



2018 – 2020 STRATEGIC PLAN

11/22/2017

Big Brothers Big Sisters of the Midlands

Facilitation Method

The facilitation method utilized is Technology of Participation (ToP). This method encourages participation of the entire group and for the facilitator to remain neutral.

MISSION
MATTERS

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2018 – 2020 Strategic Plan

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STRATEGIC PLANNING DAY

The Big Brothers Big Sisters' Board of Directors and Leadership team met for a full day to create and build an innovative strategic plan. In advance of the strategic planning day, the Strategic Planning Task Force met several times to discuss stakeholder input, accomplishments since the last strategic plan and identified possible strategic initiatives.

Strategic Planning Task Force Members are: Dave Budler, Steve Bullock, PhD, Brendan Flanagan, Roger Garcia, John Gilbreath, Marnie Jensen, Tahnee Markussen, Chris Rodgers, Shirley Spieker, and Theresa Thibodeau.

Board members present at Strategic Planning Day: Ron Cardenas, Chris Enzolera, Nate Farmer, Brendan Flanagan, John Gilbreath, Marnie Jensen, Eric Johnson, Steve Kessler, Michelle Koraleski, Tony Kreis, Heidi Mausbach, Chuck Nelson, Mark Russell, Shirley Spieker, Theresa Thibodeau, and Brian Zaversnik.

Big Brothers Big Sisters staff present at Strategic Planning Day: Nichole Turgeon, Elizabeth Hansen, Michelle Drake, Jim Frederick, Katie Shanmugam, and Connie Krambeck

Mission Matters

This strategic planning process was facilitated by Mission Matters. Mission Matters is a group of professionals who provide consulting services to non-profits, government entities, philanthropists, and socially responsible companies, with a special focus on leadership development, strategic planning, coaching, and capacity building.

Lead facilitator for this project was Beth Morrissette.

Big Brothers Big Sisters

MISSION

Our mission is to provide children facing adversity with strong and enduring, professionally supported one-to-one relationships that change their lives for the better, forever.

VISION

Our vision is that all children achieve success in life.



STRATEGIC PLANNING TASK FORCE

The Strategic Planning Task Force was comprised of Board members and community members. They met on July 25, 2017 to review and discuss the *Stakeholder Survey Feedback* document. During this discussion three themes became apparent; Diversity and Inclusion, Partnerships, and Branding. A gap was noted in these three themes, which was Capacity.

The Strategic Task Force came back together on October 2, 2017 to review the accomplishments of the current strategic plan and to better define the themes. After some discussion, four strategic initiatives were identified and later updated by the full Board.

The four strategic initiatives are:


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- 1. EXPAND BASE OF INCLUSIVE AND SUPPORTIVE BIG BROTHERS BIG SISTERS COMMUNITY**
 - 2. BUILD AND FOSTER GENUINE PARTNERSHIPS FROM BOARDROOM TO PLAYGROUND**
 - 3. DISTINGUISH AND ENERGIZE OUR BRAND**
 - 4. ALIGN OUR GROWTH WITH QUALITY SERVICE AND PARALLEL CAPACITY**

Table 1. Current Accomplishments for 2015-2017 Strategic Initiatives:

Measurable Impact	Leadership and Partnership	Diversity and Inclusion
<ul style="list-style-type: none"> • Youth outcome survey results • Growth & number of children served • Reduction in kids waiting for match • Strides / advance in marketing and new website • Number of longer lasting relationships have increased • Board and former / current Bigs involvement and recruitment • New outreach strategies have been successful 	<ul style="list-style-type: none"> • Bigs in Blue • Foster care partners • Midlands Mentoring Partnership <ul style="list-style-type: none"> • Joint recruitment with other mentoring programs • Strong Board engagement <ul style="list-style-type: none"> • National recognition for Board and Agency • Staff awards for leadership with other BBBS agency • Greater awareness and requests for involvement <ul style="list-style-type: none"> • Both in Omaha and nationally 	<ul style="list-style-type: none"> • Increased diversity of staff • More bilingual program staff <ul style="list-style-type: none"> • Recruitment position for specific populations • Intentionality and awareness in Board recruitment • Quality / competence in matching Bigs with Latino families • Increased Latino Bigs and Littles

Sustainable Resources	Additional Accomplishments
<ul style="list-style-type: none"> • Established Alumni Network • Increasing revenue year over year • Strong Board Giving & Getting • Super strong staff & CEO <ul style="list-style-type: none"> • Retention in staff • App for Bigs • Enhanced risk management around technology 	<ul style="list-style-type: none"> • Risk assessment plan annually for Littles and agency • Outstanding governance presence • Learning organization • Overall support to the families – not just the Littles

OUR FOCUS QUESTION

Throughout the strategic planning process, we had one focus question that served as our guidepost for discussions and ideas.

