VISION:
all children achieve success in life.

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

ACCOUNTABILITY:
by partnering with parents/guardians, volunteers and others in the community we are accountable for each child in our program achieving:

• Higher aspirations, greater confidence, and better relationships
• Avoidance of risky behaviors
• Educational success
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2011-2015 BBBSA Business Plan ............................................................................ 13
Big Brothers Big Sisters of America (BBBSA) Business Plan Introduction and Overview

The purpose of this business plan is to align the goals, activities and resources of the national office with the 2011-2015 Big Brothers Big Sisters Nationwide Strategic Direction. The new nationwide strategic direction sharpens our network’s focus and redefines what we do, what we achieve and why it matters. This direction is captured in new vision, mission and accountability statements and a logic model. The Nationwide Leadership Council (NLC) identified the following four priority areas which will drive our success in this new direction:

**IMPACT AT SCALE** = Achieving and substantiating deeper impacts with outcomes data and evaluation studies that strengthen our case for support at the community and national levels; building a complementary foundation of people, process and technology to foster a continuous learning environment.

**LEADERSHIP AND PARTNERSHIP** = Positioning BBBS as an integral part of the community solution for children and families facing adversity. This means connecting our work to education and juvenile delinquency prevention and becoming preferred partners in the solution to keeping more children in school, on track and out of trouble.

**INTENTIONALITY, DIVERSITY AND INCLUSION** = Increasing our relevance to and engagement with communities of color, which are disproportionately at risk, and infusing intentionality, diversity and inclusion into everything we do; infusing our learning from this engagement into how we serve children and families in these communities.
SUSTAINABLE RESOURCES = Building robust, diversified and sustainable revenue streams based on a stronger case for support and the people, process and technology to engage and steward each participant, donor and supporter.

STRATEGIC GOALS

The sharper focus of this new strategic direction is intended to put our network on a path of sustainable growth in our outcomes and scale. Our outcomes goals call for continued progress on longer, stronger matches, especially in our School Based Mentoring program. A whole new level of match retention is a critical driver of both greater outcomes and growth in children served.

Our second key goal is to get back onto a path of sustainable growth in our revenues and our children served, and to regain the ground we lost due to short term corrections caused by the 2008/2009 recession and the subsequent cuts in state and federal funding. Our 2015 BBBSA revenue goal is $50m and our goals for the network are $300m in revenues and 262,000 children served, taking us above our peak scale of 2008.

A summary of our historical results and goals in these key areas can be found following this introduction and overview.

BBBSA TACTICS THAT CAN ACCELERATE STRATEGIC PROGRESS

Three critical elements of the BBBSA business plan will accelerate the achievement of our strategic goals:

1. DEVELOPING AND SUPPORTING THE PLATFORM FOR IMPACT AT SCALE - The number one priority of BBBSA in the next few years is the development and support of the next generation of program models, practices, systems and data. This platform will enable agencies to achieve and substantiate deeper impacts in our three outcomes accountability areas. It will provide the substance that helps position BBBS as one of the most innovative and effective youth serving organizations and an integral part of the solution in education and juvenile delinquency prevention.

BBBSA will continue to develop our outcomes system and technology solution, Agency Information Management System (AIM), toward our goal of being recognized as best of class. Another element of our platform is R&D and innovation to enhance our mentoring models. We began this focus on model innovation with our work around Enhanced
School Based Mentoring (ESBM). Now, we have identified a pipeline of potential model enhancements and are following a rigorous, collaborative, evidence-based process to design these enhancements and validate their impact and our ability to implement them at scale across the network.

