

Genesis Project
Feasibility and Readiness Study

Prepared for
Luther Classical Academy

*St. John's - Port Washington, St. John -
Fredonia, and Pilgrim Lutheran - West Bend*
Steering Committee

Genesis Feasibility
Report

July 2023

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Genesis Consultants

Introduction

Missouri Synod Lutherans have long seen a need for integrating all learning with faith in Jesus Christ. They have listened to the mandate of Holy Scriptures in Matthew 28:19-20,

... "Go and make disciples of all nations, baptizing them in the name of the Father and of the Son and of the Holy Spirit, and teaching them to obey everything I have commanded you. And surely I am with you always to the very end of the age" (NIV)

Lutherans understand that their duty as parents and members of the Body of Christ is clearly stated in Proverbs 22:6 ...

... "Train up a child in the right way, and when old they will not stray" (NRSV).

The Lutheran School Feasibility Study is provided as help for St. John's - Port Washington, St. John - Fredonia, and Pilgrim Lutheran - West Bend to explore the opportunity to start a classical Lutheran school.

The services provided consist of work by trained and experienced Lutheran school professionals. Consultants are trained to help conduct surveys, review demographic data and conduct interviews. Consultants summarize information received and offer recommendations based on the consultant's best judgment as professional educators.

The role of the consultant is to recommend and advise. Consultants do not make decisions for congregations. The Feasibility Study is intended to serve as a guide for the committees, boards, and the congregation(s). *The primary goal of this project is to help make a decision.* Therefore, recommendations not to open a Lutheran school or to delay opening a school are considered as productive and successful as studies that recommend opening a school.

This report is intended to summarize some of the data and various elements that must be considered regarding the feasibility of starting a Lutheran school. After review of the data, recommendations, and discussion with the Steering Committee the congregation(s) and/or governing body will need to determine whether or not it is the right time and they are ready to move ahead with the more advanced phase of establishing a Lutheran school. You are commended for the decision to undergo this project as a resource for considering the feasibility of a Lutheran school. We trust that the summaries and recommendations will help you as you seek God's will and serve His children and their families.

The Feasibility Study Process

In February 2023 a study to test the feasibility and readiness of starting a Lutheran school, grades kindergarten through eight, in Port Washington, Wisconsin was begun with the help of Genesis Project consultants. This study report has included: the Vision Statement or a Case for a Lutheran school, the demographic study summary, a summary of many interviews conducted by the consultants (May 20, June 2-3, 2023), written surveys, research of area school programs and recommendations.

The purpose of the Feasibility Study was to

- Assess the interest of congregations and community in starting an elementary school
- Assess the interest and the ability of parents in sending their children to a Lutheran school in Port Washington
- Assess potential congregational and third source funding for a Lutheran elementary school
- Assess the market for potential students
- Assess attitudes toward the potential location of the facility
- Provide data and information from which interested parties can decide the establishment of a new Lutheran school

The Feasibility study included gathering of hard and soft data based upon the following:

- LCEF demographic study
- 29 confidential interviews of individuals or households
- 41 surveys received from members of Lutheran congregations in the Port Washington, Fredonia, and West Bend areas
- An analysis of data gathered by researching the following schools:
 - Trinity Ev. Lutheran School (ELS) - West Bend
 - Our Savior Lutheran School (WELS) - Grafton
 - First Immanuel Lutheran School (LCMS) - Cedarburg

Acknowledgements

Special thanks are appropriate and should be extended to members of the Steering Committee who, in addition to the regular business associated with their congregations and personal working responsibilities, assumed the challenging task of researching the opening of a Lutheran school.

Thanks are also extended to those who took time to be interviewed. The information on the following pages includes the findings of the individual interviews. The summaries of attitudes, together with quotations, are intended to assist in clarifying not only the spirit of the respondents but also to help the committee understand the points of view and needs of the people from the interviewees' perspective. All quotes remain anonymous to assure confidentiality.

The Lutheran Church Extension Fund of the Missouri Synod provided demographic information.

As with any successful effort of God's Church on earth, many people with varying abilities and spiritual gifts are working together on common goals.