WHAT DO WE WANT TO SEE IN PLACE FOR DIVERSITY & INCLUSION, PARTNERSHIPS, OUR BRAND, AND QUALITY SERVICES & CAPACITY FOR BIG BROTHERS BIG SISTERS OF THE MIDLANDS BY DECEMBER 31, 2020 AS A RESULT OF OUR WORK TODAY?

REVIEW MISSION AND VISION

Big Brothers Big Sisters mission is:

Our mission is to provide children facing adversity with strong and enduring, professionally supported one-to-one relationships that change their lives for the better, forever

Big Brothers Big Sisters vision is:

Our vision is that all children achieve success in life



CURRENT REALITY

The team began the Strategic Planning day by listing the strengths and weaknesses of the current environment. This may include internal and external factors. As a team, we listed the benefits of developing and implementing a successful strategic plan. The challenges listed are the unintended consequences that may pop up when Big Brothers Big Sisters is successful at reaching the strategic initiatives.

Internal	<u>Strengths</u>	<u>Opportunities</u>	External
	<u>Weakness</u>	<u>Challenges</u>	
	<ul style="list-style-type: none"> • Staff • CEO • Outcomes • Board • The Model • The Passion – staff, Board, volunteers, everybody <ul style="list-style-type: none"> ○ “An Amazing sight to see” • Brand • Established framework for Bigs • Safety measure – recruitment 	<ul style="list-style-type: none"> • National office is doing work to support us • On-line giving • Tap into millennials • Partnerships with nonprofits that are trying to do same thing • Focus on relationships <ul style="list-style-type: none"> ○ Mentoring is not necessarily the right word • Technology to deliver services? • Innovations in mentoring • Commitment by community to better our children • Community engagement 	
	<ul style="list-style-type: none"> • Diversity – Board & Bigs • Perception • Sustainable staff – burnout, retention • Capacity – volunteers, money, physical, staff • Building – outgrown it • Recruitment of Bigs to serve Littles • Alumni Network • Brand confusion • Becoming complacent (donors) • Crack the code with North and South Omaha – connect in the community • No endowment • Fundraising <ul style="list-style-type: none"> ○ How to move forward ○ New dynamic of giving 	<ul style="list-style-type: none"> • Loss of quality – degradation of quality (with potential growth) • Larger waiting list of kids • Staying true to our core model – not fragmented • Safety – too big too fast • Donor complacency- don't want to feel that they are being “taxed” <ul style="list-style-type: none"> ○ Don't see it as an investment any more • Corporate giving – economic impact to them • Trend in philanthropy <ul style="list-style-type: none"> ○ Middle class not back to the same level of giving before recession • Future recession = impact giving • Risk in growth – without flexibility to adapt with environmental factors 	

PRACTICAL VISION

Creating a practical vision is a time for participants to share their realistic hopes and aspirations for the future of Big Brothers Big Sisters. Participants were instructed to “Imagine that it is three to five years from now, and BBBS has been selected as the premier Big Brothers Big Sisters organization of the year. BBBS is going to be highlighted by a major news magazine as the ‘Agency of the Year’. You have been selected to conduct the tour for the reporters.”

Participants were then asked a series of thought-provoking questions to ponder as they envision the future for BBBS. After small group discussion and large group consensus work, a set of practical vision elements were agreed upon. These practical vision statements set the stage for agreement amongst participants for a shared vision of BBBS's future.

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- **INTENTIONAL & ENDURING PARTNERSHIPS**
 - **GROW & DIVERSIFY FINANCIAL RESOURCES**
 - **CREATION OF VISIBLE & COLLABORATIVE ENVIRONMENT(S)**
 - **EXPAND BASE OF INCLUSIVE & SUPPORTIVE BIGS**
 - **SHARE INSPIRING STORIES & OUTCOMES TO DRIVE
ENGAGEMENT**
 - **ENHANCING PROGRAM SUPPORT TO ACHIEVE SUCCESS IN LIFE**

The chart below represents the group work product and insights into some of the conversations that led the group to the practical vision.

