

2007–2010 Nationwide Strategic Direction



Little Moments. Big Magic. Huge Impact.

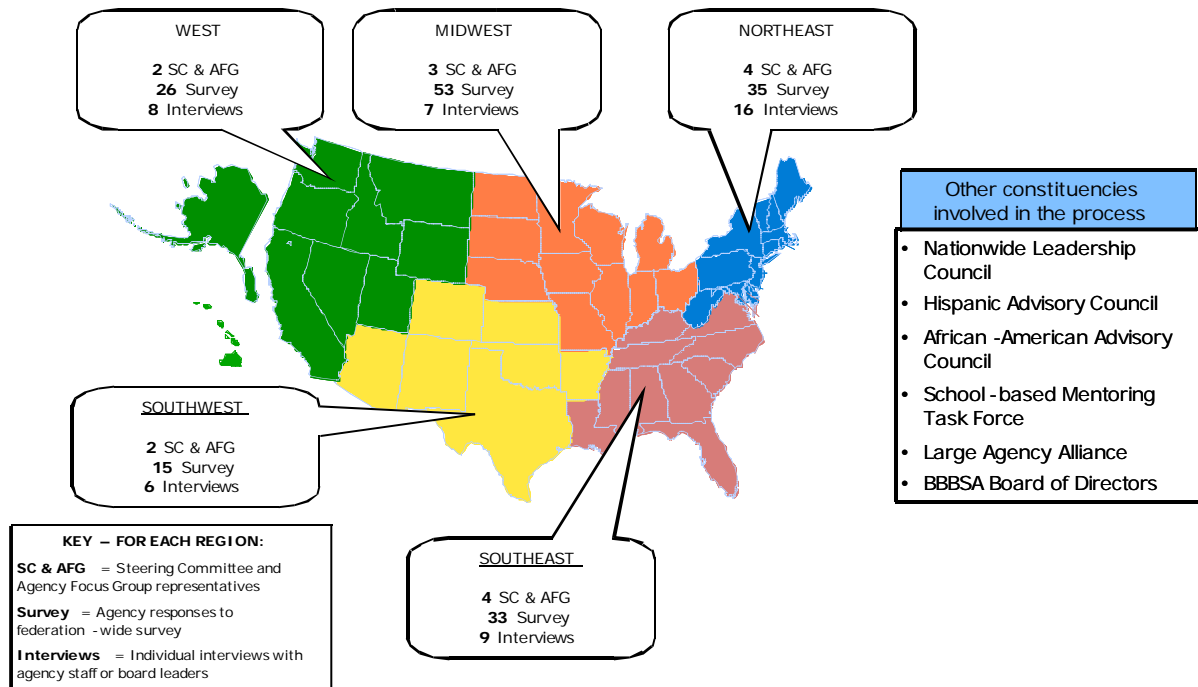
Table of Contents

Background and Process	3
BBBS Nationwide Strategic Planning Framework.....	6
Guiding Principles	7
Strategic Direction.....	7
Network Goals.....	10
The Important Implications & Expectations for Agencies.....	12
Important Implications and Expectations for BBBSA and its Three-Year Business Plan	13
Appendix 1	14
Appendix 2	15

Background and Process

In October 2006, Big Brothers Big Sisters of America (BBBSA) and its Board of Directors began the process of developing the 3rd phase of its strategic growth plan launched in 2000. Our intent was to build on the successes of the past six years and incorporate the lessons learned during that time in order to advance the organization. Throughout Big Brothers Big Sisters (BBBS), people continue to feel a great sense of urgency to serve many more children and to reach our goal of serving 10% of the at-risk kids in our communities. We have begun to transform all aspects of our operations and have increased the number of children served by 150% since 2000. It's now clear that it will take considerably more time and much greater investment in capacity-building in order to achieve consistent quality growth and reach our goal.

In order to continue refining our plans, we decided to undertake a significantly more thorough and inclusive process than in the past. This process was facilitated and supported by Bridgespan, a leading strategic consultant in the non-profit sector and through a generous planning grant from the Edna McConnell Clark Foundation, a long time supporter of BBBS. It was conducted under the leadership of the new Nationwide Leadership Council, the coordinating body consisting of agency representatives from all five regions and select members of BBBSA leadership.





