

Set Your Team Up to Tackle Your BHAG with Success

Does your organization have a Big, Hairy, Audacious Goal, or BHAG? If you do, it can be intimidating to know how to start tackling it. Accomplishing a big goal requires the right team, a clear plan, and a process of continuous improvement. By following an intentional process, organizations can identify their team and their key supporters and use their input to create a clear path forward.

Laying a Strong Foundation

Before tackling your BHAG, you need several important factors in place to set your advancement team up for success. First, ensure you have the right leadership, staff, and key volunteers in the right roles to shepherd the process. Second, confirm that they understand your school's major revenue sources and how these sources fund your daily operations, short-term projects, and fiscal sustainability. Third, work on completing a SWOT analysis and setting your vision for the school over the next five to ten years, including specific objectives, goals, and strategies. Finally, put a continuous improvement process in place to guide your work toward your BHAG.

Advancement Crew, Assemble!

Your advancement crew works with and for the visionary and integrator at your school, most often the priest/pastor and chief of staff, respectively. Your advancement team should include dedicated staff members as well as key volunteers who have specific roles on the team. Your staff and volunteers pour energy into your engaged parents, alumni, and large gift supporters. In turn, these people influence their disengaged peers.

Escale Tip: Remember that key volunteers are often your best asset. Make sure the volunteers on your team buy into your vision and already support your school.

Set the Stage for Success

Together with your school's visionary and integrator, your advancement team should review your school's main sources of revenue and expenses. Then, they should complete a SWOT analysis of your school's operational strengths, weaknesses, opportunities, and threats. Armed with this knowledge, they can move on to setting a vision for the school and developing objectives, goals, and strategies to achieve that vision.

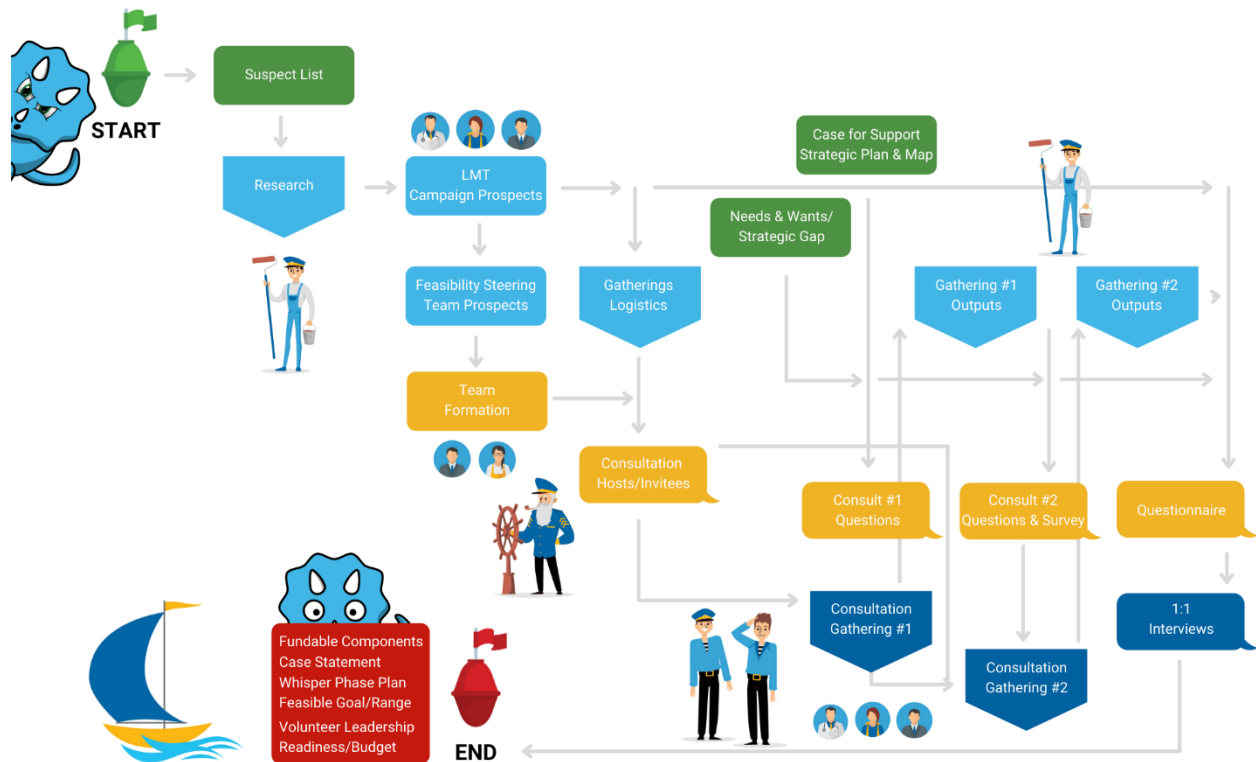
Adopt a Continuous Improvement Process

Strong organizations continually review their goals and progress, seeking input from their community and stakeholders and designing improvements for the school's leader to consider. Once the leader has settled on a path forward, the team implements and optimizes the improvements.