	Grow & Diversify Financial Resources	Creation of Visible & Collaborative Environments(s)	Expand Base of Inclusive & Supportive Bigs	Share Inspiring Stories & Outcomes to Drive Engagement	Enhancing Program Support to Achieve Success in Life
Expand Current Partnerships (business)	Open new funding sources	Fortune 500 Center of Excellence (ex: Miami BBBS)	Identify diversity benchmarks & establish measurable goals	Targeted advertising to improve awareness	Maintain / focus on quality above all else
Corporate Partnerships to engage Bigs & Littles	Pursue diversity directed funding	Crossroads non-profit hub	Active involvement in local support organizations	Focus on solve not serve	Big life skills support
Establish enduring partnerships with key corporations & Civic organizations	More donor exposure to Board – smaller settings	Leverage building / infrastructure challenges to increase visibility	Find community diversity & inclusion champions	Right avenues to present stories	Integrate Big sensitivity training
Target fastest growing companies – doing well	Top 10 organization in Omaha to give to	Improve workplace to improve services	Recruit / involve individuals from right areas	Define “success” measure & share	
Create an advisory committee of millennials	Targeted campaigns to corporations so employees choose to give \$ to BBBS		Measurable Board diversity goals for recruiting	Identify “cost” to community if BBBS wasn’t here	
Align with specific partners with defined goals				Put BBBS in position to share awesome stories	
Include partnerships in our Brand				Stories that create action	



UNDERLYING BARRIERS OR BLOCKS

Next, the team turned their attention to the true meaning of Big Brothers Big Sisters' practical vision and the underlying barriers to the practical vision. Addressing the underlying barriers or blocks helped BBBS's Board and leadership team create strong strategic initiatives and action steps to overcome these challenges.

We began this discussion by answering the question, "What is currently blocking our achievement of this vision?"

An example to illustrate the intent of this discussion was an image of a dandelion. The process of analyzing underlying blocks does not involve solving isolated problems, but identifying the root causes of many surface issues. It is like weeding dandelions. If you cut down the dandelions, they grow back within a few days unless you dig down and remove the tap root. In contradiction analysis we are looking for that underlying cause for the symptoms being experienced in your organization.

Before the participants began listing blocks they were instructed to avoid the words "lack of". We're looking for what's there, not what's missing. It's like working in your garden watering the plants and the water running from the hose suddenly stops. You don't just stare at the hose and shout, "There's no water" (lack of). You turn to check if there is a kink in the hose, if someone stepped on it or if someone turned off the water. In this exercise we're looking for the kinks or blocks rather than announcing what's not there.

Potential barriers that could impede success:

Intentional & Enduring Partnership	Growth & Diversify Financial Resources
<ul style="list-style-type: none"> • Disorganized & uncoordinated focus 	<ul style="list-style-type: none"> • Reluctance to ask
<ul style="list-style-type: none"> • Conflicting tactics 	<ul style="list-style-type: none"> • Overlapping / competing asks
<ul style="list-style-type: none"> • Competing interests 	<ul style="list-style-type: none"> • Discouragement by ask – rejection is hard
<ul style="list-style-type: none"> • Restricted access 	<ul style="list-style-type: none"> • Fragmented
<ul style="list-style-type: none"> • Misaligned goals 	<ul style="list-style-type: none"> • Unclear education – know what we do
<ul style="list-style-type: none"> • Undeveloped relationships 	<ul style="list-style-type: none"> • Undeveloped approaches
<ul style="list-style-type: none"> • Timeliness of asks 	<ul style="list-style-type: none"> • Outdated approaches



Potential barriers that could impede success (continued):

