



WATERFORD  
SCHOOL

FEASIBILITY STUDY

# EXECUTIVE SUMMARY

Community Counseling Services (CCS Fundraising) provided this executive summary of the feasibility and planning study conducted on behalf of Waterford School as we prepare for an ambitious upcoming capital campaign. Please accept our gratitude for your tremendous interest and participation in facilitating this critical phase.



## WHY WE DO WHAT WE DO

### VISION

We inspire individuals to pursue lives of meaning and purpose.

## WHAT WE DO

### MISSION

We provide students with a world-class liberal arts education that stimulates intellect, ignites passion, and shapes character.

## IDEALS WE LIVE BY

### CORE VALUES

*Integrity*

*Excellence*

*Curiosity*

*Responsibility*

*Caring*

**W**  
**WATERFORD**  
**SCHOOL**

Dear Waterford Community,

As we begin the final stretch of the 2018-2019 school year, I want to express my gratitude for your participation in the campaign feasibility and planning study Community Counseling Services (CCS Fundraising) conducted this winter. The insight and direction you provided will help guide Waterford's fundraising initiatives for the coming year and beyond.

During the months of February and March, CCS conducted an inclusive electronic survey that resulted in more than 800 responses from parents, grandparents, alumni, faculty and staff, alumni parents, and other friends of Waterford. In addition to that work, the CCS team engaged 102 members of the Waterford community in in-person conversations. The responses were both informative and encouraging. You affirmed the critical intersection of exceptional teaching in the liberal arts tradition, and how vital faculty are to delivery of our program. We appreciate your recognition that Waterford must consistently deliver on our mission today, and strategically plan for a dynamic future.

We recognize the immense privilege and deep responsibility to deliver a world-class liberal arts education that inspires lives of meaning and purpose. Informed by your feedback, we are inspired to move forward as we plan a historic capital campaign to cultivate essential resources for a thriving program long into the future. As we begin planning our campaign, your commitment will be even more vital. I hope that we might again call on you for guidance and leadership in the coming months.

Thank you again for your support of our school, our faculty, and most importantly, our students, and for your participation in this critical and illuminating process – the path ahead is clear, thanks to your candor and advice. On the next page is a brief executive summary of the study's findings. Please be in touch should you wish to discuss the results or our plans for the future. I will keep you informed as we move forward.

Best Regards,



Andrew Menke  
Head of School

## OVERVIEW

Between January and March 2019, CCS Fundraising conducted a Feasibility and Planning Study to test the potential for a campaign to fund facility and endowment needs of Waterford's community now and into the future.

To determine this potential, a total of 66 personal interviews with 102 key stakeholders were conducted, engaging a wide-range of representative constituents in discussions about the proposed campaign initiatives for Waterford School. These personal interviews represented parents, administrators and faculty, board members, alumni, grandparents, former board members, and alumni parents. Through an e-survey, 805 additional parents, faculty and staff, alumni, grandparents, alumni parents, and other friends of Waterford gave their input.

The participation of the interviewees and e-survey respondents in the Feasibility Study positioned CCS to provide recommendations about the financial viability, timing, and priorities of a campaign by gathering as much in-depth feedback as possible from Waterford's constituents.

CCS also conducted an Advancement Assessment, which analyzed and evaluated Waterford's donor database, advancement efforts, and staff structure. We presented our findings and recommendations to the Board and administration.

CCS evaluated Waterford's campaign readiness through these lenses: case for support, leadership, prospective donors, fundraising plan.

## NEXT STEPS

*Based on these positive study results, CCS recommends that Waterford move forward with the planning phases of a comprehensive campaign. The reactions from the proposed projects and Waterford's priorities are encouraging, and the Board and Waterford administrators will be determining next steps and details of the timeline, goal, and final case for support.*

*Thank you for your insight and participation —we appreciate your support as we pursue our ambitious goals. And most importantly, we look forward to including you in our work as we move forward.*

## SUMMARY

The results from interviews and the e-survey show the following:

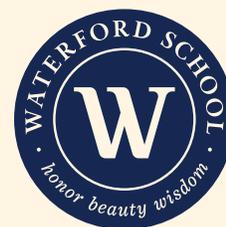
**Overall:** Waterford is well regarded. Ninety-five percent (95%) of interviewees have a positive or very positive impression of the school. Interviewees particularly consider Waterford's faculty, academics, and liberal arts approach areas of strength.

**Case for Support:** Reactions to the background statement outlining Waterford's potential campaign were positive among interviewees (85% positive/very positive) and e-survey respondents (78% positive/very positive). Though interviewees and e-survey respondents saw the importance of all tested priorities, the science and math building, the dining hall and student commons, and the endowment emerged as the top three most compelling priorities.

**Leadership:** There is willingness among the Waterford community to help with the campaign in several ways, including leading, hosting, and participating on committees.

**Prospective Donors:** Most interviewees (89%) would consider making a gift to the campaign, along with 86% of the e-survey respondents.

Based on this analysis, we recommended a series of planning and implementation steps for the review of the board and Waterford administrators.



### STAFF LEADERSHIP

**Andrew Menke**  
Head of School

**Brandon Bennett**  
Associate Head of School

**Ben Hoke**  
Director of Advancement

**Greg Miles**  
Director of Finance

**Todd Winters**  
Director of Admissions & Enrollment Management

**Amanda Apple**  
Director of Marketing & Communications

### CCS STUDY STAFF

**Frederic J. "Rick" Happy**  
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**Theodore "Ted" Blackburn**  
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**Ingrid Warner**  
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