

Growing a Culture of Giving

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Background

Trinity Christian School was founded in 1981 with a vision for providing a quality Christian education for its community in Windward Oahu. By 1990 the school had expanded to include classes from preschool through 6th grade and serving over 100 families each year for the next 16 years. But, as graduates from 6th grade succeeded at the best, most prestigious schools on the island, and as waiting lists grew, the opportunity to serve more families began to provoke school visionaries to take another step of faith.

The School Board made the bold decision in 2007 to expand Trinity to include a secondary school (7-12 grade). At the same time, they decided to embrace a classical method and philosophy for education to provide a holistic vision for the school, improve the quality of education throughout, and participate in a growing renewal of classical Christian education in America. These decisions proved deeply transforming for the school as it split Elementary grade levels into two sections and expanded into single sections in grades 7-12. By 2013, Trinity had grown to 360 students and 250 families and graduated its first senior class.

In order to accommodate the expansion, half the school moved to a leased property a few miles away for the split campus model we have today. And as we have matured our program and now graduated four classes, the school community increasingly yearns for a permanent solution and a combined campus where we can fulfill our vision for the school. We find ourselves balancing this desire for new property with the necessary investments in our leased property in order to build out our program (we are in the midst of doubling our Secondary School to two sections). Windward Oahu is an extremely expensive real estate market (New York City prices) with no empty land for developing.

Fiscally, the school is on good footing with some stable and steadily-increasing enrollment, a balanced budget, and some cash reserves. As of last year, and despite a risky 7-yr expansion through a nationwide economic downturn, the school achieved 97% cost-based status. Still, the split campus, our lease situation, and expanding Secondary School compel us toward a level of fundraising the school has never endeavored, with no serious plans on how to get there.

Problem

While the 97% cost-based status is a milestone we can celebrate, being mostly independent from gifts and donations, it also means that the school has not relied on nor cultivated regular giving, and we are nowhere near the kind of giving we would need to meet future growth goals.

In 2012 and 2013 the school held a Spring Gala event that netted around \$20,000 each year, but through a tremendous effort. In subsequent years, we hosted a Fall Festival that was more open to the

public and a fun time for the school community. It has also netted between \$15 and \$20K each year. But, this is rather meager fundraising for growing school our size (\$3.5M budget). Furthermore, we have not conducted an Annual Fund for the past three years, as long as I have been the Head of School. I was told that my predecessor had tried to do the Annual Fund, but it never worked out well, raising only around \$6K. As a new Head, I have hesitated (until now) to do an Annual Fund for fear of doing it poorly.

Therefore, I have a community of families (and now a few graduating classes) who have not been accustomed to any serious giving to accomplish the growth of the school. But we are now in a position that calls for considerable giving, as it will likely cost \$4-6M just for land. At my Van Lunen cohort's first meeting in July, 2015, I recognized the need to begin growing a culture of giving in our school community. Thus was born my Van Lunen project.

Project

I originally called my project an Annual Fund project, but have since widened its scope to Growing a Culture of Giving. To put it in more stark terms, I wanted to get giving 'off the ground,' and go 'from 0 to 10mph.'

To that end, I began consulting with Zach Clark from Leadership and Development, whose lessons immediately resonated with me. I had previously sought out development advice via other heads of schools and other development consultants, and I received conflicting advice. It was not until I met Zach and heard his message that I really understood the *Why* of development. His was a vision for stewarding God's resources that resonated not only with my head but also my heart.

Therefore, we determined to walk through a mini version of his coaching service, meeting on the phone periodically and doing homework in-between. As said before, I was initially focused on an Annual Fund as the solution to my problem. But Zach took me back to square one, and from that initial consulting I abandoned my assumption that the Annual Fund was alone the solution. What I did instead was to work on a Development White Paper that defined Donor-Driven Steps for the school, which then led to a renovation project and a vehicle for growing giving (and educating a School Head).

Execution

As a disciplined (and important) first step of the project, Zach led me through a rapid assessment of our mission, vision, and values. Ever since I started as Head of School, I knew my job included "crafting a message," and not just a message made of some fine sounding words, but one that was the product of some deeply-held convictions, recognition of the distinctive features in our school, and a compelling picture of its future. I knew that words matter, and I had already done quite a bit to articulate the mission, vision, and values in our school.

