Executive Summary

Big Brothers Big Sisters’ cornerstone belief is that mentoring changes lives. Third party research confirms this belief. It shows that when a Little is matched with a Big, that young person is less likely to engage in risky behaviors like drug and alcohol use, and more likely to attend class and feel competent in school.

Big Brothers Big Sisters dedicated trained staff members make matches carefully and support them thoroughly. Our one-to-one mentoring model has been studied and improved upon for decades, and as a result, continues to be the gold standard of mentoring. Our Evidence Based Mentoring Program has positively impacted thousands of local children’s and families’ lives.

Moreover, Big Brothers Big Sisters prioritizes a JEDI (Justice, Equity, Diversity, and Inclusion) approach to mentorship. Through our founding over a century ago as an alternative to the juvenile justice system, JEDI is inherently a part of our origin story. We believe in bringing people together, respecting and valuing each other, appreciating each other’s differences, and lifting children to a brighter future where they can achieve their fullest potential.

In this 2023-2025 strategic plan, we are prioritizing our service focus for a future of even Bigger impacts as we lead with a #KidsFirst framework. Taking advantage of the BBBSA 2027 National Strategic Plan, released in December 2022, we will also align our goals as applicable and promote impact measures, such as highschool graduation rates, that show the success of the BBBS mentorship model and success in our San Diego community.
Over the past 3 years, we have built resilience, reserves, and resolute focus as we emerge from the pandemic into the new normal. We have analyzed the state of our agency and surveyed our network of volunteers, youth, staff and board members. We found areas where we are excelling and even exceeding expectations, including:

- Achieving our highest ever length of match for our mentoring relationships (which signifies the strength of the match and deeper, long-term impacts).
- An increase in overall revenue and a dedicated focus to build reserves for long-term sustainability.
- The creation of a virtual enrollment process that is time saving, cost efficient and convenient for our volunteers and families.

We also identified opportunities. This is the focus of our 3-year strategic plan—identifying youth who are in most need of mentoring support and aligning with resources to create a continuum of care from childhood to adult.

OUR GROWTH DEPENDS ON:

- Strengthening the recruitment and retention of volunteers through strategic engagement activities, with a critical eye on the volunteer experience
- Increasing our marketing and brand awareness to engage and inspire more volunteers and donors
- Focusing a unified Development team on diverse fundraising efforts
- Building our community and corporate partnerships to have greater impacts through collaboration
- Deepening BBBS board engagement and a focus on diverse recruitment practices
- Analyzing targeted studies of innovative mentoring initiatives to expand youth service
- Prioritizing a culture of trust, open communication and respect

When we STRENGTHEN, ACTIVATE and EMPOWER, we will provide longer and stronger matches with meaningful outcomes for the children we serve.
STRATEGIC PRIORITIES:

1) Strengthen and Grow Youth and Volunteer Base to Make Strong Matches
   a) Develop and launch on-going recruiting and marketing strategies
   b) Deepen and expand partnerships to seed youth and volunteer interest
   c) Identify opportunities for program innovation that expand access to youth and volunteers, monitoring and assessment of trends

2) Activate Financial Strength
   a) Continue to create a balanced revenue portfolio
   b) Execute investment strategy
   c) Identify and secure new donors, and invest in donor retention and stewardship

3) Empower People and Optimize Processes
   a) Create and implement staff recruitment and retention strategies
   b) Continue to invest in tools and processes that support the cohesion throughout the enrollment process and match experience
   c) Diversify Board, staff, volunteers and donor base

BIG BROTHERS BIG SISTERS OF SAN DIEGO COUNTY MENTORING MODEL

Since 1961, Big Brothers Big Sisters San Diego (BBBS San Diego) has been a leader in providing 1:1 mentoring. The core Community-Based Program, where one child (Little) is intentionally “matched” with an adult volunteer (Big) in a long-term, professionally supported mentoring relationship, remains the cornerstone of our model today.

