

Establishing a Development Program

Concordia Lutheran High School has been in operation for over 25 years. During the course of this time there have been several efforts toward establishing a development program for the school. However, those efforts have met with limited meaningful results with respect to the amount of donors as well as the number of significant gifts to the school. With this in mind, the school board made the decision in August 2009 to split the roles of Principal and Head of School to allow one person to focus on the day-to-day activities of running the school and another person to work on development and other responsibilities relating to the business side of the school. The new principal was selected after interviews with the current principal, respected leaders among the faculty and the Board of Directors. The ministry for the new principal of Concordia Lutheran High School will begin in July 2010.

The 2009-2010 school year permitted time to put into place some of the aspects we believe will lead to the long-term viability and sustainability of Concordia as the school of choice in northwest Harris County. These include implementation of a software system to track all relevant information on current and potential donors, the origination of a Development Committee working directly with Board members, and more regular visits with those who support the ministry of the school.

While there is still much to be done, and the work will always be ongoing, we have had significant results because of these changes. First, a generous gift of over \$1,000,000 was received which paid off the entire amount of our debt! This was instrumental in allowing for the second significant outcome of dividing the roles of Principal and Head of School. The new Principal promises to be a good match with the ministry of our school, and we are excited about the future of Concordia Lutheran High School.

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Project Overview

Concordia Lutheran High School is located in Tomball, TX, thirty-five miles northwest of Houston in Harris County. The school opened its doors to serve the surrounding community in 1984. Students of CLHS come primarily from the surrounding seven school districts, and some travel upwards of 45 minutes. The school is owned and operated by The Concordia Lutheran High School Association of North Harris County. The association is comprised of eight Lutheran (LCMS) congregations which provide support of approximately \$160,000 to the annual operating budget. While this amount has stayed relatively constant, we understand the congregations are under their own financial pressures that increase our need to seek alternative funding. The current facilities were new and moved into in April of 1996. Generally, these are in good shape, although they are getting to an age where more maintenance is required. Upkeep of the property is particularly important as there are other private school options in the area that have newer facilities. To continue to attract families, the facilities themselves must be in top condition.

With an alumni that is growing and reaching an age when they have more ability to support Concordia, and realizing the need to not rely too heavily on tuition while also providing for expansion and facility improvements, implementation of a strong development program is essential to the viability and longevity of serving our community.

Project Process

With a clear understanding that building of relationships is essential to success, our first focus has been to be more open with our constituents while remaining honest in our communication. We have established a Facebook page for our alumni allowing us to connect with them and also providing them a way to network with each other. In addition to providing a communication tool, it is also a way for Concordia to find some of those alumni whom we may not have been otherwise able to locate.

Another step taken for more communication with our graduates has been to give the responsibility of alumni relations to a staff member who has two of her own children who have graduated from Concordia. This is an area which we will continue to address as we realize we can do significantly more in connecting with alumni, and we have parents of alumni who have indicated their sons and daughters are eager to provide financial support to the school.

During a day-long board meeting in August prior to the school year, the decision was made to split the roles of Principal and Head of School. This was done primarily with the acknowledgement that in order for the two roles to function as well as possible; one person could not do both, especially in a school of our size. While the decision was made in August, the actually hiring of someone to become the principal took place in the spring semester with a July 1, 2010 start date.

In the fall of 2009, we also had two opportunities for parents of current students to attend a "State of the School" presentation. This included information on aspects of the history and future of the school, achievements of our students in academics, fine arts and athletics, and the current financial status. This was enlightening for many of our parents, and many of them took time to thank us for sharing the presentation. Some even indicated they would be talking to schools they had come from as an idea which would be good for them to implement. While we believed the sharing of data would be a powerful tool, the responses affirmed that belief. The effect on some was to come in the very next day with a check in hand to support the efforts of the school.

We also began looking at new options for a donor data base system, and just prior to the end of 2009 we made the move to have eTapestry be the system we are using. This included taking information from a variety of sources to be converted into the eTapestry data base, and some of that required manually entering older information so the conversion could take place with our entire history of donors.

Our board has been going through some changes of its own, also, and one of those was to establish a Development Committee to work closely with the school and not put all of the work on the shoulders of one person. This committee began meeting late in the spring semester, so any real effects of their efforts are yet to be realized. Other than providing help to the person at the school who is responsible for development work, it is another way for stakeholders to be directly involved and have input into what we will do to more effectively have many people, business and organizations supporting the ministry of Concordia.

While all of this has been taking place, it has become much more commonplace to sit down with supporters over breakfast or lunch. This has been an important factor in building the types of relationships which are needed for development to be successful. In addition to getting together with individuals over a bite to eat, invitations to events and golf are becoming a more regular occurrence.

Project Results

With a review of the Financial Goals from our Strategic Plan, along with the work which has been done during this project, it is gratifying to know that some of those goals were met this year ahead of schedule. The most significant of these goals was to be debt free by 2012. The total remaining debt as we entered the 2009-2010 school year was slightly over \$1,000,000. A couple conversations had taken place with a donor during the summer, and the "ask" for a donation to cover the balance of the mortgage (all of the debt) was made in October. The initial response was that was not something which the donors could do at this time. As we were having final exams for the first semester, I received a call from the donor asking if we could get together. Of course, we could, and during the time we had together, a gift was made to cover the full amount of the mortgage!!!

Obviously, this was very meaningful for the school. At the same time, both having a strong development program as we move into the future (after all, these donors have been the primary givers to the school) and having a broad base of supporters are essential for our sustainability.

While we have yet to see sizeable amounts of financial support from our alumni, the fact that we have more communication with them is paying dividends in the relationships we are building. Very little contact has been maintained with our graduates over the years, and the Facebook page and events we are holding for alumni are helping get them reacquainted with their alma mater.

The division of the roles of Principal and Head of School is not one which we have felt the effect of yet since the new Principal will be stepping into his position on July 1. Although this is true, it is a very important step on the part of our board to understand this need and take the action to allow the development program to become what it needs to be in the future.

Project Reflection

The opportunity to take part in the Van Lunen Fellowship program and my project of establishing a development program have been great learning experiences, and it makes one realize that we are just scratching the surface of what needs to be done to have the

program be successful. At the same time, it is exciting to put things in motion for something which will benefit Concordia.

While it was understood that relationships are key to having an effective development program, it has become even more evident as I have more actively become engaged in this realm. One member of the Development Committee shared earlier in the year that she really liked the direction the school was taking, and that was specifically about activities to engage individuals and build those relationships.

As this year has progressed and different areas of need have arisen, it is also very apparent that we will constantly have to prioritize the projects we want to address through our development program. It has become clear we will need to make some adjustments with respect to our tuition and how that is structured to minimize or eliminate third source funding from being a part of our operational budget.

Our alumni are a source of support for the school which has previously been untapped. Not only are they untapped, many of them are also reaching a point in their own careers when they will have a greater ability to provide for Concordia. The key in this will be to have them become engaged in what is taking place with the school, and greater communication with them will be a key element in making this a reality.

Finally, while the separation of roles for Principal and Head of School is significant for the school and the individuals in those positions, it is also already apparent that we will need a person with sole responsibility for development in the future. Although that may be a few years in the making, we need to be planning for that step as my work as Head of School will have a variety of other responsibilities which will take away from the work of development.