Findings

November 2025

CONFIDENTIAL

Executive Summary – Feasibility Interviews

- Stakeholders express strong pride in Westfield State and broad confidence in the President's leadership.
- Overall sentiment is that a campaign is timely and appropriate given institutional momentum and student impact.
- The most compelling areas of investment identified by interviewees include:
 - Scholarships and student financial support
 - High-demand programs in nursing, PA, education, and health sciences
 - Career readiness and employer partnerships
 - Innovation in teaching and applied learning
 - Tangible, high-impact projects aligned with workforce needs
- Several participants noted positive momentum in Advancement's engagement efforts and described staff as dedicated, even as they emphasized the need for stronger systems, clearer focus, and deeper major-gift capacity.
- Interviewees highlighted institutional patterns that may affect campaign readiness, including:
 - Uneven follow-through and shifting priorities over time
 - Limited major-gift experience and cultivation depth
 - Underdeveloped data and advancement systems
 - Lack of a coordinated prospect identification and pipeline strategy
 - Low visibility among alumni who are not closely connected
- Despite these challenges, stakeholders believe WSU has meaningful strengths to build on, and that a well-structured, clearly communicated campaign could attract strong support.

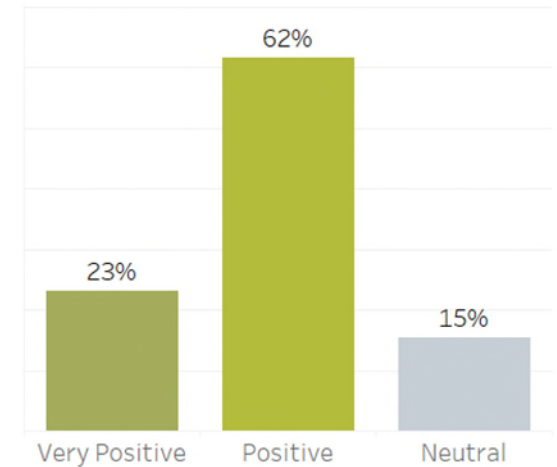
Context

Overview of Interview Cohort

This report summarizes key findings from 14 stakeholder interviews conducted as part of the campaign readiness assessment.**

- 14 interviews: alumni, donors, volunteer leaders, community partners
- Mix of long-time supporters and newly engaged prospects
- Strong representation across sectors (business, nonprofit, healthcare, law enforcement, finance)
- Majority have high familiarity with WSU and strong affinity for the institution
- Tone of interviews: supportive, candid, invested in WSU's success

Overall Perception of WSU



** Charts reflect ratings assigned by Khow Consulting.

Overall Mood and Appetite for a Campaign

- Key Finding: Stakeholders overwhelmingly believe WSU should pursue a campaign and the moment is right, but readiness requires organizational strengthening.
- Evidence:
 - 14/14 rated the campaign “very important”
 - Most see it as “overdue,” a “long time coming,” and urgently needed given state funding trends
 - Several noted WSU is “going against the trend” in higher ed (enrollment stability, workforce value)
 - WSU’s mission and student impact are widely admired
- Representative Quotes
 - “It’s time. People are waiting to be asked.”
 - “You can’t afford not to do this.”
 - “The why is clear: declining state funding and increasing needs.”

Priorities & The Case for Support

Reaction to the Vision and Case for Support

- Key Finding: The vision is directionally compelling, but stakeholders want greater focus, clearer outcomes, and stronger data. The next version should be shorter and more targeted.
- Feedback focuses on specificity and structure rather than disagreement with the direction.

• What Resonated:

- Student access and affordability
- Workforce-aligned programs (nursing, PA, teaching, business, criminal justice)
- Innovation in teaching and learning
- Regional workforce needs (health care, public safety, education)

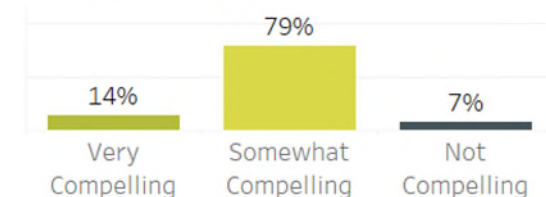
• What Needs Strengthening:

- A more focused set of priorities
- More specifics: cost, scope, impact, metrics
- Less abstraction, fewer slogans
- Greater differentiation from other institutions
- Stronger outcomes data, benchmarking, and ROI framing

• Representative Quotes

- “A good start — the path, not yet paved.”
- “We need metrics.”
- “Pick two things and run with them.”
- “Tell me what exactly I’m investing in and why it matters.”

Compellingness of Case



Pillar-by-Pillar Resonance

Pillar 1: Advancing Student Access

Importance: Very high; universal agreement on necessity

Compellingness: High when tied to outcomes, income, and affordability

Notes:

- First-gen and “students like me” stories are especially resonant
- Scholarship need is seen as “critical” and urgent
- Avoid broad “access” framing — stakeholders respond to rigor, results, and persistence stories

“If money goes to students in need, that’s a feel-good right there.”

Pillar 2: Empowering Innovation in Teaching, Learning & Career Readiness

Importance: Highest across the cohort

Compellingness: Very strong, especially when tied to employability

Notes:

- Best alignment with donor motivations and employer needs
- Clear demand for graduates in health, education, business, and tech
- The Ride Center is widely viewed as proof of innovation

“This is the future — innovation and employability.”

Pillar 3: Building a Regional Driver for Health, Creativity & Community

Importance: Mixed

Compellingness: Lower relative to other pillars

Notes:

- Health and workforce development elements are compelling
- “Regional” framing feels narrow to many alumni
- Creativity/community components need clearer definition
- Several stakeholders expressed enthusiasm for a potential Health-focused facility described in recent conversations with leadership, noting it felt concrete and high-impact.

“Health care and workforce needs — that’s compelling. The regional language needs work.”