That said, it was very helpful going through the process again. This time I approached the thought exercise armed with some excellent questions and a good formula for crafting our message. Much of what I had already written down for the school was affirmed, but I learned to bring better focus to this message and then use it more effectively. For example, I had previously used the word "vision" to refer to our plans for a permanent campus and the kind of buildings we hoped for. But, I learned through my consulting to define vision in terms of *the lives affected* by our school ministry. As it turned out, our

school leadership had recently crafted a “Profile of a Graduate,” and so it became a simple step of calling that profile our vision.

Furthermore, my consulting impressed on me the need to promote that vision—the vision of a graduate—at gatherings of parents and meetings with stakeholders. This was a simple but very important correction for me as a new school head. At previous speaking engagements with parents, I would always think through a particular message for that event. But, it was very helpful to have someone tell me, “Whenever you speak in front of your parents, you have one goal above all others... whatever else you do, you must hit your vision out of the park....and vision is the picture of your graduates.” This simple recalibration changed the way I spoke to parents at our first meetings of the school year, the way I spoke at our Board meetings, and the way I spoke with potential donors over a coffee.

This reflection part of the project culminated in a Development White Paper, a 5-page “message” inclusive of our school’s mission, vision, values, history, strategic direction, and next steps. Once again, I had already thought through many of these things separately, but I’m very grateful for Zach’s consulting business (I’ll call it a ministry) for the clarity it brought to me in pulling these thoughts together into a concise, coherent development message, which guided me throughout the whole project and the whole school year.

At the same time I was crafting this Development White Paper and identifying donor-driven steps, I was trying to solve a problem of needed classroom space to accommodate the expansion of our Secondary School to two sections. A number of things conspired (read: God’s sovereignty) in the fall of our school year to answer the need for additional space and get giving off the ground: 1) our landlord on the rented property had recently vacated a building due to health concerns following a sewage backup, 2) a growing positive relationship with those landlords led to favorable terms for renovating that building and then renting it at no cost over the next three years, 3) a school Facilities Manager we had recently hired had the construction and contractor skills to take on a major renovation project, and 4) we now had a compelling development message and the encouragement to begin soliciting donors for the project. By November, I had an agreement with our landlord, and I officially began the Sato Building Renovation Project. Instead of doing a generic Annual Fund like I had first pictured, I was now leading others to invest in the advancement of our school through a tangible project.

This project advanced quickly through the remainder of the school year. Armed with some initial financial commitments, I announced the project to our school community in December with the goal of raising \$180,000, our cost to fully renovate a 2600 sq ft building that would add three classrooms and an art room to our campus. We began construction with a volunteer “Demo Day” in early January. Cash donations and gifts-in-kind sustained the rapid advance on this project through March, with the exterior complete and the interior framed. Along the way I met with donors to share with them the unfolding story of this project, cast a vision for its impact on our students, and show them how they could participate.

Challenges

In process of executing this project and soliciting donors for the first time, the school faced a few challenges that impacted the project. First, this was an Accreditation year for our school, the first in six years and the first one that I had personally faced. The whole accreditation process went well and resulted in a good endorsement for our school, but not without a tremendous amount of effort on my

part, distracting from my ability to personally engage with donors on behalf of the Sato project. Secondly, my initial efforts to find donors led to a promising grant opportunity with a prominent Foundation in Hawaii, but after several months going down this path we discovered that we could not get the grant due to our lease agreement with our landlord. Once again, this had a personal impact on my time and energy moving this project forward. Third, I learned that our Facilities Manager would be relocating to the mainland to plant a church (sorry to lose him, but fully supportive of his call to ministry). His crucial contribution to the project as carpenter and contractor (reducing the projected project cost from \$350K to \$180K) would be lost as of the end of June. Therefore, I decided in April to advance project construction beyond the funds we were able to raise at that point, thereby spending out of our school reserves to complete the project by June. We continue to raise funds for the project, but we will not likely reach our goal of \$180K before the work is completed. Still, we have enjoyed some great success as a result of doing this project, and I have personally benefited as well.

Results and Lessons Learned

First, it needs to be said that qualitatively, this renovation project will result in a beautiful and functional new addition to our campus. The location of the building in the center of our small campus, its utility for our expanding classroom space and enrollment, and the design and quality of work have already brought excitement and inspiration to our student body and community of families. We have included students and parents in some design features with wonderful effect. The finished product will beautifully reflect the values of our school and give a picture of what to expect when we get a permanent campus. Also, we have already begun using the building's new front porch as place for meetings, performances, and a Hawaiian May Day celebration. Ultimately, this project will prove a valuable investment in our school's future as it will undoubtedly encourage families to continue with our school and attract new families to it. The project has galvanized many around the vision of our school in ministering to more students.

