



# Unleashing the Dream

The path that is connecting vision with resources  
at Heritage Christian Schools

One school's journey from near bankruptcy to new life and a bright future. How a new leader at that school connected with a visionary consultant through the Van Lunen Program to put his school on track to a preferred future.



# Unleashing the Dream

The path that is connecting vision with resources at Heritage Christian Schools

## ***Prelude***

In 1972 a small church in Milwaukee decided to start Heritage Christian School in the basement of their building. In following years the school grew to become an independent PK-12 school that had two campuses and was drawing about 1,200 students from all over the Milwaukee area. Momentum that seemed unbounded slowed and regressed in the early 2000's. Hindered by some unpopular decisions by the administration and aided by the economic collapse of 2008, the school found itself on the brink of closing its doors in 2010 with an enrollment of about 400 students and a mountain of debt.

Within a few years the Lord started worked miracles. In late 2012, as the enrollment began to climb, a lawsuit was settled in favor of the school that put it back on firm financial ground. All of its debts were settled, but it no longer owned its own buildings, leasing three buildings instead.

During the 2012-13 school year I was approached by the school board to be a candidate for the head-of-school position. While I was reluctant at first, having witnessed from afar the trauma the school had just been through, I came to see that God was leading me to take the helm at Heritage and play a role in guiding it to a healthy future.

## ***The Vision***

When I arrived in the summer of 2013, I found that the school still had many of its best teachers from "the glory years" before the financial collapse. Morale, however, was a bit low. Teacher pay had been cut dramatically to right the ship and they also missed

## *About the Project*



*Author:* John Davis,  
President

*School:* Heritage  
Christian Schools  
3500 S Glen Park Road  
New Berlin, WI 53151

*Consultant:* Zach Clark,  
Founder and Lead  
Coach, Development  
and Leadership  
Coaching





paychecks in 2010 that did not get paid back until the lawsuit was settled.

The board, on the other hand, was coming out of a period of intense involvement in the day-to-day operations of the school. During the darkest days some of them would spend up to 40 hours a week dealing with issues, primarily financial, at the school. For an entire year before I arrived there was no head-of-school; instead there were five principals/directors that reported to the board chairman. Needless to say the board was tired and ready for a leader who would take charge administratively.

Everyone was ready to see the school move ahead. We adopted a challenging theme for the year: *Be Exceptional!* We renewed our focus on our mission: *Training and inspiring servant leaders through exceptional Christ-centered education and programs.* Soon there was a positive buzz about the school in the community.

As the board left the administration to me, it stepped up its search for a building and property that we could someday call home. In the city of New Berlin, where we already had one of our leased campuses, the school district was selling a middle school building. It was a perfectly round, two-story building that sat on 10 acres of land – more than enough space to handle our middle and high school. On top of that, an architect on our board quickly designed a possible addition that, when built, would provide enough space to bring the elementary students to the same campus.

### ***First Step***

In April of 2014 we called a meeting of parents to announce our intention to buy Glen Park School from the School District of New Berlin for \$1.75 million. It was not till the November that we closed the deal. We loved the building's potential, but were overwhelmed with the amount of work needed to be done to get it ready for school the 2015-16 year. Many rooms needed asbestos removal, electrical and HVAC systems needed overhauls, every wall needed paint, and the offices needed to be completely remodeled.

With all of this work on the horizon, we decided to hire a new advancement director in the summer of 2014. Mary McCarthy was a school mom who had been a development professional her entire career. She was ready to jump in and bring some order to a segment of the school that had been somewhat neglected. While the task of buying the new building was relatively easy (the school basically traded lease payments for mortgage payments), we had a lot of work to do if we were going to raise money to do all of the remodeling and the eventually build the addition that would unite grades K-12 on the campus.



## ***Van Lunen to the Rescue***

Neither Mary nor I had ever been a part of a multi-million dollar capital campaign. Few members of our board had much experience with projects as large as we were about to tackle. We were looking for help.

In June 2014 I attended the *Best Practices Conference* at Wheaton Academy in West Chicago, IL. There I heard Van Lunen Director Jim Marsh make several presentations, along with Tom Konjoyan, a 2012-13 Van Lunen Fellow, who had turned around a struggling school in Southern California. By the end of the conference I knew that I wanted to be a part of the Van Lunen Program. I felt sure it would bring me the knowledge and relationships we would need to get Heritage to its desired future.

When I arrived at the campus of Calvin College in July 2015 to begin my training, I met the tremendous Van Lunen faculty and connected with my fellow cohorts. During our training we heard many excellent speakers, but none stood out more to me than Zach Clark, Founder of Development and Leadership Coaching. Zach's relational approach to donor development made sense to me, and he had the experience to prove that his methods worked.

So I approached Zach with my project: to develop a plan to fund the building of an addition to our newly purchased school campus (total cost about \$5M+). I was thrilled when I learned in July that my project was approved with Zach as our consultant. By September we started having phone conversations to set up our plan.