Creation of Visible & Collaborative Environments(s)	Expand Base of Inclusive & Supportive Bigs
<ul style="list-style-type: none"> Limited financial resources 	<ul style="list-style-type: none"> Not focus – action plan
<ul style="list-style-type: none"> Excessive capital campaigns 	<ul style="list-style-type: none"> Unclear goals – need definition
<ul style="list-style-type: none"> Quantity & quality of staff – restricted space 	<ul style="list-style-type: none"> Unrealistic goals – same budget but resources not there – reaching more with same resources
<ul style="list-style-type: none"> Uncertainty - risk 	<ul style="list-style-type: none"> Perception – white mentor organization
<ul style="list-style-type: none"> Inexperienced in Big risks 	<ul style="list-style-type: none"> Uninformed volunteer pool – misunderstood ask of Bigs
	<ul style="list-style-type: none"> Fear, reluctance by Bigs
Share Inspiring Stories & Outcomes to Drive Engagement	Enhancing Program Support to Achieve Success in Life
<ul style="list-style-type: none"> Creative resources 	<ul style="list-style-type: none"> Staff reluctance to change
<ul style="list-style-type: none"> Restriction to confidentiality 	<ul style="list-style-type: none"> Space constraints
<ul style="list-style-type: none"> Conflicting – how to tell our story and not exploit our Littles 	<ul style="list-style-type: none"> Location
	<ul style="list-style-type: none"> Staff skill set – restricted education
<ul style="list-style-type: none"> Unutilized resources 	<ul style="list-style-type: none"> Additional position with specialization = money
<ul style="list-style-type: none"> Avenues to share story 	<ul style="list-style-type: none"> Risk – change current curriculum
<ul style="list-style-type: none"> Limited visibility 	<ul style="list-style-type: none"> Unutilized strengths of staff - undeveloped
<ul style="list-style-type: none"> Understanding audience 	<ul style="list-style-type: none"> Resources
	<ul style="list-style-type: none"> Unclear / undefined growth model




STRATEGIC INITIATIVES WORKSHOP

Now that the team had a clear understanding of the practical vision for the future of BBBS and a better understanding that would either prevent or slow down progress in the strategic plan, the team identified substantial and innovative actions steps they could take over the next several years to make their practical vision come to fruition.

This part of the workshop included participants working by themselves in silence and then sharing in small groups their best ideas. The small groups came back together to answer the question. “What innovative, substantial actions can deal with these obstacles and move us toward our vision?”

When we came back together, we identified which action steps would support the movement of the proposed strategic initiatives presented by the Strategic Task Force. After small groups worked on yearly goals, two teams made recommendations to change their strategic initiatives. Below are the strategic initiatives.

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- 1. EXPAND BASE OF INCLUSIVE AND SUPPORTIVE BIG BROTHERS BIG SISTERS COMMUNITY**
 - 2. BUILD AND FOSTER GENUINE PARTNERSHIPS FROM BOARDROOM TO PLAYGROUND**
 - 3. DISTINGUISH AND ENERGIZE OUR BRAND**
 - 4. ALIGN OUR GROWTH WITH QUALITY SERVICE AND PARALLEL CAPACITY**

Below is the table of the key actions listed for each strategic initiative:

Expand Base of Inclusive and Supportive BBBS Community	Build & Foster Genuine Partnerships from Boardroom to Playground	Distinguish & Energize Our Brand	Align Our Growth with Quality Service & Parallel Capacity
Diversity & Inclusion task force	Develop a key partner assessment questionnaire (tool)	Develop Big outreach / support program	Utilize strengths of Board & staff (personalized plans) <ul style="list-style-type: none"> • Time, talent, treasure • Closing ellipse
Presence in North & South (Omaha) Location, champion, etc.	Develop short list of potential partners & assess (choosing 1-3 to target)	System for sharing & storing stories <ul style="list-style-type: none"> • Hotline, electronically, permission based 	Update resources – automation tools
Get clear about diversity (goals?)	Develop Facebook as a partner	Analyze data to determine ideal Big target	Facility task force including non-Board with leader
			Develop external fundraising champion(s)
Focused Board Recruitment	Partnership coordinator / task force	Simplify & demystify the role of a Big	Board fundraising training
			Find next fundraising step change
Capturing the voices of the community we serve	Define what looking for in a partner (<u>I</u> deal partner)	Promote the benefits of being a Big	Re-evaluate current fundraising strategy to create more efficiency
	Develop staff / Board relationships with counterparts @ other mentoring agencies	Define Audiences & develop messaging matrix <ul style="list-style-type: none"> • Bigs, Littles, Corporations, donors, parents, partnerships 	Develop a relationship matrix for fundraising
			Develop a donor packet (corporate & individual)
	Corporate case & engagement menu	One-page KPI	Create a task force to advance future environments
		Program innovation – corporations	Explore life skills training resource providers (in the community) to partner with
			Look at organization structure <ul style="list-style-type: none"> • Titles, departments, fundraising vs marketing vs recruiting

DEVELOPING GOALS: 1 YEAR, 2 YEARS, 3 YEARS

Strategic Initiative 1: Expand Base of Inclusive & Supportive Big Brothers Big Sisters Community