2. **DEVELOPING A NEW DONOR BASE FOR BBBSA AND THE NETWORK**
   
a. **INDIVIDUALS** - The current largest base of financial support for the BBBS network and national office is foundation and government grants which represent 50%+ of our revenues. Our individual and corporate support is largely event-based, not recurring mission based. Imagine a future when the largest source of our operating funds come from individual annual donors, funds which are largely unrestricted, and our base of grants are used to fund investments in innovation and infrastructure. BBBSA’s business plan addresses the infrastructure our network needs in order to capitalize on our large natural constituent base and develop individual giving into our largest revenue base. Our plan includes the positioning of our brand for donor support in multiple media channels and the development of the systems, processes and technology (ECRM) to engage these participants, gain their financial support and build lifelong relationships with them.

   b. **CORPORATE AND FOUNDATION SUPPORT** - Developing a large base of individual donors will take years. In the mean time, BBBSA sees significant opportunity in the corporate and foundation sectors to secure large contributions of financial and marketing resources aligned with our strategic focus. We plan to focus on fewer, larger opportunities, primarily major multi-year, multi-million dollar corporate partnership opportunities to build the profile and relevance of our brand and to conduct targeted campaigns to men, especially African American men, and the Hispanic community.

3. **CHANGING THE WAY WE WORK WITH OUR AFFILIATES, MORE FOCUSED AND ALIGNED WITH STRATEGIC PRIORITIES** - BBBSA proposes to change the way we work with and support our affiliates in order to achieve the strategic direction and implement our new standards. We will shift our agency support model to focus on:
   
   * Using technology, data and our national perspective to facilitate and encourage learning and peer sharing and to support agencies’ journeys toward operational excellence and “collective impact” in their communities. We believe that this
support redefines “agency development” and leads to more fluid, focused assignments with agencies based on the work that is needed and the group of agencies that share that need and “opt in”.

- The implementation of the new standards, especially supporting 150+ smaller agencies as they prepare for investments in AIM and adoption of our outcomes system and governance requirements.
- The use of knowledge management systems, instead of a designated personal liaison, to provide centralized access to the resources and information agencies need on an ongoing basis.

FOUR YEAR BUSINESS PLANNING OUTLOOK

A four-year outlook that provides context to the sequencing of our business planning tactics described in the previous section follows this report.
## Big Brothers Big Sisters of America - Strategic Goals

<table>
<thead>
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<th>2009</th>
<th>2010</th>
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<th>2015</th>
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<td></td>
<td></td>
</tr>
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<td>-</td>
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</tr>
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<td>-</td>
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<td><strong>BBBSA Revenue</strong></td>
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<td>31.7M</td>
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Four Year Business Planning Outlook

FY 2012 (July 1-June 30)

Fund Development and Marketing
Investor Engagement, Research, ECRM, Brand Development

FY 2013 (July 1-June 30)

Program Impact and Outcomes at Scale
Research/Analytics, Testing

FY 2014 (July 1-June 30)

Knowledge and Business Management Platforms:
SDS/AIM/ECRM/Standards Platforms

FY 2015 (July 1-June 30)

GOALS

• Grow BBBSA revenue to $50M
• Grow Network Revenue to $300M

• Leverage Common Network Platform to:
  • Improve 12 mo. retention rate
  • Reach 262,000 children

• Be category leader in quality outcomes; establishing milestones, evaluations, benchmarks

• Be preferred partner in communities, education and juvenile justice space
The success of our strategic plan is supported by our deliberate investment in key platforms that drive efficient execution of our tactics. Each of these platforms are included in our four year business plan outlook.
We have an opportunity to align all of our communications platforms (Web, Agency Connection, TLO, e-mail, community bulletin board) to more efficiently mobilize our network and communicate to external partners. Our ability to leverage the economies of scale and the power of scale directly correlates to this capability.

Efficient Business Operations and Scalability

Relationship Management Platform (Fund Development):
Investor Engagement Research, ECRM, Marketing and Partner Engagement

Communications Platform: Seamless Information Management

Basic Infrastructure Platform: Secure and Reliable Systems Support

- Server farm
- Voice IP
- Teleconference
- Video Conference
- T1 Lines
- Disaster Recovery and Security

The shift from a transaction-based funding philosophy to a relationship-based philosophy is essential. The Fund Development plan is focused on shifting our revenue mix to favor individual and corporate giving and requires investment in engagement tools and processes.