Priority Resonance (Cross-Cutting Themes)

Most Compelling Priorities

- Scholarships and student support
- Nursing, PA, health sciences
- Teaching and public service pathways
- Career readiness and employer partnerships
- Innovation centers (e.g., Ride Center)
- Data-informed program development
- Faculty development tied to student learning
- Building capacity for high-demand programs

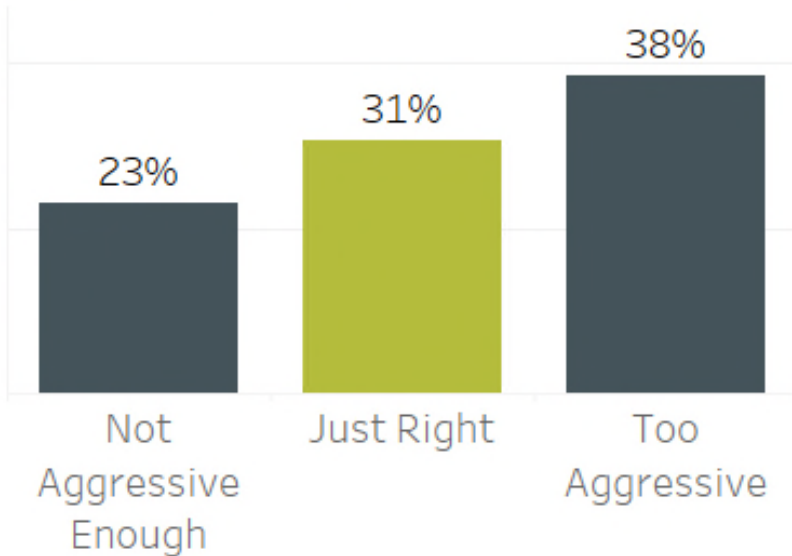
Least Compelling

- Unfocused messaging
- Vague or poetic language (“engine with a soul”)
- Geographic emphasis on Western MA
- Anything that seems like window dressing (signage, events)
- Undefined arts/community components
- Region-centric framing that feels limiting

Appetite for Scale

Perception of Campaign Goal

Goal Perception



Overall: Mixed but trending “just right” with conditions

- Some say \$25–\$35M is appropriate
- A few suggested the goal could be higher if tightly focused
- Several saw it as ambitious given WSU’s history
- Most said feasibility depends on **strategy, leadership, and focus**

Representative Quotes:

- “Ambitious but doable — with structure.”
- “It’s a lot — but over 5–7 years, possible.”
- “Go bigger if you can prove the plan.”

Major/Principal Gift Feasibility

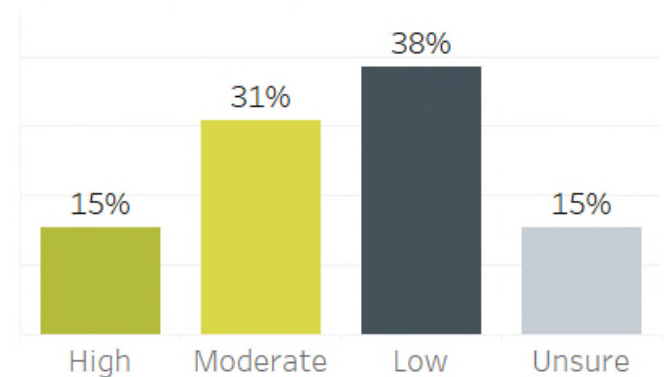
Key Finding: Stakeholders believe seven-figure gifts are *possible but not yet probable* without strengthening advancement structure, leadership, data, and discipline.

- Confidence: Low to moderate
- Many said: “The prospects exist — but the system doesn’t.”
- WSU needs clearer identification, cultivation, and stewardship practices
- Stronger presence among health systems, banks, business owners, and high-capacity alumni

Representative Quotes

- “I don’t know who those people are.”
- “We need strong leadership for big gifts.”
- “It can happen — but not with things as they are.”

Principal Gift Confidence (\$1M-\$5M+)



Institutional Strengths & Challenges

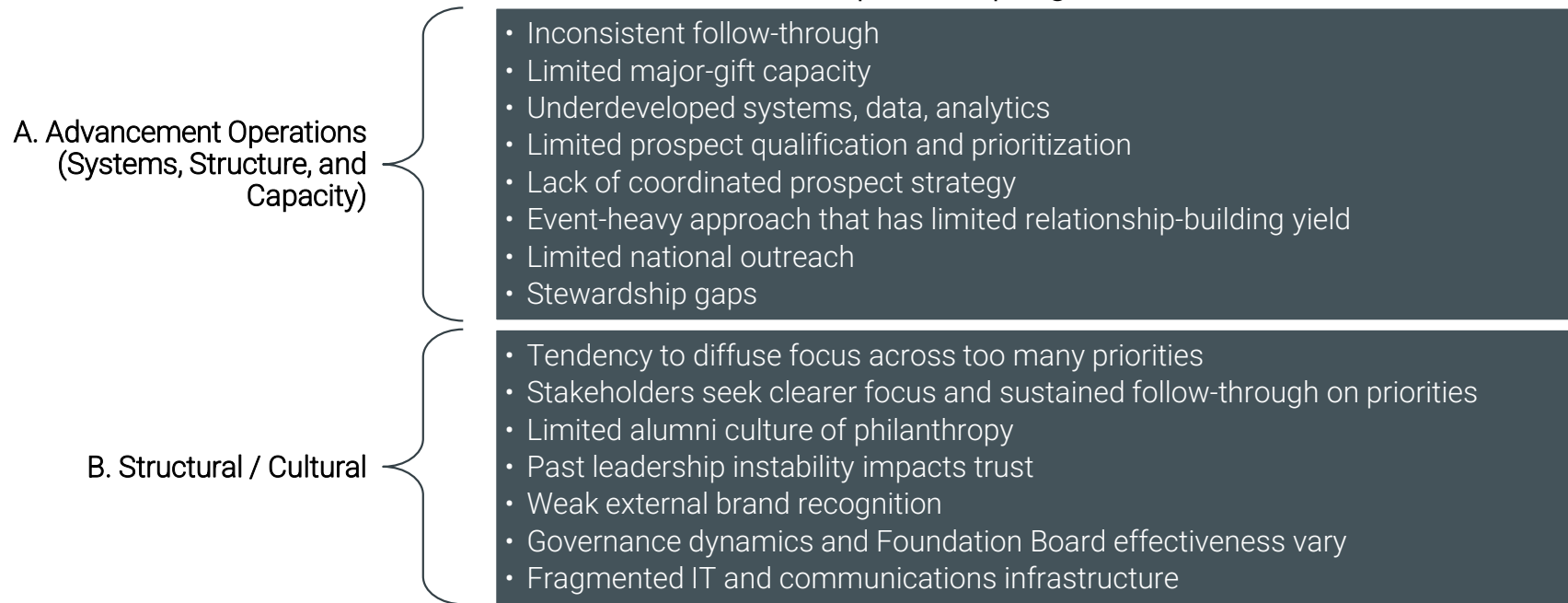
WSU Strengths Identified by Stakeholders