## ***Development and Leadership Coaching***

Zach took a very different approach to development training than I expected. I thought he would come to our school, do a feasibility study, tell us what we needed to do, and then check up on our progress occasionally. But the truth was, we were not ready for a major capital campaign. Zach was not interested in hitting a short term goal, but rather, his desire was to see us lay the right foundation of development principles and practices that would allow us to not just raise money for the new addition, but to continue to build relationships and be successful for many years to come.

So as the name of his consulting company implied, Zach lined us up with a coach with whom we would meet with weekly for an hour by phone. Our coach would be Sarah Guldalian, a former coworker with Zach in the development department of Westminster Christian School which was led by Jim Marsh. Sarah also is the owner and CEO of Rhino Hyde Productions, a marketing company in the St. Louis area.

Sarah always greets Mary and me with a cheery voice filled with enthusiasm. Each week we pray, connect a bit, and then get down to business. She checks with us on how we did with the previous week's assignments, which often is a combination of watching a video (featuring Zach), reading materials, doing homework, etc. At times the work is difficult, but Sarah is very understanding. She keeps us on task but doesn't come across too strong. We love working with Sarah!



## ***The Development Plan***

### **Phase 1 – Message, Strategy, and Donors**

Early in our work with Sarah we focused on our development message. We crafted a five-page whitepaper that gave a brief history of our school, our mission and core values, what drives us, what we must accomplish, and how (strategy) we would accomplish it. After some tweaking we felt we put together a compelling story and vision of who we are and why we must accomplish our goals to be successful in the mission God is uniquely calling us to do.

We next worked on categorizing donors based on our connection with them. We gave the highest priority (green) to those with whom we had the greatest momentum – people who were most connected with the school and excited about what we were accomplishing. The next tier of donors (orange) were people with whom we had a bit less affinity or momentum, but had potential as bigger donors. The last group (red) consisted of people who had great potential, but little or no connection with the school.

### **Phase 2 – Skills and Disciplines**

After a number of weeks of refining our mission and identifying our key donors, we were challenged to start having one-on-one meetings with the people on our “green” list. We were provided with examples of ways we could make appointments, questions to ask at the meetings, and ways to follow up with people after the meetings. Mary and I split our green list based on our personal connections and started having multiple meetings every week. Whether it was breakfast, lunch, or coffee, we tried to meet somewhere off campus. Our initial goal was to get donors talking about their vision and advice for the school, while also asking them who they might connect us to that could help us in moving forward.

One of the most difficult things about the meetings was scheduling so many of them on top of my regular duties. My goal was to have five meetings a week, but I didn’t always meet my goal. However, I did have dozens of meetings that either established new connections or reinforced existing ones. We know these relationships, which will be consistently nurtured, will pay dividends in the end.

In this phase we also learned about many disciplines that will help us build our development program. They include regular thanking, reporting, asking, following up, integrating development messages, and the establishment of development committee task forces. Though we were already doing some of these things, it has been a challenge to both understand these things and incorporate them in our daily routines.

### **Phase 3: Systems for Success**

This is the phase we are working on as I write this paper in late May, 2016. It began with reviewing the basic habits, which was a good thing considering all of the new things that we took on our plate since the program started months ago. We looked at the team metrics and disciplines we need to keep going to succeed. We did some communications planning and established a small group



approach. The first small group – a development communications committee, began in the last two weeks. A group of very connected moms in the school met with Mary to discuss our development plan and to talk about ways we can get our message out to others. This phase also talks about how to lead people to decisions.

Phases yet to be covered this year include:

### **Phase 4: Momentum in Significant Giving**

Steps in this phase will include:

- Updating prospect planning and message
- Broadening the reach of donor communications
- Improving donor retention and regaining past donors
- Recruiting new donors
- Growing the network of influence and potential givers

### **Phase 5: Reinvention and Scaling Development Efforts**

Steps in this phase will include:

- Development planning and budget
- Gathering new data on donor perspectives
- Growing staff and volunteer capacity
- Updating communications timelines and materials for year-end giving
- Planning donor specific experiences and proposals

## ***The Road Ahead***

While Mary and I will continue to meet weekly by phone with Sarah to work on our coming phases, the biggest challenge on our horizon is to launch our campaign to raise the money we need to add the new high school wing and gymnasium to our “round” campus. We are waiting for our architect to finalize costs for the first phase of the addition. We envision having our plan well-crafted and ready to put before donors and parents by the start of the new school year.

One question we ask ourselves is, “How long will it take to build the new addition?” Zach has prepared us to do all that we can to raise that money as quickly as we can. He suggests that rather than setting a hard and fast timeline, to say that we will move as fast as our donors can help us get there. We hope that we can complete the first phase in two years, but we know we have a challenge raising money in a school that has almost 75% of its students coming on state vouchers or financial aid.

We have learned it all comes down to building and nurturing strong relationships with each individual donor. We believe that with a good plan, clear communication, excellent execution, and trust in God, we will reach our goals much faster than we might have thought possible. And in the end, after the building is done and the dust settles, we will not only have accomplished many extremely important goals, but we will pass on a set of development principles and practices that will help Heritage Christian Schools be successful for years to come.