Initial Steering Committee - Board Members

- 1) Rev. Dustin Anderson, Port Washington, chair
- 2) Konrad Rosnik, Port Washington
- 3) David Asbach, Port Washington
- 4) Timothy Gierach, Port Washington
- 5) Rev. Christopher Raffa, West Bend
- 6) Samuel Boehlke, West Bend
- 7) Tanner Schmidt, West Bend
- 8) Jacob Hand, West Bend
- 9) Rev. Marshal Frisque, Fredonia
- 10) Abraham Rohde, Fredonia
- 11) Melissa Kultgen, Fredonia
- 12) Rick Nelson, Fredonia
- 13) Matthew Harvey, Fredonia
- 14) Rev. John Klieve, emeritus, Port Washington

Case – Vision Statement

Mission:

The mission of Luther Classical Academy is to provide Biblical literacy and Lutheran Confessional catechesis in, with, and under the arts and sciences.

Vision:

LCA will use classical Lutheran education to support parents by teaching students that which is true, good, and beautiful, fostering virtuous growth toward Christian service in the world. In the future, LCA may serve as a hub for satellite schools at the other association churches, or otherwise expand to other non-traditional educational endeavors

Ownership:

Luther Classical Academy (LCA) is a nonprofit organization owned by the THREE founding association congregations - St. John's - Port Washington, St. John - Fredonia, and Pilgrim Lutheran - West Bend. Future opportunities may be considered for additional partner congregations.

The founding congregations will be equal owners of LCA, but ownership of the campus and present materials remain the property of St. John's, Port Washington.

The potential impact LCA on students, faculty, churches, community

- Students will be formed into mature adults who are grounded in the faith, capable of critique and analysis of all systems of thought in accordance with the truth, and skilled in the beautiful presentation of all that is good.
- Students and parents will be prepared for confidence in their sacramental life as Christians and a clear defense of their faith. The faith as expressed in Scripture and explained in the confessions will be a habitual part of every student's life through the daily prayer life of the school community.
- Future leaders in families, church, and community will be equipped, strengthened and encouraged in the skills for which they show a natural inclination or preference.
- The community will benefit from an influx of flexible, adaptable, and inquisitive youths thanks to the education LCA can provide.

Students and Families Served

- Grades Kindergarten (full and half day options) through 8, with the option of later adding 3K and 4K and high school if the demand exists.
- Students from Ozaukee, Washington, Sheboygan, and Milwaukee counties within ~35 minutes drive time of the school campus.
- Families committed to a distinctly Lutheran classical education.
- Homeschooling families.

School Programs, Curriculum, and Identity

- Classical education
- LCA will be an institution of the Lutheran Church - Missouri Synod and will teach its doctrines
- LCA will cooperate with homeschool parents and co-ops to offer the core of our curriculum (at cost) including daily chapel, foundational matters, and extracurricular activities.
- LCA may serve as a hub to connect students to extracurricular activities

Enrollment Projections:

- Year 1: 30
- Year 2: 40
- Year 3: 50

Leadership

- School Board - 9 members (the pastor and 2 reps from each of the 3 founding congregations)
- Headmaster - member in good standing of an LC-MS congregation
- School Pastor - LC-MS, nominated and elected by School Board for a term of 6 years.

Administration, Teaching faculty

- A headmaster, 3 teachers, and administrative support in the first year.

Facility Location

St John's Lutheran Church

217 N Freeman Dr

Port Washington, WI

The building is 48,000 ft² (previously certified for 350 students) on 8.5 acres.

Renovations required for stairwells, bathrooms, electrical systems, parking lot, HVAC

Available for School: 12 classrooms, bathrooms, the church sanctuary, library, music room, art room, computer lab, indoor/outdoor recreational space. Offices, conference rooms, and other administrative spaces. A kitchen and cafeteria.

Funding:

- \$10,667 Projected First Year Cost of Educating a Student
- Revenue
 - \$3733/student First Year Tuition LCA congregation member
 - \$4933/student First Year Tuition Non-Member
 - \$32,000 First Year LCA congregational support (30%)
 - \$112,000 Five Year Fundraising Goal (35%)
 - \$21,500 Current Commitment over 5 years.
- Need-based tuition assistance provided
- We are not utilizing the school choice program in Wisconsin.