- Mission-driven, high-impact institution
- First-gen and local mobility stories
- Strong programs with clear workforce outcomes
- Caring faculty, safe campus, personal attention
- Positive enrollment trends
- New academic programs in high-demand fields
- Strong confidence in your leadership

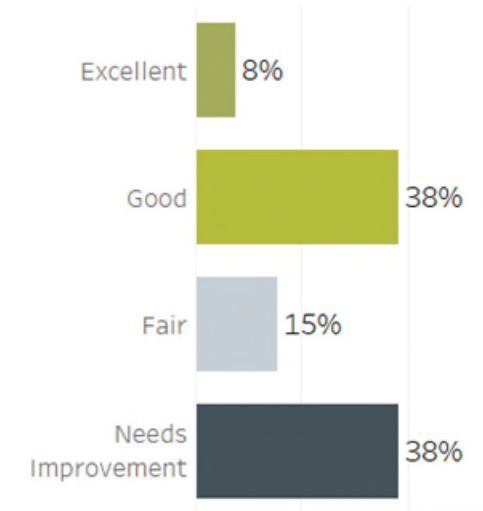
“Westfield is going against the trend — that matters.”

Institutional Challenges (Themes Identified by Stakeholders)

Context Note: Several interviewees acknowledged recent improvements in Advancement's outreach and described staff as committed and mission-driven. The themes below reflect structural and systemic conditions that stakeholders believe will shape campaign readiness.



Stewardship Perception



"There's no focus."

"We've never done a campaign — it's not a light lift."

"Data is a real problem."

"Alumni don't know the story."

Readiness

Readiness to Launch a \$25M-\$35M Campaign

Overall Assessment:

Stakeholders are **supportive** and believe WSU can get ready, but do not believe it is ready today.

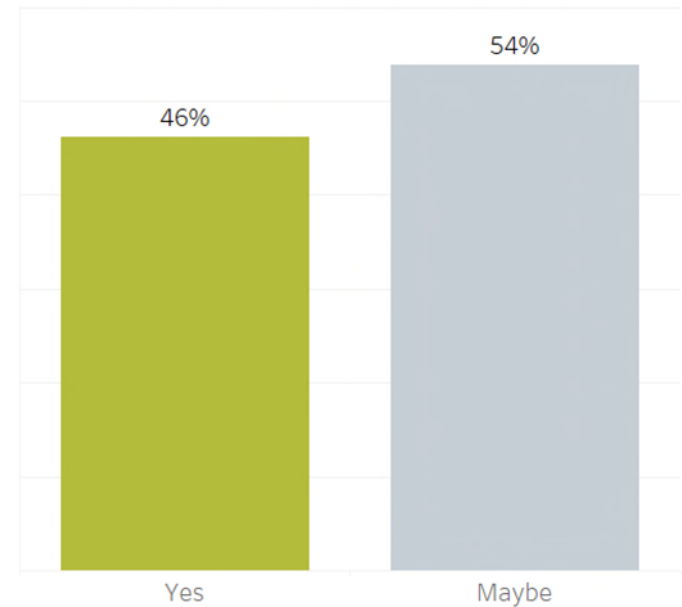
Typical Framing from Interviews:

- “It’s possible — if you fix X, Y, Z.”
- “You can raise \$30 million if you do the work.”
- “Not ready yet — but on the right path.”

Conditions for Success Identified:

- Stronger advancement leadership/structure
- Clear, disciplined focus on a small set of priorities
- Better data and prospect strategy
- Strengthened donor and alumni engagement
- Case refinement with clearer impact metrics
- Internal alignment around campaign priorities
- A more visible, consistent external brand
- A multi-year capacity investment (including Campaign Manager)

Would Make a Campaign Gift

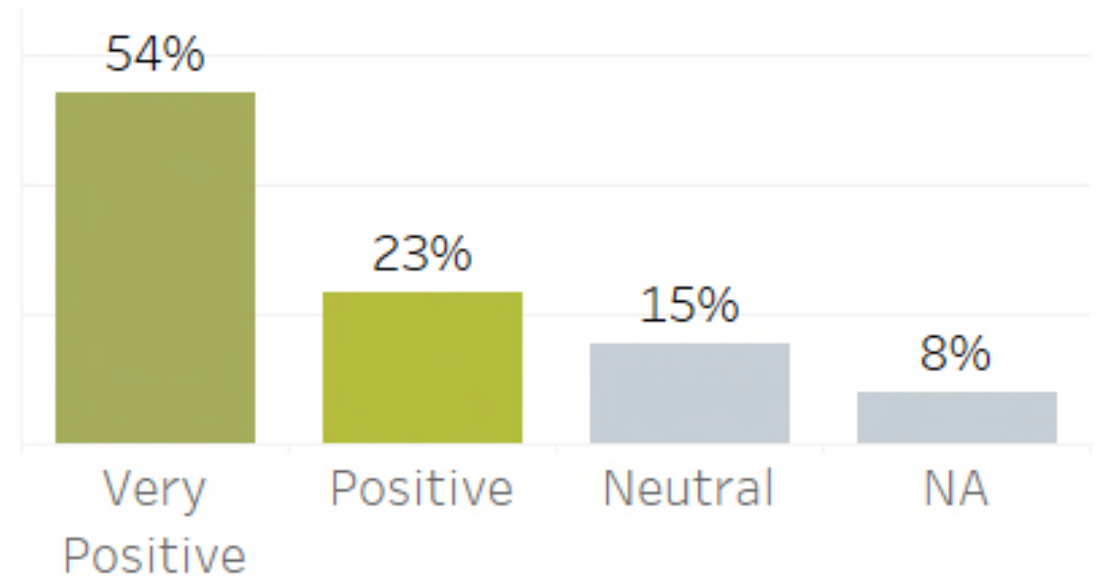


Confidence in Leadership

Key Finding: Stakeholders expressed high confidence in the President's leadership and sees her as the person who can drive a successful campaign.

