

Unleashing the Dream

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

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

Consultant: Zach Clark, Founder, Development and Leadership Coaching

Summary of Project

VISION - After experiencing an almost catastrophic financial collapse six years ago, Heritage Christian Schools, a 43 year-old PK-12 independent school in the Milwaukee area, rebounded dramatically to see its finances and enrollment trending upward. In November 2013 the school purchased a former public middle school and made plans to renovate and add to it, opening the possibility of combining its three leased campuses in one place.

VAN LUNEN - HCS President John Davis joined the Van Lunen Program in 2015 with a goal of finding the best way to raise major funds that would allow the school to accomplish its mission and complete the building projects at the new campus. John connected with Van Lunen presenter Zach Clark, Founder of Development and Leadership Coaching, and was approved to work with Zach as a consultant on this project.

COACHING - Zach met several times with John and HCS Advancement Director Mary McCarthy and eventually set up weekly one-hour phone sessions with development coach Sarah Guldalian. She would provide John and Mary with weekly assignments, teaching videos, and debriefings that would lead to the establishment of effective development disciplines and best practices.

THE PLAN – The first phase of the plan was to develop a basic development message and strategy, followed by a systematic way to connect with donors. John and Mary wrote a five-page development message that included the strategic steps that the school would take to reach its God-inspired goal. At this same time they identified over 130 donors with whom they would meet one-on-one, sharing mutual vision and setting the stage for future conversations.

The second phase of the plan focused on developing certain skills and disciplines. In this phase the meetings with donors started taking place. Scripts for setting up appointments and asking questions during meetings were given and rehearsed. The goal was to establish strong relationships that would build momentum as they followed up with further meetings, asks, thank you notes, and updates.

At the time of this writing the school is in the third phase, which includes the use of data and metrics while harnessing the synergy of small groups. They will work through two more phases that will help build momentum toward significant giving and the ability to scale development efforts.

ROAD AHEAD – Working this plan will lead to giving relationships helping HCS dreams come true!