- The Community-Based Mentoring program is facilitated through 1:1 mentoring matches for youth aged 7-21. Bigs and Littles meet in the community two to four times per month and participate in activities of mutual interest. Volunteers make at least a one-year commitment and receive specialized training to best support youth. Matches receive ongoing case management support by BBBS staff to encourage strong, impactful, long-lasting relationships.

We utilize our proven mentoring model to target youth who are struggling and who show the most promise to positively respond to a mentoring relationship. Currently, these target groups include:

- Students who are experiencing difficulties at school (trouble academically, problems with peers, being bullied, behavioral problems)
- Youth with a background of trauma and abuse
- Youth exposed to – or disproportionately affected by violence
- Culturally competent initiatives to work with specific ethnic groups, including Chaldean refugee children through “Ayana” and Latino children through “Hermandad”
- As San Diego has the highest concentration of U.S. military nationwide, we work with hundreds of children and teens who have active-duty military parent(s) through “Operation Bigs”, for youth with a parent who is active duty military, veteran or gold star.

BBBS San Diego also provides mentoring enhancement opportunities to ensure enrolled youth reach their full potential.

- BBBS San Diego and its strategic partners provide college and workforce preparation workshops, coaching, and resources to all teenage Littles, through its BIG FUTURES initiative. The goal is to prepare and support post-high school Littles (Graduate Littles) to and through their post-secondary years in one of three paths, which we call the three E’s:
  1. Enrolling in college/trade school
  2. Enlisting in the military
  3. Employment

- BBBS San Diego encourages and provides physical and mental well-being enrichment activities and workshops open to all BBBS San Diego youth and mentors, through its HEALTHY FUTURES initiative. This includes no-cost workshops on health, behavior and resilience topics, group physical activities, support and improved access to resources in conjunction with community partnerships. All BBBS of SDC Program Staff are Mental Health First Aid trained and practice a Trauma-Informed Care approach.

BBBS San Diego mentoring programs have proven, long-term positive outcomes for youth including improved self-esteem and peer relationships, better grades, and less risk-taking behavior such as drug/alcohol use and truancy. Mentors give youth the confidence and support they need to set and achieve higher goals, make positive life choices, and have brighter futures.
Vision and Mission Statement

BBBS MISSION:
Create and support one-to-one mentoring relationships that ignite the power and promise of youth.

BBBS VISION:
All youth achieve their full potential.

LOCALIZED STRATEGIC VISION STATEMENT:
We will strengthen our organization and increase the value of our services to the San Diego County community.

BBBS Values

Passion – “Work hard at what we love.”

Integrity – “Do the right thing.”

Trust – “We’ve got your back.”

Accountability – “Own it.”

Diversity – “Value each other regardless (period).”
## Strengthen and Grow Youth and Volunteer Base to Meet the Needs of Strong Matches