- Evidence:
 - "She has the vision."
 - "Leadership is the strongest it's been."
 - "This is the moment — because of her."
 - This is a major asset.

Perception of President Thompson



Summary

Summary of Feasibility Interview Findings

Strengths:

- Strong institutional mission, outcomes, and momentum
- High confidence in presidential leadership
- Stakeholder appetite for a major campaign
- Compelling pillars with refinement
- Strong affinity among alumni and partners

Challenges:

- Advancement structure not yet campaign-ready
- Need for focus and clear priorities
- Underdeveloped data, systems, and pipeline
- Limited major-gift experience
- Case needs more specificity, metrics, and differentiation
- Mixed confidence in feasibility of \$1M–\$5M gifts
- **Conclusion:**
 - Stakeholders support the vision and believe a campaign is feasible with focused priorities, strengthened advancement capacity, and clearer strategy.
 - Stakeholders want Westfield to pursue the campaign — but with disciplined preparation.

Prospect Potential Analysis

November 2025

Executive Summary

- Westfield's alumni, donors, and non-alumni constituents collectively hold over \$1B in five-year philanthropic capacity.
- Using conservative modeling, Westfield could reasonably expect to capture ~\$20.4M from individuals in a campaign.
- Approximately 550 households demonstrate moderate-to-strong philanthropic inclination and form the core major-gift pool.
- The leadership pipeline is thin: only one known prospect currently appears in the \$1M+ high-inclination tier.
- To reach modeled potential, Westfield will need significant prospect qualification and sufficient major-gift staffing (including supporting staff).

Key Findings

- Westfield's philanthropic landscape is **imbalanced**: while total capacity is high, the number of **known, engaged high-capacity prospects** is **limited**, underscoring the need for active qualification.
- The campaign will require a **top-heavy strategy**: a small number of leadership gifts will drive early momentum, but most high-capacity households have **low or unknown inclination** at this stage.
- Approximately **550 households** show moderate-to-strong inclination and form the **core campaign working pool**, but this group must be moved quickly into qualification, cultivation, and solicitation cycles.
- Alumni exhibit **stronger philanthropic behavior** but generally **lower capacity**, while non-alumni represent a **larger untapped pool of high-capacity prospects** who require systematic engagement.
- Reaching modeled potential will require:
 - Rigorous and ongoing **prospect qualification**
 - Disciplined **major-gift portfolio management**
 - Regular **leadership involvement**, particularly with six- and seven-figure prospects
- **Staffing**: Current staffing levels are not structurally aligned with the gift volume required to reach modeled potential; Westfield will need additional full-time major-gift–focused staff to maintain pipeline momentum.

Modeling Purpose & Framework

Purpose of the Prospect Potential Analysis (PPA)

- Determine potential fundraising capacity from households making major- and principal-level gifts.
- Systematically identify and review household prospects with high potential to make a major or principal gifts.
- Identify High Priority Prospects (HPP).
- Inform the choices that will need to be made regarding:
 - Prospect management
 - Staffing for major and principal giving fundraising
 - Setting the campaign goal.

About the Prospect Potential Analysis

This analysis estimates the philanthropic potential of individual households using two core inputs:

- **Philanthropic Capacity**
 - Estimated five-year giving potential to *all* organizations, based on:
 - iWave data
 - Past giving to Westfield
 - Manual review of top prospects
- **Philanthropic Inclination**
 - A likelihood score (A–E) based on:
 - Giving history
 - Alumni affiliation
 - Recency and frequency of giving
- **How results are modeled:**
 - Prospects are segmented by both capacity and inclination.
 - High-capacity prospects are manually reviewed by Westfield Staff.
 - Industry-standard capture assumptions are applied to estimate reasonable campaign potential.
 - Only individuals (not organizations) are included in this modeling.
 - Results inform: campaign goal setting, staffing needs, and prospect management strategy.

Major Giving <> Annual Giving

Major Gifts

- Infrequently solicited (not annually)
- Typically come from assets (a "stop and think" decision)
- Often targeted at specific donor interests or projects
- Require a personal relationship and customized approach

Annual Gifts

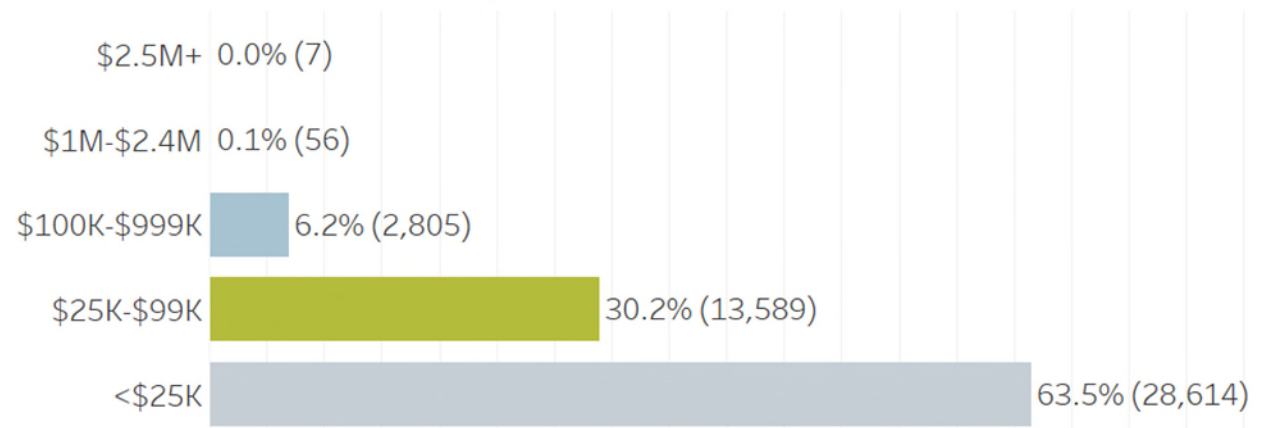
- Frequently solicited (multiple times annually)
- Typically come from discretionary income
- Often unrestricted
- Typically solicited by volunteers, email, digital, mailings, phone, events

