



Strategic Plan—Fiscal Years 2019-2021 | Approved—June, 2018

Vision Statement:

Our vision is that all children achieve success in life.

Mission Statement:

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.

High-Level Goals and Success by 2021:

- **Sustainable Revenue/Investments/Fiscal Health**
 - Increase revenue portfolio by 10% by 2021; with continued diverse income from individual gifts, grants, foundations, corporate sponsorships, and special events
 - Finance: Maintain overhead under 25%; establish and maintain 4-6 months operating reserve
 - Launch planned giving program by FY21.
 - Form and enable exploratory committee in FY19 to evaluate the feasibility of new BBBS-ETN building through capital campaign.
- **Marketing, Outreach, and Brand Awareness:**
 - Fully implement BBBSA national rebrand during FY19.
 - Finalize stewardship and communication plan for agency during FY19, fully implement in FY20, and evaluate and refresh by FY21.
 - Prioritize stewardship of donors in FY19-21 through efforts such as formal communication process, stewardship committee, and utilization of Development Assistant or Development Coordinator role.
 - Develop targeted, annual campaigns aimed at fulfilling program enhancements, and better utilize social media tools and video to tell the BBBS-ETN story.
 - Increase volunteer inquiries by 10% year over year for next three years.
- **Program Service Delivery:**
 - Meet annual, national gold standards for BBBS service delivery measured in growth, efficiency, impact and quality.
 - Fully implement Mentor 2.0 program at South Doyle High School.
 - Strategically support program enhancements, which help BBBS-ETN reach its 1,000 children served goal by FY20, and continually surpass that benchmark in FY21 and moving forward.
- **Leadership Development:**
 - Implement strategies to strengthen, develop, and diversify board.
 - Further engage staff in strategic plan and encourage staff to become more involved in leadership and community activities.
 - Develop succession plan for key leadership roles.

GOAL ONE: Sustainable Revenue/Investments/Fiscal Health

Big Brothers Big Sisters of East Tennessee will continue to diversify its fundraising efforts, increase assets, and build its reserve, ensuring financial security and allowing the agency to expand and enhance programs and ultimately serve more East Tennessee children. The agency will also determine if a capital campaign for a new building is feasible and recommended by FY21, with the help of a volunteer-driven building exploratory committee.

- **Increase individual gifts each year through 2021 (campaign, monthly, annual donors), including growth in number of donors, resulting in increased total fundraising by 2021.**
 - Note: Percentage increases to be incorporated in updated strategic plan at conclusion of FY19, after chief development officer has been on board for full fiscal year.
 - To include percent growth in number of individual donors, fundraising from individual gifts, and level of campaign donations.
 - Launch Leadership Giving society by close of FY19.
 - Receive commitments from new leadership donors in Knoxville area.
 1. Set goals by start of FY20.
 - Secure new leadership donors in Tri-Cities.
 1. Set goals by start of FY20.
 - Create leadership societies.
 - Major donors (\$5,000+), Leadership donors (\$1,000+), monthly donors by FY20.
 - Planned giving donors by FY21.
 - Young professionals (\$120 annually) and Bigs Who Give in FY21 (no later than FY22).
 - Engage Bigs as donors, with full tracking in FY20—with launch of Salesforce platform through BBBSA—expand the number of Bigs who make annual gifts.
 - Set goal by FY20 for increases in FY21 and FY22.
 - Increase the number of monthly donors by 25 each year for a total of 90 by FY22. (The agency is currently at 15 monthly donors.)
 - Loosely, agency to pitch monthly donors at \$50/month for a total monthly income of \$4,500 by FY22.
 - Capitalize on the engagement and donations from hundreds of adults who inquire each year about volunteering and who attend orientation, resulting in new donors at any level, annually.
 - Set goal in FY20.
 - Set visit goals for development staff, board members, and volunteers/committee members as relationship managers by FY20.
 - Engage donors strategically and consistently through creation of agency's stewardship and communication plan by completion of FY19.
 - Utilize part-time Development Assistant to update and maintain database; steward donors; ensure that all donor data and contact information is updated regularly.
 - If budget allows, hire additional development staff by FY21 to assist with stewardship of donors, oversight of affinity groups, collections, management of database, and, if applicable, oversight of Development Assistant.

