

A Comprehensive Advancement Plan for Mayer Lutheran High School

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Project Summary

The need for a comprehensive advancement plan for a private high school is essential to sustaining the school's mission into the future. The **mission** of Mayer Lutheran High School is to *prepare the next generation of Christian leaders* and the school's **vision** is to *be a vibrant Christian community engaged in maximizing potential*. To make friends for the school, communicate the mission and vision to a broad audience, and raise third-source funding, a reasonable, thoughtful plan for advancing the school's mission is necessary. The project focused on creating and maintaining such a plan.

Goals of the Project

- Identify the key areas that need to be addressed in the school's advancement plan.
- Articulate a philosophy of fundraising and development.
- Publish a comprehensive plan to address the school's need for strategic planning, fundraising, major gifts, communications, alumni relations, and public relations.

Purpose of the Project

- Create accountability and transparency in funding the school's mission.
- Provide key ingredients for building upon and improving our advancement strategy.
- Provide a written plan to promote institutional continuity in the advancement area and to aid in school head succession planning

Results of the Project

- First School Gala Auction held
- Alumni Phonathon instituted
- Grandparents Day held with funding appeal
- Redesign of school publications with help of design professional
- Capital Campaign Readiness Committee formed and functioning
- Number of Donors increased by 22% compared to previous year

Project Overview

Mayer Lutheran High School is located in western Carver County, Minnesota, thirty-five miles from the Twin Cities. Since its founding in 1961, MLHS has served families from a radius of twenty-five miles in addition to international students and students from other parts of the Midwest who board in private homes. The school is owned and operated by the Lutheran High School in Mayer Association, a 501(c) 3 non-profit organization composed of twelve Lutheran (LCMS) congregations, which provide an annual subsidy to the school's \$2.5 million budget. In 2008-09, that subsidy totaled nearly \$350,000. As is the case with most private schools operating under this model, the subsidy has steadily decreased over the last decade as congregations increasingly find themselves struggling to meet their own budget demands. Additionally, the school's 48-year-old campus needs significant improvements and expansion if it hopes to attract and keep families from the growing population settling in our region.

In order to plan for a future of declining Association subsidies while keeping tuition as affordable as possible, and to provide capital funding for facility improvement and expansion, a comprehensive advancement plan is essential if the school expects to sustain its mission long into the future. Creating such a plan, and executing it, is crucial for the long-term health of the ministry. Thanks to the support of the Van Lunen Center, we were able to create a plan for advancing the school's mission that is both reasonable and dynamic, requiring constant attention and evaluation to keep it relevant and effective.

Process of Creating the Advancement Plan

Creating a comprehensive advancement plan for Mayer Lutheran High School involved several steps. First, an inventory of all fundraising, communication, public relations, enrollment management, and strategic planning assets was taken. This "advancement audit" involved articulating everything we do, and have done in the past ten-year period, to promote the school's mission and vision and to make a case for support from the community.

The cornerstone of any advancement plan is the strategic plan. In 2006, the Board of Directors, working with the Executive Director, developed the school's strategic plan. This five-year plan affirmed the school's mission of preparing the next generation of Christian leaders while also developing a vision statement and establishing the school's core values. Throughout the 2006-07 school year, the specific facets of the strategic plan were developed and articulated with input from the Board, parents, staff, and the general community. In May, 2007, the strategic plan was approved by the Delegates' Assembly, the formal representative body of the Association churches. The strategic plan continues to be reviewed monthly at Board meetings and an annual report is presented each September.

Following a thorough understanding of the school's strategic plan, a fundraising audit was conducted. Reports indicating amounts raised for the annual fund, endowments,

major gifts, restricted gifts, and capital gifts provided a baseline for measuring future fundraising goals. Specifically, we examined the role of the 2,700 alumni have in giving and discovered that only five percent gave a gift of any type in 2007-08. As a result of this finding, an alumni phonathon was conducted for eight days in late October and more than 100 new donors from the alumni were added to the records in addition to getting updated directory information for many more.

In addition to a fundraising audit, we also examined our special events. The school has traditionally held a large summer rummage sale, a student aid brunch, a golf outing for technology, and a pork chop dinner. All have been successful at raising funds and gathering the community together. But, they did not have the impact that a large gala could offer. We developed and held our first dinner auction in November and raised \$78,000 for the annual fund. Its success was much more than money, however. It was a great celebration event of our ministry, bringing together more than 300 people of different generations and relationships to our school. Additional events created in the plan include a Heritage Society luncheon for those who have included MLHS in their planned giving, and luncheons to honor area pastors and church workers, volunteers, secretaries, principals, grandparents, and parents. All of our special events are aimed at making and nurturing friends for MLHS, but they also are opportunities to ask for gifts and to let our needs be known.