A Steering Committee was established to lead the work with Bridgespan, consisting of four NLC selected agency leaders, one BBBSA board member (who is also on a local agency board) and five BBBSA leaders. During this planning process, Bridgespan began to use the word “Network” to describe BBBS nationwide and other national youth serving organizations. The Steering Committee began adopting this language as well and over the course of the process grew to prefer using *Network* instead of *Federation* (the term for the legal structure of BBBSA and its affiliates) in the context of our unified nationwide directions. The image that the phrase “BBBS Network” generated for us is one in which interdependent parts and a partnership of agencies, and BBBSA all work together toward our common mission.

This planning approach led to more agency participation than ever. Over 160 agencies participated in surveys and leaders of over 70 agencies actively engaged in and gave input to the plan. They represented all regions, agency sizes, and types of markets (urban, rural, and suburban).

The NLC would like to thank all of the agencies for their tremendous response and valuable input. We believe that it is a new day in our organization’s effort to be the most effective nationwide Network in our sector. We are truly all in this together!

We share the key hopes and concerns for BBBS’s continued and successful journey. Throughout the planning process, we heard the same key hopes and concerns for the future of the BBBS Network:

- Shared principles and directions – BBBSA and all agencies should have shared principles and strategic directions. In addition, BBBSA should commit to a specific plan for which it will be held accountable, while providing planning tools and support to agencies to integrate these directions into their own plans.
- Growth goals – The Network remains dedicated to reaching 10% of the at-risk children in all communities – one million youth nationwide. Interim growth goals will be more realistic in recognition of the hard work and investments that agencies are making in capacity building to ensure that long-term growth is sustainable and of high quality.

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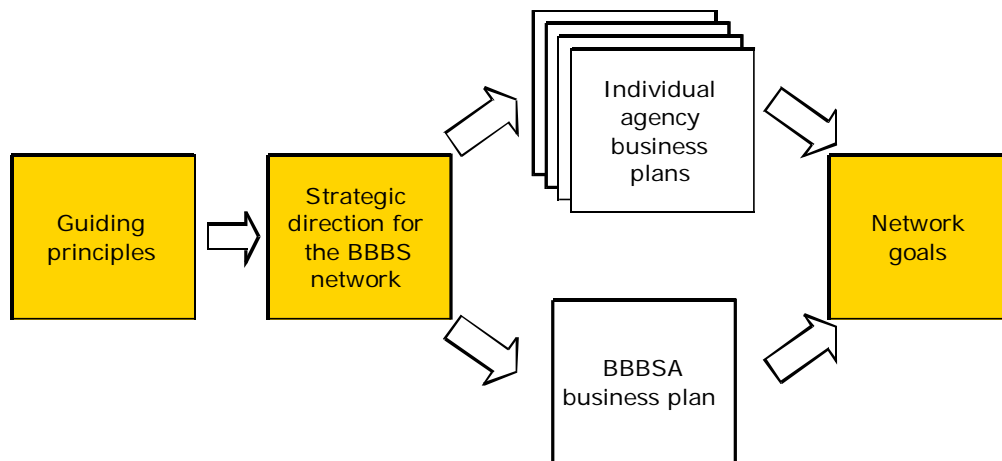


- Quality – The focus on quality should be as intense as the focus on growth for both community and school-based mentoring. Reaching more youth is meaningful only if it is done in a quality way.
- Urgency – A stronger and more relevant case for support is urgently needed to mobilize donors, volunteers and partners.
- Male volunteer recruitment and minority outreach – Increased focus is needed in both of these areas to adequately serve youth in all communities, especially those on agency waitlists and those within the targeted populations that agencies seek to serve.
- Talent and Organization – The Network needs improved and shared Human Resources support to attract, retain and develop talented and diverse staff, leadership and boards.
- Configuration – The Network recognizes that reconfigurations and consolidations are occurring naturally and can provide significant benefits. Agencies must drive the process with BBBSA playing a supporting role.
- BBBSA internal capabilities – In order to better support its initiatives and better serve agencies, BBBSA must invest in its own capabilities beyond its recent efforts in fund development.