Philanthropic Capacity & Inclination

About Philanthropic Capacity

- Counsel determined an estimated five-year philanthropic for all individual households using:
 - Screening data from iWave.
 - Previous Giving to Westfield (if greater than screening data).
 - Individual review of top prospects with Westfield staff.
- Capacity reflects potential philanthropic giving over five-years to all organizations.
- Capacity is based on publicly available information and Quality of Match. Organizations are not included

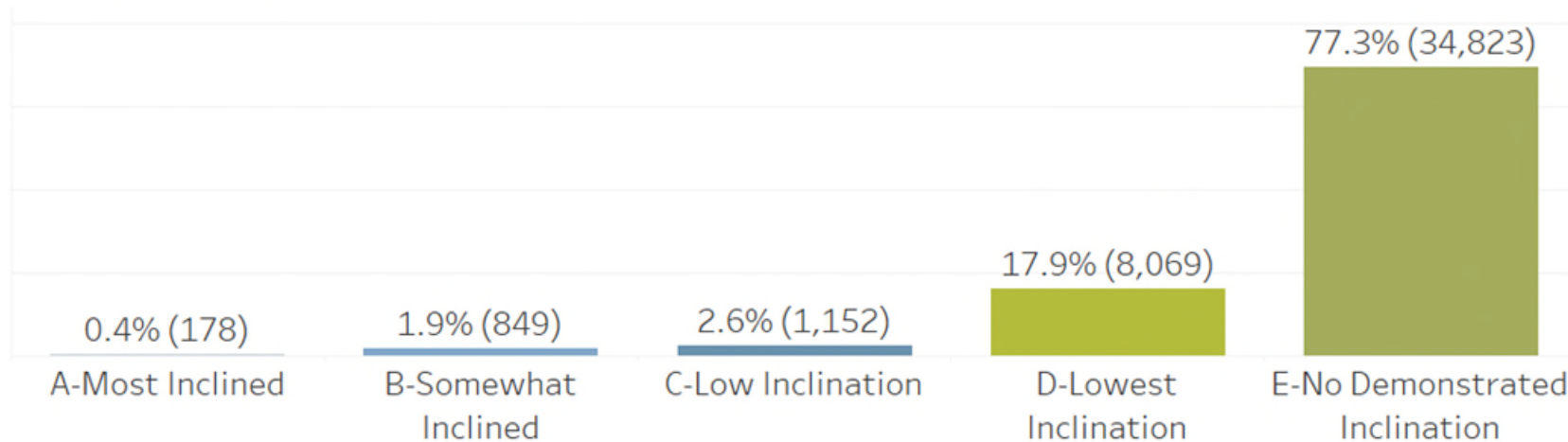
PPA- Household Capacity (iWave + Giving)



About Philanthropic Inclination

- Using RFM (recency, frequency, monetary) scoring, prospects were placed into one of five inclination categories (A-E).
- This inclination is based solely on giving to Westfield.
- Top prospects were manually reviewed with Westfield.

PPA - Philanthropic Inclination



Philanthropic Inclination

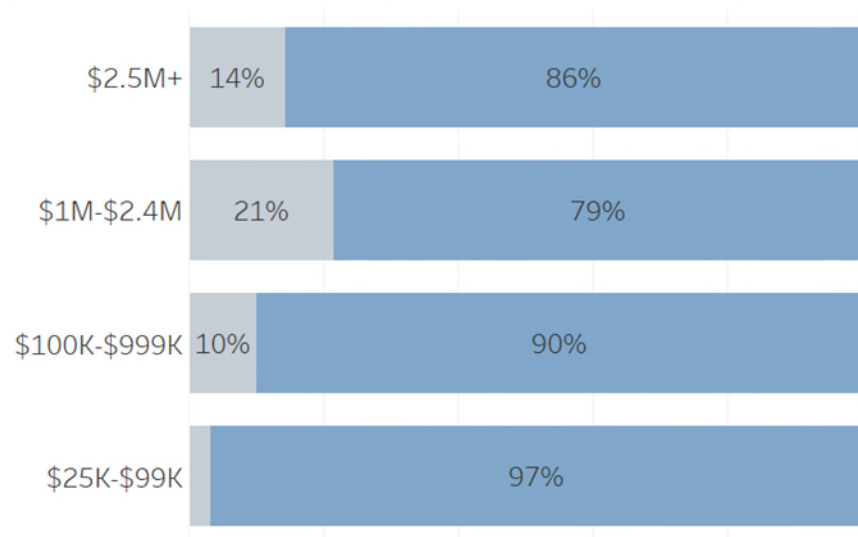
- The data below represents prospects with capacity of \$25K+ only.
- As the data below show, A-level prospects have given greater amounts, more frequently, and more recently.