Team Members: Brendan, Ron, Chuck and Katie

First-Year Goals	Two-Year Goals	Three-Year Goals
<p><u>1. Goal Year ONE:</u></p> <ul style="list-style-type: none"> • Task Force: Board, Staff, Community Members, Alumni or Current Little, Parent/Guardian to develop the framework to understand the importance of diversity. Strategic questions related to diversity and inclusiveness related to all stakeholders. • Ratio active matches/waiting Littles. • Task Force will monitor metrics of absolute waiting Littles as well as the ratio. <p>by whom: Board Members (Chuck, Ron, Brendan)</p>	<p><u>1. Goal Year TWO:</u></p> <ul style="list-style-type: none"> • Evaluating the effectiveness of the target that was established in year one. • Size of the waitlist is our measure. 	<p><u>1. Goal Year THREE:</u></p> <ul style="list-style-type: none"> • Re-evaluate the metrics. • Analyze success and refine tactics/strategy.
<p><u>2. Goal Year ONE:</u></p> <p>Board Members working with the Marketing/Recruitment Director on strategies to expand the base of inclusive and supportive Bigs. (coordinate with Strategic Initiative 3, Goal 2)</p> <p>by whom: Marketing & Recruitment Director, and Board Members (Chuck, Ron, Brendan)</p>	<p><u>2. Goal Year TWO:</u></p> <ul style="list-style-type: none"> • Progress on metric identified in year one. • Tactics that drive that metric up. Identify who are the successful Bigs. • Analyze success and refine tactics/strategy. 	<p><u>2. Goal Year THREE:</u></p> <ul style="list-style-type: none"> • Progress on metric identified in year one. • Tactics that drive that metric up. • Identify who are the successful Bigs. • Analyze success and refine tactics/strategy.



Strategic Initiative 1: Expand Base of Inclusive & Supportive Big Brothers Big Sisters Community (continued)

First-Year Goals	Two-Year Goals	Three-Year Goals
<p>3. Goal Year ONE:</p> <p>Recruitment of diverse Board members</p> <p>by whom: Governance chair & CEO</p>	<p>3. Goal Year TWO:</p> <ul style="list-style-type: none"> • Increase diversity and inclusivity on Board by 10%. • Continue to utilize framework in year one. 	<p>3. Goal Year THREE:</p> <ul style="list-style-type: none"> • Increase diversity and inclusivity on Board by 10%. • Continue to utilize framework in year one.



Strategic Initiative 2: Build & Foster Genuine Partnerships from Boardroom to Playground**Team Members:** Brian, Shirley, John and Jim

First-Year Goals	Two-Year Goals	Three-Year Goals
<p><u>1.</u> Goal Year ONE:</p> <ul style="list-style-type: none"> Define attributes of an ideal partner. Board approval. <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p><u>1.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Reassess attributes of partnerships as needed to stay true to the agency mission. Board Approval 	<p><u>1.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Reassess attributes of partnerships as needed to stay true to the agency mission. Board Approval
<p><u>2.</u> Goal Year ONE:</p> <p>Assess and evaluate current partners.</p> <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p><u>2.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Engage selected partners to deepen relationships. Using a partnership matrix. 	<p><u>2.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Measuring, evaluating current partnerships. Develop a key partner assessment questionnaire.
<p><u>3.</u> Goal Year ONE:</p> <p>Identify new partners based upon attributes of an ideal partner.</p> <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p><u>3.</u> Goal Year TWO:</p> <ul style="list-style-type: none"> Engage selected partners and Identify new partners. Work to deepen relationships. 	<p><u>3.</u> Goal Year THREE:</p> <ul style="list-style-type: none"> Measuring, evaluating current partnerships. Develop a key partner assessment questionnaire.
<p><u>4.</u> Goal Year ONE:</p> <p>Identify resources to help execute partnership strategy</p> <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p><u>4.</u> Goal Year TWO:</p> <p>Hire staff partnership resource to help strengthen program and utilize Board capabilities.</p>	<p><u>4.</u> Goal Year THREE:</p> <p>Evaluate Staff Partnership Coordinator.</p>