As for donations, I believe we did quite well considering some of the challenges we faced this year. As of the end of May, we have raised \$85K in total cash gifts and gifts-in-kind. This is more than all the money we raised in four years of Spring Galas and Fall Festivals, and with far less effort! Furthermore, we now have 35 students enrolled in next year's 7th grade, which will be split into two sections. Prior to this, the highest enrollment we have had for 7th grade was 18.

Those represent the major results of the project, but I must list several other outcomes, which I can directly link to this project:

- The process of assessing our mission, vision, and values revealed this area as a relative strength of our school. That encouraged me to submit a proposal to the Society for Classical Learning (SCL) to teach a workshop entitled "Words Matter: Crafting and Communications Your School's Mission, Vision, and Values." My proposal was accepted and I'll be presenting at the SCL Annual Conference this June.
- In the midst of consulting with Zach and growing in my understanding of Development, I began engaging with a prospective Director of Advancement for our school. We were emailing each other almost daily for months as I shared what I was learning about Advancement, and he shared how God was guiding in him a new vision for his work and ministry. I directed him toward Leadership & Development resources and he personally contacted Zach, just as I was consulting with Zach on his aptitude for such a job. Now our school will have its first ever Director of Advancement beginning this July, and I believe he will be a great fit and contribution to the growth of our giving culture.

- Having raised support for the Sato Renovation Project, I now have a list of donors I can share with our new Director of Advancement when he arrives.
- While the grant opportunity with the one foundation fell through, I learned a bit more about this foundation, advanced our relationship, and identified a possible new opportunity for an even bigger grant.
- I reconnected with another key foundation in our community which had previously donated to the school. They were likewise constrained in giving to this project, but I was able to reconnect with this potential donor who will likely be very supportive of some of our next donor-driven steps.
- The Development White Paper I produced early in the project has proved very useful in several circumstances already. It has prompted good discussion and brought clarity for the School Board, the school principals, the Accreditation team, the prospective Director of Advancement, one of the Foundation contacts, and a long-time grant writer here in Hawaii who has volunteered her services. All were impressed with our school and excited for its future as a result of reading the White Paper.

Perhaps the greatest long-term benefit of doing this project is what it has done for me personally. Prior to being a Head of School, I was a 20-yr career Naval officer who did not do development (in the military, we just recklessly spend tax-payer dollars). This was an entirely new set of skills, and a new kind of leadership, that I had not ever faced before. Indeed, I was reluctant to face it in my first two years as a Head of School. This project pushed me to do what was uncomfortable, but equipped me with the tools and compelling reasons for doing it. In the process of meeting with parents and asking them to contribute to our vision, I could see how many lessons I learned via lecture or consulting were validated via experience. The personal invitation to participate in our growing school really did work so much better than the impersonal shotgun methods, direct mailings, Spring Galas, etc. I believe these lessons (solidified with a concrete experience) will guide the advancement of our school in a significant and lasting way. Finally, I feel that this experience of asking for donations has made me a better school head, even apart from the donations received. The personal and genuine approach to soliciting donors forced me to be more personal and engaged with parents in my school. Contrary to my fears of repelling people, finding partners to invest in our school has deepened relationships with them.

In my first two years as a school head, I thought about hiring a Director of Advancement in order to take the burden of fundraising off my plate. Now that we have one joining our team this July, I feel a confidence *and a desire* to lead him and work alongside him as we grow a culture of giving in our school.

I want to thank:

- Zach Clark for his inspiration and sound advice as I ventured into new territory.
- Jim Marsh for his guidance in helping me to select this project in the first place. I am amazed at the strategic impact of that one decision at the start of my time with the Van Lunen Fellows.
- The Van Lunen Fellows program, its instructors, and fellow cohorts for taking a Naval officer and turning him into a school head.
- My wife for graciously enduring this past year's "deployment." She has been a quiet support in a very noisy and challenging year.
- Jesus Christ my Lord, who has served as my inspiration for every endeavor and light unto my path. As I reflect on the past year, I'm in awe of God's sovereign hand and loving care.