Who Endorses This Program

- Dr. Angus Menuge, Concordia University Wisconsin
- Rev. Dr. John Wille, President, South Wisconsin District of The LC-MS

Researching Area Non-Public Schools

Researching community area schools help a Steering Committee to benefit from information about the elements, trends and experiences of schools already in operation for the purpose of planning and decision making. The Steering Committee spent time gathering information and data from three area nonpublic schools.

First Immanuel Lutheran School - LCMS

W67N622 Evergreen Blvd, Cedarburg (9.7 miles from proposed school)

www.filschool.org

EC – 8th Grade

Enrollment 447

Full Time Faculty - 10 rostered, + non-rostered

Five Year growth - not known

Annual Fee \$100+

Tuition \$9800 members (congregation grants \$5613 to each family); \$4187 non-members

Our Savior Lutheran School - WELS

1332 Arrowhead Rd, Grafton, WI 53024 (4.9 miles from proposed school)

<https://oursaviorgrafton.org/school/>

Kindergarten - 8th Grade

Enrollment 58

Full time faculty - 4

Five Year Growth - not known

Annual Fee \$100+

Tuition \$3940 members; \$5750 non-members

Trinity Evangelical Lutheran School - ELS

1268 Pleasant Valley Rd, West Bend, WI 53095 (13.6 miles from proposed school)

<https://school.trinityels.org/>

3K/4K - 8th Grade

Enrollment

Full time faculty - 6

Five Year Growth - not known

Annual Fee \$100+

Tuition \$1430 members; \$3570 non-members

Only one private/parochial school currently operates in the City of Port Washington, **St. John XXIII Catholic Elementary School**. The Steering Committee may want to look more closely at the enrollment and offerings of this nearby parochial school.

The Steering Committee will want to review in detail the curriculum sources, programs, activities, before or after school care offerings, funding sources and budget comments that each of the schools may have shared. It may be beneficial to learn more about each of these

established schools. The original nonpublic school research data provided by the steering committee is added as an **Addendum** to this report.

Surveys

Surveys help planners to develop a basic understanding of issues by asking for the opinions of individuals that may have influence on a decision or how a plan or program may be implemented. Questions are asked for the purpose of soliciting specific responses needed for thorough planning. Surveys also help to communicate potential school programs and events. A wise planner always seeks the counsel, wisdom, and advice of others to insure planning accuracy and soundness. “An intelligent heart acquires knowledge, and the ear of the wise seeks knowledge.” Proverbs 18:15.

Congregational surveys were conducted seeking information and reaction relating to the possibility for a potential startup of a classical Lutheran School in Port Washington, Wisconsin. Surveys were received from 41 individuals: 4 from Pilgrim - West Bend, 11 from St John - Fredonia, 25 from St. John’s - Port Washington, and one respondent did not list his congregation.

A Closer Look

The survey asked respondents to indicate, in general, if they would like to see a Lutheran school in Port Washington. Significantly, 93% answered “yes,” while the remaining 7% (3 people) answered “unsure.” 2 of the respondents who were “unsure” also disagreed or strongly disagreed with their willingness to support a new Lutheran school. Yet, 93% said they would be willing to support a Lutheran school in Port Washington.

The proposed school wishes to pursue a uniquely classical Lutheran education. 66% said they had some understanding of this core pursuit of the new school, while 27% were unsure and 7% did not know what classical Lutheran education is.

The survey asked, “Would you send your child(ren) or grandchildren” to a new Lutheran K-8 School?” 61% of the respondents marked “Yes”; 15% marked “No”; 22% marked “Unsure”; and one respondent gave no response.

Lutheran schools are typically funded with tuition, congregational support and third source funding. This survey asked, “what would be the top level of annual tuition per student that you feel you could pay....” All responses were at or between \$2,000 to \$5,000.

The proposed school is counting on financial support from the budgets of the three founding congregations. Respondents were asked, “Do you feel your congregation is willing to support a new school financially?” Overall, 85% agreed or strongly agreed while 15% disagreed or strongly disagreed. By congregation: St John's Port - 84% agreed or

strongly agreed, St John Fredonia - 82% agreed or strongly agreed, and Pilgrim West Bend - 100% agreed or strongly agreed.