<table>
<thead>
<tr>
<th>CURRENT STATE AND NEED</th>
<th>INITIATIVES (ACTIONS/TACTICS)</th>
<th>OUTCOMES (GOALS/MEASURES)</th>
<th>PROGRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Develop and launch on-going recruitment and marketing strategies.</strong></td>
<td><strong>Craft a robust, detailed marketing budget</strong> in support of comprehensive, strategic marketing and outreach activities based on data and market research. Add positions/staff capacity that supports both outreach/recruitment and fundraising ability.</td>
<td><strong>Measure</strong>: Increase in Big referrals</td>
<td></td>
</tr>
<tr>
<td>Volunteerism is down nationally and strong outreach and marketing efforts are critical to maintaining youth and raising volunteer Big recruitment.</td>
<td><strong>Track outreach activities</strong> via referral source in Matchforce. Track success of various outreach activities, use finite survey questions to better assess specific touch points and efficacy of outreach activities/ mediums. <strong>Evaluate the success and return on investment of various marketing and outreach activities</strong> on a bi-annual/no less than 6-month term.</td>
<td><strong>Measure</strong>: Enrollment pipeline yield ratio (i.e. # of youth and volunteer Big inquires required to achieve a # of interviews, required to achieve our match goal)</td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Support the Big Experience</strong> with 3-month/quarterly new Big cohort events (happy hour, dinner, etc.). Recruitment team can mimic events such as the Volunteer Information Session to engage new Bigs.</td>
<td><strong>Measure</strong>: increase in 12-month retention rate</td>
<td></td>
</tr>
<tr>
<td><strong>2. (Re)establish a strong engagement platform for corporations/corporate partners.</strong></td>
<td><strong>Staff a position to engage corporate partners</strong> aimed at increasing both volunteerism and funding through corporate partnerships.</td>
<td><strong>Measures</strong>: # of corporate partnerships and change over time; # of corporate engagement opportunities via short-term activities (e.g. events); measures to assess the financial sustainability of the program-model.</td>
<td></td>
</tr>
<tr>
<td>We can attribute some of the decline in recruitment to loss in corporate engagement.</td>
<td>Create partnerships with corporations for <strong>BSW-like opportunities for a hybrid workforce.</strong></td>
<td><strong>Outcome</strong>: increased # of Bigs and general volunteers via corporate partnerships</td>
<td></td>
</tr>
</tbody>
</table>

---

Big Brothers Big Sisters of San Diego County  
4305 University Avenue, Suite 590, San Diego, CA 92105 | 858-536-4900 | SDBigs.org
3. **Identify opportunities for program innovation that expand access to youth and volunteers.**

   Lingering effects of COVID, shifting funder priorities and evolving needs of at-promise youth we serve require us to adapt and innovate to sustain mission success.

   The Board and Agency have decided not to return to site-based programming this year (2023); and, instead, evaluate future opportunities to grow and innovate in site-based partnership and beyond.

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Description</th>
<th>Measure</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create marketing to promote the benefits of older/senior Bigs (55+)</strong></td>
<td>Revive Sports Bigs (nationally now most often called Sports Buddies) with a proven recruitment and retention focus- build partnerships around it (Padres, Waves, Loyal, Gulls, Aztecs, gyms, rec centers, etc.). We can integrate aspects of the previous Healthy Futures program to assimilate trauma informed care, healthy lifestyle activities, etc. Utilize Internship role to focus on Match Activities, coordination and activity planning. Assure job description, appropriate pay and supervision is in place prior to accepting internships. Leverage sports teams partnerships to coordinate events and activities for the matches. Look to tie in Sports Bigs with the 2023 5k Anyway as launch.</td>
<td><strong>Measure:</strong> reduction in “Senior” Big match rejection rate; increased in “Senior” matches</td>
</tr>
<tr>
<td><strong>Strengthen service to military families,</strong> and new ways to serve military youth. Recruit for more military representation on the board, consider a military advisor committee inclusive of staff, board, and parents. Include a budget for marketing and outreach to military families. Build on existing and new partnerships for a pipeline of youth and Bigs.</td>
<td></td>
<td><strong>Measure:</strong> increased matches for military youth by increasing youth referrals and assessing # of military/veteran Bigs in years past vs. current trends.</td>
</tr>
<tr>
<td><strong>Strengthen wrap-around services to support our response to critical issues effecting at-promise youth</strong> (i.e. bullying, violence prevention, mental health, etc.). Continue to build our bank of resources. Support staff training, and training resources for parents and Bigs through The Learning Exchange. Track resource distribution in Matchforce. Ensure we have a budget for training and resources. Make sure staff are well equipped, knowledgeable and can support matches, parents and all volunteers with resources.</td>
<td></td>
<td><strong>Measure:</strong> # of matches in critical need areas (e.g. at-risk, incarcerated parent) - see CalVIP grant goals for specific categories.</td>
</tr>
</tbody>
</table>
Work to support every Little, and their Big/Parent, to graduate highschool through training, partnership resources, sharing scholarship/internship opportunities, college visits, etc.)

