

Van Lunen Project Summary
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The Project:

My article, addressed to other Heads of Schools, tells about my school's comprehensive capital campaign and shares five ideas of things I have found to be true in this experience.

By way of background, I came to the school in August 2017 and found a 57 year old institution that functioned in a familial way and operated with a finance system like a checkbook. While my leadership style is deeply relational, I also appreciate clarity. I began moving us towards functioning as an institution through planning and policies. Our school developed a strategic plan in my first year of leadership. Throughout the first and second years of my leadership I discovered a serious financial deficit and had to take difficult corrective action in the second year.

My Van Lunen Fellows year spans the third year of my leadership at the school. During this year, my applied project has been to implement a comprehensive capital campaign concurrently with rebuilding trust in the community after a time of little financial transparency.

Forward in Faith is a comprehensive capital campaign that includes our annual Fair Balance Tuition Fund, our Renovation Fund, and Secure the Future (Cash Reserves, Endowments, and Estate Giving).

1. The Fair Balance Fund makes variable tuition possible. This is funded through a sponsored Community Service Day and an Annual Auction, which together raise over \$600,000 each year. All other unsolicited and undesignated annual giving also goes to the Fair Balance Fund.
2. The Renovation Fund is the largest portion of the comprehensive capital campaign. The goal is \$3.9 million to do the first phase of facility upgrades.
3. The third part of the comprehensive capital campaign is "Secure the Future", which includes endowments, cash reserves, and estate giving. We don't make direct asks for this category, but have instead created the discipline of putting aside 10% of all funds that are raised for the Fair Balance Fund and for the Renovation Fund to "Secure the Future".

The Learnings

My article highlights five ideas or learnings that I think are worth sharing.

1. **Get help.** Even in the midst of extremely tight budgets and staff reductions, we hired a part time development director. We invested in a donor database specifically for schools. We re-arranged job descriptions to give a highly detail-oriented administrative assistant responsibility for the database. We formed a Campaign Committee made up of highly engaged and influential donors under the age of 45.

2. **Focus on students.** We revised our talking points to focus our fundraising on student impact rather than a building or filling gaps between income and operational expenses.

3. **Do not wait for a perfect time.** We chose to be transparent with donors about the school's financial challenges. We used the opportunities of donor meetings to share the difficult management changes that had been made to address the challenges. This built donor confidence. Donors had become weary of just meeting annual needs each year and were eager to give towards the future.

4. **Emphasize ownership.** We intentionally built on the strong value of community by using inclusive language that emphasized community ownership of the school. We know we are successful when we hear community members talk about what "we" are doing at the school instead of what "they" are doing over there at the school.

5. **Believe in abundance.** We moved from an Eeyore-like, gloomy approach to finances to an idea of abundance. Our conversations with donors and our thank you notes express the joy of generosity.

Impact:

As a school, we have changed our attitude towards money and fundraising. Our new Finance Director includes all the departments of the school in budget planning. She provides them with financial information for their part of the school. Money is no longer a mystery.

We have gained confidence in telling the story of our school. Teachers had reacted to the word "marketing" because they felt it cheapened their calling to teaching. By instead telling the story, we can share how God is at work among us and in the lives of our students. By focusing on storytelling, we have invited donors and community members to share their own stories of the school.

Even in this difficult COVID year, we have cash reserves to help us in the coming year. This is because of the design of the capital campaign. No funds need to be reallocated to cover expenses.

Because we went ahead in faith to plan the second phase beyond this first phase, we have been able to extend our fundraising efforts even through this time when construction has been paused for one year because of the Coronavirus.

We have built trust with donors as we have shared not only the school's financial challenges, but also our plans to implement changes and to report back on those changes.