Strategic Initiative 3: Distinguish & Energize Our Brand

Team Members: Steve, Heidi, Chris and Elizabeth

First-Year Goals	Two-Year Goals	Three-Year Goals
<p>1. Goal Year ONE:</p> <ul style="list-style-type: none"> Review & identify the ideal roles & responsibilities for marketing & recruitment for the agency Redefine and restructure roles and responsibilities for the Marketing department <p>by whom: CEO and Marketing Task Force</p>	<p>1. Goal Year TWO:</p> <p>Launch and leverage the national branding materials to increase brand exposure</p>	<p>1. Goal Year THREE:</p> <p>Examine most effective marketing campaigns to continue with and what to stop</p>
<p>2. Goal Year ONE:</p> <p>Leverage our data to target and acquire more successful Bigs determine which metrics to measure. (coordinate with Strategic Initiative 1, Goal 2)</p> <p>by whom: Marketing Director and Chief Program Officer</p>	<p>2. Goal Year TWO:</p> <p>50% decrease in Littles average wait time. A matrix will inform best practice wait times for Little and Big matches</p>	<p>2. Goal Year THREE:</p> <p>Decrease wait time to reach best practice wait time</p>
<p>3. Goal Year ONE:</p> <p>Create target based messaging and communications</p> <p>by whom: Marketing Director</p>	<p>3. Goal Year TWO:</p> <p>Reduce cost per lead by x %</p>	<p>3. Goal Year THREE:</p> <p>Reduce cost per lead X %</p>



Strategic Initiative 4: Align Our Growth with Quality Service & Parallel Capacity

Team Members: Mark, Michelle, Tony and Michelle

First-Year Goals	Two-Year Goals	Three-Year Goals
<p>1. Goal Year ONE:</p> <p>Determine necessary facility needs including strategy for identifying new home for the future</p> <p>by whom: Facility Needs Task Force</p>	<p>1. Goal Year TWO:</p> <ul style="list-style-type: none"> • Site selection and raise \$ • Arrange for credit 	<p>1. Goal Year THREE:</p> <p>Be ready to move by October 31, 2020</p>
<p>2. Goal Year ONE:</p> <p>Conduct staff assessment, forecast # of staff additions for 2019 and 2020. Program staff as well as support staff.</p> <p>by whom: Leadership team</p>	<p>2. Goal Year TWO:</p> <p>Continue to monitor staffing needs to ensure match quality, child safety and infrastructure support.</p>	<p>2. Goal Year THREE:</p> <p>Same as year 2 - Continue to monitor staffing needs to ensure match quality, child safety and infrastructure support.</p>

IMPLEMENTATION

Quarter by Quarter – Year ONE

Strategic Initiative 1: Expand Base of Inclusive & Supportive Big Brothers Big Sisters Community				
Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>1. Goal Year ONE:</p> <ul style="list-style-type: none"> • Task Force: Board, Staff, Community Members, Alumni or Current Little, Parent/Guardian to develop the framework to understand the importance of diversity. Strategic questions related to diversity and inclusiveness related to all stakeholders. • Ratio active matches/waiting littles. • Task Force will monitor metrics of absolute waiting littles as well as the ratio. <p>by whom: Board members (Chuck, Ron, Brendan), Designated BBBS staff</p>	<ol style="list-style-type: none"> 1. Review the existing the agency diversity and inclusion plan 2. Recruit the external members of the diversity and inclusion task force <p>by whom: Brendan, Chuck, Ron, designated BBBS staff</p>	<ol style="list-style-type: none"> 1. Task force meets to evaluate plan and establish accountabilities for the group. <p>by whom: Inclusion & Diversity Task Force, Designated BBBS staff</p>	<ol style="list-style-type: none"> 1. Start to implement the plan from quarter two <p>by whom: Inclusion & Diversity Task Force, Designated BBBS staff</p>	<ol style="list-style-type: none"> 1. Recalibrate the plan and analyze the ROI of the plan <p>by whom: Inclusion & Diversity Task Force, Designated BBBS staff</p>