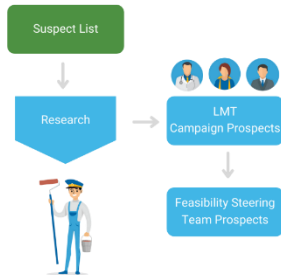
Tackling Your BHAG

With your team, strategic plan, and continuous improvement process in place, you are in a good position to start tackling your BHAG. Your feasibility steering team should take input from your databases and your key stakeholders to create an attainable goal that will be successful. At the end of the listening process, you should have a clear understanding of where your goal will take your organization, what you hope to fund, and the case for support that will sway supporters into making gifts. These first steps are the key to tackling your BHAG.

Escale Tip: Ask for money, get advice. Ask for advice, get money!



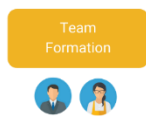
Step 1: Identify True Need and Supporters



Your first step in tackling your BHAG is to identify your organization's true fiscal need. Your advancement team needs to bring in a certain amount of money each to keep the doors open and fund essential operations. How much more will it need to raise to fund your BHAG? This difference is called the strategic gap. The strategic gap is your true fiscal need that you will need to raise in your capital campaign.

Now that you know how much you need to raise, it's time to comb your organization's databases for potential prospects and supporters, especially the major, leadership, and transformational gift prospects. If you gain their support early in the campaign, these supporters can help your campaign look more investable.

Step 2: Form Your BHAG Team



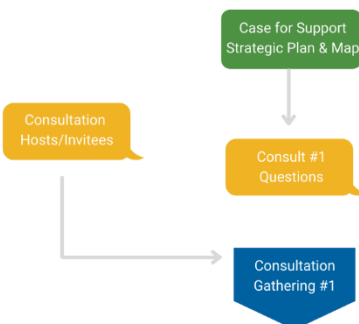
Next, identify the people who should serve on the feasibility steering team as well as the people who will be engaging prospective supporters. The feasibility steering team will guide the entire process and come up with the first round of questions for the engagement team to use in gatherings and participate in conversations with supporters and prospects to ask for their advice.

Step 3: Host Conversations with Prospects



With your people in place, it's time for the engagement team to use the feasibility steering team's questions to gather information from major, leadership, and transformational gift prospects and supporters. These conversations should create engagement and be centered on the direction of the organization and are not an opportunity to ask for money (that comes later). The engagement team takes notes on these conversations to share with the feasibility steering team.

Step 4a: Synthesize Information and Develop Focus Group Questions



With the data from your first round of conversations in hand, the feasibility steering team should create a second set of five questions for the supporters and prospects from the first round of conversations. These questions should relate to your organization's capital campaign priorities and show the connection between your BHAG and your organization's wider goals.

Step 4b: Synthesize Information and Develop Survey

Consult #2
Questions & Survey



Consultation
Gathering #2

At the end of the second conversation with prospects and supporters, the engagement team should lead participants through a survey exercise to prioritize the goals they discussed in these two conversations. Have these goals compete head-to-head to force participants to choose which one is the better choice. Then, your team should add up the answers to see which goals the group determined to be your school's priorities.

Step 5: Synthesize Information and Create a Questionnaire

Questionnaire



1:1
Interviews

In the final step of preparing to tackle your BHAG, use the information you gathered from your survey in step five to create a questionnaire for one-on-one interviews with the same key stakeholders. Typically, this work is done by an outside consultant to get candid answers on how the interviewees feel about your organization's leadership, influential volunteers, and how they see themselves participating in the capital campaign.

After this step, your organization should have a good idea of who your early supporters are, who is willing to give a gift, and who is able to engage their peers in the process.

Closing Thoughts

Tackling your BHAG doesn't have to be intimidating. By following the above five steps, you will gain clarity on the feasibility of your goal and identify the people who will help you experience success. Once the process is complete, your advancement team should feel confident moving into the public phase of the capital campaign.