	A-Most Inclined	B-Somewhat Inclined	C-Low Inclination	D-Lowest Inclination	E-No Demonstrated Inclination
# of Households	117	434	535	3,795	11,576
Median # of Gifts to WSU	31	11	2	2	0
Median Lifetime Giving to WSU	6,082	823	150	60	0
Median Largest Gift to WSU	600	100	66	25	
Average Fiscal Year of Last Gift	2025	2025	2024	2005	
Percent Alumni	57.3%	67.1%	45.6%	93.7%	100.0%

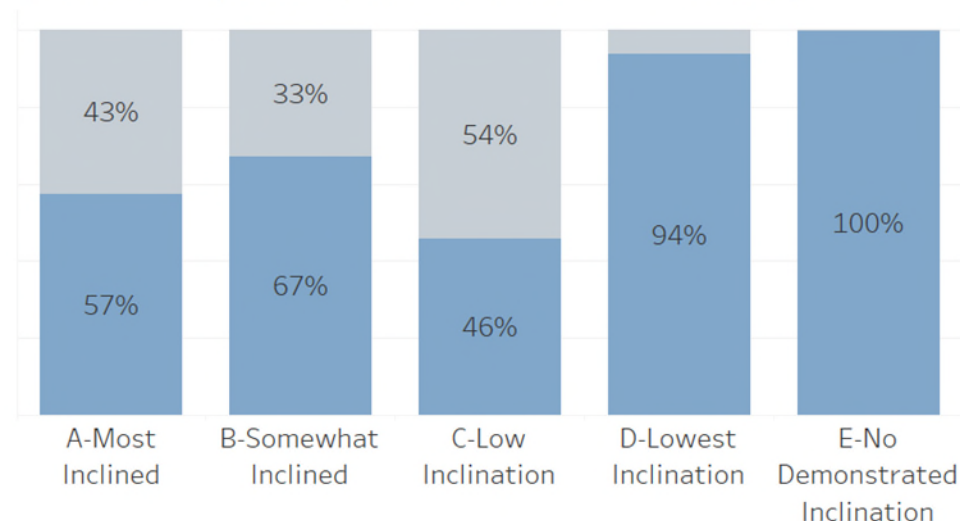
Capacity and Inclination by Constituency

- While a significant portion of leadership prospects are non-alumni, this campaign is the time for Westfield to deepen connections – philanthropic and otherwise – with alumni.

\$25K+ Prospects by Capacity & Constituency



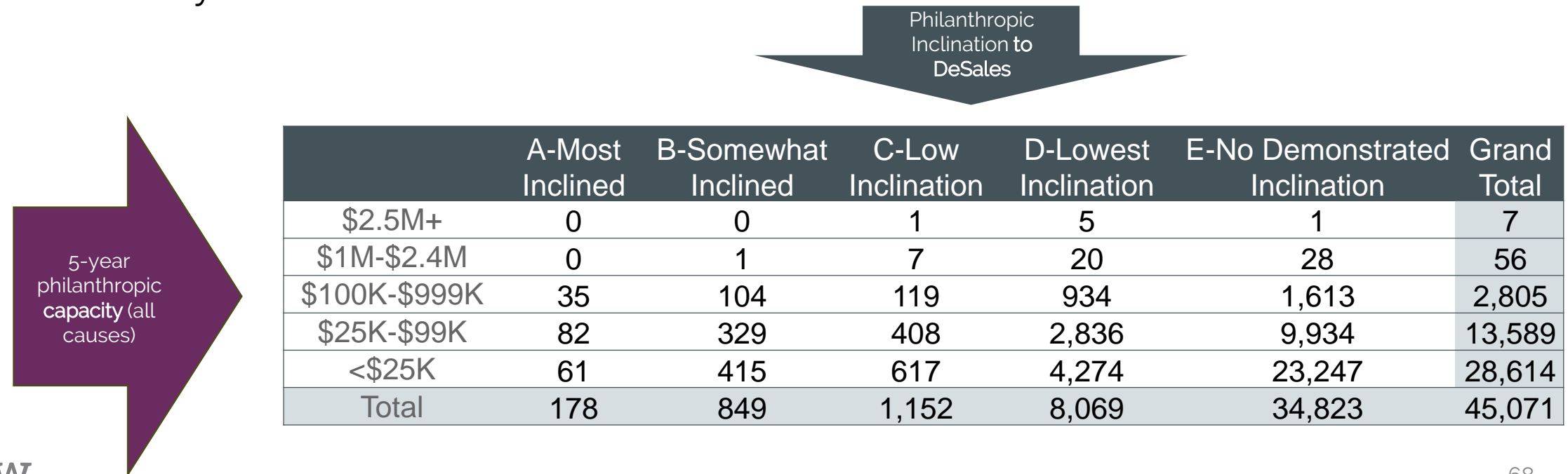
\$25K+ Prospects by Inclination & Constituency



■ Alumni
■ Other

Capacity and Inclination of Westfield's Individual Constituents

- The table below shows the full segmentation of Westfield's database after using data analysis and screening to determine philanthropic capacity and inclination. It should be noted that prospects rated \$100,000 or more and with the highest suspected levels of inclination were reviewed name-by-name by Westfield staff.