- Prioritize donor retention and consider means of retaining annual donors from year to year by start of FY21.
- **Increase volunteer participation in fundraising efforts in order to expand pipeline, by 2021.**
 - Expand Fund Development Committee by FY22 to incorporate more volunteers.
 - New subcommittees to include steering committee, leadership giving committee, individual giving committee, corporate giving committee, and planned giving/foundation committee.
 - Create at least one affinity group by FY22, including options such as current Bigs, individuals who are 55+, women's groups, parent groups, etc.
- **Launch Planned Giving Society by FY22.**
 - Formalize gift acceptance procedure in FY19.
 - Create informational brochure on planned giving society by FY20.
 - Establish relationship with Community Foundation or Bank who can manage planned gifts by FY20.
 - Host education session for potential donors on will-making and life insurance designations in FY20, and continue offering in FY21.
- **Form and enable Exploratory Committee to evaluate the feasibility of new building by FY20.**
 - Committee to review need, options available, and agency's fundraising potential, making its recommendation by FY21.
 - If outside group, set aside funds in FY20/21 to cover costs for exploratory committee.
 - If recommendation received to proceed with capital campaign to support new building costs, hire at least one additional development staff member in FY21 to assist in management of building capital campaign.
 - This might also require adjusting of campaign goals.
- **Standardize event efforts and increase events fundraising by 5-8% each year.**
 - Build more volunteer-driving events and establish board event chair(s) for Bowl for Kids' Sake in 2019. Consider doing so for additional agency events in FY19 and FY20. (Other than BFKS, event chairs could be community members.)
 - Create event binders and standard timelines for all events by conclusion of FY19.
 - Update and clarify sponsorship grids/levels and materials for corporate sponsors by end of FY19.
 - Continue to build on FY18 successes by growing all event committees, expanding BBBS-ETN's reach in the community.
 - Create committee charters/job descriptions for all event committees in FY19.
 - Engage Bigs as event participants and as peer fundraisers, growing participation rate in Bowl for Kids' Sake by at least 10% each year FY19-21.
 - Increase Tri-Cities event revenue each year through FY22.
 - Set sponsor retention and sponsor upgrade goals for all events by FY20.
 - Implement at least one private event at supporters' homes annually in order to support program enhancements and expand the agency's base of support.
 - Goal of raising at least \$7,500 through this event.
- **Launch 55th Anniversary Campaign in 2020 calendar year with goal of surpassing 50th anniversary campaign totals.**

- In FY19, establish formal campaign gifts report for providing Fund Development chair and committee, as well as board.
- Host 50th anniversary event and launch 55th fundraising campaign in FY20.
- In FY20, create suite of one-sheets with tangible donor opportunities, including: scholarships, building fund (if applicable), Mentor 2.0/post-secondary education, arts/craft club, healthy lifestyles, and all applicable program enhancements.
- **Increase grant income each year through FY22.**
 - Totals to be established at end of FY19.
 - Consider including separate goals for renewable grant income (5%) and a separate goal for new grants.
 - Maintain United Way funding at consistent levels to FY18 through FY21.
 - Identify and secure both state and federal funding to be used to support and enhance existing programs as well as new and justifiable initiatives through FY21.
 - Continue to pursue federal opportunities via pass-through grant funding from BBBSA.
 - Pursue efforts to meet with state and local legislators once annually to build relationships and identify potential funding opportunities by FY22.
 - Identify and pursue national affiliate partner funding opportunities with BBBSA.
 - Identify and pursue technology and capital improvement grants with a goal to secure \$25,000 in funding by end of FY21.
 - By end of FY20, work to establish separate measurable goals for:
 - State vs. federal
 - Federal funding via pass-through
 - Meetings with legislators
 - National BBBSA grants

GOAL TWO: Marketing, Outreach, and Brand Awareness

Big Brothers Big Sisters of East Tennessee will implement the BBBSA brand transformation, establish a detailed and strategic agency communication and stewardship plan, prioritize stewardship of donors, and better utilize awareness campaigns to recruit more mentors, serve more children, and fulfill program enhancements.

- **Fully implement the BBBSA brand transformation during FY19.**
 - Update website, marketing materials, promotional items, event marketing, program materials, and all other collateral to comply with national rebrand.
 - Continue to capture dynamic photography, in accordance with new brand standards for use in marketing and donor materials.
 - Maintain part-time marketing coordinator to support this endeavor.
- **Finalize agency communication and stewardship plan by end of FY19, and fully implement in FY20 and FY21.**
 - Track all outgoing communications and stewardship efforts from agency during FY18 and FY19 to ensure all current efforts are incorporated in plan.
 - Create additional email communications:

