ESCALE ADVISORS
Strategic Coaching. Advancement Leadership.

www.escaleadvisors.com
cbreen@escaleadvisors.com
612-518-2620

Keep Your Strategy in Shipshape with Continuous Improvement

A strategic plan is a crucial tool that enables an organization to achieve its advancement goals. But continuously improving on the implementation of that plan is just as vital. An organization must adopt a continuous improvement process to maintain effective day-to-day operations, a productive team, and successful outreach efforts.

Defining the Continuous Improvement Process

Every advancement strategy requires regular maintenance and repairs. Processes naturally break down and become obsolete over time and must be reviewed and tweaked. The trick is to integrate regular review and maintenance into the strategy. Escale Advisors breaks the continuous improvement process down into a workflow.
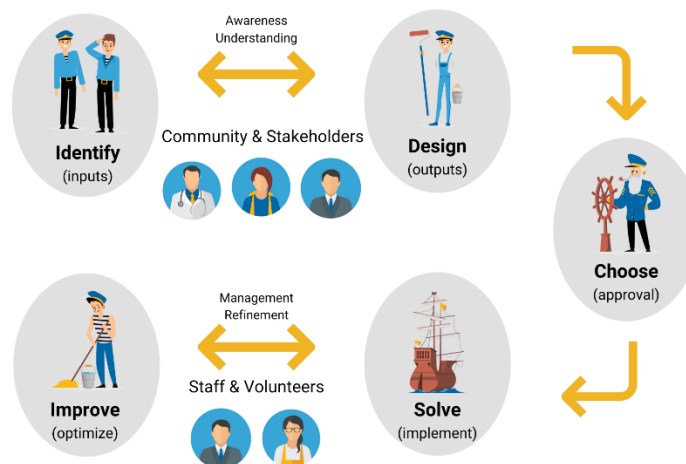
Identify and Design
Most organizations will learn of an issue in their advancement strategy from people working in the field. They may be staff, volunteers, or even community members. It may be that the strategy they're implementing is failing to meet the organization's goals, or that a lack of strategy is limiting their success.

Once an issue is reported, it's up to the advancement team to design several possible solutions. The team should develop these solutions with input from the people who identified the issue as well as other stakeholders in the community.

Obtain Approval from Decisionmakers

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Once the team has designed several solutions, they present them to the key decisionmaker at the organization. Depending on the structure, this may be the headmaster, board of directors, or faith leader. The decisionmaker will review their options to choose the organization's path forward.

At this step, it is possible for the decisionmaker to ask the advancement team to combine two strategies or go back to the drawing board. In this case, the advancement team repeats the identify and design steps until more options are ready for the decisionmaker's review.

Implement and Refine

Once the decisionmaker approves the design, it is time for the advancement team to implement it. An important step in the implementation process is setting aside time and human resources to make sure the plan stays on track and fix issues as they arise.

In Practice: Operationalize the Advancement Strategy

What does continuous improvement look like in the field? One opportunity for continuous improvement is in the design and implementation of an organization's strategic plan.

Operationalize Your Strategy

Advancement strategies are not helpful if they are never put into action. Operationalizing an advancement strategy budgets the time and human resources needed to complete the work of the strategic plan. Doing so gives teams a horizon to sail toward as well as ample time to prepare for major deliverable dates.

A simple spreadsheet with 52 columns representing the weeks in the year is a helpful foundation for operationalizing strategy. The rows represent different stakeholders in the process, including the board of directors, advancement committee, and advancement staff. Rows should also include key processes, including marketing efforts, fundraising calendars, admissions, the school calendar, and any process improvement initiatives.

With this framework in place, advancement leaders can plan out the year for each stakeholder and process. This will give everyone involved a birds-eye view of the year and any looming deliverable dates. By operationalizing their strategy, an advancement team can plan ahead and review and recalibrate their efforts without losing sight of the bigger picture.

Develop Workflows

An operationalized strategic plan identifies individual tasks and the people responsible for implementing them. Workflows for these individual tasks increase the likelihood these tasks will be completed on time. Workflows should

Escale Tip: If you don't have a workflow process, you'll be buried by the workload.

identify who is responsible for each task and the steps needed to complete it.

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In Practice: Assemble the Right Team

People play a large role in the continuous improvement process. To work, the process relies on open lines of communication between all stakeholders and people being engaged in their work.

Organizational Leadership, Staff, and Volunteers

An organization's leader, staff, and volunteers are at the heart of the advancement team. These people design, approve, and implement the advancement plan. Part of that work is identifying the organization's engaged community members. Organizational leadership, staff, and volunteers pour energy into engaged families and community members.

Engaged Families and Community Members

Engaged families and community members play a large role in any organization's advancement strategy. Not only are they the people most likely to contribute to the organization, they also play a critical role in reaching out to disengaged families and community members. Engaged families and community members pour their energy into their disengaged counterparts.

Disengaged Families and Community Members

Disengaged families and community members represent opportunity. While disengaged families and community members may not interact directly with organizational leadership and staff, the energy the staff pours into engaged families ripples down into disengaged families. Engagement may start with a simple conversation between parents at a soccer game or birthday party.

In Practice: Systematize Your Asks

One important part of operationalizing an organization's advancement strategy is creating workflows for supporter outreach. This empowers advancement teams to focus time and resources on the most lucrative opportunities while developing relationships with less engaged supporters.

Prioritize Your Target

The supporters with the most giving potential are the people who gave to an organization last year, but have not renewed their gift in the current year. These are the supporters advancement teams should prioritize in their strategy. Major, leadership, and transformational gift LYBUNTs (see adjacent *Escale Tip*) should get top priority, followed by major, leadership, transformational, and lead annual givers who have contributed this year or in past years. Recent annual givers are up next, with people who have never given to the organization bringing up the rear.

> **Escale Tip:** LYBUNT stands for "Last Year But Unfortunately Not This" year. These are supporters who gave to your school last year, but haven't given in the current year.

Systematize Your Outreach Strategies

Once an advancement team has prioritized their outreach targets, it should systematize its outreach strategies. Major, leadership, and transformational givers should receive personal calls, emails, and visits from advancement staff and volunteers. Lead annual givers should receive personalized direct mail, emails, and phone calls. Events and other marketing such as mass email, mail, and texting can be used to reach everyone.

Closing Thoughts

It is not enough to develop a strategic plan. To experience success, your advancement team needs to apply a process of continuous improvement to operationalize your strategic plan, identify the right people for the right advancement tasks, and systematize your outreach to current and potential supporters.