When asked what the respondents feel would be an adequate number of total students to begin the school, 39% said "20-25." Fewer responded "50+" (24%), "10-20" (22%), "35-50" (12%), and "5-10" (1 respondent).

The respondents were also asked to rank eight factors in order of importance. The results were:

- First: Quality of Programs
- Second: Strong Lutheran Emphasis
- Third: Faculty
- Fourth: Tuition
- Fifth: Quality of Facilities
- Sixth: Enrollment Size
- Seventh: Location
- Eighth: Other factors *

* Other factors listed were (in no particular order):

- Exceed the programs available at public schools.
- Financial security.

Written responses were given to the question: "What are your expectations for this school?"

- "Lutheran character," "Lutheran catechesis," "classical Lutheran education," and similar terms were stated in no less than 16 comments (approximately 40%)
- Other comments included:
 - "offer a daycare"
 - "academic excellence"
 - "safe"
 - "self supporting school"
 - "good musical program"
 - "sports"
 - "field trips"

The survey questions and responses can be found in the **Addendum** of this report.

Summary of Surveys

An overwhelming 93% of the survey respondents said they would like to see a school in Port Washington and the same said they were willing to support it. The 7% who did not support the school or were unsure indicated concerns with school financing and the potential of overworked faculty.

The case statement proposed tuition at \$3733 (member) and \$4933 (non-member) per year. Those surveyed said they would like to see tuition in the \$2,000 to \$5,000 range. The current plan generally reflects those surveyed.

The proposed financial plan includes a contribution of \$32,000 per year from each congregation. While 85% of the respondents said they thought their congregation would be willing to support a school start-up, it is unclear what the response may have been if the proposed amount had been included in the survey.

No athletic program is included in the current plan. Only 2 of the 41 respondents mentioned sports or programs.

The Steering Committee received 41 responses from surveys. Additional survey responses would have been beneficial to gain a better understanding of the thoughts of the members of the three congregations. The respondents represent 11% of the average attendance of the three congregations. St John's Port Washington had the best response with 37% of the avg attendance submitting surveys. St John Fredonia had a 7% response rate and Pilgrim West Bend had a 3% response rate.

While statistically the data reflects positively on the start of Kindergarten through grade 8 classical Lutheran school, there are also some reservations. Those reservations are: the level of congregational financial support for the school and lack of responses from a wider spectrum of all three congregations.

Additional comments made on the survey questions and not contained in this report summary are noteworthy for consideration and study as they give some reflection of the strong support for a uniquely *Lutheran* school as well as the needs, concerns and uncertainties about starting the school.

Congregational surveys with their comments given to the Genesis Consultants are returned with this report and made available to the Steering Committee for further study and consideration.

Summary of Interviews

Twenty-seven confidential individual interviews were conducted. The confidential individual interviewees were receptive to the interview process and expressed appreciation for the opportunity to share their feelings and ideas about the proposed school. The following summary of the interviews represents the major themes expressed by those interviewed. While quotations are taken from individual interviewees, they are cited as representative of those interviewed in general.

Reaction to the Case/Vision Statement

There was an openness by all interviewees to discuss a start-up K-8 classical Lutheran school in Port Washington, WI. Initially the interviews centered on the reaction to the CASE the Steering Committee had presented for consideration while also casting a vision.

The comments reflected a genuine interest and support for the school and its location.

General concerns and questions arose around the affordability of the school. Even so, there was a general optimism about the possibility of funding the school if everyone in the community got behind it.

Several of the interviewees were not familiar with classical Lutheran education while others were comfortable with it and thought it was the best that any Lutheran school could offer.

Several asked about the proposed “school pastor.” Generally, these felt that the current pastors of the three congregations were too busy to take on the role. Some offered that a solution might be to have an ordained Headmaster.

Important Qualities of a K-8 classical Lutheran school.