Quality Talent and Organization
Configuration **Minority Outreach**
BBBSA Internal Capabilities
Growth Goals Urgency
Shared Principles & Directions
Male Volunteer Recruitment

■ BBBS Nationwide Strategic Planning Framework

The framework that has been developed for the 2007-2010 BBBS Nationwide Strategic Direction includes shared Guiding Principles and Strategic Direction, individual Agency Business Plans and a BBBSA Business Plan, all of which lead to goals for the Network as a whole:



These shared elements (highlighted above) are included in this document. They have been approved by the Nationwide Leadership Council, and will be approved shortly by the BBBSA board. The NLC urges all agencies to embrace and adopt these shared elements as the foundation for their individual Business Plans.

BBBSA has also developed its own three-year Business Plan which outlines how we intend to support our agencies' move in this strategic direction. That plan includes our key initiatives, deliverables, goals, timetables, resource allocation and financial projections. In addition, we will provide a whole new level of resources to support agency planning efforts using the help of Bridgespan who has much experience in assisting direct service providers in their planning processes.

And now, here is the first Nationwide Strategic Direction adopted by your Nationwide Leadership Council!!

■ Guiding Principles

We have reaffirmed our guiding principles for the entire Network throughout this process:

- We will stay true to our mission to help children reach their potential through professionally supported, one-to-one relationships with measurable impact.
- There are a large number of children and families in our country who need our program. Our vision consists of successful mentoring relationships for all children who need and want them contributing to better schools, brighter futures, and stronger communities for all.
- We promise to foster a culture of commitment to diversity and inclusion, partnership and collaboration, continuous learning, people development and high performance.

■ Strategic Direction

A Refined Definition of Success—

A shift from “What We Do” to “What We Achieve”

One of the most important responsibilities of non-profit leadership is to decide how our success will be defined and that for which we will be held accountable. For many years, BBBS has been a leader in accountability for results, especially for the outcomes we seek for the children we serve. We believe that we can and should build on that leadership position and truly set BBBS apart. We want to be known for what we achieve in addition to being the leading youth mentoring organization.

This plan calls for a refined definition of success that will include three areas of focus:

1. How many children we serve – For several years, we have accepted responsibility for bringing our life-changing program to the many underserved children who “fall through the cracks.”
2. How well we serve them – Several elements combine to give BBBS the opportunity to build on our strong foundation for outcomes. We are confident that we can ensure that our growth is high quality. We have completed a second Impact Study, which evaluates our School Based Mentoring program and we have thoroughly reviewed its findings and those from the 1995 study of Community Based Mentoring. We are seeing the power of AIM, our new program technology platform. It is giving our agencies an intensified ability to focus on and track each individual participant and match, to continuously analyze and improve their effectiveness in operating programs on a large-scale basis. We have concluded that our current



outcomes of measurement instrument — Program Outcomes Evaluation (POE) — is not being consistently used in all matches and could be much more effective for internal purposes as well as for external communications. It is the right time to incorporate new quality and outcomes measures into our goals and performance management systems. The new outcomes measure will track progress in three areas substantiated by the Impact Studies: the ability to develop and maintain effective relationships, academic engagement and achievement, and avoidance of risky behaviors.

(See Appendix 1 for details)

3. Which children we serve – We use the terms “in-need” and “at-risk” regularly throughout BBBS. We believe, for the most part, that we are serving vulnerable children who can benefit from our program and our Leadership wants to ensure that this does not change as we grow. We have now developed a common framework for defining the risk profile of the children we serve and identifying the level of need of a child as *(low, moderate, high or very high)* depending on certain environmental factors. *(See Appendix 2 for details)*

We have also been evolving toward a more targeted approach to growth. We believe that it is time to refine our success measures in order to reflect the demographics of the children and volunteers we intentionally want to serve. The percentage of boys in our program has declined, especially boys who are matched with men. Our school based mentoring programs, MCOP/Amachi, and our Hispanic Mentoring Initiative have increased our service to minority communities. However, we have much more work to do in order to serve those communities in proportion to their need and accordingly, we will add the demographics of our children to our success measures.

We believe that these refined success measures combined with the right relevant messages can help us transition from being known for “what we do” to being known for “what we achieve,” positioning BBBS at the heart of urgent, socially relevant issues in our communities.