- In FY19, explore quarterly insider email from CEO as a means of stewarding donors.
 - By FY20, explore monthly or bimonthly email from CEO to campaign donors.
 - By FY20, explore e-newsletter to all supporters, at least twice per year.
 - *Alternate all of the above so no supporter is receiving too many communications.*
 - By FY20, establish thank you and stewardship protocols and finalize stewardship matrix to more effectively engage donors.
 - Consider calls/letters on one-year anniversary of gifts.
 - Update thank you letters annually.
 - Focus thank you letters and stewardship on program outcomes, such as matches and former Littles who have benefited from BBBS-ETN programs.
 - Fully develop recognition opportunities list, including occasions for permanent recognition, as well as pop-up opportunities throughout the year (i.e. at events, in newsletter, through board communications) by FY21.
 - Include goals for personal visits to donors by staff, board, CEO, CDO, fund development.
 - Launch agency e-newsletter, at least twice per year, by FY20.
 - Develop formal plan for e-newsletter to Bigs, including match events, fundraising events, details about sponsorship and opportunities for corporate support, etc. by FY20.
 - Work with Tri-Cities team to better incorporate TC donors, foundations, and corporate supporters in communication and stewardship plan.
 - Provide special and exclusive opportunities for donors tied to current events—for instance a private rooftop at the BHRC, a pre-reception at Cash for Kids’ Sake, etc.
 - At start of each fiscal year, establish key communication points and weave them into all events, remarks, newsletters, and the annual report for that year.
 - Incorporate special stewardship messages and other communications to donor societies by FY21.
- **Create month-long awareness campaign each fiscal year to define and tell our brand story.**
 - Set marketing budget for these annual campaigns. When possible, set board or volunteer chairs of these campaigns.
 - Feature program enhancements, new programs, and program focuses, such as Mentor 2.0, LGBTQ+ mentoring, Bigs 55+, minority Bigs recruitment, couples matches, etc.
 - Set tangible goals around media outreach and form relationship with media partners for each campaign.
 - Place special emphasis on the 50th Anniversary of the Agency in CY 2020.
- **Formalize agency social media plan, increasing use of available tools and ultimately expanding impressions (Facebook, Twitter, and Instagram) annually.**
 - Formalize and launch social media ambassador program in FY19.
 - Establish impressions goals by FY20.
 - Set budget for social media marketing for FY20 budget.
 - Feature live video to better engage audiences in events and program enhancements.

- Utilize events and marketing interns to regularly thank, steward, and engage donors, supporters, and corporate sponsors via social media.
- **Increase volunteer inquiries by 10% per year.**
 - *Note: The percentage might change. Due to the national rebrand launching in June 2018, it is recommended we revisit after one fiscal year with the new brand, which will include a national marketing campaign.*
 - Formalize Lunch and Learn plan at the start of each fiscal year in order to strategize and maximize corporate visits, beginning in FY19.
 - Better utilize Bigs in order to recruit mentors through speaking engagements at volunteers' companies and through targeted asks for referrals and securing Bigs as social media ambassadors in FY19.
 - Launch Speaker's Bureau in Knoxville area by FY20.
 - Explore reconfiguration of Community Engagement role, transitioning to development team with more focus on outreach and strategic partnership development by FY22.
 - Pull volunteer inquiry stats and compare year-to-year trends on a monthly basis, beginning in FY19.

GOAL THREE: Program Service Delivery

Big Brothers Big Sisters of East Tennessee will strive to meet and surpass annual, national gold standards for BBBS service delivery and unveil program enhancements to better serve marginalized youth. The agency will consistently reach more children and exceed our goal of serving 1,000 children annually by our 50th anniversary in 2020, surpassing this benchmark thereafter.

- **Meet and surpass national gold standards for BBBS service delivery, annually through 2020.**
 - Serve a minimum of 150 children.
 - Achieve a Community-Based 12-month retention rate that is five percentage points higher than the national average for the network.
 - Achieve a Site-based 12-month retention rate that is five percentage points higher than the national average for the network.
 - Maintain a match support contact done rate of 90%.
 - Continue growth in number of end active matches.
- **Serve 1,000 children annually by FY20 and consistently thereafter.**
 - Increase volunteer inquiries by 10% each year through targeted marketing campaigns and strategic outreach.
 - Evaluate School to Work program by FY22, and consider serving at least two corporate offices, reaching *at least* 30 additional children per year, per location as part of future strategic plans.
 - Explore implementation of programming aimed at Littles who are attending college, community college, and trade schools; allowing the agency to continue serving all applicable youth through age 24 by FY22.
 - Increase site-based plus matches by 15% (FY18 compared to FY21), which increases average match length and children served.