When asked about the type and quality of program the school needed to provide for students the interviewees most frequent comments were an unwavering commitment to uniquely Lutheran catechesis, family-oriented culture, and a need to offer something different from the local public schools. Additional suggestions included the need to clarify “classical,” how to involve “homeschoolers,” and consideration of some form of outside of the school day activities (ie, sports, before/after school care, archery, rhetoric club, etc.).

Funding of the Proposed School

There were references made to the budgetary challenges for funding the proposed school. Special concern was most frequently given to St John’s Port Washington’s ability to update the facilities and budget the proposed \$32,000. At the same time, there was strong optimism that St. John’s Port Washington could do it. Those opposed said that the current

finances could not support the school while the optimistic majority thought that there is a more positive and enthusiastic culture at St John's Port that could support the school. Generally speaking, the other two congregations were viewed as able to contribute the \$32,000. There was much agreement that the tuition rate was affordable. Individuals commented on their willingness to support the school and financially help families with demonstrated need and had a desire to educate their children in a classical Lutheran school.

Major Obstacles

When asked about major obstacles to establishing a classical Lutheran K-8 school in Port Washington most were optimistic and ready to get started. Even so, there were some who were more cautious. These made reference to finances, budgeting and start-up costs and adequate enrollment numbers to sustain the school. Several were either unfamiliar or unclear about classical Lutheran education. Interviewees stated additional possible obstacles were: availability of quality teachers and headmaster, congregations not on board for financial support, too few students, and the memory of issues that led to the closure of the previous academy on the same campus.

Additional Counsel for the Steering Committee

When asked to give additional advice and counsel to the Steering Committee as they continue their work the following comments were made:

"I need to know more about classical Lutheran education."

"I think classical Lutheran education is important!"

"Aren't the hard sciences often lacking in classical Lutheran education?"

"I like the doctrinal alignment of the 3 founding congregations."

"I have a great interest in this school but am ambivalent."

"I am not dissatisfied with public education. Christians need to be the salt in public schools."

"Many families upset with public ed... these will be attracted to the new school."

"I still have much sadness over the closing of the previous academy and worry that the same will happen to this school."

"I am optimistic about the future of this school!"

"I planned to homeschool until I heard about LCA!"

"My advice is to open with K-3 and build the school that way."

“Extracurriculars are important... even things like archery.”

“Sports should be offered once the school is established.”

“Headmaster needs certain skill sets in addition to being a solid theologian, such as: marketing, general administration skills, and enough time to do the job.”

“Headmaster needs to be a theologian.”

“It is a good idea that the Headmaster is a pastor.”

“Ordained Headmaster is a good idea... He can be the ‘school pastor.’”

“Pay attention to parent dynamics. Unsatisfied parents can be very influential.”

“It is important that the school will support the parents and not take kids away from parents.”

“Managing conflict is the key to success.”

“Port Washington is a great location for school!”

“If it weren’t for financial issues at SJ Port, I’d be all for it!”

“St Johns Port cannot afford \$32K at this time but could be motivated to do it. There is a new spirit replacing the old stagnant spirit. Pastor Anderson is a great blessing!”

“If everybody gets behind the \$32K each year [per congregation] we can do it.”

“OK not to have Wisconsin School Choice [vouchers] at first but reconsider later.”

“Homeschool relationship with LCA needs to be clarified.”

“Extracurricular sports are absolutely important... Other Lutheran schools in the area have sports. Key to success.”

“Would be nice to have sports in the future.”

“Extracurriculars are important but realize the difficulty in fielding sports teams in a new school.”

“Student Body – 30 the first year is short-sighted. Can definitely do more!”

“\$112K – very low. Can do much more. Ozaukee Cty has the highest per capita income in Wisconsin! **

- i. Should be able to raise \$350-\$450K if done well. Fundraising, messaging will be key. Very possible.
- ii. “The money is here. The only trouble is that it’s still in their pockets.”
- iii. Def should consider professional fundraisers.
- iv. Go beyond three congregations. The community will support this financially!”

