

CASE STUDY: SOCRATES ACADEMY

THE CLIENT

Socrates is a Hellenic charter school in North Carolina. Sharity was engaged to lead Socrates Academy's 2023 strategic planning and segmented capital campaign process to raise \$21M.

THE NEED

Socrates Academy needed to define a three-year strategic plan and develop a capital campaign to enable the construction of a new high school building and the expansion of its programming. Socrates had never done any fundraising beyond that done by the parent and student-led events.

THE RESULTS

Sharity built out Socrates's fundraising infrastructure, which included developing an economic impact report and outcome measures and cultivating donors for an eight-figure gift.

Designed for long-term sustainability, Sharity developed an integrated parent-family support plan, and alumni association.. Several cabinets were built from founders to national leaders.

Once the campaign was well underway, Sharity assisted with the identification and onboarding of a new major gifts officer to lead the fundraising efforts into the future.

THE MATERIALS

Below is a suite of documents produced by Sharity for Socrates Academy. Others can be provided upon request.

[Socrates Academy Strategic Plan](#)

[Socrates Academy Pitch Deck](#)

[Socrates Academy Economic Impact Report](#)

[Socrates Academy Prospectus](#)

