

CASE STUDY: EXPANDING GREEK EDUCATION IN CHARLOTTE

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 engaged in 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, 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, which included 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.

Socrates has broken ground and is anticipating cutting the ribbon on the new High School in 2025.

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](#)