** Consultants note:

County Information (students served in Ozaukee, Washington, Sheboygan Counties) including ranking in the state of Wisconsin (50 counties total):

#3. Ozaukee County

- Median household income: \$84,394
- 33.3% above state average, 29.8% above national average
- Households earning over \$100k: 41.6%
- #139 highest among all counties nationwide
- Households earning less than \$15k: 5.3%
- #139 highest among all counties nationwide

#4. Washington County

- Median household income: \$80,839
- 27.7% above state average, 24.4% above national average
- Households earning over \$100k: 36.9%
- #236 highest among all counties nationwide
- Households earning less than \$15k: 4.9%
- #183 highest among all counties nationwide

#24. Sheboygan County

- Median household income: \$62,101
- 1.9% below state average, 4.5% below national average
- Households earning over \$100k: 25.1%
- #866 highest among all counties nationwide
- Households earning less than \$15k: 6.8%
- #742 highest among all counties nationwide

Source: <https://stacker.com/wisconsin/highest-earning-counties-wisconsin>. Accessed 6/5/2023. 9:53 a.m. CT.

“Fredonia’s 4K could be a feeder for LCA. Guess that about 30% of families attending Fredonia live in Port Washington.”

“I think the school should start at grade 1 not kindergarten.”

“LCA needs to offer before/after school care.”

“Definitely should start a high school too.”

“I like the idea of a school pastor but the regular pastors are too busy to be the school pastor. However, the regular pastors need to find a way to stay involved in the daily life of school. They need to have a presence.”

“Are three pastors necessary on the school board? Maybe only one pastor?”

“Excited that this is not just a better academic education but the right kind of spiritual education”

“Consider increasing the student body by $\frac{1}{3}$ each year”

“ The vision language of the true, good, beautiful is appealing. Growth is embedded in the vision”

“Teaching the TRUTH is vital.”

Summary of Interviews

In general, interviewees were genuinely open to the discussion of a classical Lutheran K-8 classical Lutheran school in Port Washington. Most were optimistic and supported the school start-up. Those who supported the school start-up most frequently mentioned these: St. John’s Port Washington’s campus is ideal, classical Lutheran education, a school that works with families, and the need for a private school alternative to public education. Those that were more cautious were concerned about financing the school in general and St. John’s Port Washington’s ability to afford necessary property improvements and the annual congregational commitment. Finally, less emphasized areas of questions and/or concerns were: finding quality teachers and a headmaster, resolving who the school pastor would be, and articulating what a classical Lutheran education is.

Professional Opinion

The Steering Committee, composed of pastors and congregational members of St. John's Port Washington, Pilgrim West Bend, and St John Fredonia, undertook this feasibility study using the Lutheran Church Missouri Synod Genesis process to assist in deciding the start of a classical Lutheran school grades K-12 in Port Washington, Wisconsin. Many who participated in the confidential interviews and surveys stated their appreciation for the opportunity to express their personal opinions regarding the establishment of a classical Lutheran school. The feasibility study process provides opportunity for members to assess school programs offered to families in their congregations and in their community.

The consultants appreciate the efforts made in the gathering of statistics from the survey. The consultants note that only 41 surveys were received from three congregations. A more comprehensive assimilation of congregation-wide member attitudes toward the school may be needed from the congregations to determine their level of support and commitment to move ahead if there is to be a startup of a classical Lutheran school grades K-8.

Qualities of the Proposed School

Interviewees and surveys gave a clear picture of their indicated qualities of the proposed school. These expressed that the following were necessary: strong Lutheran identity, quality academic program, a school that is unique and unlike local public education, a family culture, and affordable.

Funding the School

The proposed school is being founded by three equal partner LCMS congregations. There was much agreement that the campus of St. John's Port Washington is ideal. Financial resources will be necessary to provide needed repairs and updating to the St. John's building and parking lot. Each congregation will need to be diligent in maintaining ongoing financial support of the proposed school in the first year and every year thereafter.

The proposed funding model relies upon annual tuition and congregational dollars. Other source funding will be necessary to support tuition aid for families. A scholarship fund may eventually be needed if there are families needing assistance.

In order for a school program to have a solid start a funding base will need to be established that can be used to help meet expenses in its beginning months. An adequate number of children will need to enroll in order for the tuition and fees to eventually help

the program to be self-sufficient. The Steering Committee will want to insure sustainable funding as well as start-up funding if a school is to begin.