At the core of our business plan is the investment in the platform that will allow us to continuously learn from and improve our outcomes. Key to our continuous improvement is a research and analytics platform that includes technology, compliance, and research solutions. This platform will allow us to capture, analyze and interpret our data with a view to optimizing the effectiveness, safety and quality of our programs.
PROGRAM IMPACT AND OUTCOMES AT SCALE

Impact at Scale = Quality Assurance and Outcomes
- Progressive Research & Evaluation Cycles
- Organizational Design and Competencies to Integrate Learning into Network Operations
- Uniform Standards of Operations and Quality

SDS/AIM Platform: Research/Analytics, Testing, Program Scaling, and Workflow Management

With established presence in schools, implement best practices
Targeted Enhanced School Based Model Implementation
Uniform SDM Implementation

2011
210,000 Children Served

2015
262,000 Children Served
RESOURCE AND PARTNERSHIP GROWTH

Leadership and Partnership

Intentionality
Diversity & Inclusion

Sustainable Resources

Impact at Scale

- Grow individual donor base & MG/PG pipeline
- Secure expansive corporate partnerships that leverage brand and deliver resources
- Acquire investment enabling innovation & scale of impact
- Change revenue composition
- Launch multi-channel platform for data integration and constituent customization
- Reposition events as revenue driver with targeted acquisition strategy
Inclusion as Fundamental Ingredient

- Our success in the communities we serve directly correlates to our ability to be engaged with and relevant to that community.
- The fundamentals of cultural competency require an understanding of how communities view BBBS’s interaction with them and value to them.
- A key element of the success of our SDS model is the integration of key cultural insights into the implementation of the model.
2011-2015 BBBSA Business Plan

This plan outlines BBBSA goals, initiatives and deliverables in each of the seven areas of responsibilities identified with the NLC. In some areas, detailed plans have taken shape. In others, we have “placeholders” where there is still much planning to do. A summary of our resource allocation plan follows at the end of this section.

DEVELOPING AND SUPPORTING OUR NETWORK’S PLATFORM FOR IMPACT AT SCALE

- **Best of class Outcomes System** - We will escalate the development of our ongoing outcomes evaluation and performance management system toward our goals of 1) Making our accountability statement a reality and receiving recognition for our outcomes tracking capabilities, 2) Strengthening our case for support and our connection to education and juvenile delinquency prevention and 3) Providing the data to drive program performance management and continuous improvement.

- **A Service Delivery System that enables operational excellence at our agencies** - We will continue to enhance and support our technology and data driven system. The goals are increase the number of high performing agencies in terms of program metrics (Length +Strength = Outcomes) and provide the data to know what works and for which children in order to drive continuous improvement. We continue to make some immediate improvements to AIM and in our next fiscal year, plan to develop AIM 3.0 with a more robust analytics and reporting capability. Longer term, we expect to move AIM to a more flexible, open database platform with the capability to customize variable inputs without the coding intensity involved today.

- **Program model innovation and R&D** - There are significant opportunities to deepen our impact through model enhancements. We plan to pursue an aggressive R&D agenda with a rigorous process for piloting and validating enhancements before we replicate them at scale across our network. The recent development, testing and replication of an ESBM are excellent examples of how innovation can lead to much deeper impact for BBBS. We believe that most of our ideas and promising practices for model innovation will come from our agencies and from research and evaluation insights. The priority areas for innovation and initial pilot projects include:
  1. **Volunteer training and resources** - Research and volunteer feedback suggest that effective pre-match training could increase volunteers’ effectiveness in their first match
year. We secured pilot project funding (Bechtel Foundation in collaboration with our Bay Area agency) and will be working with several agencies to develop and pilot an online portal and training curriculum for our volunteers and staff.

2. **A positive youth development framework for our mentors and match support staff** - Research indicates developmental oriented volunteers help our children achieve the social/emotional outcomes of higher aspirations and goal management and that effective match support is a driver of outcomes. We have funding to develop and test an integrated framework based on the Thrive Foundation’s SteplItUp2Thrive youth centered content. This evidence-based content would be integrated into our staff development, volunteer training, match support practices and group match activities.

3. **Enhancements to our model directly connected to education and juvenile delinquency prevention** - Without becoming too prescriptive, we believe there are potential innovations directly connected to our targeted outcomes in partnership with schools and juvenile justice. Through our national mentoring OJJDP grant, we initiated a 10 agency pilot project to enhance and document our program and partnership model for juvenile delinquency prevention for at-risk kids. We plan to pursue parallel efforts to develop and document model enhancements for deeper educational impacts based on several promising practices in our network and in collaboration with America’s Promise Grad Nation coalition.