**Measure:** Graduation rates year over year.

Review trends/outcomes nationwide on **1+1 Plus Mentoring**, and depending on results look for opportunities for expansion in 2024 and beyond. Other agencies anticipate sharing info on program outcomes in 2023 and beyond, which we can consider for future years' innovation (2024 and beyond).

**Outcome:** 2023: Yr1 - develop questions to ask other agencies and utilize a rating rubric to fully assess group mentoring models, pros and cons, and financial and capacity sustainability of the program(s); 2024: Y2 and ongoing - consider program innovation based on thorough intel and evaluation.

Partner with BBBS nationwide to support the identification and mobilization of BBBS Alumni in San Diego.

**Measure:** # of Bigs recruited, # of BBBS Alumni engaged/ activated

---

### Activate Financial Strength

<table>
<thead>
<tr>
<th>CURRENT STATE AND NEED</th>
<th>INITIATIVES (ACTIONS/TACTICS)</th>
<th>OUTCOMES (GOALS/MEASURES)</th>
<th>PROGRESS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1. Continue to create a balanced revenue portfolio</strong>&lt;br&gt;In order to create a sustainable revenue model, the Agency needs to continue to adapt and balance where we secure funding and the proportionality of various sources.</td>
<td>Maintain a diversity of revenue sources and establish annual revenue goals with consideration for the % of total of each. Set strategic % revenue goals as a part of the annual budget process. Use 3-5 year projections to consider mid- and long-term changes to our overall revenue portfolio.</td>
<td>Measure: Annual budget process to include assessment of revenue portfolio; 3-5 year financial projections and/or scenario planning</td>
<td></td>
</tr>
<tr>
<td><strong>2. Execute investment strategy</strong>&lt;br&gt;The Agency has built over 11 months of cash on hand, and</td>
<td>Engage leadership and finance committee to actively monitor and manage investments under the advice of the portfolio manager (UBS), and execute on BBBS of SDC Financial Management Investment Policy to ensure regular</td>
<td>Measure: Return on investments</td>
<td></td>
</tr>
</tbody>
</table>

---

4305 University Avenue, Suite 590, San Diego, CA 92105 | 858-536-4900 | SDBigs.org
plans to invest an initial $1M to function as a risk and opportunity reserve.

<table>
<thead>
<tr>
<th>CURRENT STATE AND NEED</th>
<th>INITIATIVES (ACTIONS/TACTICS)</th>
<th>OUTCOMES (GOALS/MEASURES)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identify and secure new donors, and invest in donor retention and stewardship</td>
<td>Identify and secure new major donors (10K+) or increase giving amounts among current major donors, with a goal of 4 annually.</td>
<td>Measure: Major Donors and change over time</td>
</tr>
<tr>
<td>A part of the shift in the funding landscape is generational shift and changes in donor priorities. Investment in donor retention, including major and individual donors, will be critical to maintaining a sustainable revenue model.</td>
<td>Invest in donor retention and stewardships with a goal of 100% major donor retention. Annually budget for incidentals to cover branded items for major donors and one stewardship event.</td>
<td>Measure: Individual donor retention</td>
</tr>
<tr>
<td>Build on Match Maker Program with specific communication plan and benefits portfolio</td>
<td></td>
<td>Measure: Increase in Match Makers</td>
</tr>
<tr>
<td>Continue to balance the overall revenue portfolio so we’re not overly dependent on one source. Remain flexible within annual planning and budget to respond to shifting priorities, program and philanthropic landscape.</td>
<td></td>
<td>Measure: Defined annual % revenue goals</td>
</tr>
</tbody>
</table>