Since interviews and surveys overwhelmingly support the location of the school at St John's Port, the building needs and general campus needs will need to be addressed. Financial planning for these renovations will be key to moving forward. Since the campus is older, ongoing maintenance must be planned for.

Support for a Classical Lutheran School

The LCEF demographic report covering a 20 mile radius from Port Washington and specific data for Port Washington indicates a stable population of school-age children and household income, which could support reasonable tuition. This data does not help determine how many of those children are interested or would consider enrolling their children in LCA. Additional conversations with LCMS schools in the area, other parochial administrators, surveys and town hall meetings could provide greater insight into future enrollment.

Based on survey and interview responses there is strong support for the start of a classical Lutheran school grades K - 8. Responses from surveys appeared positive along with the interviews, however, it will be important that that support converts to time, talent, and financial support. Serious attention will need to be given to the campus needs of St. John's Port Washington. In addition to campus upgrades, each of the three congregations will need to do their part to provide the necessary support before the school opens.

Summary

A Steering Committee was started to more intentionally and formally determine whether it is viable to start a classical Lutheran school grades K-8 in Port Washington, Wisconsin.

Based upon the supporting evidence presented in this report, the consultants recommend proceeding with starting a classical Lutheran school grades K-8 in Port Washington, Wisconsin. Important to this recommendation are the following key additional recommendations.

Recommendations

It is the recommendation of the consultants to develop, complete and have in place the following if a classical Lutheran school grades K-8 in the Port Washington area were to begin:

1. Financial foundation that insures not only initial startup but is sustainable into the future. It is recommended that the entire cost for the first year of operation be raised in advance of the first day of school.

Use the following formula as a guide for establishing the budget for the school year:

Net tuition, + congregational support, + annual giving, + capital campaign + other income is greater than > or = equal to

Capital investment + Operating costs (financial aid + salaries and benefits + other costs)

Simply put, the revenue should meet or exceed the expenses.

2. Enrollment that supports and meets an agreed upon portion of expenses.

3. Conduct a capital campaign to address all initial startup costs for the school. Attention needs to be given to the financial needs to improve the campus location as well as the operating costs of the new school. It is recommended that the St. John's Port Washington campus renovations be completed AND the funds for the first year of operation be raised prior to the first day of school (ie, August).

4. A Board of Directors operating policy manual is written. This manual should include a variety of things for the effective management of the Board. Attention should be given to hiring or calling policies. It is recommended that the new administrator be secured no later than eight months (ie, January) prior to the first day of school (ie, August). Preferably, the administrator will be on site twelve months prior to the first day.

5. Congregational voters' commitment with financial support from each of the three founding congregations.

6. A financial or business plan covering at least the first three and up to five years of the school is needed which includes:

- Accomplishments to date
- Planning Assumptions

Expense Projection

- Salaries
- Supplies and purchased services
- Buildings and grounds costs
- Other needs

Income Projections

- Congregation
- Tuition and Fees
- Third source, gifts, fundraising efforts, grants, donations

Operating Deficit

Enrollment Projections Based on Market Analysis

School Management and Leadership

The Marketing Message

- The Target Market
- Marketing Strategies

Resource Development Strategies

7. A communication plan that is intended to develop partnerships with multiple congregations, individuals, donors and others interested in supporting the school. This plan should include an explanation and benefits of a classical Lutheran education, why this school start-up is important to congregations and the community, ways in which partnerships can be made with the school, who would be served, when the school plans to open, and where the school will be located.

If Recommendations 1-7 are completed and in place, then:

1. As a legal entity in the state of Wisconsin apply for a not for profit organization.
2. Receive an approved LCMS Recognized Service Organization (RSO) status.
3. Seek dual accreditation through the Consortium for Classical Lutheran Education (CCLE) and National Lutheran School Accreditation (NLSA) - LCMS School Ministry Department.
4. Encourage board members and other leadership to attend CCLE Conferences.
5. Reach out to the South Wisconsin District for leadership and school administration assistance.
6. Seek resources from LCMS School Ministry Department.
7. Seek additional counsel from CCLE leadership.