4. **Customization to specific ethnicities and cultures** - We believe that tailored model innovations could address specific issues and needs and lead to greater relevance and effectiveness with our intentional target populations. We are beginning work on an enhanced educational model (Camino al Exito), funded by the Goizueta Foundation, for the large, fastest growing Hispanic population. Research has identified cultural and parental engagement challenges which we should address in order to refine our model.

- **Subject matter expertise in education and juvenile delinquency prevention** - As the plans above indicate, most of our program and service delivery model plans address specific educational and juvenile justice outcomes. BBBSA plans to add expert staff from the education and juvenile justice fields. These experts will help us refine our program models and practices and develop our ability to partner and communicate within these sectors. These new staff members will also help us establish and coordinate advisory councils in education and juvenile delinquency prevention and work with our Government Relations and External Affairs team to develop national partnerships.
BRAND DEFINITION AND NATIONAL MARKETING

- **Phase 2 of our Start Something campaign** - Positioning our brand so that we are known for what we achieve and as a place to donate as well as volunteer has only begun. It will take time, resources and partners to get noticed. Our goals are to “move the needle” on our benchmark brand perceptions and to dramatically increase the engagement and donations from the millions of adults that “inquire” annually about getting involved with BBBS. We expect to launch phase 2 this fall and in the next few years, focus more on BBBS outcomes and the issues we help solve and secure major corporate and marketing partnerships that will deliver the profile and resources this effort requires.

- **Targeted outreach campaigns to the Hispanic community and to men** - We plan to build on the Univision partnership and Goizueta funded program initiatives to expand our outreach to and engagement with the Hispanic community. We believe there are major corporations and media partners who will join this campaign focused on the fastest growing segment of our population and contribute financial and marketing resources. We see a similar opportunity focused on the plight of boys and the need for men and money to provide more male role models. The male dropout, unemployment and incarceration rates are huge issues and an epidemic among African Americans. We will develop new partners with whom these issues resonate and work cooperatively to mobilize citizens to get involved to change what it means for young men, and for all children facing adversity, to grow up in this country.

FUND DEVELOPMENT AND CORPORATE PARTNERSHIPS

- **Corporate and foundation revenues** - The immediate home office opportunity is to secure additional major multi-year corporate and foundation funding and partnerships. We will redeploy some of our fund development and marketing teams, leverage the infrastructure we put in place and focus on a set of major prospects whose interest align with this business plan, our outcomes, our brand and our outreach to targeted populations.

- **Long-term building of a broad and deep base of individual donors for our network** - BBBS has a natural constituent base for individual giving. This includes current and past volunteers and participants and everyone who knows one, hundreds of thousands of current BFKS participants, almost 2 million adults who visit our public web site annually.
to see how they can get involved. In the next few years, BBBSA plans to include the following initiatives in order to capitalize on this individual giving opportunity:

1. Positioning of the brand as a donor and volunteer supported organization which has begun with Phase 1 of Start Something.
2. A fund development model and an Enterprise Customer Relationship Management (ECRM) system which we have begun to develop and plan for multi-year rollout.
3. Database and relationship development - working network-wide to populate our ECRM, create the ground rules for engagement and the communications, engagement and stewardship systems that will convert the potential to reality.

**GOVERNMENT RELATIONS/EXTERNAL AFFAIRS**

- **Mobilizing the network around focused issues such as the recent federal budget and its implications for mentoring, BBBS and our children and families** - It is essential that we invest in the proper mobilization platform to expand our presence and partnerships in Washington, D.C. and across the nation. We will align our GR/EA function (supported by our new staff leaders in education and juvenile justice), Beacon Consulting, the NLC Advocacy Task Force and the network to build partnerships with the education sector (including our active participation in America’s Promise’s Grad Nation coalition) and juvenile justice.

**INTENTIONALITY, DIVERSITY AND INCLUSION**

- Embedding intentionality, diversity and inclusion into all aspects of this plan and developing a more diverse, inclusive, culturally competent national staff and Board. Our plans to be intentional and engage communities of color are fully integrated and embedded throughout this business plan. We will continue to invest in a small team to lead and coordinate these initiatives and to develop the national partnerships. In addition, BBBSA is committed to “walk the talk” and become a more diverse and inclusive executive and board team.

