

I. Introduction:

Criterion Ventures is a nimble, wonderfully-connected organization that achieves dramatic good for the world. We do this by incubating and scaling ventures that create a better world. The core team of Criterion Ventures is responsible for moving forward projects, and engaging the breadth of our network, its creative resources and reach.

In Spring of 2006 The Van Lunen Foundation approached us with a quandary: they supported Christian Schools through large (often seven figure) grants but increasingly they were questioning the efficacy of these investments. Criterion helped the foundation identify a key aspect of the problem, the overall gap in management skills of Christian school leadership. We worked with them over the next twelve months to launch an initiative to dramatically scale the management skills and talents in this sector.

To do this we employed a methodology that has proven effective with our clients over the years. In this case study we outline that methodology and use the Van Lunen Center as a way to illustrate its effectiveness and how we work with clients.

II. Understanding How We Work: The Criterion Methodology

To structure our work and make interactions with our clients more effective we use a five part methodology which involves: Mapping, Naming, Inviting, Structuring, and Executing. Each of these parts can be thought of independently, though all may be necessary at any given time to move a project forward. They are not employed in chronological order, but rather the results of work in any one area may impact the other four.

First, let's look at each part individually.

Mapping – We usually begin a new project by mapping the existing space to understand what others have already tried, what is working, and what is not. Often the most important thing we learn is what is missing, which leads us to discover opportunities for new ventures. Through these maps we convey and analyze the relationships and context in and around the venture. As we map we create a visual mode of thinking about the venture and how it fits into the broader ecosystem.

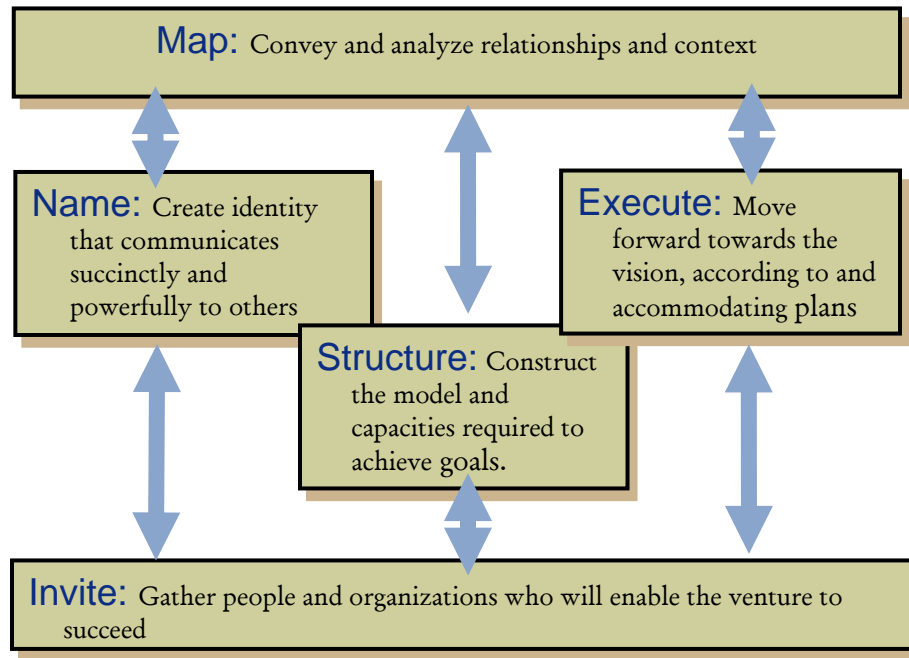
Naming – Working with our client and/or partners we create a focused description of the idea - the essence of the need and offering as well as its distinctive characteristics. Naming involves strategy, market research, and branding. Early in ventures, naming allows us to identify possible alliances, hone in on short term capital, and attract an early set of committed leadership.

Invitation - Through careful invitation we bring together the people and organizations that will enable the venture to succeed. We invite individuals and institutions into the venture early and often to create an effective network of engaged players, whether those be endorsers, customers, distributors, board members, donors, or any other group. And we ensure that the invitations are authentic, recognizing that these interactions form the basis of how these people will work with the venture in the future. In the world of social change, inviting is branding, business development, sales, marketing, customer care, and partner development.

Structuring - From various starting points, we construct the model and capacities required to achieve the venture's goals. Structuring includes business planning, resource recruiting, establishing legal and governance structures, and performing due diligence.

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Execution - We move ventures forward towards their vision, according to and accommodating plans. Often, our execution takes place in a space that is fluid. It includes management of complexities including communications, commitments, reporting and tradeoffs between time, cost and quality. Executing includes all aspects of business – sales, marketing, systems development, human resources, finance and others. Criterion’s reputation of showing up and helping shines here – we move past helping to strategize or plan and just get things done. Our role changes over the life of a venture but it is always defined by a set of outcomes and deliverables.



III. Applying the Methodology: The Van Lunen Center

The Van Lunen Foundation was established to encourage Christian education at the primary and secondary levels. The foundation had been making large grants, often as high as \$1 million, to primary and secondary schools with visionary leaders executing strategic projects. In recent years, the foundation trustees began to feel challenged in identifying an exceptional pool of potential grantees. They wanted to do something that would “change the system” and ensure the existence of a more robust group of leading Christian schools a generation from now. With this as a background the foundation came to Criterion Ventures for help.