Strategic Initiative 1: Expand Base of Inclusive & Supportive Big Brothers Big Sisters Community (continued)				
Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>2. Goal Year ONE:</p> <p>Board Members working with the Marketing/Recruitment Director on strategies to expand the base of inclusive and supportive Bigs. (coordinate with Strategic Initiative 3, Goal 2)</p> <p>by whom: Marketing & Recruitment Director, Board members (Chuck, Ron, Brendan)</p>	<p>1. Review agency and community demographics</p> <p>2. Board members on task force will review the existing metrics for Diversity and inclusion</p> <p>by whom: Marketing & Recruitment Director, Chuck, Ron, Brendan</p>	<p>1. Present the findings from quarter one to the marketing staff and task force</p> <p>2. Task force and staff collaborate to expand the base of inclusive and supportive Bigs</p> <p>by whom: Marketing & Recruitment Director, Chuck, Ron, Brendan</p>	<p>1. Check in the partnership task force</p> <p>by whom: Marketing & Recruitment Director, Chuck, Ron, Brendan</p>	<p>1. Board task force will meet with Nichole (CEO) to identify financial needs for task force</p> <p>by whom: Marketing & Recruitment Director, Chuck, Ron, Brendan</p>

Strategic Initiative 1: Expand Base of Inclusive & Supportive Big Brothers Big Sisters Community (continued)				
Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>3. Goal Year ONE:</p> <p>Recruitment of Diverse Board Members Define main objective for board diversity and inclusivity. Analyze demographics and establish targets.</p> <p>by whom: Governance chair and CEO</p>	<ol style="list-style-type: none"> 1. Define the main objectives for board diversity and inclusion 2. Analyze demographics and establish targets. 3. Begin recruiting needed board members <p>by whom: CEO and Governance Committee</p>	<ol style="list-style-type: none"> 1. Continue to recruit needed board members 2. Present new board members for board approval at the June meeting <p>by whom: CEO and Governance Committee</p>	<ol style="list-style-type: none"> 1. On-boarding of new board members <p>by whom: CEO and Governance Committee</p>	<ol style="list-style-type: none"> 1. Evaluate needs for following year and determine next year’s recruiting plan 2. Integrate diversity and inclusion training for board retreat. <p>by whom: CEO and Governance Committee</p>

Strategic Initiative 2: Build & Foster Genuine Partnerships from Boardroom to Playground

Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>1. Goal Year ONE:</p> <ul style="list-style-type: none"> Define attributes of an ideal partner. Board approval. <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p>1. List of key attributes to share with Board and staff.</p> <p>by whom: PTF & Staff</p>	<p>1. Receive and incorporate comments on drafted list. Incorporate feedback from staff and board.</p> <p>by whom: PTF & Staff</p>	<p>1. Continuing to refine the attribute list.</p> <p>by whom: PTF & Staff</p>	<p>~~~No Action~~~</p>
<p>2. Goal Year ONE:</p> <p>Assess and evaluate current partners.</p> <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p>1. List of all the existing partnerships collected by the staff.</p> <p>by whom: PTF & Staff</p>	<p>1. Begin evaluation of partners based on draft list of key attributes.</p> <p>by whom: PTF & Staff</p>	<p>1. Finalize evaluation of partners.</p> <p>by whom: PTF, D/ITF & Staff</p>	<p>~~~No Action~~~</p>
<p>3. Goal Year ONE:</p> <p>Identify new partners based upon attributes of an ideal partner.</p> <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p>~~~No Action~~~</p> <p>Waiting for progress on Goal 1, Quarter 1</p>	<p>1. Receive partner ideas from Board members and staff.</p> <p>by whom: PTF & Staff</p>	<p>1. Prioritize top three partners to recruit</p> <p>2. Create and implement plan to build relationships</p> <p>by whom: PTF & Staff</p>	<p>1. Begin to build three new partner relationships</p> <p>by whom: PTF & Staff</p>

Strategic Initiative 2: Build & Foster Genuine Partnerships from Boardroom to Playground (continued)

Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>4. Goal Year ONE:</p> <p>Identify resources to help execute partnership strategy</p> <p>by whom: Partnership Task Force & selected BBBS staff</p>	<p>1. Finalize formation of task force.</p> <p>by whom: PTF & Staff</p>	<p>1. Recruit additional resources as necessary.</p> <p>by whom: PTF & Staff</p>	<p>1. Develop list of potential resources to execute plan and accomplish goals.</p> <p>by whom: PTF & Staff</p>	<p>1. Budget for partnership resources needed in 2019</p> <p>by whom: PTF & Staff</p>