**AFFILIATE STANDARDS**

- **Supporting agencies in the implementation of new affiliate standards** - For the next 2 ½+ years, we expect to support agencies in their plans to implement new standards if/when approved. We expect that much of that focus will be helping smaller agencies explore how they can upgrade their capabilities and become a more sustainable
enterprise. This could include assisting with mergers/consolidations and new partnerships for greater sustainability. After this implementation period, our responsibilities will shift to compliance monitoring and feedback to the affiliates.

**AGENCY SUPPORT**

The next few pages describe how we expect to work directly with agencies in support of the strategic direction and how we see that work evolving over time. In the next few years, we want to change our agency support model to focus on four areas:

- Implementation of new affiliate standards as described above.
- Centralized knowledge management system that will provide the access to the broad range of resources and information agencies need (a much more robust Agency Connection supported by centralized staff).
- Specialized support for Child Safety and Youth protection.
- A redefined “agency development” function that uses our national perspective to facilitate and encourage learning and peer sharing and to support agencies journey toward operational excellence and “collective impact” in their community.

**ORGANIZATIONAL DESIGN FOR AGENCY SUPPORT**

![Diagram of organizational design for agency support](image)
**COLLECTIVE IMPACT JOURNEY**

- Varying degrees across network, pockets of bright spots that are working on their own critical path towards collective impact.
- Varying degrees within the categories below.
- Challenge is to support agencies to move from one category to the next, so that the final category of collective impact is an exponential effect, resulting in a social problem being addressed and BBBS a part of that solution.

**STRATEGIC JOURNEY TO COLLECTIVE IMPACT**

<table>
<thead>
<tr>
<th>“making good matches”</th>
<th>BBBS Impact</th>
<th>Collective Community Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Indicators:</td>
<td>Performance Indicators:</td>
<td>Performance Indicators:</td>
</tr>
<tr>
<td>Average quality metrics (AML, 12 mo RR, some use of SoR and YOS)</td>
<td>Above average quality metrics (AML, 12 mo RR, regular use of SoR and YOS)</td>
<td>Top tier of quality metrics (Primary value is long, strong matches; use of SoR and YOS as a compelling case for support)</td>
</tr>
<tr>
<td>Some partnerships (e.g., schools for SB matches, churches, Rotary) primarily around delivery of a program</td>
<td>Intentional engagement of families and other partners (Hispanic, African American, military, school, faith, corporate, etc.) around making an impact</td>
<td>Partners (Including schools) view agency as co-owning student achievement; mutual benefits identified &amp; delivered; BBBS “at the table” on education and Justice; common goals &amp; metrics with partners</td>
</tr>
<tr>
<td>Agency leadership presence is recognized; BBBS regarded positively in community</td>
<td>Agency well known within community &amp; perceived as very important to needs of youth; some prominent community members actively involved</td>
<td>Agency actively engaged with the community &amp; highly responsive to needs; agency leadership is core in helping solve community youth issues; positioned as the “go to” agency for youth issues &amp; solutions</td>
</tr>
<tr>
<td>Recognition of need for diverse revenue, small individual donor base, large % of funds from single source to support making matches</td>
<td>Written plan focused on diversified revenue to support BBBS impact, engagement of broad range of funders, moderate individual donors, less reliance on single source funding</td>
<td>Highly diversified funding with strong ROI and case for support, well-cultivated individual donor base, culture of philanthropy that invests in community impact</td>
</tr>
</tbody>
</table>
INVESTING IN OUR FUTURE

We currently anticipate revenue (GAAP) of approximately $30 million approximately half of which will be passed through to the network consistent with past practices. Of the remaining revenue approximately 40% covers critical operating infrastructure and approximately 60% covers salary and benefits for deployment of staffing and vendor partners to drive strategic initiatives. A more detailed view of our allocation of resources and alignment with the strategic areas is set forth below.

BBBSA Resource Allocation
(Based upon estimated operating expense of $16.9 million)