Conversations with Criterion refined the initial focus to Heads of School, and specifically their management skills. The challenge of management skills is not surprising when one considers that most Heads of School were trained as educators, not managers. But running an independent school today involves much more than a focus on education. A Head of School must understand complex finances, adeptly manage human resources, communicate clearly with alumni and parents, create marketing strategies, manage a governance process and more.

Over the next 12 months we worked with the foundation and other partners to create a Center for the development of management skills in Christian educators. We also launched the Center’s first fellowship program – a feat few believed possible when we first proposed the timeline. The Van Lunen Fellows Program brings together a small group of school Heads, selected through a competitive process. In three residential sessions over the course of one year these fellows attend structured classes taught by some of the most

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accomplished Heads of School in the country. Between gatherings, the Fellow’s work is supported by small groups, led by a faculty member. Each fellow chooses a substantial school-based management project to complete, ensuring the learning stays practical. Fellows also access a team of “on-call” experts, each of whom specializes in an area that Heads of School often find challenging, such as strategic planning, fundraising, etc.

By the end of the program, fellows have acquired important management skills, built relationships with peers and leaders in their field, and completed a significant project for their school. Through this process the fellows gain the confidence and skills they need to provide visionary management and leadership for the next chapter of their school’s life.

To go from “we have a problem” to the first class of fellows we rigorously applied our methodology and worked closely with our client and others. Here is what we did:

Mapping – The project began with a mapping exercise. What training programs were already available to Heads of Schools? What associations existed for Christian education schools? What research illuminated our questions about management in Christian Schools? Answering these questions led us to the leaders of Catholic, Lutheran, Reformed, and other school associations, who became crucial later in the process, for example when it came time to recruit Fellows. We identified current Heads of leading Christian schools and the training models they saw as most effective. We also spoke with colleges and universities working to equip Heads of School. This step helped us identify a long-term home for the Center.

“Criterion brought a keen sense of the interwoven networks and providers that is Christian Schools. Their ability to visually lay this out enabled us to rapidly arrive at the crux of each discussion – and move through it to a decision.”

Marlene Lund – Lutheran Schools Association

As the project continued, the mapping involved predicting what impact the venture would have on the existing world of Christian education. Who would be helped? Who might be threatened? How could we find ways to work together?

“The Foundation started with an idea. Criterion gave us the process. They helped us to refine our objectives, define our values and put the idea on paper. I did not believe we could begin in 2007 and often stated that maybe we should just plan to start in 2008. Not only did the program launch in 2007, there was no last minute rush and the program was an outstanding success. Criterion not only allowed us to shorten our timeline, but more importantly we could never have obtained the quality program we have without Criterion.”

Jim Achterhof – Executive Director, The Van Lunen Foundation

Naming – The naming began early in the process with discussions with the foundation. In these discussions we identified the core values of the project including:

- A big tent (including many denominations)
- A bias toward action (not simply research)
- A substantial impact on the field
- Excellence

We then created a two page summary of the project for circulation within the broader Christian Education community. As the project moved forward, this two page summary was revised and updated numerous times.

Later in the project the naming exercise focused more on marketing and branding. From choosing to name the entity a “Center” (as opposed to an “Institute”), to creating the look and feel, to drafting the first press releases, Criterion ensured that the elements remained consistent with the idea and values.

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Invitation – Early on we invited important figures in Christian education to join us in the exploration process. These figures included leaders in the denominational associations, respected educators at colleges and universities, and respected Heads of School in existing schools. We asked for their perspective and advice. As the process moved forward they were invited to participate first in the creation of the Center model and later in its execution. Invitees ended up taking important roles in the Center, including as faculty. By inviting them into the process at an early stage they rightfully felt a sense of ownership in the process. This “authentic invitation” was key to recruiting them down the road.

“The way Criterion engaged practitioners in a conversation about the idea created a rich dialogue. From this grew both a solid idea and the commitment of a widespread group of people”

Jim Marsh – Head of School,
Westminster Christian Academy

“We leveraged research on school leadership needs, alternative providers of executive skills and potential program models to create a Fellows Program that delivers a transformative experience to Heads. But it was our collaborative thinking and work crafting a mission statement which resulted in the larger Center model, one which provides the structure for ongoing innovation and creative partnerships.”

Dr. Shirley Roels, Director, The Van Lunen Center

Structuring - Criterion worked closely with the foundation and the other invitees in creating the structure for the idea. Early in the process this involved painting with broad strokes. Would a fellowship involve actual classes? Would fellows be paid? Where would the idea be housed, would it be affiliated with a college or would it be independent? As the process moved forward, the structuring became more detailed. Criterion drafted bylaws, helped create curriculum, laid out a budget and defined the role of outside experts.

Execution - As the plan moved into execution, Criterion Ventures continued in its leadership role, partnering with the newly appointed Director of the Center. Criterion managed the sales and marketing process, recruited the faculty, helped define the curriculum, and assisted in recruiting a board of directors. The Center is now operating independently under the auspices of Calvin College. It is funded through an endowment and operating grants provided by the Van Lunen Foundation.

“This has been an outstanding experience, the best professional development experience I've had.”

Mark Davis, 2007-08 Van Lunen
Fellow, Head of School, Lexington
Christian Academy

IV. Conclusion

The Van Lunen Center offers a good illustration of what working with Criterion Ventures is like. A client came to us with a problem and a vision of how they wanted to change the world. Using our methodology we helped them map the current terrain, name a solution, invite those needed to refine and implement the idea, structure a sustainable venture, and execute the plan. The result is an important addition to the world of Christian education that will have an enduring impact.

To talk to someone at Criterion Ventures about how we can work with you please contact:

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