After listing our fundraising and special events, we looked at our communications program. This is the one facet of our advancement plan that needs the most work. We have developed a monthly newsletter that goes to all student homes and the homes of our donors. We have an alumni publication that is mailed three times a year. We also send a publication to potential students twice a year. Additionally, direct mail postcards aimed at families in our region who have the potential to send their children to private school were mailed in conjunction with various school events. We contracted a design specialist to create all of our publications. We still need to re-design our school website, although a partial re-design was implemented this past year.

Ideas and guidance in preparing our advancement plan came from Alan Zacharias of Gonser, Gerber, Tinker, Stuhr LLP of Naperville, Illinois. Alan graciously spent an entire day with me going over the key elements of the plan and meeting with our Board to discuss the upcoming capital campaign. His expertise, experience, and enthusiasm benefitted the work that went into the plan.

Project's Results

The advancement plan helped to move the school forward in several areas, some of which were discussed above. The ***Celebrate His Harvest Dinner Auction*** was a great success and has established a model that can be followed by volunteers in the future. The alumni phonation helped to open communication and bring our graduates up to date over the mission and vision of their alma mater. We were also able to realize budget savings by updating e-mail addresses and using more electronic communication, saving on printing and postage.

Re-designing our school publications, adding color, making better use of technology in delivering information, and providing an environment of information flow that is elegant and effective has begun and is a constant dynamic at our school. Additional attention to our web site, including on-line donation capabilities, will continue to draw more people into our school community as donors, potential students, parents, or community members.

One of the most exciting opportunities our advancement plan offers is to conduct a capital campaign in 2010 to raise funds for facility expansion. A "Capital Campaign Readiness Committee" has been formed and has hired a firm to conduct a readiness or feasibility study. We plan to conduct the study in the summer of 2009 and will have a recommendation by October to present to the Delegates' Assembly.

In any advancement program, the key is building relationships and, ultimately, growing resources to advance the school's mission. In 2008-09, we were able to increase the number of donors by 22% compared to the previous year. Through special events and new and existing fundraising techniques, almost \$400,000 has been raised so far this year.

Analysis of My Project

The insights gained from creating an advancement plan are valuable, both in helping the school's mission and in actual revenue. While the plan continues to be written, edited, critiqued, and expanded, I have discovered several essential ideas.

First, an advancement plan is never finished. It continues to morph and grow like a living organism. As I sat to write the plan, I found how much work is actually involved and how many facets of a school's mission exist. From fundraising, to communication, to admissions, to construction and facilities, to special events and community relations, everything a school does is, in the end, advancing the mission and vision.

Second, advancement is not only about fundraising, although it is a measurable, key element. Certainly, to do all the right things, but not raise money, would be a futile exercise, damaging the school's credibility and stability. The key to a successful advancement program is building relationships and communicating clearly and appropriately. In the age of Twitter, Facebook, blogs, and text messaging, communication has become more complicated and demanding. Yet, to nurture friendships, we need to be aware of the many ways meaningful communication occurs and have a plan to address those needs.

Third, the importance of our alumni cannot be ignored. As church subsidies decline, the gap needs to be filled. Tuition and fees cannot cover the entire gap. Our 2,700 alumni, working as a force, have the potential to close the gap and allow for support that will enable us to expand our campus and ministry reach.

Finally, the human resources needed to execute our plan need to be in place. We do not have a Director of Advancement. As Executive Director, my work to provide the vision for MLHS takes a great deal of time. Meeting with school friends, on a meaningful scale, is quite difficult when my other responsibilities are considered. A leader in advancement is essential to helping achieve the strategic plan and to provide for a sustainable future for our ministry.

With so much to do and so much to plan, it almost seems overwhelming. Yet, as a Christian leader, I can trust in the God who promised Joshua, “*Have I not commanded you? Be strong and courageous. Do not be terrified; do not be discouraged, for the LORD your God will be with you wherever you go (Joshua 1:9).*” God kept his promise to Joshua as he led the advance of His people into the Promised Land. And, He keeps His promises to us today as we move into the uncertainty and untold challenges of leading His school into the future.