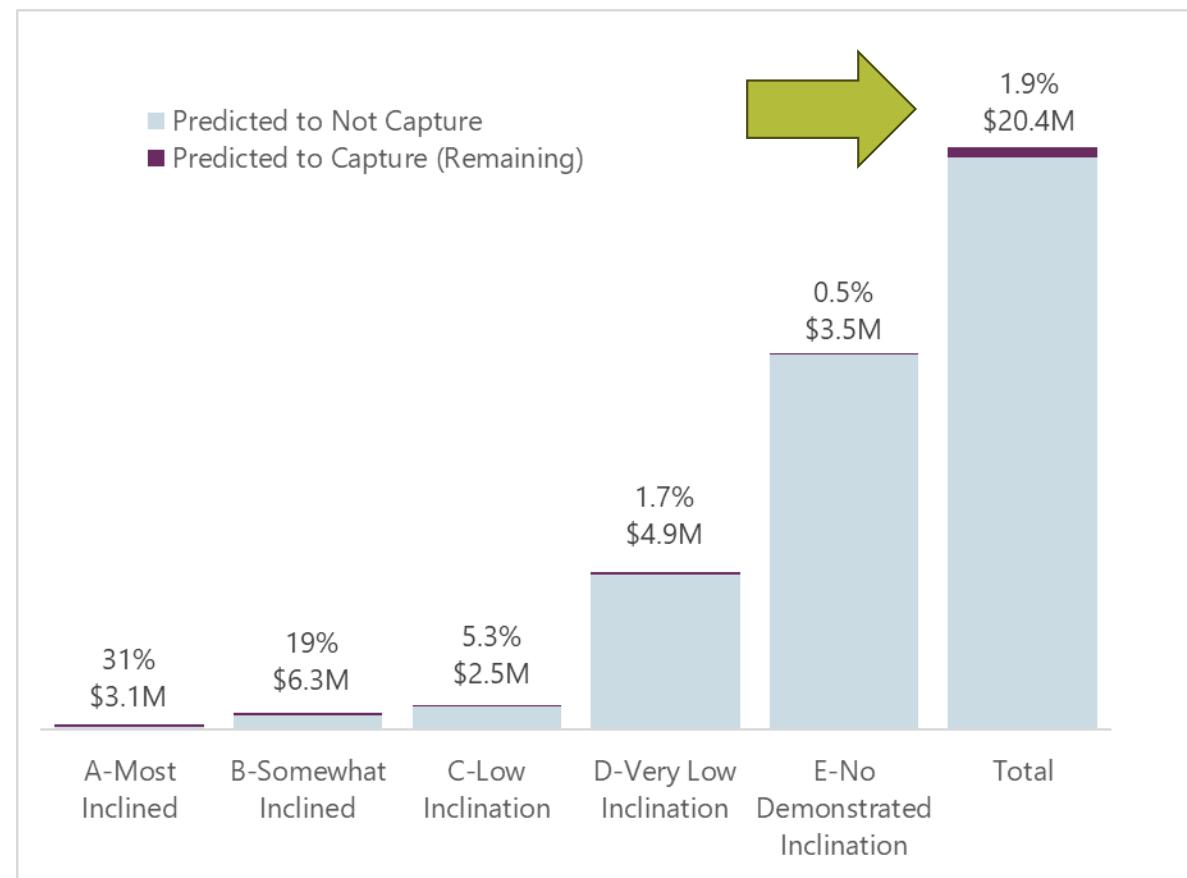
The diagram illustrates the segmentation process. A large purple arrow on the left points right, labeled "5-year philanthropic capacity (all causes)". Above the table, a dark grey arrow points down, labeled "Philanthropic Inclination to DeSales". The table below shows the resulting segmentation of the database.

	A-Most Inclined	B-Somewhat Inclined	C-Low Inclination	D-Lowest Inclination	E-No Demonstrated Inclination	Grand Total
\$2.5M+	0	0	1	5	1	7
\$1M-\$2.4M	0	1	7	20	28	56
\$100K-\$999K	35	104	119	934	1,613	2,805
\$25K-\$99K	82	329	408	2,836	9,934	13,589
<\$25K	61	415	617	4,274	23,247	28,614
Total	178	849	1,152	8,069	34,823	45,071

Aggregate Prospect Potential

Aggregate Prospect Potential

- Conservatively, alumni, donors and other individuals have over \$1 billion in philanthropic capacity.
- Based on the data provided, counsel projects that Westfield could capture \$20.4 million – or 1.9% – of this capacity in the campaign, primarily from “Most” and “Somewhat” inclined prospects.
- These calculations do not include giving from organizations or planned giving.



High Priority Prospects

- Prospects with **high capacity** and **philanthropic inclination** (highlighted below) should be the primary focus for Westfield, along with ensuring that ratings are accurate and complete. Prospects with capacity to make a major gift should be qualified and assigned a strategy/relationship that is focused exclusively on cultivating and soliciting gifts either for this campaign or the next one. Loyal donors are also critical prospects for planned giving.

Philanthropic
Inclination to DeSales

5-year
philanthropic
capacity (all
causes)

	A-Most Inclined	B-Somewhat Inclined	C-Low Inclination	D-Lowest Inclination	E-No Demonstrated Inclination	Grand Total
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High Priority Prospects (HPP) Subsegments

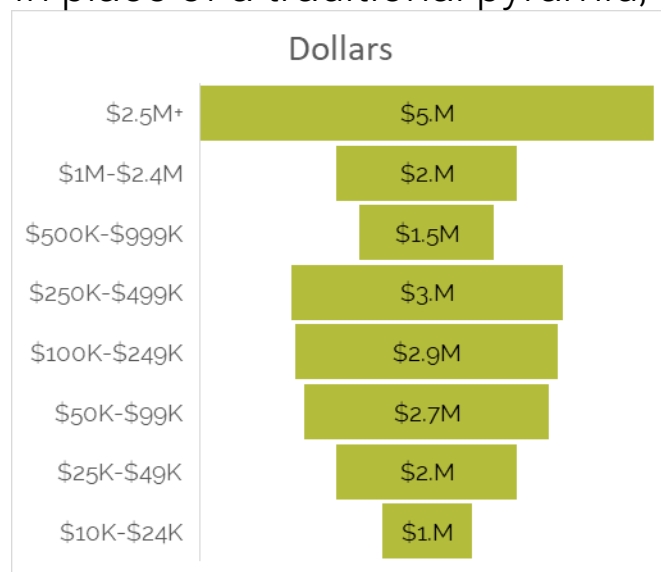
- **Campaign Drivers (A & B \$1M+)**: Prospects who could make or break a *current* campaign. Westfield currently only has one prospect that falls into this category according to this analysis. *It is likely that there are other seven-figure prospects that have not yet been identified or are not actively being tracked.*
- **Campaign Core (A & B \$25K-\$999K)**: Prospects who make up the future major giving pipeline & generate a healthy campaign pyramid base.
- **Long Shots (C-E \$100K+)**: Prospects to either quickly disqualify or with which to plan an aggressive cultivation strategy for this campaign or long-term cultivation strategy so they will become drivers of the *next* campaign.