Strategic Initiative 3: Distinguish & Energize Our Brand				
Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>1. Goal Year ONE:</p> <p>Redefine and restructure roles and responsibilities for the Marketing department</p> <p>by whom: CEO and Marketing Task Force</p>	<p>1. Review existing job descriptions and structure</p> <p>2. Identify ideal structure</p> <p>by whom: CEO and Marketing Task Force</p>	<p>1. Identify ideal structure</p> <p>2. Identify additional funding sources</p> <p>by whom: CEO and Marketing Task Force</p>	<p>1. Determine financial implications of structural changes</p> <p>by whom: CEO and Marketing Task Force</p>	<p>~~~No Action~~~</p>
<p>2. Goal Year ONE:</p> <p>Leverage our data to target and acquire more successful Bigs determine which metrics to measure. (coordinate with Strategic Initiative 1, Goal 2)</p> <p>by whom: Marketing Director and Program Director</p>	<p>1. Start conversation of what is successful 12-month retention rate Bigs</p> <p>2. Identify questions on what we want to know about those Bigs</p> <p>3. Determine how to answer questions</p> <p>by whom: Marketing Director and Program Director</p>	<p>1. Execute the data collection (survey, focus group or calls)</p> <p>2. Meet the diversity and inclusion task force</p> <p>by whom: Marketing Director and Program Director</p>	<p>1. Analyze and create plan</p> <p>by whom: Marketing Director and Program Director</p>	<p>1. Establish time line and budget needed to execute the plan</p> <p>by whom: Marketing Director and Program Director</p>

Strategic Initiative 3: Distinguish & Energize Our Brand (continued)

Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>3. Goal Year ONE: Create target based messaging and communications by whom: Marketing Director</p>	<p>1. New hire will begin to create a new plan and then create following quarter plans. by whom: Marketing Director</p>	<p>~~~No Action~~~</p>	<p>1. Incorporate new national branding. by whom: Marketing Director</p>	<p>~~~No Action~~~</p>



Strategic Initiative 4: Align Our Growth with Quality Service & Parallel Capacity

Goals for YEAR ONE	QTR 1	QTR 2	QTR 3	QTR 4
<p>1. Goal Year ONE:</p> <p>Determine necessary facility needs including strategy for identifying new home for the future</p> <p>by whom: Facility Needs Task Force</p>	<p>1. Identify & form Facility Needs Task Force (January)</p> <p>by whom: Board & select staff</p>	<p>1. Identify Facility Needs:</p> <ul style="list-style-type: none"> • How many people do we need to house, what activities do we want to do in the building? • What type of facility would support these needs? • Lease or buy? Can we stay in current space for 1 additional year? • What part of town? <p>by whom: Leadership team</p>	<p>1. Begin assessing space availability in desired area. What’s on market? How much?</p> <p>by whom: Facility Needs Task Force</p>	<p>1. Plan possible capital campaign.</p> <p>2. Finalize budget for space & moving expenses</p> <p>3. Identify partners & resources to implement plan</p> <p>by whom: Facility Needs Task Force</p>
<p>2. Goal Year ONE:</p> <p>Conduct staff assessment, forecast # of staff additions for 2019 and 2020. Program staff as well as support staff.</p> <p>by whom: Leadership Team</p>	<p>1. Conduct staff assessment, forecast # of staff additions for 2019 and 2020. Program staff as well as support staff.</p> <p>by whom: Leadership Team</p>	<p>1. Forecast to 2030</p> <p>2. Report out to Building Task Force</p> <p>by whom: Leadership Team</p>	<p>~~~No Action~~~</p>	<p>~~~No Action~~~</p> <p>4.</p>



RECOMMENDATIONS

- Engage the absent board members by reviewing the new strategic plan and ask for their commitment to supporting the implementation of one of the strategic initiatives.
- Hold a Board vote to accept the strategic plan.
- Add progress on the strategic initiatives to regular updates at the Board meetings.
- Update Year Two Goals and create quarterly action steps for 2019 in November 2018.
- All Task Forces should have a chair, clear expectation of time commitment and a set monthly or quarterly meeting time (depending on the work needed by the committee). Assign one staff and one Board member to be the point person for each task force.
- Determine Task Force reporting structure to the Board. For example, will it be quarterly updates on a consent agenda or every meeting verbal reports.
- Reassess Board Committee and Task Force assignments.
- BBBS may benefit from implementing project management technology to assist in monitoring the progress of implementation of this strategic plan.
- During the November 2018 Board meeting celebrate the accomplishments for each strategic initiative.

Creativity is thinking up new things. Innovation is doing new things. A powerful new idea can kick around unused for years, not because its merits are not recognized, but because nobody has assumed responsibility for converting it from words to actions. Ideas are useless unless used. The proof of their value is only in their implementation.

Theodore Levitt