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Core Strategies

There are three critical areas on which the Network will need to focus in order to accomplish this success:

1. Increasing our program impact by building on our established reputation for large scale, evidence-based programs:
 - a. SBM improvement for sustainable quality relationships and outcomes
 - b. Ongoing outcomes measurement for each individual child to be rooted in the Impact Studies
 - c. A framework for defining which kids we serve
 - d. Continuous, data-driven growth and quality improvement for CBM and SBM

2. Continuing to build deep resource-acquisition capabilities across agencies:
 - a. More compelling data-driven messages highlighting the relevance and urgency of our work
 - b. Enhanced fund development and volunteer recruitment/partnerships support, supplemented by national marketing and corporate partnerships

3. Intensifying our focus on people – with a particular emphasis on talent and organizational structure — as the keys to success:
 - a. Enhancing HR support and targeting board and executive leadership development to attract and retain culturally competent, diverse and outstanding talent
 - b. Locally-driven and nationally-supported organizational structure for each agency (or set of agencies) that will enable the agency to achieve sustainable, quality growth

Keys to Success Focus
Talent and Organization Structure
Program Impact
Resource Acquisition Capabilities

■ Network Goals

We have established Network goals for each of the key areas in this new definition of success:

1. Quality Growth – Our goal is to serve over 300,000 children annually by 2010, a 25%+ increase over 2006, and return to double digit annual growth by 2010 at the latest. Growth has begun to accelerate throughout BBBS in 2006/2007 primarily due to our capacity-building investments.
2. Positive outcomes for a higher percentage of children served – Initially we are focused on match length and retention rate, our number one quality improvement opportunity. One goal is to increase the SBM average match length from 10 to 13 months by 2010. Our overall match retention goal is to increase the CBM 6-month retention rate from 80% to 85% by 2010 and our SBM rate from 70% to 80%. Over the next two years, we plan to introduce new outcomes measures based on the Impact Studies’ results. These include a “strength of relationship” measure that is an excellent indicator of first year match success and a new annual evaluation tool that builds on and replaces POE while measuring progress against our intended outcomes.
3. Increased intentionality about which children we serve – Each community would develop its goals for the mix of children the agency is dedicated to serve. Nationally, we have established overall goals consistent with our plan to be better balanced and representative among major demographic groups.
 - **Increase percentage of boys served from 46% to 48% of all matches, and increase percentage of those boys served by male volunteers to at least 82% by:**
 - Increasing percentage of male volunteers from 38% to 41% of all volunteers
 - **Increase percentage of Hispanic youth served from 17% to 22% of all matches**
 - **Increase percentage of African-American and Hispanic youth served by same ethnicity volunteers to at least 57% of those matches by:**
 - Increasing percentage of African-American volunteers from 15% to 18% of all volunteers
 - Increasing percentage of Hispanic volunteers from 7% to 13% of all volunteers
 - **Establish clear baseline data for measuring the percent of Littles who are in moderate-to-high need as measured by exposure to the environmental risk factors defined by a new common framework. (See Appendix 2)**



4. Strengthen our agencies' capacity for sustainable, quality growth – All of our communities deserve a high quality BBBS program that can serve a larger portion of the children in need while positively impacting local societal issues. Our goals for a stronger Network are that:
 - **Total revenue growth continues to grow at 10% annually, to \$385M by 2010**
 - **50% of our agencies achieve 10% annual revenue growth over the next three years, up from 35% in the last three years**
 - **65% of our agencies have at least three months' cash reserves, up from 49%**
 - **80% of our large market agencies are at least \$1 million in revenues, up from 67%**
 - **40% of our regional and smaller market agencies are at least \$500k in revenues, up from 20%**
 - **60% of agencies have board and leadership development plans in place and that the four key leadership positions of CEO, VP Program, Chief Development Officer, and VP Partnership/Recruitment are well defined and filled in agencies with revenue of \$500,000 or more**

Male Volunteer Recruitment
Hispanic Volunteers

African-American Volunteers

Strengthen Capacity **Quality Growth**

Positive Outcomes for More Children

Intentionality: Which children we serve

■ The Important Implications & Expectations for Agencies

The Nationwide Strategic Direction raises the following implications and expectations for agencies to incorporate into their individual agency business plans:

- Sustained quality growth should be at the core of each agency's efforts
 - Growth remains as important as ever, but the quality of our matches needs to be at the forefront as well – both in the data we track and use to manage our organizations and how we position and communicate about BBBS. Agencies will adopt the new and improved quality measures.
 - In order to achieve this delicate balance, agencies must keep a steady, ongoing focus on the engine of revenue growth as well as the planning and monitoring of program expansion to ensure that the growth in matches can be appropriately supported and sustained.
- Each agency will work toward maximizing its impact and community support by being intentional about whom it serves
 - Scarce resources make it critical that agency dollars be focused on serving the youth that can most benefit from our programs.
 - Agencies should set local targets for the mix of youth served, based on community needs, and design their program mix of CBM and SBM strategically in order to reach these target populations.
- Both CBM and SBM can be strong and robust programs in terms of quality and growth
 - Agencies will need to refine SBM to lengthen matches, and strengthen the program in general, aided by the recommendations of the SBM Task Force.
 - CBM has more potential that has yet to be tapped; agencies are encouraged to focus on tapping into this potential through the use of targeted marketing and partnerships.
- Resource acquisition will be a central leadership focus for all agencies
 - Long-term quality growth is fully dependent on the ability of agencies to continually grow their revenue and volunteer base; agencies, therefore, need to maintain and/or strengthen their focus on their fund development function and volunteer recruitment in planning priorities.

- Agency organizations will ensure that their talent and organizational structures are strong enough to support the complex challenges of sustained quality growth
 - Success is dependent on people; agencies need to provide core HR support services, seek development opportunities for staff and continuously develop their Board of Directors.
 - Agencies will assess their current structures to determine if they can independently reach sufficient size, attract and retain talent, and provide high quality programs, or whether collaborations or formal relationships with neighboring agencies may be in order.

■ Important Implications and Expectations for BBBSA and its Three-Year Business Plan

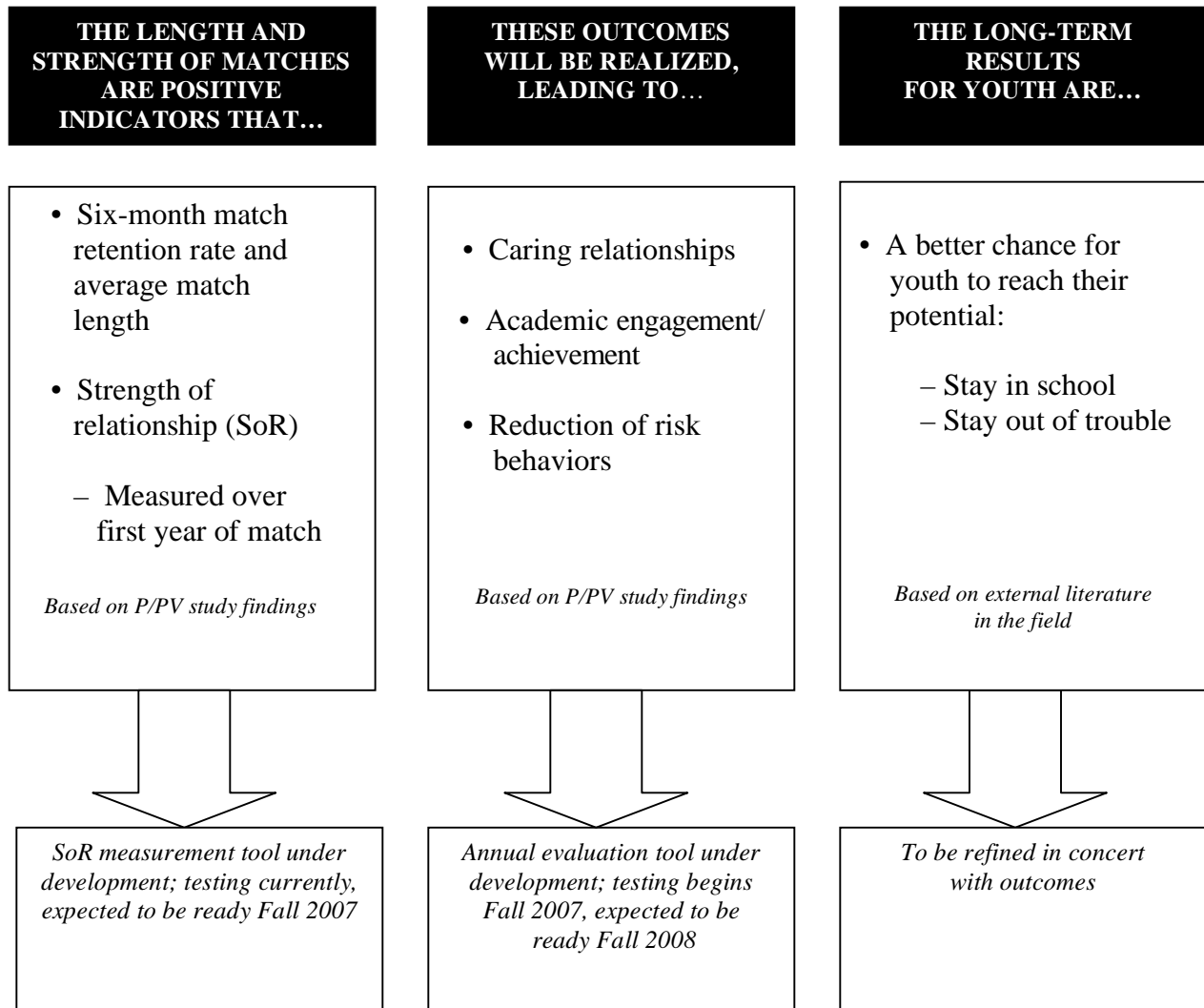
BBBSA will hold itself accountable for providing strengthened infrastructure and enhanced support and tools for agencies in the following ways:

- Leadership on the definition of success
 - Performance management system to support refined definition of success
 - Development of a more urgent case for support focused on “what we achieve” versus “what we do”
- Increased direct support to agencies
 - Deepened agency development and performance management support for agencies with the size and potential for growth
 - Dedicated, assigned staff for all agencies, including small agencies
 - Configuration expertise for agency-led efforts to explore collaboration or consolidation
- Maintenance of current significant level of funding to agencies, with new investments shifted towards enhanced *staff capacity* and *expertise*
- Enhanced capacity in key central functions, with a particular focus on *Marketing, Corporate Partnerships* and *Human Resources*
- Emphasis on talent and leadership, particularly the five key roles in every agency (*Board, E.D., VP of Program, CDO, VP of Partnerships*)

It’s an exciting new chapter for the BBBS Network. We are raising the bar for excellence and “achievement for” our children and communities!

■ Appendix 1 – Outcome measure

The specifics of the outcome measure for this refined definition of success will be developed over the next 18 months.



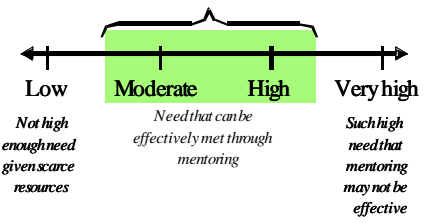
Appendix 2 – Target population

Framework for which children to serve: Agencies are encouraged to consider three dimensions when defining target population.

ENVIRONMENTAL RISK

Environmental risk factors are **external factors—societal, family, or school—that make growing up more difficult**. Directionally, children exposed to these factors have higher levels of need.

BBBS seeks to serve youth with moderate to high exposure to environmental risk factors.



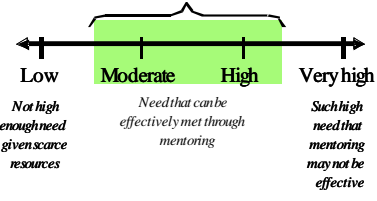
To track environmental risk of youth served, BBBS has chosen three categories that generally reflect moderate to high risk. We seek to have 75% or more of our youth served fit into at least one of these categories:

1. Children receiving free/reduced lunch
2. Children with an incarcerated parent
3. Children not living with two parents

PERSONAL NEED

Youth who have not been exposed to any of the defined environmental risk factors may still have high levels of personal need for other reasons, e.g. **poor family relationships, poor academic progress or misconduct**.

As with environmental risk, BBBS seeks to serve youth with moderate to high levels of personal need.



The personal needs of youth are expected to be determined qualitatively by agencies during the enrollment process. **No specific targets** will be set for percentage of youth with high personal needs.

DEMOGRAPHICS

BBBS believes in striving to serve a population of youth that is demographically representative of the population in need, with a particular focus on gender and race/ethnicity.

GENDER
 Since boys and girls are shown to be equally needy across the country, BBBS seeks to serve a population that is **50% boys and 50% girls**.

RACE AND ETHNICITY
 The racial/ethnic demographics of youth in need vary significantly from community to community. BBBS seeks to serve populations that are **reflective of the racial and ethnic mix of each community's population in need**. Agencies are encouraged to use local data on the three environmental risk factors to determine the appropriate mix for their communities.