### Empower People and Optimize Processes

<table>
<thead>
<tr>
<th>CURRENT STATE AND NEED</th>
<th>INITIATIVES (ACTIONS/TACTICS)</th>
<th>OUTCOMES (GOALS/MEASURES)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Create and implement staff recruitment and retention strategies</td>
<td>Assess incentive structure bi-annually to assure that the incentives are appropriately challenging, achievable and motivating to staff.</td>
<td>Outcome: increased matches</td>
</tr>
<tr>
<td></td>
<td>Assess staff pay, rewards and recognition practices to develop new and additional ways to reward and recognize staff, retain and recruit new staff in order to remain competitive.</td>
<td>Measure: Bi-annual LT review of incentive structure.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Measure: improved staff morale (via annual survey); maintain staff retention.</td>
</tr>
</tbody>
</table>
### 2. Continue to invest in tools and processes that support the cohesion throughout the enrollment process and match experience

Systems inefficiencies degrade staff job-experience and can ultimately effect our mission success. In order to effectively support our work, we will continue to build a practice of assessing, improving and iterating on systems and processes.

- **Assess systems use and user experience** among staff. Refine the Agency’s suite of systems, systems use practices, and support for staff as needed.

- **Address some immediate systems improvement needs** including: Fix chronic VPN issues, and look into cost and scope of moving file storage to the cloud. Update Jotform account to better centralize and standardize all agency forms.

- **Update data and analysis of enrollment process/timeline.** Create an enrollment pipeline analysis (use board support or external metric tool)
  - USD Study Q42022
  - Future R&D partnerships and opportunities to be identified 2023-25

- **Consolidate technology as possible.** Look into tools to help Bigs to track and manage their application/enrollment process. (EX: OC app). Research and adopt a texting system. Options to automate notifications measure: increased Ready-to-be-Matched (RTBM) Bigs

- **Measure:** Annual system survey

### 3. Diversify Board, staff, volunteers and donor base

- **Need more Board representation in our most urgent focus areas/needs:** marketing, IT solutions, military, JEDI, etc.

- **Continue to hire to improve overall diversity among staff** (i.e. male identifying program staff).

- **Diversifying our donor base** (generational, ethnic, major vs. individual). Look to events specific to generation (i.e. YPC) and community engagement activities.

- **Measure:** increase # of board representing critical areas

- **Measure:** increase in # of male-identifying program staff.

- **Measure:** # and attributes of donors
Key Performance Indicators
The following KPI’s will be evaluated regularly as a part of program delivery, as well as measures to track progress towards strategic plan goals.

Measurements to include:
- Maintain current average match-length, and continue to meet or exceed the national average match-length
- Meet or exceed national 12-month match retention rate standards
- Focus on retention of quality matches, and grow new quality matches
- Maintain or improve YOS survey results, annually
- Increase the number of recruitment and/or match support partnerships (e.g. YMCA), annually. (Baseline: 2022 = 10)
- Increase Bigs from areas of highest need: CalVIP zip codes, male, Spanish speaking, BIPOC, highest needs RPIs, and areas where most kids are waiting

Financial Projections
To Include:
- Expense budgets will be created annually to match allocated resources
- Annual Operating Plan and Budgets outline specific annual strategies
- Ongoing monitoring by the Board Finance committee of actual performance for timely correction of deviations
### SWOT Analysis
A summary of themes from the department and Board SWOTS:

#### 2022-25 Strategic Planning SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>People power</td>
<td>Lack of bandwidth, staff capacity</td>
</tr>
<tr>
<td>Leadership</td>
<td>Disjointed match-pipeline departmental handoffs</td>
</tr>
<tr>
<td>Financial health and stability</td>
<td>Diversity among staff, Board, volunteers</td>
</tr>
<tr>
<td>Compelling mission</td>
<td>Dependance on consistent volunteer force</td>
</tr>
<tr>
<td>Program performance and QA ratings</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leverage and grow partnerships</td>
<td>Declining volunteerism</td>
</tr>
<tr>
<td>Improve match-pipeline communications</td>
<td>Staff retention and rising cost of living</td>
</tr>
<tr>
<td>Grow government funding</td>
<td>Lingering effects of COVID</td>
</tr>
<tr>
<td>Diversify industries represented by Board</td>
<td>Economic volatility</td>
</tr>
<tr>
<td>Invest in story building and leverage story</td>
<td>Shifting funder priorities</td>
</tr>
<tr>
<td>Leverage financial strength</td>
<td>Child abuse allegations/Statute of Limitations</td>
</tr>
<tr>
<td>Opportunities to grow and innovate</td>
<td></td>
</tr>
</tbody>
</table>