	A	B	C	D	E	Grand Total
\$2.5M+	0	0	1	5	1	7
\$1M-\$2.4M	0	1	7	20	28	56
\$100K-\$999K	35	104	119	934	1,613	2,805
\$25K-\$99K	82	329	408	2,836	9,934	13,589
<\$25K	61	415	617	4,274	23,247	28,614
Total	178	849	1,152	8,069	34,823	45,071

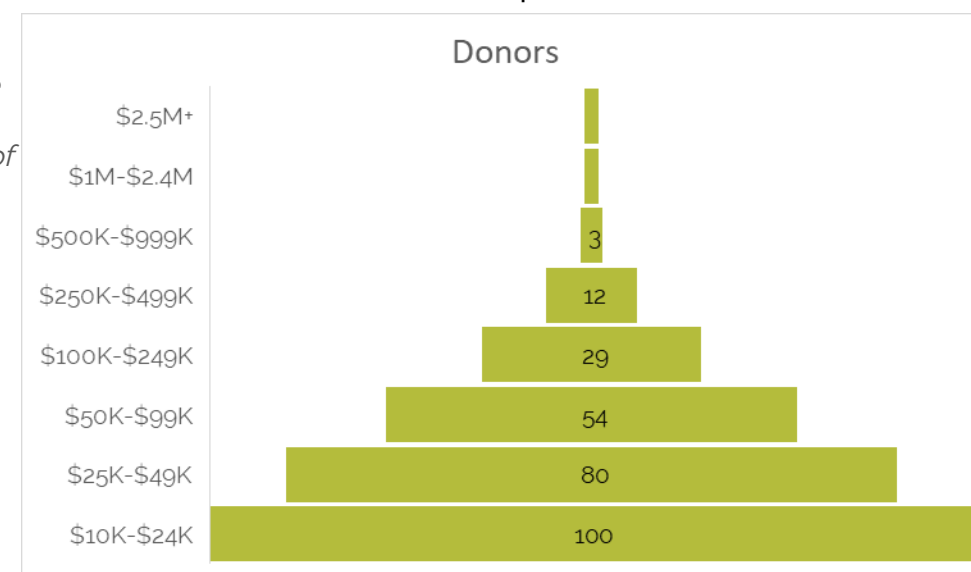
Gift Table & Resource Implications

Potential Gift Table

- Below is an illustrative gift table to show distribution needed to reach \$20 million in major gifts – and \$25M - \$35M overall.
- Based on the estimated captured capacity of Westfield's prospects at each level and an aspirational goal for principal giving, the major gift pyramid for this campaign would include:
 - 282 Donors of \$10K+
 - 4 Donors (\$7M) of \$1M+
 - Donors of \$1M+ represent 35% of the \$20M total
- Notably, only 28% of the campaign would come from donors of less than \$100K over five years.
- In place of a traditional pyramid, dollars resemble a "T" and donors resemble a space needle.



Campaign success will be highly dependent on leadership gifts at the top of the pyramid



Potential Gift Table (Coverage)

- Westfield has too few A-level inclination prospects to secure sufficient gifts at most levels. When B-level prospects are included, WSU has sufficient prospects EXCEPT at the \$1M+ level.
- Westfield State will need to qualify, cultivate and solicit and steward (when appropriate) nearly 850 prospects.
- Securing gifts from B- and C-level prospects will require significant cultivation and, thereby, resources.
- This gap can be resolved by aiming to secure a narrower gift table with more donors of \$1M+ and fewer at lower levels, which will require significant time and focus the President, Vice President and Senior Leadership.

Level of Giving	Donors Needed	Prospects Needed*	A Prospects	A Prospects vs. Donors Needed	B Prospects
\$2.5M+	2	6	0	-6	0
\$1M-\$2.4M	2	6	0	-6	1
\$500K-\$999K	3	9	5	-4	7
\$250K-\$499K	12	36	8	-28	28
\$100K-\$249K	29	87	22	-65	69
\$50K-\$99K	54	162	29	-133	125
\$25K-\$49K	80	240	53	-187	204
\$10K-\$24K	100	300	42	-258	256
Total	282	846	159	-687	690

**A typical campaign sees one donor for every 3-5 potential prospects; an ambitious ratio of 3:1 was used in this analysis.*

Staffing Requirements for Reaching Modeled Potential

- A full-time Major Gift Officer (MGO) focused solely on major gifts typically closes **12–18 major gifts annually** (3–4 solicitations/month; 25–33% close rate).
- Westfield will need to close **~250 major and principal gifts** and work with at least **850 prospects** over the next five years to achieve the modeled potential.
- To sustain this volume, Westfield will need **at least three full-time MGOs** dedicated to major and principal gifts.
- Westfield will also need staff dedicated to Donor Relations to support major gift work.
- Current staffing levels and competing operational responsibilities limit the ability to:
 - Actively qualify mid- and high-capacity prospects
 - Engage six- and seven-figure donors at the required cadence
 - Maintain a consistent pipeline of solicitations
- Achieving the modeled potential will also require **direct engagement** from the President, Vice President, and senior leadership—especially with leadership-level prospects.

Technical Appendix: Methodology

- This Prospect Potential Analysis is based exclusively upon data provided by Westfield.
 - Westfield provided files of individual donors and alumni (not including organizations) with attributes and giving histories. Westfield also provided philanthropic capacity and affinity information received from iWave.
 - Counsel segmented this data based on philanthropic capacity as determined by iWave (provided by WSU) and previous giving.
 - Counsel assigned a Philanthropic Likelihood (A-E) score to each entity in the file.
 - Prospects were excluded if:
 - They are not alumni, current parents, current or current faculty/staff or current/previous board members with a very-low philanthropic affinity AND have a capacity < \$250K
 - They have an iWave Common Name score of >3 and very-low philanthropic affinity.
 - A subset of high-capacity and high-likelihood prospects were manually reviewed by Westfield staff and capacity and likelihood values were adjusted as appropriate.
 - Counsel used this segmentation to estimate Westfield's philanthropic potential and segment prospects
- Counsel will provide Westfield with a data file that includes the final capacity and philanthropic inclination scores assigned in this analysis.