- Increase number of active matches, with specific emphasis on Mentor 2.0, to include the following number of additional active matches by FY21:
 - 160 more mentor 2.0 matches by completion of fourth year of program in FY20
 - Maintain number of community-based matches in Knoxville area, add 15 new matches in Tri-Cities
 - 1. Note: TC has most growth opportunity in terms of current staff support.
 - Maintain number of site-based matches in Knoxville area, add 10 new matches in Tri-Cities
 - 1. Knoxville office will focus on extending site-based match length (and ultimately children served) through site-based plus emphasis and through expansion to additional middle schools.
- **Evaluate expanded service to college-age Littles for possible implementation in next strategic plan.**
 - By FY22, research agencies who have pursued this and consider implementation of their tactics.
- **Evaluate launch of program enhancements to better reach our most vulnerable youth, perhaps to include (but not limited to):**
 - LGBTQ youth
 - Youth experiencing effects of opioid epidemic
 - *Note that this enhancement might be prioritized due to increased federal funding.*
 - Foster youth
 - English Language Learners students
- **Increase the number of Bigs of color by 3% percent each year. (For background, Mentor 2.0 is currently at 20% and one-to-one is at 14% overall.)**
 - Create task force aimed at outreach to mentors of color by FY21.
 - Closely follow national research and resources in order to implement plan.
- **Expand Bigs in Blue program to all counties, serving 25 children by FY22.**
 - Foster current partnership with KPD.
 - Explore creation of task force to provide oversight of program in FY21.
 - Establish partnerships with police departments in all counties by FY22.
- **Continue to expand service in Sevier County to 20 children by FY22.**
 - By FY21, determine feasibility of launching Sevier County Advisory/Leadership Council.
 - Consider hiring of part-time staff member dedicated to Sevier County matches by FY21.
- **Fully implement trauma informed care model by conclusion of FY21.**
 - Apply OCJP grant to support trauma informed care training in FY19-21.
 - Utilize self-assessment from BBBSA to review agency policies and make necessary internal changes in FY19-21.

GOAL FOUR: Leadership Development (Board and Staff)

BBBS-ETN will focus on retention, training, and career-development of its world-class team. The agency will continue to recruit and maintain an active, inspired board, with emphasis on increasing diversity in volunteer committees, on the board, and on the board's leadership team.

- **Continue to strengthen board recruitment and accountability practices, and improve board diversity to better represent the community we serve.**
 - Create governance committee to oversee board recruitment and accountability by conclusion of FY19.
 - Hold at least one board recruitment event per year, beginning in FY20.
 - Launch Junior Board in FY21 or FY22, aimed at engaging young professionals and creating a pipeline for future board members.
 - Prioritize engagement of diverse supporters in event and other agency committees, as a means of increasing number of diverse board prospects.
- **Enhance board engagement to increase giving and increase advocacy**
 - Achieve 100% board giving through clear communication regarding expectations, as well as targeted asks.
 - Provide opportunities for board to participate in advocacy and fundraising through hosted events in their homes, committee participation, Bigs recruitment, and a speaker's bureau.
 - Evaluate tools such as Board Source to develop board and track board member success toward goals of participation and fundraising.
 - By FY21, offer training to board on effective donor development principles and key elements in developing a donor-centric culture.
- **Consider launching Honorary Board by FY21.**
 - This would serve as a means of connecting with former board members who have completed two terms and whom we'd like to keep engaged.
- **Enhance staff development through FYs 19, 20, 21.**
 - Beginning in FY19, hold annual staff retreat, centered not only on team-building, but on agency's strategic plan and how individual goals can help BBBS-ETN achieve its larger goals.
 - Train staff on effective donor development principles and key elements in developing a donor-centric culture, engaging all team members in the agency's fundraising strategy.
 - Encourage formalized cross-training of roles to ensure depth and smooth transition during staffing changes.
 - In order to expand BBBS-ETN's reach in the community, as part of annual performance goals for all team members, continue to encourage staff to participate in at least one community group, committee, or board
 - Offer time during the business day for this participation and encourage report-backs at team meetings.

- **Develop succession plan for key leadership roles by FY21.**
 - **Hold quarterly strategic plan update meetings with staff to ensure individual goals are tracking with strategic plan goals.**
-

HIRING PRIORITIES (Extends beyond FY21, so not included in plan)

- Hire staff to support strategic initiatives, including, in priority order:
 1. Development Coordinator (Development)—*Note: This position is partially filled through part-time development assistant.*
 2. Program Specialist/Generalist (Program)—*This position will be hired during FY19 through OCJP grant funding; funding guaranteed for three years.*
 3. Match Support Director—*internal promotion* (Program)
 4. School to Work Coordinator (Program), *contingent upon funding and determination that BBBS-ETN would like to launch this program*
 5. Development Position to Support Capital Campaign, *if applicable*
 6. Part-time Sevier County position (Program)
 7. Events Director (Program)
 - a. Note: This position could be elevated based on funding opportunities.