4305 University Avenue, Suite 590, San Diego, CA 92105 | 858-536-4900 | SDBigs.org
**Risk Analysis**

Assessment of Potential Risks  -->  Management of Risks:

- National decline in volunteerism  -->  Focus strategic development in recruitment and retention efforts

- Forecasted revenue not achieved annually  -->  Adjustments will be made to the following year’s Operating Plan and Budget based on actual revenue, mid-year budget adjustments made as needed, and use of reserves to respond to risk and opportunity.

- Economic downturn, inflation and volatility  -->  Ensure sound financial planning to manage the effects of inflation and to prepare for a potential economic downturn.

- Organization’s dependence on events is a significant vulnerability to unknown disruption as well as shifting funder landscape --> Continue to balance revenue sources and identification of consistent, stable sources of revenue.

- Corporate giving can also be impacted by unforeseen changes in the business market and can put philanthropic giving at risk  -->  Implement strategies to build individual/foundation giving and grow government funding

- Staffing turnover and leaves of absence cause loss of productivity  -->  Retain flexibility in personnel budget to provide budget for coverage; plan for staff retention focus

- Perhaps no risk poses a greater threat to BBBS’ ability to achieve its mission than a single child endangerment event that is widely publicized across the San Diego region  -->  Keep updated crisis communication manual with clear communication around processes, response and messaging; Maintain quality standards, never sacrificing quality for growth.
2023-25 Strategic Planning Timeline

PLAN FOR THE PLAN
BIG BROTHERS BIG SISTERS OF SAN DIEGO COUNTY
2023-2025 Strategy Planning Timeline

2023

Jan

Review & approve final Strategic Plan.

Dec

Review draft Strategic Plan & provide final input.

Nov

Establish Direction; Review draft Strategic Priorities & provide input.

Oct

Review SWOT and draft Strategic Priorities for 2023-2025.

Sept

Sub-Committee presents to BoD on site-based planning.

Aug

Sub-Committee makes site-based planning recommendations to BoD.

Jul

Board Strategy Alignment: Establish ongoing schedule to review the Strategic Plan and align the Board of Directors' Annual Plans and Agency Operating Plans.

Jun

Determine Strategic Planning Committee Chair; Review planning timeline & build Strategic Planning Committee.

2022

Board of Directors

BBBS Leadership, Strategic Planning Committee, Site-Based Sub-Committee & Executive Committee

BBBS Leadership Team & Individual Stakeholders

Analysis:
Review 2020-2023 Strategic Plan and articulate direction for 2023-2025.

Strategy:
Formulation and Mapping: Confirm objectives, priorities and resources, and align to BBBS National Plan.

Finalize Strategic Plan and align with Operational Plan and Budget.

Sub-Committee:
Develop departmental objectives & strategy.

Finalize Strategic Plan and align with Operating Plan and Budget.

Provide strategy updates and data needed to create Strategic Priorities.

Ensure appropriate strategy alignment at team and individual levels.

Review organizational objectives & strategy.

Collect & review stakeholder feedback & complete departmental SWOT analyses.

BIG BROTHERS BIG SISTERS OF SAN DIEGO COUNTY

4305 University Avenue, Suite 590, San Diego, CA 92105 | 858-536-4900 | SDBigs.org
“We live in a world in which we need to share responsibility. It's easy to say, "It's not my child, not my community, not my world, not my problem." Then there are those who see the need and respond. I consider those people my heroes.”

Fred Rogers